



Assemble Support Guide for Volunteers

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Signup

To create an account on Assemble you must apply for an opportunity or have an account created by Julia's House volunteering team.

Logging in

To log into Assemble, go to <https://juliashouse.goassemble.com/portal> and enter your email, followed by your password in the next screen.

If you volunteer with different organisations who both uses Assemble, you'll be asked to select the organisation you want to log into.

There is a two-factor authentication as an extra layer of security (also known as two-step authentication). If required, you'll be asked to enter a code which will be sent by email.

If you don't have an active role within Julia's House, your account will be [inactive](#) and you will not be able to log in.

Forgotten password

If you have forgotten your password go to <https://juliashouse.goassemble.com/portal> and enter your email address and select the [Forgot password](#) link in the **Welcome** screen.

On the *forgot password* screen enter your email address again and press the "Request Reset" button. You should receive an email within couple of minutes. Make sure to check your junk/spam folder if you do not receive it within 10 minutes.

Simply click on the blue link within the email. This will take you to the "Set a new password" screen. Type in your email address (to confirm) and your new password.

If you have any issues, please contact the volunteer team – volunteer@juliashouse.org

My Assemble account is inactive

You can only access Assemble if you have at least one current volunteer role recorded against your record. If you have [left all your roles](#) or if your role has reached its end date, your account will automatically become inactive, and you won't be able to access Assemble.

If you would like to continue volunteering with Julia's House, you can apply for a new opportunity or if you think there has been a mistake and you haven't left your role please contact the volunteer team: volunteer@juliashouse.org or call 01202 644220

Update my details

You can view and amend your details at any time.

To access your details in a browser, log into Assemble, click your initials at the top right-hand corner and then click on the "View profile details" link.

To upload or change your profile photo on your user details page click the **Upload Photo** button and select an image from your computer. Your photo will be shown, instead of your initials, in the top-right menu, in your profile and within the Directory.

Details tab

To add or update any of your details enter the information you want to amend and press the update button to save the changes.

You can change your Preferred Name which will then be used instead of your recorded first name e.g. Bob instead of Robert.

Important - You won't be able to update your first name, last name or date of birth. You also cannot change your volunteer start date with Julia's House. If you need to amend any of these fields, please contact the volunteer team: volunteer@juliashouse.org or call 01202 644220.

Diversity information

To protect your privacy, your diversity information will never be displayed to anyone, including you. The information is added to an anonymised report for statistical monitoring purposes. So, every time you select to update, the diversity form will be empty and you will not see any previous answers you may have given.

About you

If you would like to share some basic information about yourself with other volunteers, this will be shown in the Directory e.g. "I enjoy walking on the beach with my greyhound, Stanley."

Skills & Interests

To update your skills and interests, press the "Skills and Interests" tab, and then select/unselect the appropriate skills and interests. Once you have made the changes, press the "Update" button to save. This can be useful for Julia's House as on occasion we require volunteers with a certain skill set so can contact anyone with that set to see if they can support us.

Info

Please be aware that the list of skills and interests are managed by your organisation. If you would like a new option added, please message; volunteer@juliashouse.org

Other volunteers can search for someone with a particular skill or interest in the Directory, so if you have enabled the "Appear in volunteer directory" option they can find you by searching for your selected skills and interests.

Status

Assemble allows you to place yourself "on hold" for up to six months at a time e.g. if you're expecting a long recuperation after being in hospital. This allows you to let your organisation know if you're going to be unavailable for a specific period of time. Ideally if you can message us first to let us know.

Click on the "Edit" link next to your current status (active on default) and then tick the checkbox to indicate you are going to be on hold and select the desired dates.

You must also choose whether or not you want to be contacted during your absence period. If you say that you don't wish to be contacted, you won't receive any auto-notifications or messages from Assemble.

At the end date, Assemble will automatically remove you from being on hold, but you can cancel this at any time too simply by unticking the box here.

The screenshot shows the 'STATUS' section of a volunteer profile. At the top, there is a navigation bar with tabs: DETAILS, SKILLS & INTERESTS, CONTACTS (which is active), ROLES & RESPONSIBILITIES, PASSWORD & PRIVACY, and RECOGNITIONS. Below the tabs, the 'STATUS' section is displayed. It features a checkbox labeled 'I am on hold between the dates below:'. To the right of this checkbox is a 'Close' button. Below the checkbox, there are two date selection fields: 'Start date' and 'End date', both with a 'dd/mm/YYYY' placeholder and a calendar icon. Below these fields are two radio button options: 'I do not wish to be contacted between these dates.' and 'I don't mind being contacted between these dates.'

Please note that your manager(s) will be sent a notification to let them know that you've gone on hold.

Contact preferences

Appear in volunteer directory - If ticked, you will be discoverable by other volunteers using the Directory pages. They will not see your contact details but will be able to send you a message.

Appear in "Near me" - Allows other volunteers to know that you live within 20-mile radius of them. Don't worry, it will never reveal your specific location to any other volunteer.

Contact details

Here you can view, amend and update your phone number, postal address, email address and emergency contacts.

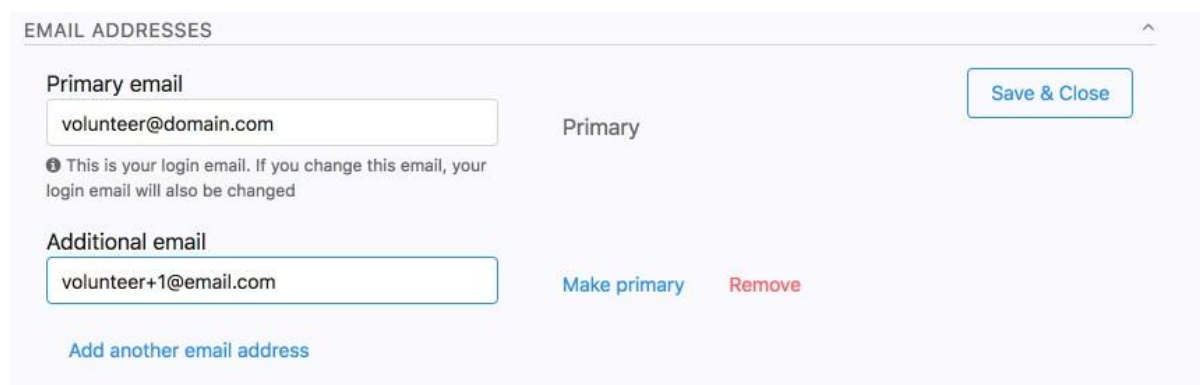
To modify your contact details, click on the "Edit" button. (or "Click here" link if you haven't added one yet).

Click the "*Add another...*" link if you want to store more information, e.g. additional email address or phone number.

If you add multiple email addresses or phone numbers, press the "Make primary" to indicate which one is your primary.

To remove individual items, click the remove link

When you are finished making changes, press the "Save & Close" button.



The screenshot shows a web form titled "EMAIL ADDRESSES" with a close icon in the top right corner. It contains two main sections: "Primary email" and "Additional email". The "Primary email" section has a text input field containing "volunteer@domain.com", a "Primary" label, and a "Save & Close" button. Below the input field is a small information icon and text: "This is your login email. If you change this email, your login email will also be changed". The "Additional email" section has a text input field containing "volunteer+1@email.com", a "Make primary" link, and a "Remove" link. At the bottom of the form is a link that says "Add another email address".

The postcode lookup functionality - To edit or add a postal address enter your postcode and then select the correct address, you can amend any detail afterwards if necessary.

If you cannot find your address, click the "Manual entry" to enter details manually.

Can't save my changes - If a mandatory field is not entered or is not formatted correctly, Assemble will highlight them to you, correct your details and press save again, make sure you are adding correct international format when adding overseas numbers.

Roles & responsibilities

This section displays your role title, the named manager for the role and the team (including group, shop or department) that it's part of. Roles that you have left will normally be shown with an end date, slightly greyed out.

You can click on the blue role title to download a copy of the role profile in PDF format.

DETAILS

SKILLS & INTERESTS

CONTACTS

ROLES & RESPONSIBILITIES

PASSWORD & PRIVACY

RECOGNITIONS

Roles

Download role profile pdf

TITLE	MANAGER	TEAM	START DATE	END DATE
Cheer Team	Adriana Oliveira	Fundraising	22 May 2018	-

Leave role

Risk activities

If there are any mistakes in this section, please contact your manager and they will be able to make the necessary changes.

NB Your organisation may not have added all of your closed roles to Assemble as this can be very complicated when working with older systems. That doesn't mean they're not recorded, only that you can't see them in your user profile.

If you wish to leave one or more of your roles, click on the "Leave role" link and follow the instructions on the screen.

Training

Training is assigned to role profiles, so you'll only see a list of training associated with your roles on the User details ⇒ Training section. Each course is shown as a tile in the *Required training modules* section or the *Optional* section. You'll get notifications in Assemble when you've got training that you're required to complete.

The order these tiles appears in is simply the order in which the training requirements were added to your role.

The tiles will also tell you if a course is completed or not. Some training needs to be repeated or updated every year or couple of years. This will also be shown on the tile, telling you when it expires.

Rogue Superhero
Volunteer for 1 year

Training required

Status
Active
DOB
21 Jan 1888

DETAILS SKILLS & INTERESTS CONTACTS ROLES & RESPONSIBILITIES PASSWORD & PRIVACY TRAINING

Required training modules

Not completed • Expires

New starters
Induction modules for new volunteers

No attachments

Go to course

Completed • Expires in 4 months

LH - 60 Second Skills
Test Moodle integration

No attachments

Go to course

Completed • Expires in 5 months

General Induction
FYI

No attachments

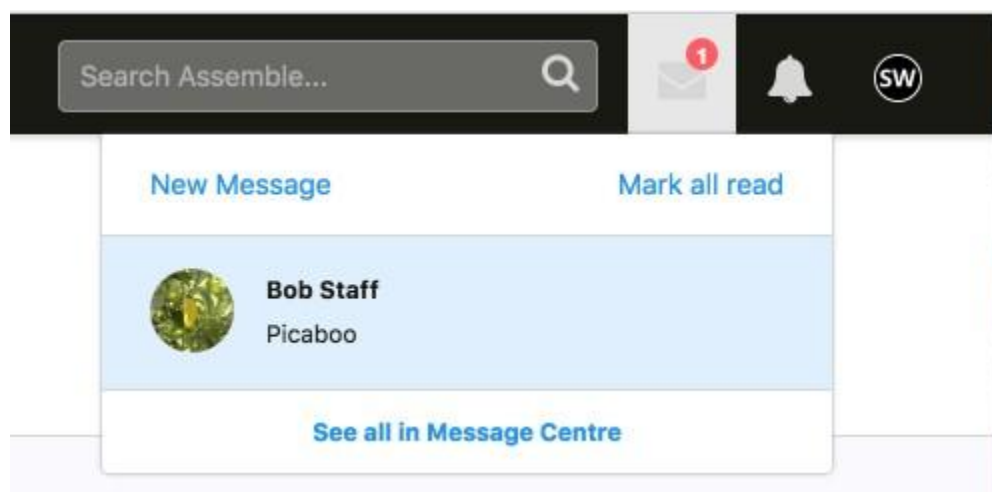
Note: Your training completion status within Assemble may not update instantly, so don't worry if you don't see that happening. If you log into Assemble again the next day it should be updated by then.

My messages

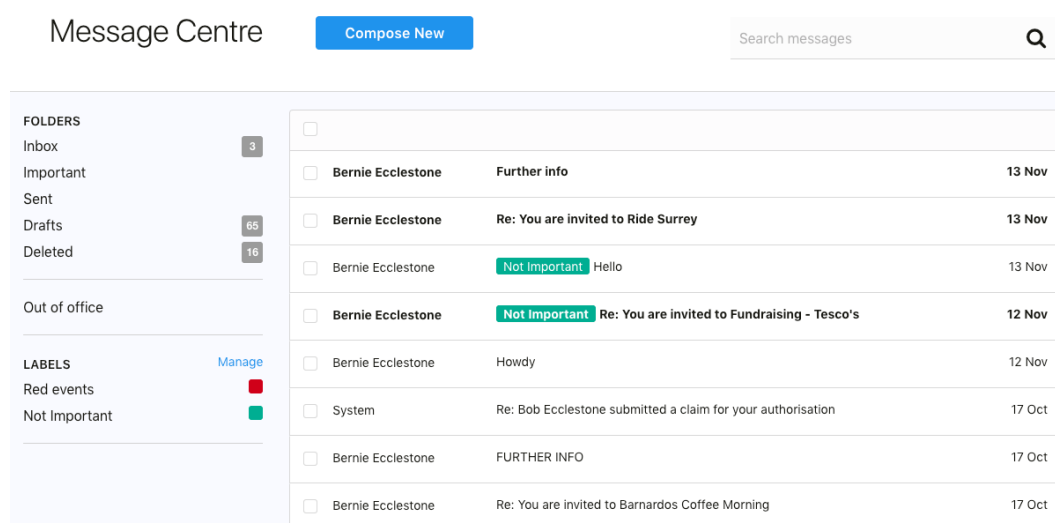
With Assemble's built-in messaging functionality, you can contact other users within Julia's House.

View messages

To see your messages, click the envelope icon on the top menu available from any page. This will list the most recent messages you've received, which you can click on to read.



To see the full message centre, click “See all in Message Centre”.



Once you access the message centre itself, you can see your inbox, sent items, drafts and deleted messages.

Composing a new message

Selecting the "New message" button on the top left of the message-centric drop-down will open up the composing message modal on the bottom right-hand corner of the page you are in. Or select the "See all" in the Message Centre link at the bottom of the drop-down to access the full functionality.

Click the "Compose New" button at the top of your inbox page to open the full compose message screen.

To add your message recipient on the "To" input field start typing the name of the person to reveal the incremental search list with the names of the users you have access to.

You must select the person's name from the dropdown list to save it.

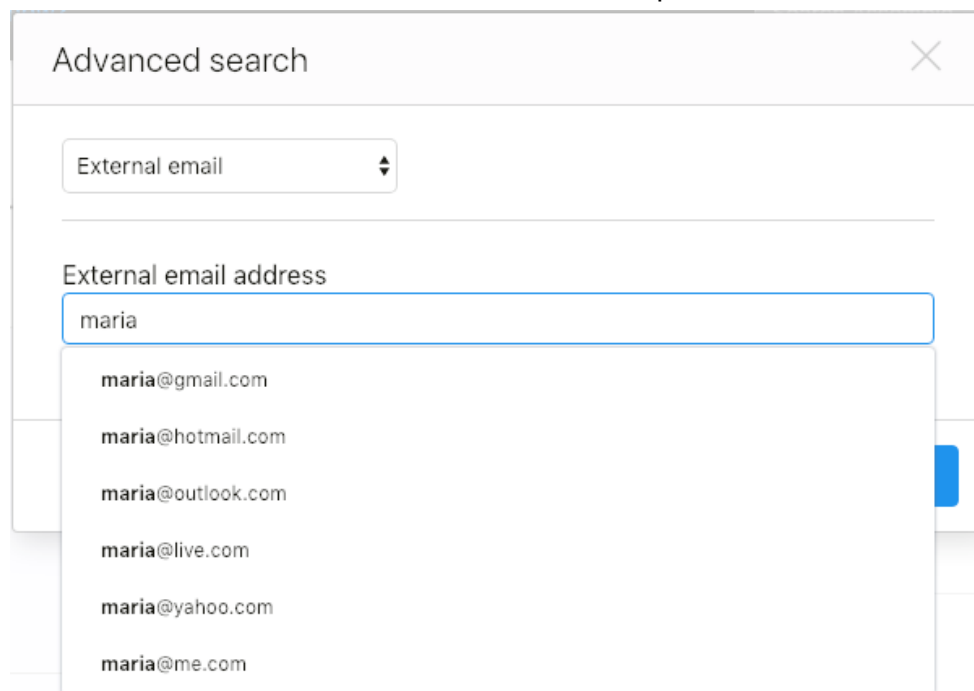
Select "cc", "bcc" to reveal the input form field.

External messages

You can also send messages to an external email address by clicking on the "To", "Cc" or "Bcc" to reveal the advanced search pop-up window.

Select the "External email" option from the drop-down, and on the search, start typing in the email address of the person; as you start typing in, the system will open a drop-down with suggestions with the most common email domains.

You must select the email address from the dropdown list to save it.



Advanced search

External email

External email address

maria

- maria@gmail.com
- maria@hotmail.com
- maria@outlook.com
- maria@live.com
- maria@yahoo.com
- maria@me.com

Saving a message: The system will automatically save your message every 15 seconds. You will find the saved message on the "Drafts" folder.

Searching the document hub

The document hub allows Julia's House to make resources available to you to help with your volunteering role, e.g. briefings, films, posters, forms etc.

You can browse through the files and folders to find something of interest or search from both the [universal search](#) or the [context search](#) in the document hub. When searching the system checks both file titles and descriptions to help you locate what you need.

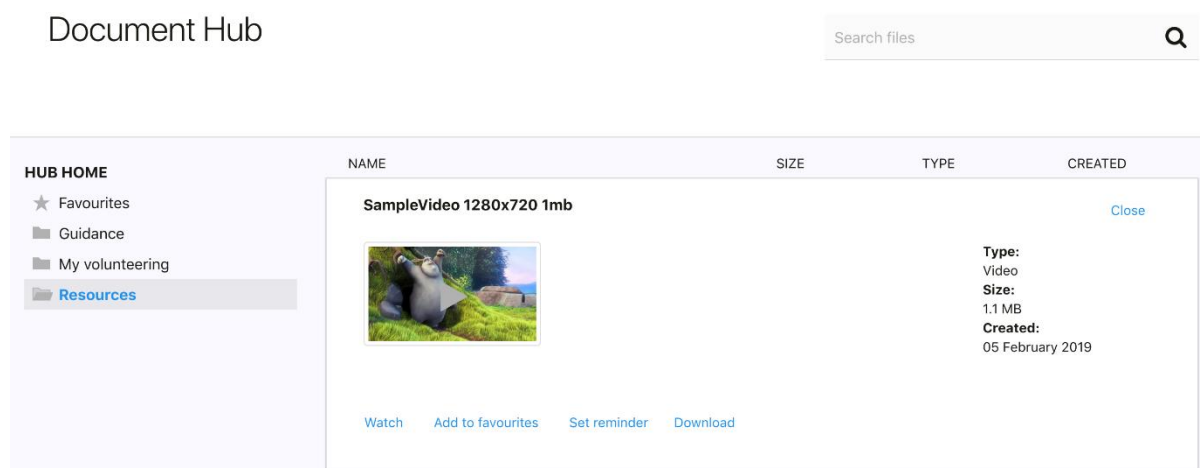
From the file list you can mark a file as a favourite (or not) by clicking on the small star on the left of the line. This will add a link back to the file in your favourites list so you can quickly return. You can also favourite from the file details page.

Clicking on a file will open its detail page, showing you the name, a thumbnail, description of the file and other basic information.

To view the file in your browser, click on the thumbnail or related action ('watch' in example below). You can also download the file locally to open in another application or edit as the document hub is read only.

If you don't have time to review the full file you can set a reminder which will send you an alert in Assemble to return at a later date.

Clicking 'Close' will return you to the file listing.



My tasks

This will show all open tasks that have been assigned to you or tasks that you created.

Take a task (assign to self)

To assign a task to yourself, which is also known as taking a task, click on any unassigned task. You will only be able to see tasks that are relevant to your role or team.

Once you have read the details of the task and are happy that you will be able to carry it out, click the "Assign to me" button.

The task owner will be notified that you have taken the task.

Record activities

Once you have been assigned a task or taken one, you will be able to record activities against it. This lets you record, if you want to, everything you've done to complete that task. It's particularly useful if the task requires you to carry out multiple activities over a number of days. To add an activity, just press the "Add activity" button and follow the on-screen instructions.

All your past activities for this task will be shown to you below the "Add activity" button. They will also be visible in the [Activities](#) section with the hours you've spent being updated.

Leave a task

If you are no longer able to complete the task, click the "Leave task" button and you will no longer be notified about this task. All your recorded activities will be kept within the task, so the next person assigned the task knows what's been done. If you leave a task, the task owner will be automatically notified.

Complete a task

When you have completed the task, click the "Complete" button. This will add an activity for you, and you can say how long you spent on the task (or the most recent activity for it if you've already added other activities to it). If the category of the task you are completing has outcomes that need to be recorded, you will be asked to provide this information. Please be aware that if the outcomes are compulsory, you will not be able to complete the task until you have provided this information.

Add new task for yourself

If you have permissions to do so, you can create tasks for yourself to complete.

To add a new task, click the "Add new task" button and you will be asked for the following basic details:

- Category (same categories used in activities)
- Priority (low, normal, high, urgent)
- Due by / due on
- Task title
- Owner (defaults to the user setting up the task)

In addition to the above required information, you can also enter the following information when setting up a task:

- Further description of the task
- Location (specific address)

Add new task

Task Category

Fundraising (small)

Priority

Normal

Due by

15/03/2022

Time

09:00

Task

Coffee morning - Shrewsbury House School

Description

We have been contacted by the head master of Shrewsbury House School who informed us that several parents there have shown interest in our cause and wondered if we could organise a coffee morning.

The school will provide the tables etc, however will need someone to:

- 1- Pickup latest leaflets/posters from HQ
- 2- Pick up tea, coffee and biscuits (make sure you enter the receipt into Assemble)
- 3- Get to the school at 08:00 on the day to set up.

Location

Shrewsbury House School, KT6 6RJ

Add teams

Add roles

Owner:

DutySheet Staff

This task is not assigned to anyone

Cancel

Add task

Managing your tasks

You will get a notification in Assemble when you've been assigned to a task. If a task is made open to a team, you're part of or to anyone with a role that you have, you won't get a notification but can see which tasks are available in the Unassigned view of tasks.

When a task due date has passed, it will be displayed in red, but you can still complete it. The task itself is not automatically removed from the system. If it's a task that you created, you should then cancel, extend or complete the task.

EVENTS

The events functionality is an excellent place for Julia's House to invite and keep you informed on all the great activities we organise to support volunteering, e.g. volunteering training, meetings, conferences or events you may be interested in helping at etc. You may receive a direct invitation or be able to sign up to ones that have been opened to you and others.

Viewing events

On the event listing page, you will see all upcoming events that you are directly invited to or are open to your team/role(s).

Upcoming Events				Search events
UPCOMING EVENTS		PAST EVENTS		
EVENT NAME	DATE & TIME	LOCATION	STATUS	
Assemble Training Organised by Matt Loughton	1st February - 8th February 2021 5 sessions	3 locations	Attended	View event
Fundraiser Organised by Matt Loughton	7th February 2 sessions	Aberdeen, AB12 3DN	-	View event

Click on any event to see further details.

Fundraiser



DESCRIPTION

Help us raise money.

DETAILS

Created by

Matt Loughton

Category

Fundraising (large)

Attendance requires approval

No

ORGANISERS

Matt Loughton (Main)

[Send message](#)

ATTACHMENTS

LOCATION 1

Location

Wellington Road, AB12 3DN
Wellington Road
Aberdeen
AB12 3DN
[View map](#)

Attendees

0
Volunteers who have accepted the invitation

Choose your session

07 February 2021

08:30 - 13:30

16:30 - 20:30

[Attend selected](#)

Warning

Clicking "Decline" will decline your attendance for the entire event.

NB If an event is open to the whole organisation, you don't need to let anyone know if you want to decline the invitation, only if you accept.

If you look at the event location(s), you may see multiple locations or timeslots available. By clicking on each timeslot you will see further information, such as who else is attending and a link to a map location.

The screenshot shows a web interface for selecting an event session. It has two tabs: 'LOCATION 1' and 'LOCATION 2'. Under 'LOCATION 1', the location is 'Wellington Road, AB12 3DN', 'Wellington Road', 'Aberdeen', 'AB12 3DN'. There is a 'View map' link with an external icon. The 'Attendees' section shows '1' volunteer who has accepted the invitation: 'Ross White'. To the right, under 'Choose your session', the date is '07 February 2021'. There are two session time slots: '08:30 - 13:30' (highlighted with a green border) and '16:30 - 20:30'. An 'Attend selected' button is at the bottom right.

Accepting an invitation to attend

Once you have decided to attend a session, your accepted sessions and details will appear above the locations for easy access on the day. You also cancel your attendance at a session at any time from here.

Sessions which you are attending			
Name	Date and time	Location	
Location 1 Wellington Road, AB12 3DN	07 February 2021 08:30 - 13:30	Tesco Aberdeen Wellington Road, Aberdeen, Aberdeenshire, AB12 3DN, United Kingdom AB12 3DN	Cancel
Location 1 Wellington Road, AB12 3DN	07 February 2021 16:30 - 20:30	Tesco Aberdeen Wellington Road, Aberdeen, Aberdeenshire, AB12 3DN, United Kingdom AB12 3DN	Cancel

When you are invited to an event, an entry will be added to your calendar, which you can also click on to view the details screen. When you have confirmed you will be attending a session, this will turn green. Where appropriate an activity will automatically be created for you after the event.

To manage attendance, some events will be set up with a waiting list. This may be to make sure that everyone has the chance to say if they want to attend. In this case, accepting the event invitation will place you on a waiting list for sessions you wish to

attend. The event organiser can then communicate and let you know if you've got a confirmed place.

Tip: If you need to contact Julia's House, you can send them an Assemble message directly by clicking the button found in the event details.

ROTA

Calendar view

When you first enter the rota system, you will be shown a calendar with the current month loaded. On a certain date(s), you may see coloured dots:

- **Blue:** This indicates that you have a shift booked for that date.
- **Red:** This indicates that there is at least a 15-minute period where there is a shortage of volunteers.
- If there are no coloured dots on a specific date, then it means that there are enough volunteers covering the rota that day and that you are not doing a shift.

Rota						
Add shift						
PRINT						
Display: ALL ROTA TEAMS ▾						
< Nov 2018 >						
Today Tomorrow						
MONTH WEEK DAY						
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
29	30 •	31	01	02	03	04
05	06 •	07	08 •	09 •	10	11
12	13 •	14	15	16	17	18
19	20 •	21 •	22	23	24	25
26	27 •	28	29	30	01	02
03	04 •	05	06	07	08	09

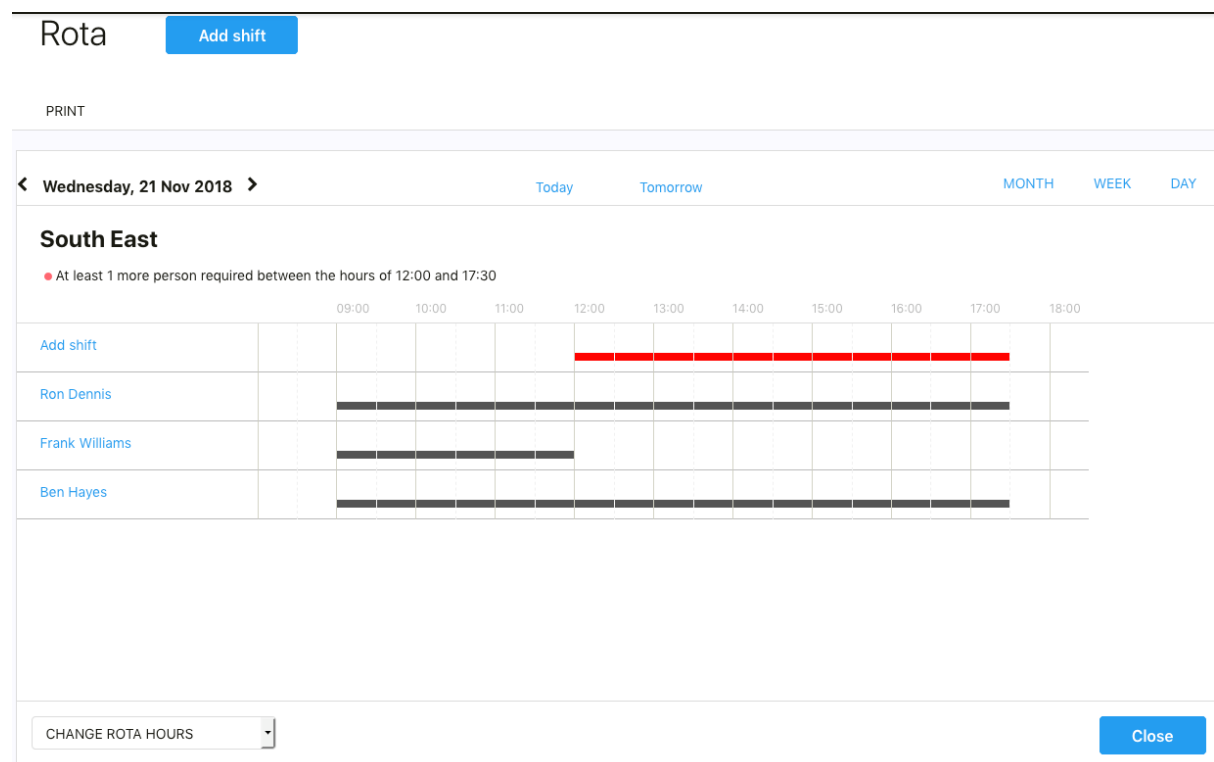
If you are part of multiple rotas, for example, you volunteer in two separate shops within Julia's House, you can filter these to show them one at a time. You'll see a "Display: [Rota Name]" drop-down on the top right of the calendar. Simply select the rota you

want to view and click Clear when you want to see all your shifts together in the single calendar view.

From the month view, you can click on a specific date to see further details. (If you have access to multiple rotas, then you'll be taken to an overview of each of your rotas where you then click to select the rota you want to see.)

Date view

Looking at a specific date for a rota will show you the list of others who are covering shifts on that date. If there are any gaps in the day when the rota is below minimum numbers, this will be shown as a red bar. The numbers of volunteers on a shift are set by your organisation, so that will affect when a red bar is shown.



Add shift

Click the "Add shift" button from the top of the rota on any page and a modal will pop up. This allows you to add a shift for any date; however, if you were on a specific date, then the date will be pre-filled for you.

Add shift

☐ All day

Date

21/11/2018

Start time

12:00

End time

17:30

Repeat

EVERY WEEK

Mon

Tue

Wed

Thu

Fri

Sat

Sun

Until

dd/mm/YYYY

Team

SOUTH EAST

Select volunteers:

Bernie Ecclestone

Cancel

Add shift

Check the date you want to add and make sure it is correct. Then select the desired start/end times of your shift.

Tip: If available, you can click the "All day" checkbox, and the system will pre-fill the start and end times of the shift for you

Please be aware that your start/end times cannot be more than half an hour before or past the rota start times. The system will also not allow you to book overlapping shifts.

If you would like to enter a repeating shift, starting from the date you've selected, select the desired repeat frequency:

- None
- Every week
- Every 2 weeks
- Every 3 weeks
- Every 4 weeks

As soon as you select a repeat frequency, you will see days of the week appear below. Select the required days of the week you would like to enter and then select the end date of your repeating shifts.

If you have access to multiple rotas, you will also see a Team selector where you can click on the desired rota.

Once you have filled in all the required details, press the "Add shift" button and you will be shown a validation message which will indicate whether or not your shift was successfully added.

Repeating shifts

If you add a repeating shift, you will be provisionally booked in while Assemble carries out scheduling checks. This will allow the system to ensure that you have not accidentally booked overlapping shifts and that your hours are valid. So, you may not see your shifts appear instantly but will normally be within 15 minutes or so. You will receive notification via the Assemble messaging system, confirming which of your shifts were added.

Edit/cancel shift

If you would like to edit or cancel your shift, click on the shift time indicator bar next to your name where a box will pop up, allowing you to change your shift hours. If you would like to cancel it, press the "Delete" button.

To help with recording hours, Assemble automatically adds the relevant activity category for rota shifts if this has been set up. If the shift is updated, the activity should reflect the changes made to it.

Shift times will also appear in your Assemble calendar.