What is the Sharing Portal?

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

Public Site: Your public website is available to anyone arriving at your public URL. On the public site volunteers may register and get granted a volutneer profile, which 'unlocks' additional abilities on the public site.

Sharing Portal: Users who are granted 'partner staff' or 'volunteer leader' profiles log in via the public site, but are then taken to the sharing portal, where they have functionality to recruit and/or manage volunteers. Sharing Portal users are able to navigate back to the public site and use its features as well.

Administrative Site: This is the back-end of HandsOn Connect and requires a Salesforce license. Administrative site users are able to access all features and functionality, and can 'log in' to the public site as any volunteer, volunteer leader or partner staff.

In this manual we'll be going over the features and functions available in the Sharing Portal.

Are all sharing portals the same?

No. The experience in the Sharing Portal is different depending on the 'profile' of the user logging in. The two primary profiles using the sharing portal are:

- Partner Staff
- Voluneer Leader

The 'permissions' of what each profile can access and do in the sharing portal can be customized for you as part of the HandsOn Connect onboarding process. If you wish to change or extend the permissions for a profile, open a support ticket and the profiles can be adjusted to meet your business needs.

Because different menu items and functions may or may not be available in your configuration, this manual will discuss the generic, out of the box configuration of the sharing portal. The screenshots and layouts shown here may be different in your version of the sharing portal.

Partner Staff Profile

Partner staff are typically staff members at a non-profit organization who are partners with your organization. Anyone with partner staff access has the ability to view and work with records pertaining to their organization. They will not have acccess to contacts, volunteer opportunities, or information from other organizations.

By default, 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.

Volunteer Leader Profile

Volunteer Leaders are typically trained by your organization, and made the opportunity coordinator of a project that is serving either your organization or one of your partner organizations. Volunteer leaders are only able to see the details of Volunteer Opportunities and Occurrences where they are assigned as the Opportunity Coordinator. They will not have access to information about other volunteer opportunities or occurrences.

By default, Volunteer Leaders are able to do the following in the sharing portal.

- Manage existing volunteer opportunities, and view the details, approve or reschedule volunteers, etc.
- Report Attendance and Hours for the projects they manage
- View contact records of volunteers who have volunteered for a project they led.
- Return to the Volunteer Portal to update and manage their personal information as well as use other volunteer functionality.