# USING THE HANDSON CONNECT SHARING PORTAL FOR PARTNERS

# Table of Contents

# Sharing Portal Overview

# What is the Partner Sharing Portal?

HandsOn Connect is made up of two different user experiences each with its own interface:

**Public Site:**   The public website (Volunteer site) is available to anyone arriving at your host organization's site.  On the public site volunteers may register (create an account), search for volunteer opportunities, and sign up or express interest in those opportunities. This is also where you can update your personal information, create teams, and see a variety of information published by the site owner.

**Sharing Portal:**  The sharing portal is a special portion of the public site, which the site administrator grants access to.  If you are granted a 'partner staff' profile, you'll be taken immediately to the sharing portal when you log in on the public site.

In the Sharing portal, you'll have the ability to create volunteer opportunities, and manage the volunteers who sign up or express interest in those opportunities. Sharing Portal users are able to navigate back to the public site and use its features as well.

## Are all partner portals the same?

No.  Your host organization's system administrator will customize the sharing portal and determine what features you do or don't have access to.  In this manual we'll discuss many of the default settings, but your actual portal design may vary. You may have access to fewer or more features.  For anything not covered in this manual, please contact your host organization's system administrator.

## Partner Staff Profile

Generally, in the sharing portal, partner staff are able to do the following:

- Create Volunteer Opportunities managed by their organization and submit them for approval
- Manage existing volunteer opportunities, and view / edit the details, occurrence dates, approve or reschedule volunteers, etc.
- Report Attendance and Hours
- Update information about their organization
- View contact records of volunteers who have volunteered with their organization
- Return to the Volunteer Portal to update and manage their personal information as well as use other volunteer functionality.

# Navigating the Sharing Portal

The left side of the sharing portal has the navigation to get to the different functions available in the portal.  The exact items in this menu will vary depending on what features your host's system administrator has enabled.

When you first log in you'll arrive at the Home Page, and you'll always see the left navigation on the left side of the page.

## Left Menu Navigation

At the top left of the page you'll see your organization's logo.  (if the logo isn't there and you see only text, you can add a logo by going to the My Organization Menu Item.

The various menu options, and their functionality will be described in the other chapters of this manual.
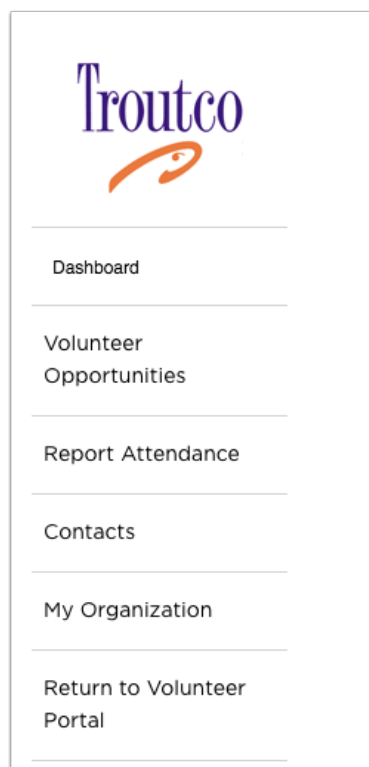


> 💡 Depending on the setup of your sharing portal, additional Menu Items may appear including:

- Locations
- Reports
- (Additional custom menu items may also appear)

# Home Page

# Home (Partner Portal)

When you first log into the public site you'll be taken to the sharing portal and to the Partner Home Page..

The content of this home page will change from time to time and contain announcements, resources and tips from your host organization's System Administrator.

## Home Page

Here's a sample Home Page.  The content on your portal's home page may be quite different.

Also - the colors and design of the partner portal are likely be different than those pictured in these articles.

# Volunteer Opportunities

# Volunteer Opportunity Types

**HandsOn Connect offers different opportunity types to meet the different ways that organizations recruit and manage volunteers.**

There are two different ways of 'scheduling' volunteers:

- Date and Time Specific Opportunities
- Individually Scheduled Opportunities

Each of these two schedule types has two "Registration Type" variations, which gives us a combination of four different volunteer opportunity types

- Date & Time Specific - Full SIgn up
- Date & Time Specific - Express Interest
- Individually Scheduled - Express Interest with Schedule
- Individually Scheduled - Express Interest Only

Which opportunity type you create depends on how you want to recruit and manage volunteers.

**Here are the Four Types of Volunteer Opportunities you can create.  Use the correct combination of Schedule Type & Registration Type to recruit and manage volunteers for your needs:**

> 💡 If you prefer to see this same material presented as a video — a video is available at the end of this article.

## Schedule Type = Date & Time Specific

Use this type of schedule when you need a certain number of volunteers, all of whom will be volunteering on the same date, start time and end time.  You can create one or more 'occurrences" of dates and times for this opportunity.  Use this type of schedule if you need, for example, 5 volunteers on Monday from 6:00 pm - 8:00 pm, or every Monday from 6:00 - 8:00 pm.

There are two Registration Types available for Date and Time Specific Opportunities:

1. **Sign up -** Used with Date and Time specific schedule to automatically sign up and confirm any volunteer who meets the opportunity requirements (such as minimum age, background

check required, etc). If they do not meet the restrictions, they will not be able to sign up and will receive a message saying what restrictions they have not met. When the maximum attendance for the date's occurrence is reached, volunteers have the option of joining the waitlist for that opportunity, or signing up for a different date and time of the same opportunity if it's available.

2. **Express Interest** - Used with Date and Time specific schedule, this registration type allows volunteer to express interest in that occurrence, but they are not automatically confirmed. The opportunity coordinator must then review and either confirm or decline that volunteer to participate. This registration type is useful if you need to do background checks, wish to interview your volunteers or go through other processes before confirming a volunteer to participate.

   The volunteers initially sees the upcoming opportunity as 'pending' - and when they are confirmed for the opportunity they receive an email notification that they have been confirmed. (It's also possible to decline a volunteer if they are unsuitable for the opportunity).



# Schedule Type = Individually Scheduled

Use this type of schedule when you have a flexible schedule of when you need volunteers, and each volunteer may be scheduled to attend at a different date and time over an extended time period. Each volunteer for this opportunity can be scheduled to attend on a different date and time based on their availability. Volunteers can express interest for this opportunity as often as they like making this ideal for ongoing volunteers when scheduling can be flexible. This schedule type can also be used when you simply want volunteers to express interest, without having to specify when or where the volunteer activity will take place.

There are two Registration Types available for Individually Scheduled Opportunities

**3. Express Interest with Schedule** - You define a schedule of times when volunteers are needed (i.e. Mondays 9 - 5 and Fridays 9 - 12) on an ongoing basis or to a specified 'end date'. Volunteers can then express interest in the opportunity and propose one or more times they are available to attend within the schedule youve defined. The opportunity coordinator then simply confirms the volunteer if they approve the date(s) and time(s) they wish to volunteer.

This allows significant flexibility in scheduling individual volunteers and works well for ongoing commitments to volunteer.   Opportunity Coordinators can also administratively schedule volunteers for one or more date & times for this ongoing opportunity.

4. **Express Interest Only -** Use this schedule type when you simply want to allow a volunteer to express interest in an opportunity, without proposing when they will volunteer. Opportunities of this type do not require a location for the opportunity so it works well for virtual opportunities or expressing interest in receiving further information, joining a committee that doesn't yet have a schedule of meetings, etc.   There is no need to confirm or schedule interested volunteers, though you can choose to do so administratively if you wish. This simply generates a list of interested volunteers and what you choose to do with this information is up to you. Volunteer merely express interest, and do not see it as an 'upcoming opportunity' unless you elect to schedule them for a specific time and place to volunteer.



# Examples: How the different opportunity types appear to volunteers on the pubic site:

**Date & Time Specific - Full SignUp:**

Multiple dates and times (occurrences) are shown -- the volunteer sees a 'Sign Up' button.  if the opportunity is full, they see a button to join the waiting list.

English as a Second Language

ISSUE AREA(S)
Talent Development

Troutco | http://www.troutco.com

REQUIREMENTS
Age Minimum (with Adult):18+, Minimun Age:18+

Teach spanish to young people using our bilingual site.

⊕ SHARE THIS OPPORTUNITY

Sign Up

**FRIDAY, JULY 28, 2017 FROM 7:00 PM – 10:00 PM**                    ⊖

Location: River City, CA 92506

Volunteer Limit: 5 | Spots Remaining: 4

Opportunity Leader: Art Trout ✉

Full opportunity address and directions will be sent to you by e-mail after you sign up.

SIGN UP | Or sign up with a team. ❓

**THURSDAY, AUGUST 10, 2017 FROM 8:00 PM – 9:00 PM**                 ⊕

**FRIDAY, AUGUST 25, 2017 FROM 7:00 PM – 10:00 PM**                  ⊕

## Date & Time Specific - Express Interest

Multiple dates and times (occurrences) are shown -- volunteer sees 'express interest' button

Opportunity Details

Children of the Night

ISSUE AREA(S)
Hunger & Homelessness

Troutco | http://www.troutco.com

POPULATION SERVED
Homeless

Volunteers are needed to provide workshops at the Children of the Night shelter home in Van Nuys, California.

REQUIREMENTS
Age Minimum (with Adult):18+, Minimum Age:18+

Organize a 1.5-hour activity on a hobby or special interest (i.e. arts & crafts, makeup, improv, comedy, acting, animation, first aid, dance, yoga, jewelry making, magic, origami, self-defense, etc.). Volunteers are asked to provide all materials necessary for their activity.

⊕ SHARE THIS OPPORTUNITY

Express Interest

**WEDNESDAY, AUGUST 2, 2017 FROM 6:00 PM – 8:00 PM**                 ⊖

Location: Louisville, KY 40202

Volunteer Limit: 500 | Spots Remaining: 500

Opportunity Leader: Art Trout ✉

After expressing interest, the opportunity leader will contact you to confirm your participation and provide directions for this opportunity.

EXPRESS INTEREST | Or express interest with a team. ❓

## Individually Scheduled - Express Interest with Schedule

The time period volunteers are needed is displayed, and Volunteer can 'express interest". Upon clicking on the Express Interest button, they can express interest in one or more dates & times they're interested in volunteering.

The Opportunity Coordinator can then review the dates they've expressed interest in volunteering, and confirm or decline them. (They also have the option of rescheduling the volunteer for one or more dates if desired).



## Individually Scheduled - Express Interest Only

The description gives the details and tells the volunteer what to expect. The volunteer can express interest, but does not schedule themselves.  The opportunity may or may not have a location.

Opportunity Details

## Help with Hurricane Valerie Recovery Efforts

Troutco | http://www.troutco.com

ISSUE AREA(S)
Adult Education

REQUIREMENTS
Age Minimum (with Adult):18+, Minimum Age:18+

Thousands of people who have become displaced as a result of Hurricane Valerie. We know you want to help, but for now, our community urges volunteers to stay at home until specific, organized projects are put together to help with the response.

By clicking on the express interest button below, you'll be added to our Disaster Response mailing list and we'll send you a weekly bulletin with the latest news about recovery efforts, with links to specific response opportunities that have been published on our site and your help is needed!

Thanks for your great heart and spirit and your interest in helping with the recovery.

➕ SHARE THIS OPPORTUNITY

### Express Interest

**VOLUNTEERS NEEDED THROUGH 12/31/2017**       ➖

Opportunity Leader:  Art Trout  ✉

After Expressing interest, the Opportunity Leader will be notified of your interest and will contact you with further details or to schedule you for this opportunity.

EXPRESS INTEREST

# Video: Volunteer Opportunity Types

Start watching this video at 1:53 in the video timeline.

.

# Creating a new Volunteer Opportunity

HandsOn Connect makes it quick and easy for you to create a new volunteer opportunity.

After you create the opportunity, it will be sent to your system administrator who will review and publish the opportunity.

# Go to Volunteer Opportunities menu and Click on "Create Volunteer Opportunity"



# Create Volunteer Opportunity Step 1

The actual fields that appear on the first page for volunteer opportunities, and whether they are required or not will vary depending on how your organization has set its requirements. So not all feeds described below may appear in your portal. If any field is shown and not mentioned here - ask your system administrator for an explanation of what the field is used for by their organization. Here are some of the major fields that will appear:

The fields will also vary depending on the schedule type and registration type of the opportunity you defined:

The red * indicates that a field is required.  Most fields are self explanatory or have a green ? help icon which provides further explanation.

1. **Opportunity Name** -  (the name of the opportunity as you wish it to be appear on the website. Good clear names make a difference!  (i.e. "Arts and Crafts with Kids" is a better opportunity name than "Volunteers Needed"
2. **Schedule Type** and **Registration Type -** see this article for a full explanation on the four types of opportunities that can be created based on these two characteristics.
3. **Description -** this is the text that describes the opportunity in detail.  You can use the WYSIWYG editor to style the text (very similar to how you would in a word processor), and can even upload and add images.  Keep things as simple text unless you're somewhat familiar with working on website content.   But its a powerful tool if you are familiar with creating html through a web editing tool like this WYSIWYG editor.
4. **Opportunity Coordinator -** select the name of the member of your staff (usually you!) who will be in charge of the volunteers, confirm their participation (if using 'express interest") and report attendance after the project.  (If you need additional staff members to be opportunity coordinators, you can request that they be added as opportunity coordinators using the My Organization / Create Organization Contact option.
5. **Location -** A location is the address where the volunteer opportunity will take place. Any location you've created in the past is available here to select, or, if you need to create a new location, select the picklist option "Add a location (next step)".   A location is required for all opportunity types EXCEPT Individually Scheduled / Express Interest Only.   If your opportunity is an IS / EIO and doesn't really take place anywhere, just leave the picklist value set to "Select Option" (you'll notice its not required to make a selection in this field for this opportunity type)

How many of the following fields will appear in your portal depends on your organizations configuration and what info is provided on the website.

6. **Image** - if your organization is 'featuring' opportunities on the site home page, you may be asked to upload an image for the volunteer opportunity.  This image must be square.  (It is separate from any image that you may have entered in the project description, and only used in the "Featured Opportunity" portion of the website, if it is enabled.

7. **Primary Impact Area -** select a value.

8. **Population Served -** select a value (generally not required)

**9. Age Groups Served -** By default, "All Ages" is preselected for you - but if your project only benefits certain ages, then you can change the selection here.

10. **Minimum Age -** what is the youngest volunteer that can sign up for the opportunity? (Note: In some sites there are two separate age fields.  Minimum Age is the minimum age to sign up,   "Minimum Age with Adult" is a way to say that a young person can volunteer, but only if accompanied by an adult.   If only the minimum age field is presented, the minimum age and minimum age with adult will be treated as the same age.

**11. Maximum Attendance -** This field only appears for Date & Time specific opportunities. It is the maximum number of volunteers you want to sign up before 'closing' the opportunity to further signups. Any volunteers who try to sign up after the maximum attendance has been reached, will have the option to join a waiting list and be notified is space is available.

**12. Suitable for Groups** - a search field for finding projects that are well-suited to groups.

**13. RSVP/Seniors** - a search field for finding projects that are well-suited to seniors and RSVP volunteers.

**14. Type**: if this field is available, its used to indicate if the opportunity is a volunteer service project, or an "Activity" If you select 'activity' then you'll be asked to specify the activity type. Activity Types include:  Training, Recognition Events, Socials, etc.

15: **Minimum Required Level of Verification:** Nextthis field only appears if your organization has enabled background checks via Verified Volunteers.

16. **Next -** click the next button to get to the next page of the Opportunity Creation Process

# Create a Location

If you opted to create a new location in Step 1 - you'll be taken to a Create a Location page.  Fill out the fields to describe where your opportunity takes place.  The "Special Directions" field can be used to identify any special instructions relevant to the location:

> The field "Location Name" may not have been activated in your sharing portal.  If it is not present, please contact your system administrator and request that Location Name be added.  (This field allows you to identify a building or location by name.
>
> If the field "Location Name" is hidden in your sharing portal, then the Street Address will be used as the location name for your location.

Create Location

**Location Name** *
Downtown Library

**Street Address** *
310 W. Main St

**City** *
Louisville

**State** *
KY

**Country** *
United States

**Zip/Postal Code** *
40202

**Special Directions**
If parking in back lock, lock your car.  If street parking, be sure to put money in meters if before 6:00 pm.

The final step in creating an opportunity is to set dates for it.  The process varies depending on what Opportunity Type you have selected in Step 1.

# Setting Dates for Date and Time Specific Opportunities

Because date and time specific opportunities can take place on one or more dates (occurrences), you'll be asked whether or not the opportunity occurs on a regular schedule.

If no, then just enter the Date and Start and End Time.   You can also Create Additional (non-regular) occurrences, for additional dates by clicking on "Create Additional Occurrences".  When you are done entering your date(s), click on "Create".

## Create Volunteer Opportunity – Date & Time Specific

You have the opportunity to create occurrences for this opportunity that are at various times or occur on a regular schedule (such as every Monday or 1st Saturday of the month).

**Does this occur on a regular schedule?**

○ Yes

● No

### No Regular Schedule

| Date * | Start Time * | End Time * |
|---|---|---|
| 9/21/2017 | 9:00 AM | 9:00 AM |

Create Additional Occurrences

Previous                                         Create

If you indicate that it has a regular schedule, you can define the type of recurrence (daily, weekly, or monthly), and the date range for the occurrences. So for example, if I want to have a project on the 2nd Friday or every month from September to March, I would fill in the fields as follows:



This would create separate occurrences for the 2nd friday in September, October, November ….. through March. 7 different dates (occurrences) that volunteers could sign up for to attend.

# Setting Dates and Time Ranges for Individually Scheduled - Express Interest with Schedule opportunities

For this opportunity type you are requesting that volunteers sign up individually, at times when you need volunteers.

1. **Start Date and End Date** - this is the period of time the opportunity will be posted, and when you are open to having volunteers express interest in volunteering with you.
2. **Day of the Week / Start Time / End Time --** for each day you need volunteers, you can set the time range that they can express in.   Pick a day of the week, a start time and end time, and then click "Add Day & Time" to add it as a schedule item.  You can add multiple days and times as desired so that volunteers will only express interest during the times you need volunteers.
3. Click **Create** to finish posting the opportunity with the appropriate schedule of when people can express interest in volunteering.

In the schedule shown below, we want volunteers for any time they are available betweeen 9 am - 11 or 2 pm - 4 pm on Mondays.... and anytime between 9 and 5 on Thursdays. (Remember: In this opportunity type - volunteers can sign up for any start and end time WITHIN the schedule you've posted.



# Settings dates for Individually Scheduled - Express Interest Only

For this type of opportunity, volunteers do not say when they want to volunteer.  You are just getting a list of who is interested!

So you just indicate when to start listing the opportunity, and when to end it  (no one else can express interest)



Create Volunteer Opportunity – Express Interest Only

For what period of time do you want volunteers to be able to express interest in this opportunity?

Start Date *

9/21/2017

End Date *

3/31/2018

Previous

Create

# After you have set the date(s) for any of these opportunity types, click Create and your opportunity will be created!

For Date and Time Specific Opportunities it will also create multiple occurrences if you've specified them.  For Individuall Scheduled Opportunities there is only one occurrence record, which is used to record the participation of all volunteers who express interest.
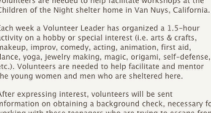
After you've created it - you'll be taken to the Volunteer Opportunity Detail Page where you can see what you've created.  If you need to make changes, click on the **Edit** Button.   The opportunity will be sent to your system administrator for approval, and then it will be published and available for volunteers to sign up.

To see what the opportunity will look like when published click on **"View Volunteer Opportunity on Public SIte"**  (the public site preview will not show the occurrences until the opportunity is published.   To go back to the Volunteer Opportunity page to search for a different opportunity or create another new one, click on "Back to List"

## Volunteer Opportunity

Edit | View Volunteer Opportunity on Public Site | Back to List

| | |
|---|---|
| Opportunity Name | Children of the Night |
| Schedule Type | Date & Time Specific |
| Registration Type | Express Interest |
| Opportunity Coordinator | Art Trout |
| Primary Impact Area | Hunger & Homelessness |
| Population Served | Homeless |
| Age Groups Served | All ages |
| Minimum Age | 18 |
| Maximum Attendance | 10 |
| Suitable for Groups | No |
| RSVP/Seniors | No |
| Min Required Level of Verification | None |
| Type | Project |
| Description | Volunteers are needed to help facilitate workshops at the Children of the Night shelter home in Van Nuys, California. <br><br>Each week a Volunteer Leader has organized a 1.5-hour activity on a hobby or special interest (i.e. arts & crafts, makeup, improv, comedy, acting, animation, first aid, dance, yoga, jewelry making, magic, origami, self-defense, etc.). Volunteers are needed to help facilitate and mentor the young women and men who are sheltered here. <br><br>After expressing interest, volunteers will be sent information on obtaining a background check, necessary for working with these teenagers who are trying to escape from a life of prostitution and living on the streets. You will be asked to sign some specific documents agreeing to our code of conduct that will be sent to you after expressing interest. |
| Image | |

### Default Location

| | |
|---|---|
| Street Address | 316 Michigan Avenue |
| City | Louisville |
| State | KY |
| Zip/Postal Code | 40202 |
| Country | United States |

### Connections

---

⚠ The most important decision in creating the opportunity is the Registration Type and Schedule Type.  These cannot be edited and changed after the opportunity has been created.  So make sure you've decided on the right type of opportunity before you create it.  See this article for information on each of the opportunity types and what they are best used for.

# Accessing Existing Volunteer Opportunities

Use the Volunteer Opportunities Menu item to see a list of all your existing volunteer opportunities.  There are a number of features that enable you to quickly find the opportunity you are looking for so you can go the opportunity detail page and manage the opportunity:

## Default view of Volunteer Opportunities

When you click on the Volunteer Opportunities menu item on the left, you'll be taken to the volunteer opportunities 'search page".   You'll see a filtered view of all the opportunities that are associated with your organization (or for Volunteer Leaders, those that you have served as leader for).

The default view here shows all opportunities that have a posting status of "This is approved and published for volunteers to sign-up".  These are the opportunities that are currently visible on the public web site.

Here are the elements of the Volunteer Opportunities page:

1. **Search by Keyword -** start typing the name of any opportunity and the list will quickly filter to reveal matching opportunities.  This is the fastest way to find a specific opportunity.

2. **Create Volunteer Opportunity -** used to create new volunteer opportunities. <u>See this article.</u>

3. **Filters:**   You can filter the list to see opportunities based on their **Posting Status, Schedule Type, and/or Registration Type.** So for example, if you wanted to see all your Date & Time Specific / Express Interest Opportunities  (whether they were or weren't currently published), you could do so.  To see ALL your opportunities in alphabetical order, just remove ALL the filters.

By default, the posting status will be filtered so you are seeing your approved and published volunteer opportunities, as these are the ones you are most likely to want to get to!

4. **Column headers -** Clicking on a column header will sort the filtered opportunities alphabetically by that column. Clicking again will reverse the sort order.

5. **Shows the number of opportunities and how many you are viewing.** Only 10 records show up on a page, but you can use the numbered pages or "previous" and "next" link to see the next or previous 10.   Or use filters or search to narrow the list.

6.   Click on the hyperlink of the opportunity name to go to the opportunity detail page where you can edit the opportunity, and view, edit or add more occurrences and connections.

| Name ▲ | Posting Status | Schedule Type | Registration Type |
|---|---|---|---|
| | This is approved and published for volunteers to sign-up. ▼ | ▼ | ▼ |
| Become a Board Member (EIO) | This is approved and published for volunteers to sign-up. | Individually Scheduled | Express Interest Only |
| Big Team D&T Test | This is approved and published for volunteers to sign-up. | Date & Time Specific | Sign Up |
| Bringing Smiles to Seniors (D&T Full) | This is approved and published for volunteers to sign-up. | Date & Time Specific | Sign Up |
| Church Helper | This is approved and published for volunteers to sign-up. | Individually Scheduled | Express Interest Only |
| Clerical Help Needed | This is approved and published for volunteers to sign-up. | Individually Scheduled | Express Interest with Schedule |
| English as a Second Language | This is approved and published for volunteers to sign-up. | Date & Time Specific | Sign Up |
| ISO EIO for Kiosk Testing | This is approved and published for volunteers to sign-up. | Individually Scheduled | Express Interest Only |
| Larry's Day and Time Test Opp | This is approved and published for volunteers to sign-up. | Date & Time Specific | Sign Up |
| Pending A Test | This is approved and published for volunteers to sign-up. | Date & Time Specific | Express Interest |
| TBS Test Opp | This is approved and published for volunteers to sign-up. | To be Scheduled | Express Interest |

Showing 1 to 10 of 10 entries (filtered from 92 total entries)

Previous  1  Next

Clicking on "View" will take you to the Volunteer Opportunity Detail Page for that opportunity.

# Volunteer Opportunity Detail Page

The Volunteer Opportunity Detail Page is where you'll manage your existing volunteer opportunities and their volunteers (connections).   It is made up of separate sections.   Here's the overview of the different sections on the page:

## Volunteer Opportunity Summary

At the top of the Volunteer Opportunity Detail page are three action buttons:

**Edit:**  use this button if you wish to change the default values for the volunteer opportunity, its name or description.

**View Volunteer Opportunity on Public Site:**  This button will take you to the public site where you'll see how the volunteer opportunity appears.

**Back to List:** takes you back to the volunteer opportunity search page.

(For Individually Scheduled Opportunities / Express Interest with Schedule, an additional button appears, see below)



# What do you edit in the volunteer opportunity? What do

# you edit in the occurrence?

The following fields are controlled by the Volunteer Opportunity record itself, so if you wish to change this for the opportunity click on 'Edit" and update:

- Opportunity Name
- Description
- Image (if used)
- Primary Impact Area
- Population Served
- Age Groups Served
- Minimum Age
- Suitable for Groups
- RSVP/Seniors
- Type (if available)
- Min Required Level of Verification (if using verified volunteers)

**The rest of the fields in the Volunteer Opportunity are just default values used when creating new occurrences.**

**To update the following fields** - **edit the occurrence instead of the Volunteer Opportunity.** (updating the volunteer opportunity will not change what appears on the public site, because these are determined by the occurrence (and can be different for each occurrence associated with the opportunity.

- Dates and Times of the Occurrence
- Maximum Attendance for the occurrence
- Opportunity Coordinator for the occurrence
- Location of the occurrence.

> ❗ You cannot edit the Schedule Type and Registration Type of an opportunity after its been created.  If you realize you've created an opportunity of the wrong type, create a new opportunity (with the same name, but the correct schedule type and registration type) and unpublish the other version of the opportunity by setting its occurrence end date(s) to a past date.   (See this article for more information on how to 'un-publish occurrences)

# Connection Grid

The Connections Grid gives you access to all the volunteers who have signed up or expressed interest in the volunteer opportunity.  For details on using the connection grid, see this article.

# Occurrence Grid

The Occurrence grid gives you access to the multiple occurrences (dates & time / locations) for date and time specific opportunities,  or the single occurrence that is created for Individually Scheduled Opportunities. For details on working with the occurrence grid and how to add new occurrences for date and time specific opportunities, see this article

> 💡   Note:  Depending on how your organization has configured the sharing portal, there may be more or less fields and sections visible in the opportunity details page.  The illustration above is the standard configuration.

# An additional Button is available for Individually Scheduled - Express Interest with Schedule Opportunities

There is an additional button at the top of the Volunteer Opportunity Detail page if the opportunity is Schedule Type "Individually Scheduled" and Registration type "Express Interest with Schedule"

The button is called "View Scheduler" and this allows you to edit the schedule you created when you first created a volunteer opportunity of this type.

# Volunteer Opportunity

| Edit | View Scheduler | View Volunteer Opportunity on Public Site | Back to List |

| | |
|---|---|
| Opportunity Name | After School Reading to Kids (ISO) |
| Schedule Type | Individually Scheduled |
| Registration Type | Express Interest with Schedule |

# Working with the Occurrences Grid

## The Occurrence Grid

On each Volunteer Opportunity Detail page is an Occurrence grid which lists the details of its one or more occurrences.

You can search for an occurrence starting on a specific date by typing the date in the search box  (1)  ("find by keyword) at the top of the grid.

You can also use the dropdown filters  (2) in any column to see only the occurrence(s) you wish to view:  (For example: use the posting status filter to just see the occurrences that are "published"  or those with dates in the past.

The occurrence grid gives you an overview of information about each occurrence.



Depending on the permissions you've been granted, the following actions may be available in the action column of the  grid:

- **Edit -** allows you to edit the occurrence info, changing the start date and time and end date and time, change the opportunity coordinator or the location of the occurrence.
- **Cancel**:  Only available for date and time Specific Occurrences.  This cancels the occurrence, unpublishes it from the public site, and sends an email notification to any volunteers who were signed up that the occurrence has been cancelled.  It updates their connections to cancelled status and attendance status automatically.
- **Print Check-In Sheet:**  - This will open a ,pdf with the names of all volunteers in confirmed status for that occurrence. You can use this check-in sheet to check-in volunteers at the project site, and later use it so you know who was and wasn't there, so you can report attendance after the occurrence has taken place.

The **Add New Occurrences** button (3) allows you to add additional occurrences for date and time specific opportunities.  The process for adding a single or a recurring series of occurrences is exactly the same as the occurrence step in "Creating a Volunteer Opportunity" except you don't have to create the opportunity definition again.

The columns in the grid also give you a quick way to see details of each occurrence, along with some basic stats about each occurrence:

- the number of confirmed connections for that occurrence,
- the number of volunteers still needed  (which is calculated based on the maximum attendance you've set for that occurrence),
- The Total Hours of confirmed service for that occurrence  (calculated after you've reported attendance).

# Occurrences for Date and Time Specific Volunteer Opportunities

Volunteer Opportunities with Schedule Type "Date and Time Specific"  can have one or more occurrences.  Each occurrence record defines:

- The date, start time and end time of that occurrence   (if they take place on the same day you can think of these as 'shifts"
- The Location for that particular occurrence  (it can be different for each date and time or always the same)
- The Opportunity Coordinator for that particular occurrence.

Clicking on the **Edit** Action allows you to update this for any individual occurrence.

Clicking on the **Add New Occurrence button** allows you to add additional occurrences to a date and time specific opportunity.

> 💡  The Volunteer Opportunity will continue to be published on the public site up through the end date or its last occurrence.  When there are no future occurrences, the volunteer opportunity will automatically be removed from the public site.   If you wish it to remain on the public site, add a new occurrence for some date in the future!

# Occurrence for Individually Scheduled Opportunities

Volunteer Opportunities with Schedule Type "Individually Scheduled" only use **one** occurrence record.  This is because each volunteer will be coming at a different date and time, and so all connections are made to one master occurrence record.  Think of this is a 'time sheet' for the Volunteer Opportunity.

The Date and End Date of an Individually Scheduled Opportunity defines the time period during which the opportunity will be visible on the public site, and volunteers can express interest in it.

Click the **Edit** action to **extend the end date** if you wish to keep recruiting volunteers past the current end date.

**To 'unpublish' an Individually Scheduled Opportunity** - edit the occurrence end date and set it to yesterday's date  The opportunity will no longer be available on the public site once search is updated  (usually about 5 minutes)..

> 💡 You can't 'cancel' an individually scheduled opportunity - because doing so would cancel all its existing connections.  To unpublish, just adjust the end date of the occurrence.
>
> You can't add new occurrences to an Individually Scheduled Opportunity - because ISOs just use one occurrence record to track all the connections that take place on a large variety of dates and times.   (or may not have any dates and times associated with the connections if the Registration Type is "Express Interest Only"

# Working with the Connections Grid

The connection grid lists all the connections associated with the volunteer opportunity record you're viewing.

Each Connection record tracks the contact (volunteer), who has signed up or expressed interest in the volunteer opportunity, and which occurrence (if date and time specific) they are connected to.

Connection Records are used to:

1) See who is confirmed to attend a given occurence.

2) Confirm, decline or reschedule volunteers who have expressed interest.

3) Send emails to one or more connected volunteers

## Finding Connections in the Grid

You can search for connections by entering a name, date, or any other keyword in the Search Bar at the top of the grid:

So for example, If I wanted to see all the connections for anyone named "Valerie" or all the connections starting or ending on "11/24/2017" - I could type this in the search bar.

Alternately - you can use any of the filters in the column heading - to filter the connections to find just the ones matching the filters you choose.

(You can use both a filter and a search term at the same time as a way to filter more granularly)

Use a combination of search and filters to find just the connections you wish to see.

You can also Sort the search/filter results by clicking on the column headers just above the filters.

When no filters are selected - you'll see ALL the connections for this opportunity, displayed 10 to a page.   You can use the page selector and next button to see the next set of 10 connections matching your filter (or no filter)



# Taking Action on Connections

There are four actions you can take on the connections you've found:

- Email Volunteers
- Mark Confirmed
- Mark Declined

To take action on one or more connections, select the checkbox to indicate which connection you want to take action upon.   (Selecting the checkbox at the top left of the grid will select ALL the connections that match your current search and filter (including those on subsequent pages that are not visible to you).

After selecting the connections you wish to take action on, select one of the three action buttons:



**Email Volunteers:** will open a window with a default message (complete with merge fields), which you can edit and customize as you wish. All selected volunteers will be sent the email.

> ❗ Note: Some team member contacts do not have email addresses. They will not be sent emails since their email address is unknown. (You may wish to email the team captain and remind him or her to contact their team members with whatever info you have sent).

**Mark Confirmed or Mark Declined:** Date and Time Specific volunteer opportunities with full sign up, automatically confirm a volunteer and notify them that they are confirmed. Opportunities in which a volunteer 'expresses interest" - have their connections created in Pending Stataus.

Depending on your needs - you can contact volunteers via email or phone, and then decide if you wish to confirm them. (To see the full contact info for a given volunteer - click on their name in the grid which will open their contact record for you!)

To confirm one or more connections, select them using the check box, and then click the "Mark Confirmed" button. The volunteer will automatically receive an email letting them know they are now confirmed to attend.

If you decide you do not want a volunteer to attend, you can select them and click "Mark Declined". If you do this, you will be asked to state a 'decline reason' and then the volunteer will receive an automated email indicating that you have declined them to participate in this opportunity. (The decline reason will not be included in the message).

# Editing Connections

If you want to make a change to a connection, you have two options:

1) **Click on the Edit action**
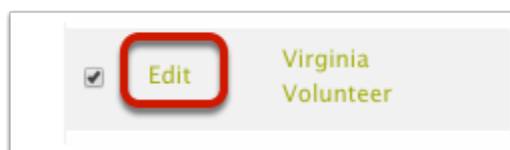


In the edit screen you can update the following fields as needed:

## Edit Connection

**Volunteer Opportunity**
English as a Second Language
**Contact Name**
Virginia Volunteer

**Occurrence**
8/10/2017 8:00 PM – 8/10/2017 9:00 PM

**Status** *
Confirmed

**Attendance Status** *
Attended (and Hours Verified)

**Hours Served**
1

**Guest Volunteers**
0

**Start Date & Time**
8/10/2017 8:00 PM

**End Date & Time**
8/10/2017 9:00 PM

Save    Cancel

2) **Some fields can be edited directly in the grid itself:**

For example - if you want to reschedule the start and end time for an Individually Scheduled Opportunity,, before you confirm the connection, you can click on the start time and/or end time - and an 'edit' icon will appear.  Click on this, and you can change the data in this cell.

You can also edit the data for Hours Served and/or Guest Volunteers.



After you edit one or more connections directly in the grid - you'll need to push the SAVE button to record your changes.  You will be unable to confirm or decline connections until you've saved any updates you've made in the connection grid.

# Individually Scheduled Opportunities - Express Interest Only

For Date and Time Specific Opportunities, and Individually Scheduled Opportunities with Schedule - the start date and time and end date and time of the connections will already be populated for you.  So you can quickly confirm them.

For ISO's that are "Express Interest Only" (EIO) -- the connections are listed with no times.  That's because you are just generating a list of volunteers who are interested -- and won't necessarily be scheduling them to attend anything.

Nonetheless -- if you DO wish to confirm and schedule a volunteer for an ISO - EIO , you can do so.  However, you will need to edit the connection and set a start date and time and end date and time before you can confirm the volunteer - so they will know what day and time you've confirmed them to attend.

# Connections

Find by keyword

[Email Volunteers] [Mark Confirmed] [Mark Declined]                                    [Add Connections] [Report Attendance]

| | Actions | Contact | Start Time ▾ | End Time | Role | Status | Attendance | Hours Served | Guest Volunteers |
|---|---|---|---|---|---|---|---|---|---|
| ☑ | | | ▾ | ▾ | ▾ | Pending Ap | ▾ | ▾ | ▾ |
| ☐ | Edit | Elena vol1102 | | | Volunteer | Pending Approval | | 0 | 0 |
| ☐ | Edit | Vanessa Volunteer | | | Volunteer | Pending Approval | | 0 | 0 |

# Posting Status and Publishing

> When you first create a Volunteer Opportunity and every time you add new occurrences, your new records are sent to your host organization to review and publish.

## Posting Status of an Opportunity or Occurrence

You will know the opportunity has been submitted for approval because the "posting status" of the opportunity and/or occurrences will be: "This is not published and has been submitted for approval".

You'll see this on both the volunteer opportunity search page and in the opportunity detail view of any given opportunity:



Once the Opportunity and its occurrences have been published, they will have the posting status: "This is approved and published for volunteers to sign-up".



When the end date of an occurrence has been reached (and in the case of Date and Time Specific Opportunities) there are no future approved occurrences, the posting status will be shown as "This is not published. There are no upcoming, active occurrences."

To republish the opportunity, go to the opportunity detail page and either:

1) Add a new occurrence (for date and time specific opportunities), or

2) Edit the single occurrence for an Individually Scheduled Opportunity, and change the 'end date" to a date in the future.

# Self-Publishing (aka 'auto-approval')

Some HandsOn Connect host organizations allow some or all of their partner organizations to "Self-Publish".  They do this by granting your organization 'auto-approval' rights.

1) Create a new opportunity and its occurrences - or add one or more new occurrences to an existing opportunity.  The process of adding new occurrences is the same as it is when creating new volunteer opportunities, except you only have to put in the details of the new occurrences.

Once you submit the new opportunity or occurrences, it will be automatically submitted for publication with no approval process needed.  it will be automatically published (usually within 10-15 minutes, and in some cases, the next business day).

You may have to refresh the page in the sharing portal to see the published status updated to reflect that the opportunity is now published on the public site.

# Administratively Adding Connections

There are a number of circumstances in which you might want to administratively add one or more connections for your existing volunteers. You may want to schedule them for additional dates (occurrences) of date and time specific opportunities, or you might want to schedule them for additional connections for your Individually Scheduled Opportunities. Here's how to administratively create new connections:

## In Volunteer Opportunity Detail View go to the connections grid and click on the Add Connection button



**For a date and time specific Opportunity:**

1) Search for a contact, and choose them from the list. (Note, you can only create connections for volunteers who already have a connection to your organization.

2) Choose an Occurrence Date (you can search by date, or choose from the picklist)

3) Choose an Attendance Status (for future dates the attendance status should always be "Please Verify", for past dates choose either "Attended" or "Not Attended".

4) Optionally indicate if there are guest volunteers.

5) Hours Served: Leave blank for future dates, if a past date and attended, put in the number of hours of service.

Click Save:

## For Individually Scheduled Opportunities (ISOs)

For ISOs there is only one occurrence, but you can create multiple connections for a contact if desired.  Let's say you want to schedule Valerie Volunteer to come every Monday from 2:00 pm - 4:00 pm from Feb 1 to March 31.   Here's how you'd do it:

1) The top part of the screen shows you the existing schedule you've chosen for this opportunity. (however, as an administrator, you can schedule volunteers for any day or time, despite the published schedule. However - you cannot create connections that are earlier than the listed start date or later than the existing end date. (If you want to schedule connections for a date later than the end date, first edit the occurrence and extend the end date!)

2) When you select a day of the week, start time and end time, you must then click on the Add Day & Time button (3) so that it appears in the grid below (4). In this way, you could also schedule Valerie for Tuesdays (and other days), click add day and time, and you would be scheduling for multiple days of the week all at once. If you make a mistake and add a wrong day of the week, click on the 'remove' link to remove a day and time before you save the connection.

5) Once you've selected the day(s) and times, you specify the time period you are creating the connections for. By default, it will list the earliest possible date and the latest possible end date -- but you probably do not want to create connections across that entire time period! So be sure to edit the Start Date and End Date for the time period you want to create the new connections for. They can be in the past, the future, or a combination of the two.

Then click on SAVE, and all these connections will be created.

⚠ •  You cannot create more than 90 connections at one time.  So limit the number of connections you wish to create.
  • If you only wish to create ONE connection, then choose the day and time, and then set the start and end date to that one date.  Then only the one connection will be created.
  • The connections you create will automatically be in confirmed status.  Volunteers will receive an email if you administratively create connections for them for future date(s).
  • For connections created for past dates - the connections will automatically be marked confirmed and attended.   (We assume you aren't adding connections where someone wasn't attended :-)   This saves you the trouble of verifying attendance when you administratively create connections for past dates.

# Report Attendance

# Quick and easy reporting of Volunteer Attendance

Volunteers rely on Opportunity Coordinators to verify their attendance so they have an accurate count of many hours they've volunteered.  The Report Attendance Menu Item in the sharing portal makes it easy to report any attendance that is due.

On the page that appears,  Once you mark a connection as attended, the hours are automatically updated and attributed as verified hours for that volunteer.
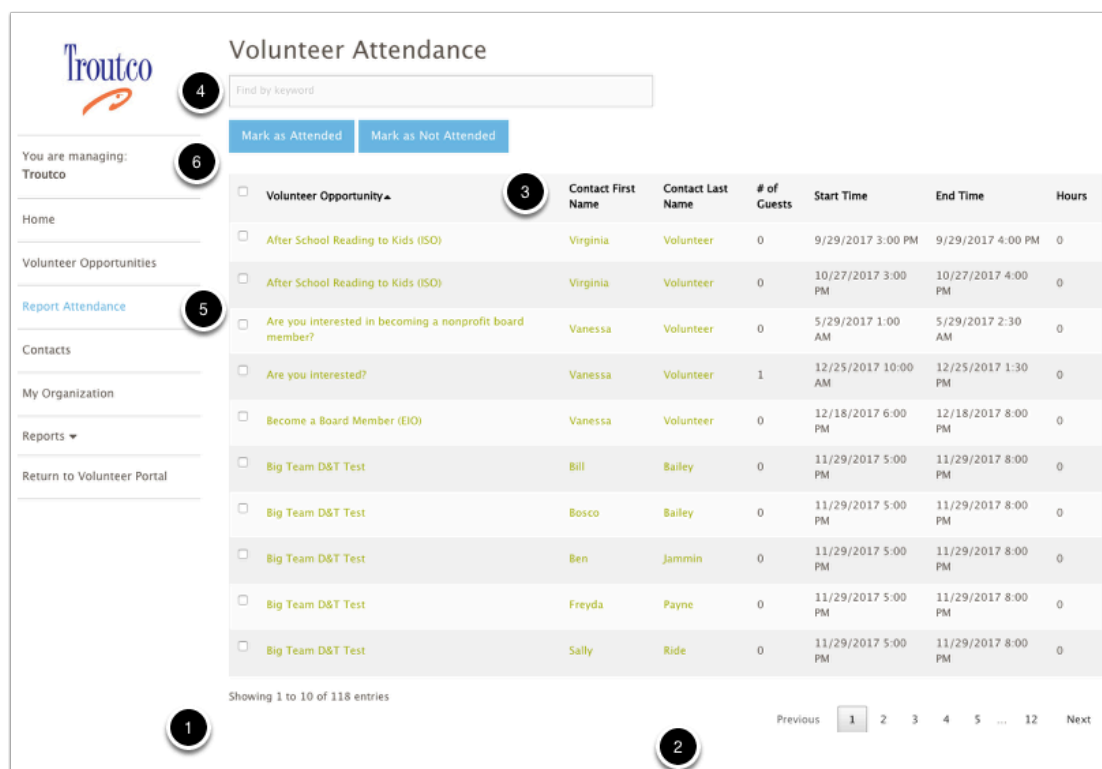
## Volunteer Attendance Search Grid

When you click on the "Report Attendance" menu item - you are shown the Volunteer Attendance Grid.   The grid lists all connections still in 'please verify' status that have taken place today or earlier.  This way you can verify all outstanding attendance in one place. You can also search and verify just specific attendance you are wish to verify.

In a perfect world - you will always verify all attendance, and the list of attendance still waiting to be reported will be a short one :-)

1. **Showing…**  Shows how many connections are still waiting for attendance to verified. 10 are shown at a time.

2. **Previous…  Next …**  Buttons allow you to scroll through the list of connections, or go to any page.

3. **Header fields.**  Click on any header field to sort the list.Clicking again reverses the sort order.

4. **Find by Keyword.**  Allows you to quickly find just the connections you wish to verify. You can type in a volunteer's name, or the Volunteer Opportunity Name, or a date, and the list will filter to show just those opportunities.

# Marking Attendance

5.  To verify a single connection, click on the checkbox to select.   You can click multiple checkboxes if you wish to verify several at once - OR if you click on the checkbox in the header row to select ALL of the currently filtered connections.

> 💡   When you click on the "All" checkbox - ALL of the connections that match the selected search/filter will be selected, even if they appear on subsequent pages.   Look at the "Showing x to x of X entries (#1) above - to be aware of how many connections you are selecting when you 'select all".

6. Once you have selected one, several or all of the connections in the filtered view - click on either "Mark as Attended" or "Mark as Not Attended" and all the selected connections will be updated.  The Hours served will be automatically calculated based on the start time and end time of the connection.

> ❗   The Hours column, before you verify the attendance, will usually have a value of 0.   However, if the volunteer has self-reported their hours, the time they have spell-reported for will already be in place.

# You can EDIT connections before you verify if desired

Before reporting attendance, you can optionally edit the connection and do any of the following:

- If a person brought a guest - edit the # of connections column BEFORE you mark attendance.
- If a person volunteered extra hours, you can edit the Hours column to give them credit for extra time.
- If the start time and End Time are different than what is stated - you can update these fields in most cases (If its a date and time specific opportunity, you can't change the end time to a time later than the scheduled end time. In that case - adjust the hours instead.

To edit any of these columns, hover over the column and a small pencil and paper icon will appear. Clicking on it will allow you to change the value in that column. After you make the edit, click the SAVE button on the top of the page to save your edit.



You can edit multiple columns before saving. The edits you're preparing to save appear in red (7) until you save them. You can undo your changes by clicking on the undo icon before saving. (8). Click on the Save button (9) to update the connection.



After you've made any edits you wish to make and clicked on Save, you can then go ahead and mark the connection as Attended or Not Attended.

Once you've marked a connection as attended or not attended, it will no longer appear on the report attendance page.  You can however, update the connection subsequently by finding the connection via either the Volunteer Opportunity Page or the Contacts page.

# Marking attendance from a check-in sheet

Here's how to easily take the check-in sheet you've printed for an individual occurrence, and, if you've used it to check-in volunteers for an occurrence on paper, then easily report it on the 'report attendance page"

1) Use the keyword search box to put in the date of the occurrence, or the opportunity name.  This will limit the connections to that one occurrence.

2)  Click on "Last Name" to sort the connections alphabetically by last name (same as they are on the check-in sheet)

3)  Your report attendance grid will now line up exactly with your printed check-in sheet - making it easy to mark who did and didn't attend :-)

# Contacts

# Viewing Contact Records

The contacts Menu Item allows you to quickly search for a contact and view their contact record.

The contacts listed on the page are any contact that has previously created a connection to an opportunity managed by your organization.

⚠️ In most cases, sharing portal users cannot create new contacts.  This is to avoid having duplicate contacts in our database.

In most cases, sharing portal users cannot edit existing contacts. This is because volunteers generally update their own contact information.

## Contact Search

1. The Search box allows you to quickly filter the list of contacts and find the one you are looking for. You can  start typing in first or last name, or email address, and the list will filter to find matches.

2. Clicking on a column header will sort the list alphabetically. Clicking again will reverse the sort.

3. Click on View to see the contact record.

# Contact Detail View

1. The contact detail page shows you basic contact information for the contact, and a list of all their 'connections' with your organization.

2. You can narrow the list of connections by entering any keyword in the search box, or

3. Use any of the filters to narrow the results further.

4. Click on the Volunteer Opportunity Name if you wish to go to the volunteer opportunity record.

# CONTACT DETAIL

Back to List  ①

| Name | Hank Pym |
|---|---|
| Most Recent Connection Date | 7/20/2017 |
| Hours Served | 0 |

## ADDRESS, PHONE AND EMAIL

| Email Address | test+hankpym@handsonconnect.org |
|---|---|
| Home Phone | |
| Mobile Phone | |
| Primary Address | 4202 E Fowler Ave, Tampa, FL, 33620, United States |

## CONNECTIONS

Package  ②

Email Volunteers   Mark Confirmed   Mark Declined

| | Actions | Volunteer Opportunity | Start Date & Time ▾ | End Date & Time | Role | Status | Attendance |
|---|---|---|---|---|---|---|---|
| | ③ | ▾ | 11/7/2017 4:00 | ▾ | ▾ | ▾ | ▾ |
| | Edit | Package Bulk Food for Those in Need! ④ | 11/7/2017 4:00 PM | 11/7/2017 7:00 PM | Volunteer | Confirmed | Please Verify |

Previous   1   Next

# My Organization

![HandsOnConnect Cloud Solutions logo]

# Updating Organizational Information

The "My Organization" menu item gives sharing portal users the ability to view and edit their organizational information.

The first section allows you to edit the information about the organization itself.

The second section allows you to view and edit the staff members of your organization. See this article for details on this second section.

## My Organization Detail Page

Clicking on the menu item "My Organization" allows you to see the information that was submitted when the organization was registered on the site.   Clicking on the edit button will allow you to edit the organizational information"



## Edit My Organization

In edit mode you can update information about your organization to keep it current and accurate.

---

- Use the WYSIWYG editor to update your organization's Mission Statement (which appears on the 'browse organization detail' page for your organizaiton.
- You can view or delete the current logo associated with your organization by clicking on 'View" or 'delete' while in edit mode.   You can then add a new logo  (113 x 113 size is recommended, and square is always best so its not compressed) by dragging and dropping a logo into place.

See this article for information on updating your organization contacts.

# My Organization Contacts

The "My Organization Contacts" grid in the lower half of the "My Organization" page shows you all the staff contacts associated with your organization.  Use this section to keep your organization's staff up to date and see who does and doesn't have portal access.

In this grid you can:

- See who on your staff does and doesn't have access to the sharing portal.
- Add new staff contacts to your organization
- Request sharing portal access for contacts in your organization who don't currently have access.
- See who is designated as your organization's Primary Contact.

## My Organization Contacts

1.  **Action Column** - You can view and (depending on the permissions your system administrator has enabled in your sharing portal) edit, the contact information for your staff contacts.  You can also Request Portal Access for a contact that currently does not have portal access.

2.  **Portal Access** - shows you who does and doesn't have access to log in and use your organizational portal.  "Partner Staff" indicates that they do have portal access.  "None" indicates that they do not.  You can click on the Request Portal Access action link, to send a request to your system's partner manager to grant access to your contact.

3. **Primary Contact** - a checkbox indicates which contact is designated as the primary contact.

4. **Create Organization Contact button**- allows you to add a new contact to your organization.  This will open a form to create a new contact record, After creating the contact, they will appear in your "My Organization Contact" list.  If you wish them to have portal access - you'll be able to click on the "Request Portal Access" link.

5. **Search** - for large organizations this makes it easy to find a specific contact by name or email address.

# My Organization Contacts



| ⑤ Search by First or Last Name or Email Address. | | | | Search | | ④ Create Organization Contact |
|---|---|---|---|---|---|---|

| ① ctions | Name ▲ | Title | ② Portal Access | Primary Contact | Primary Phone |
|---|---|---|---|---|---|
| View \| Edit | Art Trout | Executive Director | Partner Staff | ☑ | +13235479903 |
| View \| Edit | Bob Smith | Marketing Manager | Partner Staff | ☐ | 4692152822 |
| View \| Edit | Harry Helper | Program Manager | Partner Staff | ☐ | +12565806177 |
| View \| Edit \| Request Portal Access | Ursula Upgrade | Engagement Manager | None | ☐ | |

Previous   **1**   Next

---

💡   When you click on "request portal access" an email will be sent to your host organizations partner approval manager notifying them you'd like portal access granted to this contact.  Please allow a day or two for the partner approval manager to act on your request.

---

⚠️   Right now its not possible in the sharing portal to

- change who is designated as the primary contact
- request the removal of portal access from a contact.
- to remove a contact from being associated as part of your staff.

     For now: we recommend the following:

1. Email your host organization if you wish to update any of the information or carry out the actions listed in the bullet points above.
2. Optionally - for contacts who are no longer with your organization, you could edit their record and change their title to "Former - Program Manager" - to clarify that they are no longer in that role.

---

# Reporting

# Running Reports in the Sharing Portal

The Reporting Tab may or may not be visible in your version of the sharing portal. It is up to the system administrator of your organization to request that the reporting functionality be enabled.

The system administrator will determine which reports are available to partners within the sharing portal, and what format they are presented in (Tabular or Summary).

## Select A Report Folder

If Reporting is enabled in your sharing portal, a "Reports" menu item will appear on the left navigation. Clicking on Reports will show the report folder(s) that are accessible to you.

Click on the Folder Name to see the reports available in the folder. In the screenshot below, the reports are in the folder "HOC Sharing Portal Reports".
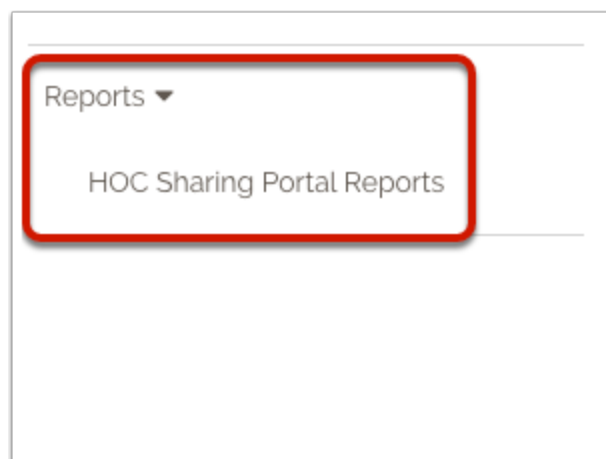


## Report List View

The list view shows you the name and description of the reports in the folder (as made available and defined by your system administrator)

Click on the name of the report to access the report:

If there are a large number of reports you can filter the report list by typing a report name in the search box

Reports can take a minute or two to generate when they are first run. A report is generated and stored for a rolling 24-hour period to make it faster to return to a recently run report.

If you have recently updated data and wish to get a fresh version of the report, you can click on the link in the report results page and generate a fresh run of the report.

Reports can be exported to .csv files to be managed or printed in Excel.



# Tabular reports allow searching, sorting and filtering

If a report is in tabular format (i.e. it is not grouped and summarized in any way, but is just a list of data), then you can control the data that is displayed in a number of ways:

1. You can choose how many records you want displayed on a single page of the report
2. You can search the report to filter the results. (Example: Type in a name and only records matching that name will be shown in the report.

3. Click on the Filter Icon to type in a filter value for a specific column, and only records with the matching term in that column will be shown.
4. Click on the "Sort" icon to sort results by that column. Click again to reverse the sort order.



**Using a Column Filter.**

# Summarized Reports have information grouped, but cannot be sorted or searched.

Summary reports can show you statistical information (like how many occurrences you have of each volunteer opportunity), and are grouped by a speciric field. (In the report below, we see occurrences grouped under each volunteer opportunity, and can see a sub-total of the number of occurrences for each opportunity.

Summarized reports can be exported to be filtered, but cannot be filtered or searched within the partner portal.

| Start Date & Time | End Date & Time | Schedule Type | Number of Volunteer Opportunities | Number of Occurrences | Managing Organization Name |
|---|---|---|---|---|---|
| Volunteer Opportunity Name: After School Reading to Kids (ISO) (Total: 1 Records) | | | 1 | 1.00 | |
| 8/18/2016 6:00 PM | 12/31/2017 7:00 PM | Individually Scheduled | 1 | 1.00 | Troutco |
| Volunteer Opportunity Name: Children of the Night (Total: 10 Records) | | | 1 | 10.00 | |
| 8/16/2017 6:00 PM | 8/16/2017 8:00 PM | Date & Time Specific | 1 | 1.00 | Troutco |
| 8/30/2017 6:00 PM | 8/30/2017 8:00 PM | Date & Time Specific | 1 | 1.00 | Troutco |
| 9/13/2017 6:00 PM | 9/13/2017 8:00 PM | Date & Time Specific | 1 | 1.00 | Troutco |
| 9/27/2017 6:00 PM | 9/27/2017 8:00 PM | Date & Time Specific | 1 | 1.00 | Troutco |

# Return to Volunteer Portal

# Navigating back and forth from Volunteer Portal to Sharing Portal

The "Return to Volunteer Portal" menu item allows a user to get back to the 'public site' where they can manage their personal information, search and signup for volunteer opportunities, and so on.

Partners and Volunteer Leaders have access all the same functionality as Volunteers do, by returning to the 'Volunteer Portal"

## Return To Volunteer Portal

Clicking on the "Return to Volunteer Portal" menu item brings you back to the Home Page of the Public Site (Volunteer Portal)
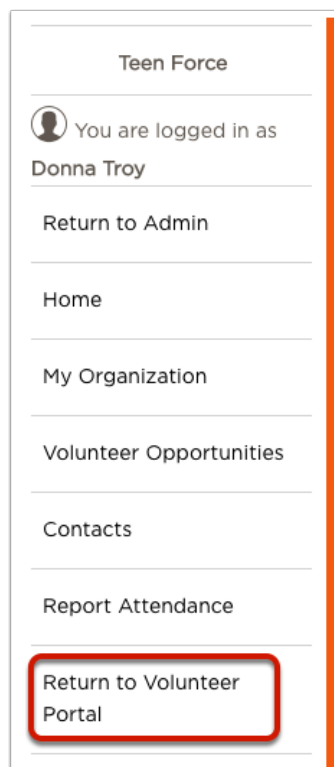


## Returning to the sharing portal from the public site (Volunteer Portal)

Click on the text "Return to Managing Opportunities" in the upper right of any page on the public site to return to the sharing portal

# Optional Features for Sharing Portal

# Adding a Skill to a Volunteer Opportunity

Your organization may optionally have added the ability to associate skills with a volunteer opportunity.   Skills may not be available in all partner portals.

If skills ARE enabled, you'll be able to add one or more skills (as defined by your system administrator) to your volunteer opportunities.  These skills will be searchable by volunteers on the public site so that someone looking for opportunities that match their skills, will find your opportunity!

If skills are enabled in your portal, here's how to add one or more skills to a volunteer opportunity:

## Skills are added after you have created the volunteer opportunity

After you've created a volunteer opportunity you can add skills to it.   On the Volunteer Opportunity detail page you'll see a section labeled "Skills".   Click the Add Skill button to associate a skill with your volunteer opportunity.



## Add Skill Page

To add a skill, drop down the picklist of skill names and select a skill.

The skills available in your portal will vary.    Select a value and then click the Save Button.



You'll then get a confirmation and be returned to the opportunity detail page, and see the skill has been added.
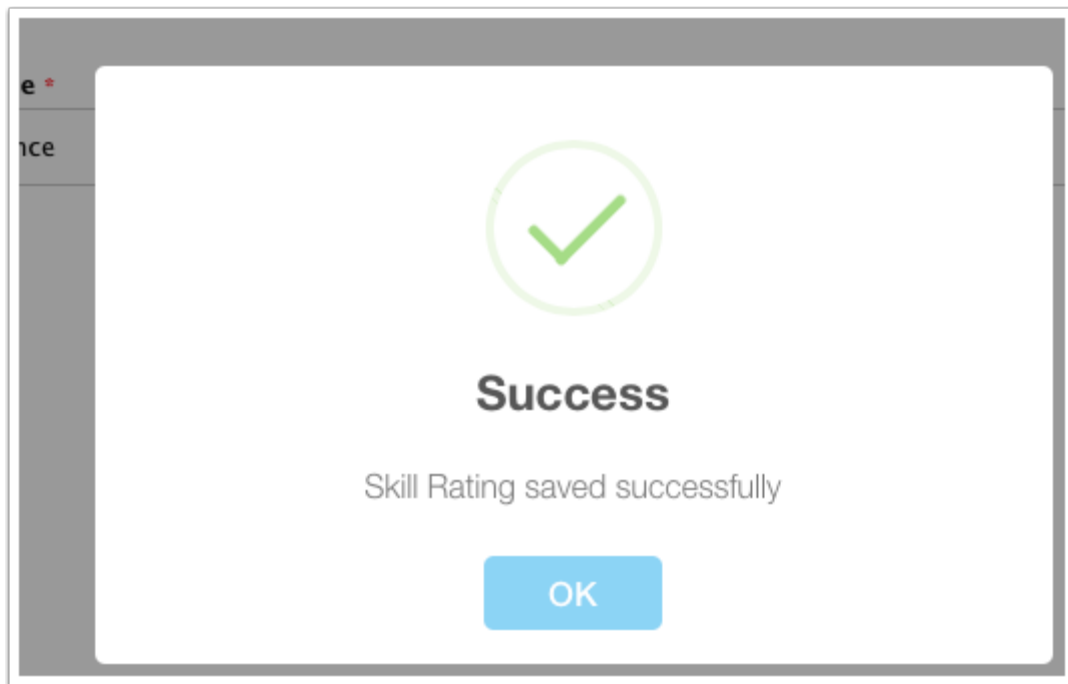
Click the Add Skill button again if you want to add additional skills.

To Delete a skill you no longer wish to associate with an opportunity, click the delete action on the skill you wish to delete.
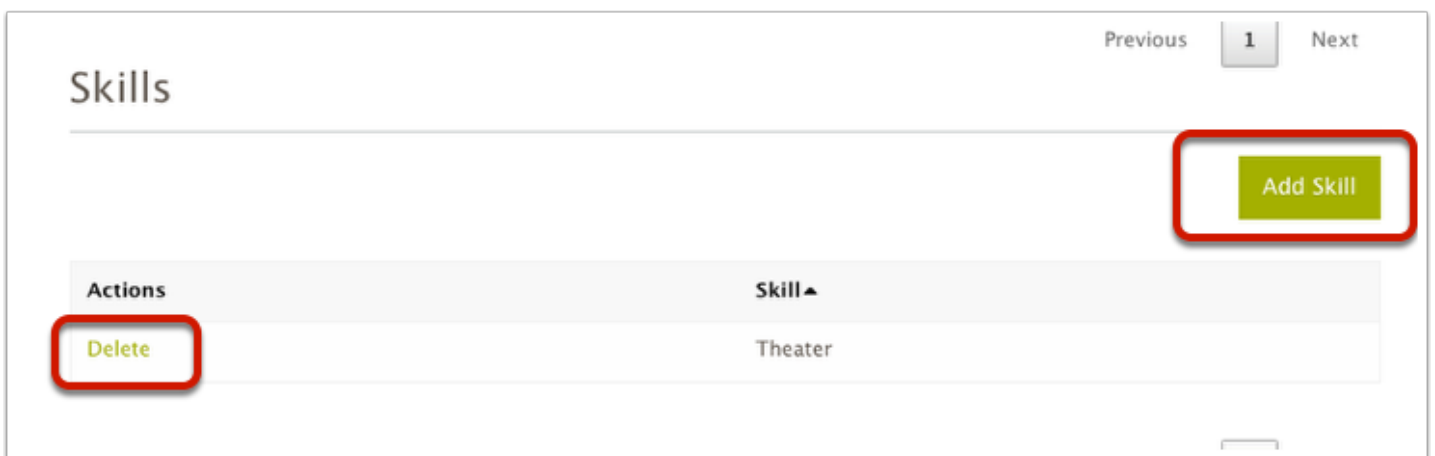


💡 Skills added to Volunteer Opportunities will not be required skills, they are just skills that are associated with the opportunity. If you wish to make a skill you've added required in order for a volunteer to sign up - please contact your system administrator.
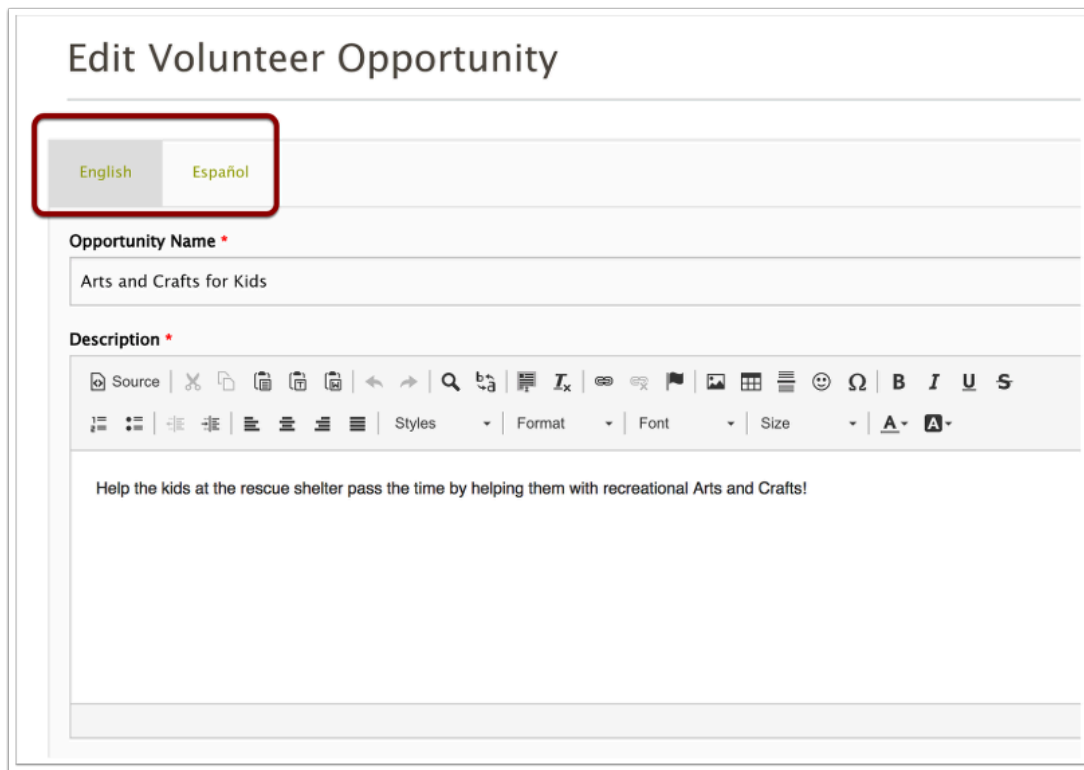
# Creating and Editing bilingual Volunteer Opportunities

If your instance of HandsOn Connect offers more than one language on the public site, you can choose to translate your volunteer opportunity into additional languages.

## How to provide a translation for your volunteer opportunity

If your site supports more than one language you will see multiple tabs for language when you create or edit a volunteer opportunity.



To offer a translation, just click on the language tab, and enter a translation for both the Opportunity Name and the Description.  Then continue creating or editing the opportunity., and click save when done.  Both the English (required) and second language will be available on the public site when published.

There is no requirement for you to offer a translation. If no translation is made available, then the opportunity will not appear in search for volunteers who select that language for the public site.

# Working with Locations

The Locations Menu item may or may not be available in your sharing portal.  In some organizations its left off for simplicity sake - in others its been activated allowing sharing portal users to edit existing locations as well as create new locations for existing volunteer opportunities and their occurrences.

## Locations Page

If enabled for your sharing portal, the locations menu item will appear in the left navigation. Clicking on it will bring up a searchable, filterable list of all existing locations, and the option to view or edit them. The interface to search and/or filter is the same as the Volunteer Opportunity page.  You can create a new location from this page, OR view or edit existing locations.



## Edit Page for Locations:

Note the warning at the top of the page.  This alerts you that editing this record will be changing the location information for more than just one opportunity.   If there are multiple opportunities and occurrences using the same location, you will be updating this info in ALL those records.

> **!** If you are wanting to change a location for just **one** opportunity or occurrence, you should NOT edit this record, but instead create a New Location. Then edit the opportunity or occurrence to use your new location instead of the one it was sharing with other opportunities or occurrences.

# View Location

Presents the location detail page.   If Edit permission ihas been granted to you, an edit button appears when viewing. Otherwise, you can just VIEW the location.detail.

## Location detail

Edit | Back to List

| | |
|---|---|
| **Location Name** | ATL |
| **Street Address** | 316 W. Main Street |
| **City** | Louisville |
| **State** | CA |
| **Country** | United States |
| **Zip/Postal Code** | 92506 |
| **Special Directions** | |

💡 By the way - if a location is edited - it is updated on the public site, generally within 15 minutes.  No automated notification is sent to volunteers if a location is edited -- so you may wish to email the volunteers manually to let them know the location has changed. (if for example you change the address, or added special directions, etc.).

# Occurrence Names and Descriptions

In some configurations of the partner portal - Occurrences are allowed to have names and descriptions.

Sometimes you may have a volunteer opportunity that needs volunteers broken into separate shifts and/or positions.  Rather than using a Volunteer Event, and separate Volunteer Opportunities (each with one or more occurrences),  you could create a single volunteer opportunity, and for each 'shift' or 'position' volunteers are needed for, you can create a separate occurrence record and give each occurrence an "Occurrence Name" (Such as "Shift 1" "Registration" or "Cleanup Crew".   You can also optionally add a short description of this shift or position that will appear as part of the occurrence information

As an example, we have created a volunteer opportunity called Picnic in the Park, and put a general description of the picnic in the volunteer opportunity description.

We need volunteers for three different jobs at the picnic:

- Check-In station. from 8:30 - 1:30
- Lunch Distribution from 10:30 - 2:30 pm
- Valet Parking from 11 am - 1 pm

So we'll create three occurrences for those three times the same day, and use the Occurrence Name field to identify the 'role' and the Occurrence Description to give volunteers a better idea of what they'll do in that role.

# When creating or editing a date and time specific volunteer opportunity, you'll have the option of adding an occurrence name and occurrence description



## How this will look on the public site:

When used...  Occurrence titles show up along with the date and time, and the Occurrence Description (if used) shows up in the Occurrence detail.

# Virtual Volunteer Opportunities

# What is a Virtual Volunteer Opportunity?

Most Volunteer Opportunities take place in a specific location and the volunteer is told to arrive at that location for a designated time period (the duration of the occurrence).  "Show up at the Food Bank at 6:00 pm on March 30"

But what about Volunteer Opportunities you can perform remotely and at your own pace.  These are ways to give service from home, your office office, or possibly anywhere you have an Internet or phone connection.  These are generally called Virtual Volunteer Opportunities.

In March, 2019, during the Coronavirus pandemic - the interest in virtual volunteering rose sharply.  The articles in this chapter discuss Virtual Volunteering, and provide ideas on how to use HandsOn Connect to create and manage Virtual Volunteerism.

## What are examples of Virtual Volunteer Opportunities?

There are probably no limits to ways that people could volunteer their time from home or online. The only limit is your imagination in finding ways to meet community needs that do not require a person to be physically present at a specific location.

Here's a list of a just a few types of Virtual Volunteer Opportunities your organization could create and manage:

- Knit blankets or create stuffed toys at home.  When completed, send them for distribution to children at local shelters.
- Receive online training and then staff a crisis hot line or phone bank from home.
- Using web conferencing, be available online to mentor students or provide homework assistance.
- Build websites for nonprofit organizations
- Write grant proposals for nonprofit organizations
- Participate in virtual group planning sessions for events
- Create marketing materials or logos for nonprofit organizations
- Manage social media campaigns for nonprofit organizations or events
- Create and manage a blog for an organization
- Raise donations for nonprofits.

## Some resources for virtual volunteering ideas

Here are some sites that you can visit to get ideas for virtual volunteer opportunities:

[Good Deeds Day](#)

[Dreamscape](#)

[Catchafire](#)

You can of course, direct volunteers to other sites that promote virtual volunteerism - or you can create and manage your own Virtual Opportunities.

The articles in this chapter will give you some ideas on how to use HandsOn Connect to promote, create and manage virtual volunteers.

# (Beta) Virtual Locations for Virtual Opportunities in the Sharing Portal

It's now possible to create Volunteer Opportunities and Individual Occurrences that are considered "Virtual".  This means that the opportunities don't take require volunteers to go to a physical address, but instead they are able to volunteer and participate from home, remotely, or online.   Here's how to designate an opportunity, or individual occurrences of a date and time specific opportunity as Virtual Opportunities.

❗ This is an optional feature that may or may not be available in your version of the sharing portal.  If its not available, please contact your system administrator to discuss making it available to you.

## Virtual Opportunities are defined by creating a Virtual Location

When Creating a Virtual Opportunity, you will choose, or create a location, that will be designated as a "Virtual" location.  To create a new virtual location, click on "Add a Location" when choosing the location for a new Volunteer Opportunity.



---

When you arrive at the Create Location Screen, you will see a new field "Location Type".  By default it will be set to "Address" - which is the normal type of address used for most volunteer opportunities.

If this is a Virtual Opportunity choose Location Type = Virtual.

When do you so, the Street Address, City, State, and Zip Code will no longer be required.   Leave them blank.

Put any info about how to participate (online URLs, etc) in the Special Directions field.



Opportunities taking place at Virtual Locations will be identified as such on the public site, and volunteers can filter search to find Opportunities with Virtual Locations, which will always be automatically have the term (Virtual) in the Where column of search results.



# Editing existing locations to make them virtual

Click on the Locations item in the left menu if its available in your sharing portal
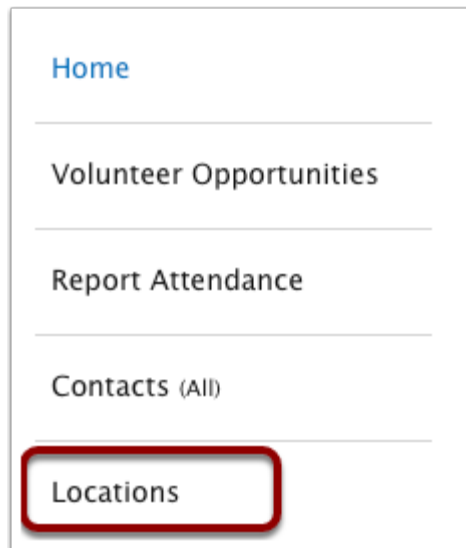
Select an existing location and click on 'edit'.

Change the 'location type' field from address to 'virtual'.  Add Special Directions related to the Virtual Opportunity



# Creating a new location for an existing Volunteer Opportunity that had no location

If you previously created a Virtual volunteer Opportunity that was Individually Scheduled - Express Interest Only and didn't give it a location,  you might now want it to appear in search as a Virtual Opportunity.  To do this:

1) Create a New Location (go to Location Menu on left, and click on "Create Location"

2).Create your new location, with Location Name, Location Type = Virtual, and Special Directions.

3). Save that location.



4. Go to the Volunteer Opportunity record you wish to now associate your virtual location with.

5, Go to the Occurrence table and select edit for the Occurrence Record. (This is where the location gets populated)

6. In the Location Field, search for your virtual location and populate it in the location field. Save the edited occurrence.

# Creating a Virtual Volunteer Opportunity in HandsOn Connect's Sharing Portal

The first thing to consider when creating a Virtual Volunteer Opportunity is how you want to manage it.

- Do you just want to distribute information about what to do and how to get involved?
- Do you want to schedule the volunteer to perform or complete the virtual opportunity by a specific date?
- Do you want to track whether or not the volunteer actually completed the virtual opportunity?
- Do you want to award hours of service to the volunteer for their or your own metrics?
- Do you want volunteers to be able to search for Virtual Opportunities on your site, separate from location-base opportunities?

HandsOn Connect offers a lot of flexibility in how you can manage Virtual Volunteer Opportunities.  In this series of articles - we'll start with the most basic way to do this, and offer ideas about how to more deeply manage and track virtual volunteerism, if that's your objective.

Let's start with a basic way to list a virtual volunteer opportunity.  For this example we'll choose to create an opportunity where volunteers are asked to knit blankets at home, and send them to our Volunteer Center, where we'll then donate them to local shelters.

## Create a Volunteer Opportunity as Individually Scheduled - Express Interest Only

Individually Scheduled, Express Interest Only opportunities are ideal for Virtual Opportunities as they do not require a location for the opportunity.

Give the opportunity a name that clearly identifies it, and indicates its a Virtual Opportunity.

In the opportunity description, give details on what the volunteer needs to do to complete the project.

For detailed instructions, it might be best to include a downloadable document that includes information on how to complete the project, where to mail or deliver it, and any other relevant details:

# How to attach a downloadable file to an opportunity description

In the sharing portal there isn't a way for you to upload documents directly so that you can put a link to a document in the opportunity description.  Here's a few options:

1) Rather than attaching a document, provide all the instructions and details in the Opportunity Description itself.

2) If the document already exists on another website, just make a link that goes to where that document can be found.
You can share documents through a number of cloud services such as DropBox, Microsoft's OneDrive, Google Docs and others.  Just store your document there, get a link to the shared document, and link to the document in the opportunity description.

3) If you don't have access to a document sharing site, contact your system administrator and ask them to store the document for you in Salesforce, and send you the URL to access the document.

# Managing connections to a Virtual Volunteer Opportunity in the sharing portal

The beauty of Express Interest Only opportunities is that volunteers simply express interest, and what you choose to do after that is entirely up to you.  You now have a list of interested volunteers with connections that can remain in pending status.  If you've given complete instructions on how to do the virtual project -  that may be sufficient for your purposes.

You can use the email capabilities of HandsOn Connect to send emails to one (or all) of the people who've expressed interest, and keep in touch with them, provide them with further instructions, or thank them for their service.  Just keep the connection as pending, and use email to manage the volunteers.

But what if you want to keep track of which volunteers actually completed the project?  What's involved in confirming Express Interest Only connections and marking attendance?

## To confirm?  Or not confirm?

In order to confirm a pending connection for an Express Interest Only opportunity, you must first update the connection and give it a start date and time and end date and time.  When you do this, the volunteer will be notified that they've been confirmed, and given the time their connection takes place.   But if the time is open ended, you may just want to leave it in pending status, and communicate with the volunteer via email.  If and when they complete the project, then you can confirm their connection, creating the start and end date based on the date the project was completed, and marking attendance and awarding hours of service as appropriate.

*On the other hand, it's perfectly OK to leave the connections in pending status, if you don't want to track completion or delivery dates of the opportunity, and award hours of service.*

## What if I do want to confirm the volunteer and set a date for the project to start or finish?

You can communicate with the volunteer by email or phone and come to an agreement on the delivery date for the finished project.  Then you can confirm the connection and set that delivery date as the 'start date and time'  for the project, so the volunteer will see it in their volunteer overview as an upcoming opportunity.  After the project has been completed, you can mark attendance and award service hours as appropriate.

In the example of our blanket knitting. We might estimate that it'll take 20 hours of work to complete the project.  So if we communicate by mail with the volunteer, and agree that they will

send us the blanket on March 30th.  Then you can confirm the connection and set the start date and time to March 30, 6:00 pm,   and the end date and time to March 31, 2:00 pm.   Once the blanket is delivered, you can then mark the connection as 'attended' and credit the volunteer with 20 hours!

# Other kinds of Virtual Opportunities (Sharing Portal)

The articles in this chapter illustrate one type of virtual volunteer opportunity.  Given that there are many different  ways to participate virtually - you can adapt the information you provide in the opportunity description to meet the requirements and process for other types of virtual opportunities.

Here's some other ideas and resources for your virtual opportunities

## Use online conferencing to facilitate virtual opportunities

Web conferencing is a great way to connect volunteers and facilitate on-line mentoring, virtual meetings and planning sessions, or to collaborate remotely.

There are a number of web conferencing applications that are available.  Some are free, some have nonprofit discounts. Here's links to a few resources:

Zoom.us - Free and paid plans.

GotoMeeting - here's a link to their free plan.  They also have paid plans.

Webex - Free and paid plans.

You can include the URL and/or Phone Number for web conferences in either the Opportunity Description, or send a link in an email to volunteers you are en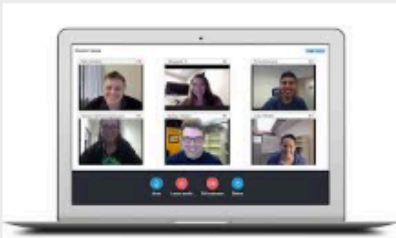gaging in web conferencing activities.