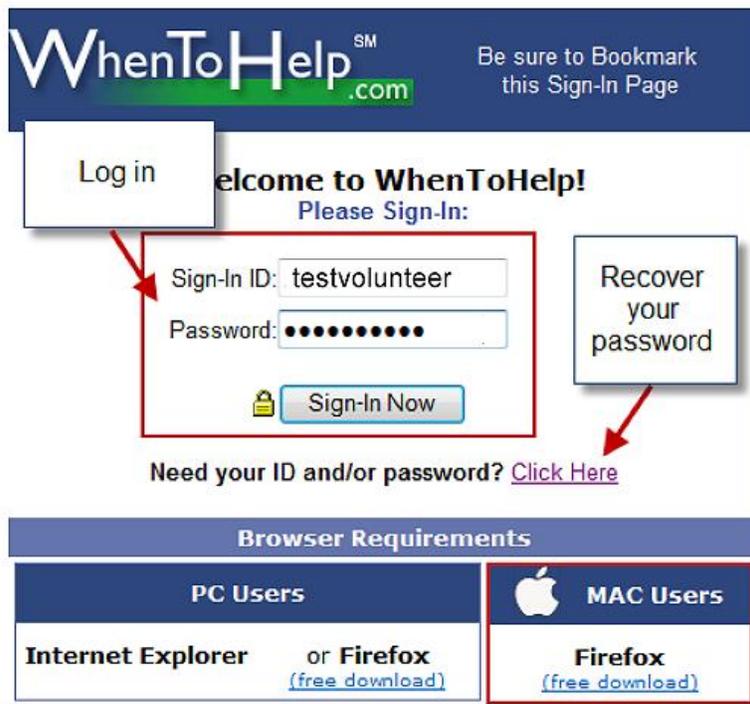# WhenToHelp Basic Instructions

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:

HOME	Schedule	Info	Prefs	Time-off	Trades	Messaging

McGill Bird Observatory

Welcome Test Volunteer

Show My Schedule

To view your schedule

Show Everyone's Schedule

To sign up for shifts

Change My Information (Notifications, Phone, etc.)

To change your personal information, preferences etc.

Choose Times I Prefer to Help

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

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

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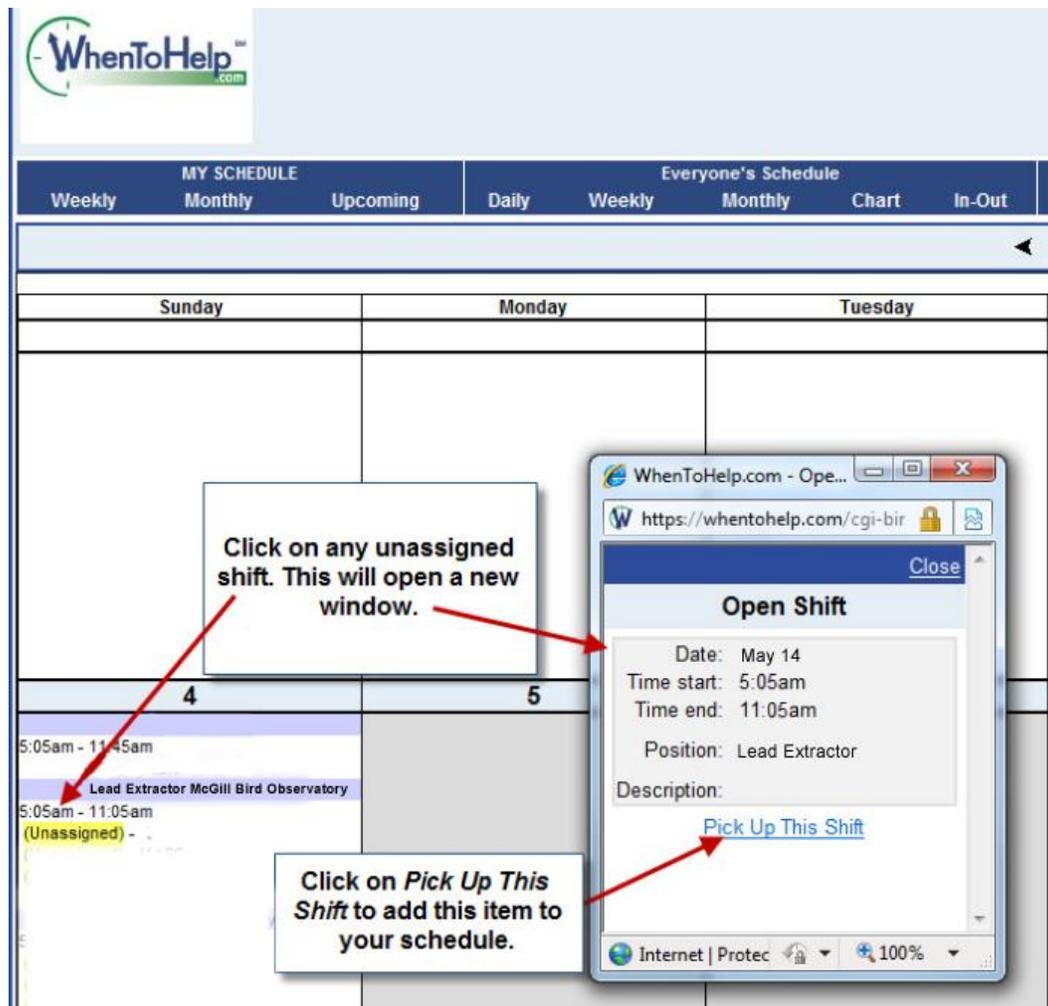
You may not be eligible to sign up for all types of shifts. If your receive a message that you are not qualified for a certain position, and you believe you should be, please email us at mbo@migrationresearch.org or use the messaging feature in **WhenToHelp**.

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.
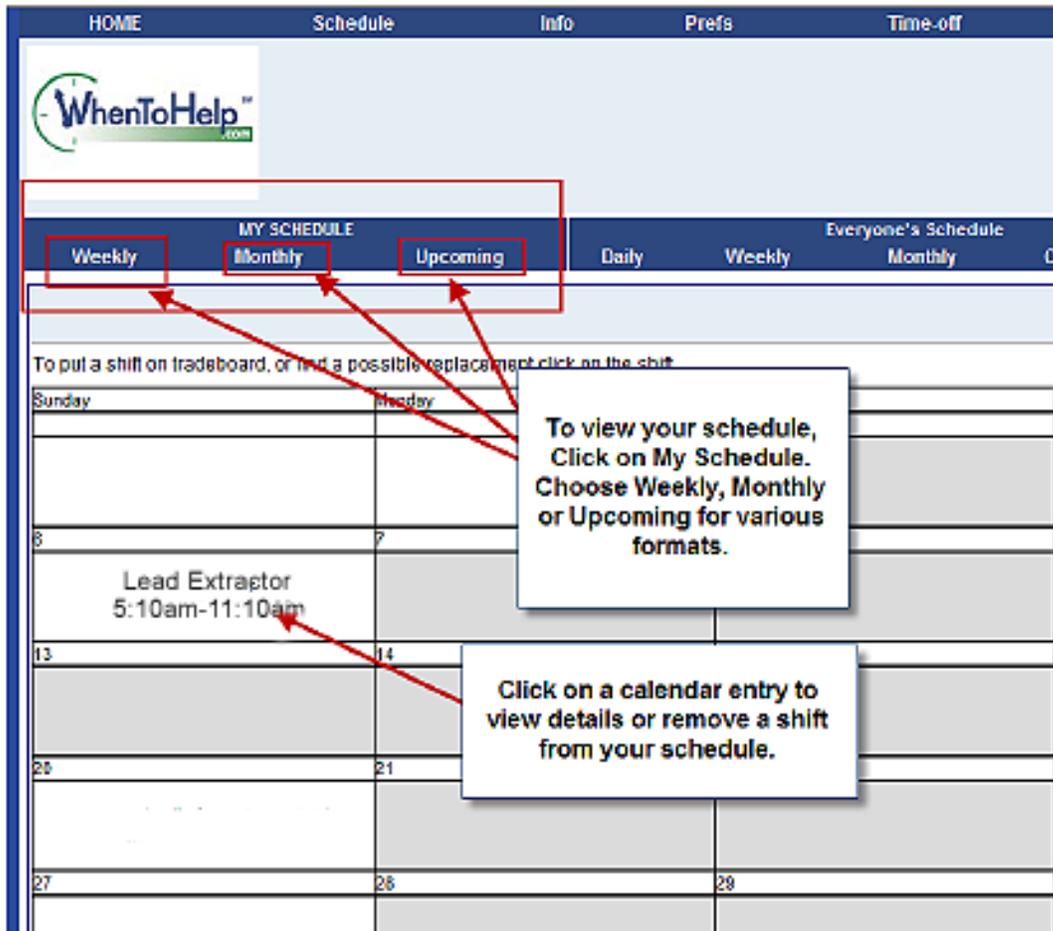
Setting preferences

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.

Notifications (optional):

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

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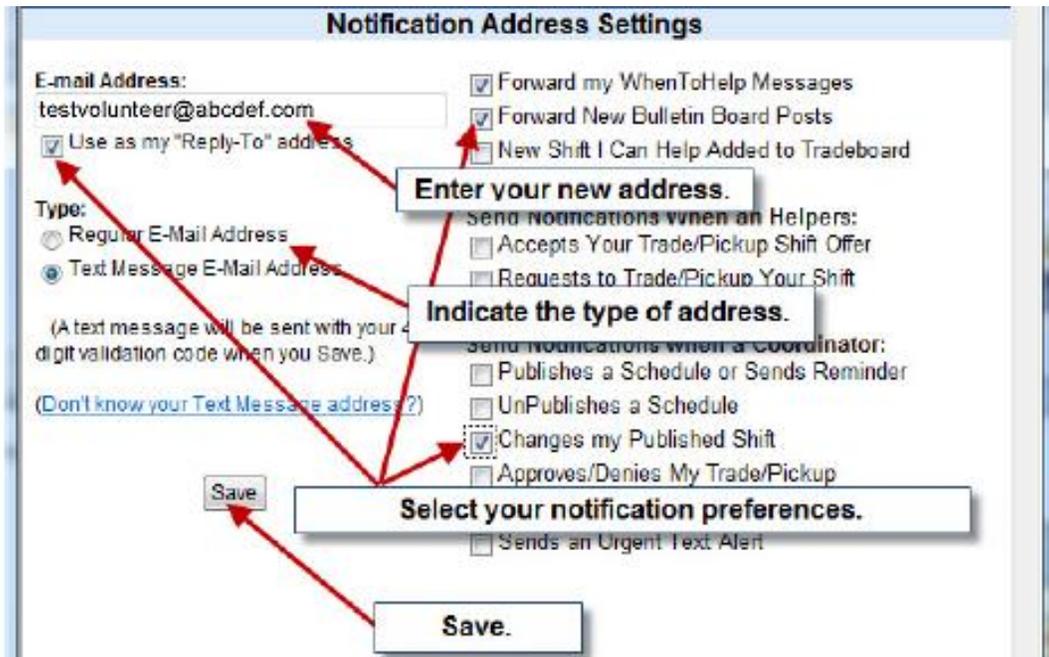
You can receive your messages through your email address by selecting notifications. At a minimum, you should select "**Changes my Published Shift**" so that you receive notification about closures or other cancellations. We also recommend you select "**Use as my "Reply To**" address, **Forward my WhenToHelp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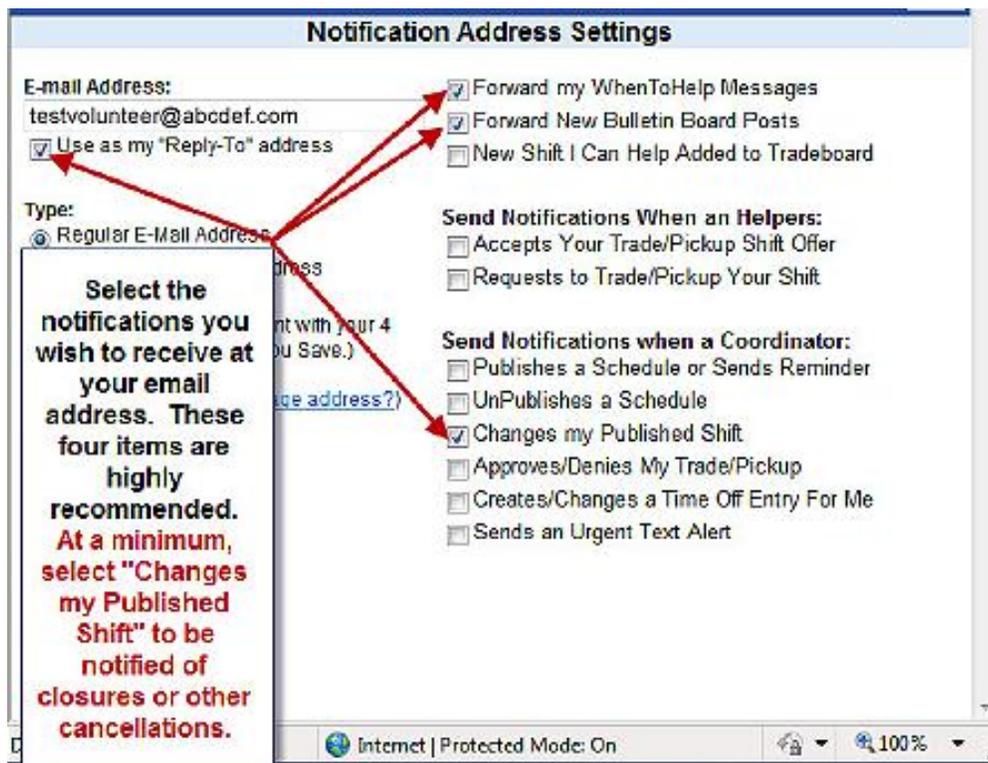
Scheduling Preferences (optional):

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.

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*[1] on which we based this document.

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[1] Nightingale, Ann, 28 May, 2010 *When To Help Instructions.* Rocky Point Bird Observatory, British Columbia. 11 pages.