

CERVIS TECHNOLOGIES

INITIAL LOGIN INSTRUCTIONS

Welcome to CERVIS, our new volunteer tracking software. Here you can sign up to volunteer for specific events or to join a committee for the current year. We are implementing events and committees in stages. The first is the BYC volunteer bartenders, which is open for registration to the current list of qualified bartenders. Coming very soon will be the 2016 505 North American Championships regatta which will be held in just a month, June 1-5, 2016. We need plenty of volunteers for this event, so please check back to volunteer.

MY INFORMATION IS IN THE SYSTEM – HOW DID IT GET THERE?

All local active BYC Members have been imported into the system from our BYC Membership database, but you will still be required to set up a password the first time you log in. Members and significant others each have their own login for the CERVIS system. Initial information required for first time login is your:


1. **First Name** – Keep in mind that this information came from the BYC Database and if you used a formal first name when you became a member, you will need to use that. Try it both ways if you don't have success the first time.
2. **Email Address** – If you have a significant other and their email was listed separately in the BYC Database, use the appropriate email for the member and significant other. If there was no email address listed for the significant other, then use the common email address you both use.
3. **Phone Number** – If a mobile number was listed in the BYC database, that is the number that I used. When no mobile number was listed, I used the home number and in a few cases only a work number was listed, so that is the phone number used. In some cases, the member's mobile number was used for the significant other because that is the only number we had in the BYC Database.

If you attempt to log in to set up your password but receive a message that you are not currently registered in the CERVIS volunteer system, your information may not be correct in the BYC database or your first name may be listed as a formal version as opposed to a familiar version (i.e. Robert instead of Bob). If you try the formal first name and you still get the message, you will need to contact me at 360-220-0444 or ttavelli@hotmail.com and I will provide you the login information we used. Please be patient as we work out the kinks during our learning phase.

INITIAL LOGIN STEPS

1. Open the BYC website in your browser (<http://byc.org>).
2. Click on "Volunteer" from the menu at the top of the page. This opens the Volunteer page where you will see a sub-menu across the top of the page, a brief description of the system and a list of the current events in the system.
3. For the initial login, click the "CERVIS Help – Initial Login" link at the top of the page to display this document. *Please be sure to read the "My information is in the system – how did it get there?" section above as it contains pertinent information about what information was used in pre-populating the system.*
4. Click on "CERVIS Profile Maintenance" at the top of the page or "click here" in the "First Time Sign-In section. Either will take you to the following screen.

CERVIS Sign in Service Events Service Projects Contact Us



BYC CERVIS Sign in

[Contact Us](#)


i Please enter your E-mail address and CERVIS password below!

Password

Remember my profile

[Don't Know Password / Reset Password](#) **i**

OR



5. Enter your email address only and then click "Don't know password". You will be presented with the following screen.

The screenshot shows the Bellingham Yacht Club website's password reset interface. At the top, there is a navigation bar with four buttons: "CERVIS Sign in", "Service Events", "Service Projects", and "Contact Us". Below the navigation bar is the Bellingham Yacht Club logo, which features a blue and white flag with a red star and the text "Bellingham Yacht Club" in a stylized font. The main heading is "BYC CERVIS Password Reset". To the right of the heading is a "Contact Us" link. Below the heading is a blue information box with a white 'i' icon and the text: "To receive a temporary password to access your account, please enter your E-mail address and first name below and click the 'E-mail Me My Password' button to proceed!". Below the information box are two input fields: "E-mail:" and "First Name:". Below the input fields is a button with an envelope icon and the text "E-mail Me My Password". Below the button is a link that says "Back to CERVIS Sign in".

6. Enter your email address and your first name (it may be your formal version, or your familiar version) and then click the "E-mail Me My Password" button. Check your email for an email from CERVIS. If it doesn't appear within a couple of minutes, check your junk email as it may be there. You will be presented with the following screen. Copy and paste the password from the email into the password field and click the "Sign in to CERVIS" button.



BYC CERVIS Sign in

[Contact Us](#)

i Please check your E-mail account for your new temporary CERVIS password. If you do not see the E-mail please check your junk/spam folder and add volunteer@byc.org to your safe senders list to ensure you receive future E-mails from this system!


 Remember my profile[Don't Know Password / Reset Password](#)

OR



7. You will be presented with the following screen to change your password to one you can remember.

CERVIS Sign in Service Events Service Projects Contact Us



Change CERVIS Password

i Please create a personal password for your CERVIS account below. Your password must contain between 6 and 20 characters and must contain at least 1 uppercase character, 1 lowercase character, and 1 number!


Name: Terry Tavelli
E-mail: tftavelli@gmail.com
New Password:
Confirm New Password:


Password Strength: Too Short


8. Passwords must be six (6) characters in length and have at least *one upper case letter, one lower case letter* and *one number*. Enter and confirm your new password and then click the "Change Password" button. You will then be presented with the Volunteer Main Menu.

The screenshot shows the Bellingham Yacht Club website's Volunteer Main Menu. At the top, there is a navigation bar with four buttons: "CERVIS Sign in", "Service Events", "Service Projects", and "Contact Us". Below the navigation bar is the Bellingham Yacht Club logo, which features a blue and white flag with a red star and the text "Bellingham Yacht Club" in red and blue. To the right of the logo is a blue circular profile icon. Below the logo and icon is the text "Volunteer Main Menu". A green notification box with a checkmark icon contains the text "Password Successfully Changed!". Below the notification box is a horizontal line. Underneath the line, there are three sections of menu items. The first section is titled "Service Event Registration (one-time or short-term service opportunities)" and contains two links: "Register / Unregister for an Event" and "View Current Event Registration Information". The second section is titled "Service Project Management (on-going or long-term service opportunities)" and contains three links: "Submit a Service Project Application", "Record / Update Service Project Activity", and "View Current Service Project Registration Information". The third section is titled "Profile Management" and contains two links: "Add Additional Volunteer to my Profile" and "View / Update Volunteer Profile Information".


CERVIS Sign in Service Events Service Projects Contact Us




Volunteer Main Menu 


 Password Successfully Changed!


Service Event Registration
(one-time or short-term service opportunities)


 [Register / Unregister for an Event](#)

 [View Current Event Registration Information](#)


Service Project Management
(on-going or long-term service opportunities)


 [Submit a Service Project Application](#)

 [Record / Update Service Project Activity](#)

 [View Current Service Project Registration Information](#)

Profile Management

 [Add Additional Volunteer to my Profile](#)

 [View / Update Volunteer Profile Information](#)

9. Update your Profile Information. Scroll down and select “View/Update Volunteer Profile Information” which will take you to the “Update Volunteer Information” menu.



10. From that menu select “View / Update Volunteer Profile Information”. You will be presented with the following screen (three screen shots) where you should verify your information and make any changes.

a. Personal Information

CERVIS Sign in	Service Events	Service Projects	Contact
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Update Volunteer Information

Volunteer Last Name:*	<input type="text" value="Tavelli"/>
Volunteer First Name:*	<input type="text" value="Terry"/>
Volunteer Primary Ph #:* <small>(ex: 719-111-2222 or 719-111-2222 x345)</small>	<input type="text" value="360-220-0444"/>
Volunteer E-mail:*	<input type="text" value="tftavelli@gmail.com"/>
Confirm E-mail:*	<input type="text" value="tftavelli@gmail.com"/>
Volunteer Alternate Ph #: <small>(ex: 719-111-2222 or 719-111-2222 x345)</small>	<input type="text"/>
Volunteer Address:	<input type="text"/>
Volunteer Address Line 2:	<input type="text"/>
Volunteer City/Town:	<input type="text"/>
Volunteer State:	<input type="text" value=""/> <input type="button" value="v"/>
Volunteer Zip Code:	<input type="text"/>
Bartender Schduling Preference: <small>(1000 character max)</small>	

- b. Bartender Schedule Preference, Volunteer Interests and Volunteer Skills. If you are currently a bartender, or would like to become a bartender, list any schedule preferences you have. Select the Volunteer Interest Areas that you prefer. Keep in mind that selecting these areas will send an email alert to the person in charge of that event or committee.

Bartender Scheduling Preference:
(1000 character max)

Volunteer Age Group:* 18 and over ▾

Volunteer T-Shirt Size:* L ▾

Volunteer Status:* Active ▾

Are you interested in being an event team leader?:*
No ▾

Volunteer Interests:

Bellingham Yacht Club

- Bartending

- Cruising

- Opening Day Committee

- Racing

-- 2016 505 NA Championships Regatta

-- Tuesday Dinghy Racing

Volunteer Skills:

No Items Available For Selection

Volunteer Equipment:

Power Boat - Committee Boat Equipment ▾

Power Boat - Mark Boat

Power Boat - Safety Boat

- c. Volunteer Equipment, Volunteer Availability and Volunteer Groups. If the event requires equipment, select the equipment you could supply (i.e. boats for regattas, tools for club scrub etc.). The equipment list will be expanded as time goes on so check back here for each event you where you are volunteering. Select times you might be available to volunteer. Select a group if applicable. If you are already a member of the bartender group, the group option will be checked.

Volunteer Equipment:

Equipment	
<input type="checkbox"/>	Power Boat - Committee Boat
<input type="checkbox"/>	Power Boat - Mark Boat
<input type="checkbox"/>	Power Boat - Safety Boat
<input type="checkbox"/>	Power Boat - Spectator Boat
<input type="checkbox"/>	Sailboat - Committee Boat
<input type="checkbox"/>	Sailboat - Spectator Boat

Volunteer Availability:

No Items Available For Selection

Volunteer Groups:

Groups	
<input type="checkbox"/>	Bartenders

 **Update Volunteer Info**

< Main Menu

11. Be sure to save all your changes by clicking the “Update Volunteer Info” button at the bottom of the page.