

ANNOUNCEMENTS

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News Items

Required Reading for all new users of HandsOn Connect

HandsOn Connect is an installed package that is added to your Salesforce Organization. There are certain configurations and records that are added to your organization that are required for handsOn Connect to work properly.

Please be aware of these special records, and take care not to delete or modify them.

Also make sure your users are aware of our best practices to ensure the integrity of your HOC related data.

1. The following Record Types are added to your SF Instance and should not be deleted or altered:

Object: Contacts

Record Type: Volunteer

Whenever a volunteer registers via the public site, the Contact is created as record type = Volunteer

Object: Accounts

Three Record Types are added:

- Business - Used in HOC to identify all for-profit organizations.
- Nonprofit - Used in HOC to identify all nonprofit organizations
- Individual - A special record type required by HOC

! A single account record of record type Individual is created and necessary for HandsOn Connect functionality. The record is named "Individual" and must not be edited or removed. No additional accounts should be created using record type Individual.

2. One, and only one account record, will be assigned as type = HOC Customer

As the organization which hosts the HandsOn Connect public site - your organization will have an account record of organization record type Nonprofit, and it will be assigned the 'type' value of "HOC Customer"

▼ Organization Information

| | | | |
|---------------------|---|--------------------------|------------------------------|
| Organization Owner | Client 9999 [Change] | Organization Record Type | Nonprofit [Change] |
| Organization Name | HandsOn Connect Demo [View Hierarchy] | Type | HOC Customer |
| Also Known As | HandsOn Connect Training | Status | Active Partner |
| Parent Organization | | Primary Contact | Abby Village |
| Federal EIN | | Group ID | 00GA0000002UU5uMAG |

! There must be one (and only one) account record (yours), with Type = HOC Customer.

- Do not change the the Type picklist value of your organization to any value other than HOC Customer.
- Do not delete this account record
- No other account should be given Type = HOC Customer

3. Be aware of these best practices when using HandsOn Connect:

Limit the ability to delete records to selected profiles.
Before deleting a record, be sure to do so in a way to avoid corrupting dependent, child records.

Some HandsOn Connect custom object records have lookup fields that are required for the record to be valid. Deleting parent records that affect child records with dependencies can corrupt those records, making it impossible to edit or update them or display their data on the public site.

Best Practice: Only the system administrator profile should have delete permissions for HandsOn Connect custom objects. Assign other users the HOC custom profile "Staff", and do not allow delete privileges to other profiles in SF that have access to the HandsOn Connect application. This will minimize the risk of users accidentally corrupting data.

For System Admin with delete privileges: Do not delete a record if it has child or lookup relationships to it. If you want to delete a 'parent' object, first delete any records below it on the dependency food chain. Only delete records that have no related records showing in the related lists.

Here are the dependencies you should be aware of when considering deleting a record:

1. **Accounts** - Do not delete an account record if it has related Contacts, Volunteer Opportunities, Locations, or Registration Answers

2. **Contacts** - Do not delete a Contact record if it has related Connections or Volunteer Team Members. Do not delete a contact that is serving as Opportunity Coordinator for any Volunteer Opportunity or Occurrence record.
3. **Volunteer Opportunities** - Do not delete a Volunteer Opportunity record if it has related Occurrences, Recurrences, Grouped Occurrences, Connections, Prerequisites, or Skill Ratings.
4. **Occurrences**: Do not delete an occurrence if it has related connections.

Do not edit picklist values, delete or rename HOC custom fields that are used by system functionality.

| I | J |
|--|-------------|
| Help/Definition | Editable |
| Is marked when the contact has identified that they have a disability. | |
| Identifies the education level as identified by the contact. This list can not be altered. | DO NOT EDIT |
| Shows the employer as entered by the contact. | |
| Identifies the employment status as identified by the contact. | Yes |
| Identifies the ethnicity/race as identified by the contact. This | DO NOT EDIT |

Don't Edit!!

OK to edit this field

Consult the HandsOn Connect master field list before editing or changing an existing field, to see if it is permissible to change its values. If the field is marked DO NOT EDIT in Row J -- then open a Help Ticket so our support staff can work with you on how to best address the customization you want to make.

[Click here to see the HOC field list.](#)

💡 Being aware of these requirements and best practices will ensure that HandsOn Connect will continue to function properly in your Salesforce instance.

Open Labs For HOC Customers

Labs are available Monday - Friday

Open Labs: Live Training Support:

Training staff is available in live webinar labs five days a week for anyone learning HandsOn Connect or with HOC-related questions or issues. All users are welcome at any time, even if they just want to listen and learn from others questions :-)

Any HandsOn Connect user (new or already live) may attend, ask questions and get supplemental training support.

No appointment is needed. Just come to the URL <https://zoom.us/j/4624114111>

Mondays: 2 – 3 pm Eastern

Tuesdays: 4:30 – 5:30 pm Eastern

Wednesdays: 2 – 3 pm Eastern

Thursdays: 2 – 3 pm Eastern

Fridays: Noon – 1 pm Eastern

HandsOn Connect and the EU General Data Protection Regulation (GDPR)

This article is intended for HandsOn Connect (HOC) customers that are affected by the General Data Protection Regulation (GDPR) going into effect on May 25th, 2018. It is not legal advice, just some information we believe might help.

HandsOn Connect (HOC) is committed to your privacy, keeping your personal data secure, and compliance with the General Data Protection Regulation (GDPR) which goes into effect on May 25th, 2018. GDPR is a major step in protecting the privacy of European Union (EU) residents, giving them more control over what, how, why, where, and when their personal data is used.

HOC has also updated its privacy policy and it can be reviewed here:

<https://www.handsonconnect.org/privacy-policy>

For illustrative purposes only, we have also provided a sample of a GDPR Notice you can use to get started with your own notice:

Simple GDPR Notice (Sample)

Let's start by briefly describing what is what, who is who and who does what, because GDPR is extensive and depending on the role you play in interacting with the user data, you have different obligations.

First, let's understand some key terms related to the GDPR, as defined by the [UK's Information Commissioner's website](#):

| Term | Definition |
|-------------------------|--|
| Personal data | Means data which relate to a living individual who can be identified: <ul style="list-style-type: none"> • from those data, or • from those data and other information which is in the possession of, or is likely to come into the possession of, the data controller, and includes any expression of opinion about the individual and any indication of the intentions of the data controller or any other person in respect of the individual |
| Sensitive personal data | Sensitive personal data means personal data consisting of information as to: <ul style="list-style-type: none"> • the racial or ethnic origin of the data subject, • his political opinions, • his religious beliefs or other beliefs of a similar nature, |

| Term | Definition |
|------------------------|---|
| | <ul style="list-style-type: none"> • whether he is a member of a trade union (within the meaning of the Trade Union and Labour Relations (Consolidation) Act 1992), • his physical or mental health or condition, • his sexual life, • the commission or alleged commission by him of any offense, or • any proceedings for any offense committed or alleged to have been committed by him, the disposal of such proceedings or the sentence of any court in such proceedings. |
| Data Subject | Means an individual who is the subject of personal data. In the context of HOC is usually means a user that has a registered account created through or used in HOC (e.g., volunteer, partner). |
| Data Controller | <p>A person who (either alone or jointly or in common with other persons) or entity that determines the purposes for which and the manner in which any personal data are, or are to be, processed.</p> <p>If you are an individual or entity that uses HOC to deliver services to users, you are a Data controller.</p> |
| Data Processor | <p>In relation to personal data means any person (other than an employee of the data controller) or entity who processes the data on behalf of the Data Controller.</p> <p>HOC is a Data Processor to those individuals and entities who use our services for the process of delivering services to users who are registered on a HandsOn Connect instance.</p> |
| Third-party | <p>In relation to personal data means any person or entity other than:</p> <ul style="list-style-type: none"> • the Data Subject, • the Data Controller, or • any Data Processor or other person authorized to process data for the data controller or processor. |

Based on the definitions above, since HOC is a Software-as-a-Service (SaaS) and we process our client's data, in GDPR lingo we are known as a Data Processor. **Our clients control the use of their user's data. Hence a HOC client will more likely be a Data Controller.**

1. What do you need to know as a HOC client and Data

Controller?

As a HOC client, and a Data Controller, who uses HOC to provide users (e.g., volunteers, partners) with services, and captures their information, especially if the user is an EU resident, there certain things you are responsible for under GDPR. We attempt to simplify them here, but please make sure to review the GDPR act and consult with your legal counsel.

First, understand that **as HOC client you are most likely a Data Controller**, since you, alone or with others, “determine the purposes for which and the manner in which any personal data are processed”. As such you remain responsible for ensuring the processing complies with the Act, whether you do it in-house or engage a Data Processor (e.g., HOC, Salesforce, Click & Pledge, MailChimp).

Ad HOC customer, it is likely that your main system is Salesforce, hence a lot of what you need to do to comply with GDPR is tied to Salesforce. To learn more go to:

<https://www.salesforce.com/eu/campaign/gdpr/>

To help meet the Data Controller requirements for GDPR, there are a couple of things you can do:

| Obligation | What you can do... |
|--|---|
| <p>Obtaining Data Subject Consent</p> <p>A Data Subject (e.g., volunteer, partner) must be presented with the option to provide consent for the collection, processing, and storage of their personal information in an intelligible format in an easily accessible form. Consent must provide clear and distinguishable information, in plain language, that accurately describes the purpose for which consent is being granted. Additionally, consent must be withdrawable in an easily accessible form.</p> | <ul style="list-style-type: none"> • Use in HOC the Privacy Policy and Terms and Conditions pages. • Use in HOC the Advanced Registration and Sign-up Module to present additional information, consent, workflow and opt-in options. |
| <p>Ability to Withdraw Data Subject Consent</p> <p>A Data Subject (e.g., volunteer, partner) must be presented with the option to withdraw consent in an easily accessible form.</p> | <ul style="list-style-type: none"> • Use the HOC Form Builder to create an easily accessible form to withdraw consent. • Use clear and concise language, such as "By using our Site, App or service, you consent to our Privacy Policy. If you don't agree, please don't use our Site, App or Service." |

Right to Be Forgotten

This is probably the best-known obligation. Data Subjects have the right to have their personal data removed from the systems of controllers and processors under some circumstances, such as by removing their consent for its processing.

Salesforce provides all the necessary tools to make sure you can erase the data for a user. This task can take several steps and may vary, depending on the complexity of your contact record, if you keep user data in other objects, the different apps that use the data, and any integrations you might have internally or with third-parties.

Salesforce allows customers to delete personal data at both an organizational level and an individual level. For more information, please see:

https://help.salesforce.com/articleView?id=data_deletion_platform.htm&type=5

Accountability/Transparency

The processor shall take appropriate measures to provide any information referred to in [Chapter 3](#) and any communication under this article related to the data subject.

HOC as a data processor will provide any information related to:

- personal data accuracy
- data subject data collection,
- data subject accessibility,
- data rectification or erasure,
- notification,
- data portability, and
- restrictions

Data Portability

Data subjects also now have the right, in certain circumstances, to receive the personal data that they have provided to a controller in a structured, commonly used and machine-readable format.

HOC as a processor will provide the personal data concerning of their data subjects through controllers. The data subject and/or controller will be able to re-transmit those data to another controller. However, the last action should be under data subjects and controller responsibility based on [HandsOn Connect Terms of Use letter E.](#)

Right to the restriction of processing

Restrictions concerning specific principles and the rights of information, access to and rectification or erasure of personal data, the right to data portability, the right to object, decisions based on profiling, as well as the communication of a personal data breach to a data subject and certain related obligations of the controllers may be imposed by Union or Member State law.

Provide a mechanism; even if it is a way to submit a written request, to allow your users to opt-out:

- processing based on legitimate interests or the performance of a task in the public interest/ exercise of official authority (including profiling);
- direct marketing (including profiling); and
- processing for purposes of scientific/historical research and statistics.

2. What is HOC doing regarding GDPR and its role as a Data Processor?

At HOC we have always taken data privacy and protection very seriously, by meeting the industry standards by building our application on platforms, such as Salesforce and Azure, certified with industry standards, such as ISO 27001, SOC 2 Type 2, and EU-U.S. Privacy Shield, as well as compliant with GDPR.

Since HOC is a Salesforce App and HOC uses Salesforce as the primary data storage, we are fortunate that this effort is greatly facilitated because many of the Data Processor requirements are provided by and through Salesforce. To learn more about Salesforce's GDPR compliance, please visit:

<https://www.salesforce.com/gdpr/platform/>

We are committed to addressing EU data protection requirements applicable to us as a Data Processor. To this effect we are:

- **Identifying personal data:** we have audited the default collection of personal data, as well as its usage, storage, and disposal.
- **Providing visibility and transparency:** As a Data Processor, HOC's key role is to provide our clients (i.e., Data Controllers) with the tools and access to effectively manage and protect their user data, as described in section 1 of this document.
- **Enhancing data integrity and security:** As our customers tighten their data security measures, we are doing the same, by implementing IT policies and procedures that provide end-to-end security.
- **Portability and transferability of data:** Leveraged by using Salesforce to comply with the user's the right to either receive all the data provided and processed by the controller or transfer it to another controller depending on technical feasibility, as described in section 1 of this document.

Data Sub-processors used by HandsOn Connect

HOC uses several systems, technologies, and tools to deliver its services. We maintain the following list of sub-processors:

- Salesforce: Customer Relationship Management. United States.
- Microsoft Azure: Application hosting. United States.
- QuickBooks: Customer invoicing, payment processing and credit card processing. United States.
- Google Analytics: Application analytics. United States.
- Jira: Development issue tracking and reports. United States.
- Raygun: Error, Crash & Performance Monitoring For Web & Mobile Apps. United States.
- Logentries: Application Logs. United States.
- Zendesk: Customer support and documentation. United States.
- Hootsuite: Social media management. United States.
- All for Good (Points of Light): Volunteer opportunity aggregator and search. United States.

- Cabot Volunteer Rewards: Opt-in rewards program for volunteers. United States.
- Squarespace. Website host. United States.

Wrap up

If GDPR affects you, it will take some time and work to comply, if you haven't already. In the end, we believe that the GDPR is a positive for both individuals and organizations.

Although we cannot implement GDPR for you, If you have any questions contact us at dataprotection@handsonconnect.org. Remember to consult with your legal counsel.

Received an email saying that Your RapidSSL Certificate for has expired?

If you have received an email reminder from RapidSSL with the subject "Your RapidSSL Certificate for YOUR DOMAIN has expired," please note that HandsOn Connect (HOC) is no longer using RapidSSL for its SSL certificates. We recommend:

1. Make sure the email refers to the domain you are using on your HOC site and not another site in your organization.
2. If it does refer to your HOC site domain, then you can safely ignore it
3. To stop receiving the email reminders, scroll towards the bottom of the email and click on the unsubscribe link.

HandsOn Connect switched to using a new provider for SSL certs called Let's Encrypt, and we implemented a process that automatically renews them. For more information, visit <https://letsencrypt.org>.

What is an SSL certificate?

An SSL (Secure Sockets Layer) certificate helps authenticate your website to other users, and secures the communication between your browser and site you are visiting, such as your HOC site, by encrypting the data that goes back and forth.

Discontinued support for Internet Explorer 11 Browser

HandsOn Connect (HOC) will discontinue support for Internet Explorer 11, effective on March 31, 2019. This does not mean that you can no longer use IE 11 with HOC, but it does mean that we will no longer test our web apps (e.g., HOC Volunteer, HOC Forms, HOC Portal, HOC CMS) for compatibility with IE 11.

We will also stop fixing items that don't work with IE 11 unless they are absolutely mission-critical and a fix is possible. Some features will simply not work in IE11.

In 2015, Microsoft released the Edge browser as a replacement for Internet Explorer. Hence, Internet Explorer no longer receives significant updates including the latest security improvements and features needed to support rich applications such as HandsOn Connect and Salesforce.

As of October 2018, less than 3% of all browser usage was on IE 11. If you are one of the last diehards, we strongly recommend that you stop using IE 11. It does not support security standards that are built into modern browsers and user experience improvements that newer browsers offer.

Note that Salesforce Lightning Experience does not support IE 11 as of December 16, 2017.

Please let us know if you have any questions or concerns.