Using the HandsOn Connect Public Site

HandsOnConnect Cloud Solutions

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Home Page

The HandsOn Connect Home Page - Your Public Site

The Home Page of your public site can be configured to contain any content you desire by using our Content Management System (CMS). You can edit and update content through a number of WYSIWYG tools and external integrations.

There are a variety of Templates available for a HandsOn Connect site, and you will select one when you first come aboard as a HandsOn Connect client.

In this manual - many of the images will be of the original HandsOn Connect template, as most of the system functionality works in the same way - no matter what your site template and layout. The navigation to get to the various features of the public site will vary from site to site - as you can customize your navigation as part of the CMS.

Some of the system functions that will be described in this manual may or may not be included in your version of HandsOn Connect. Features such as teams, self-reporting, and Skills can be enabled or not enabled depending on your organizational needs.

The goal of this manual is to show you functionally, how many of the public site features work for volunteers.

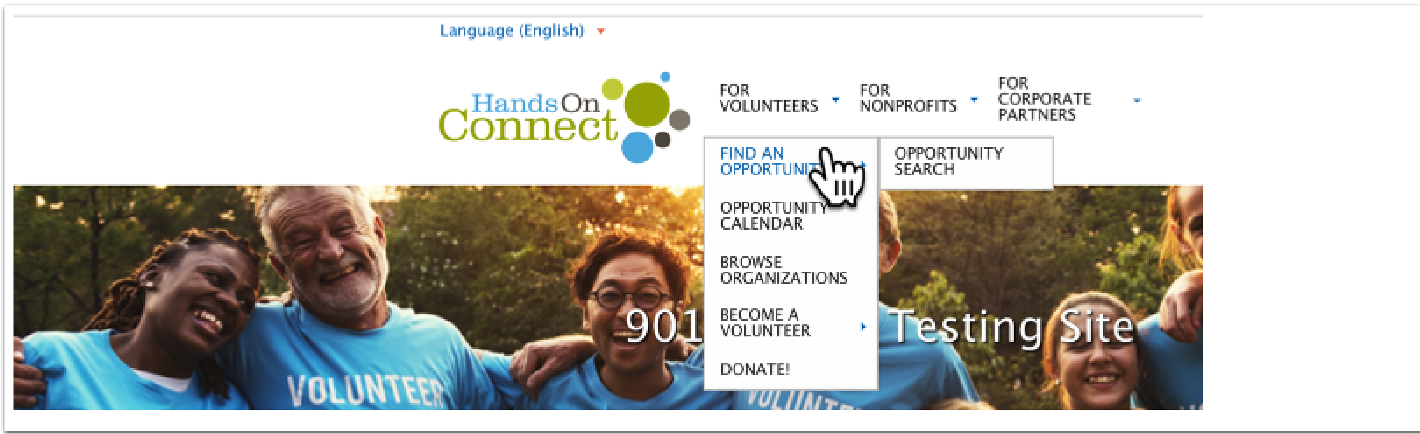
Features of the home page

Home pages are typically comprised of navigation and a collection of blocks.

Home pages (and indeed the whole site - are mobile responsive and appear differently on desktops, tablets, and mobile devices.

Here's an example of a typical home page on a desktop

1. Language Selector. (available on bilingual sites), and A logo block. (Used to feature your organization's Logo)
2. Navigation (Menus) -- In this illustration -- they expand downward when clicked on revealing sub-navigation)



3. Login widget. (allows logging into the site, and has a link to register if you don't have an account yet)

4. Image Block (can be configured in a number of ways)

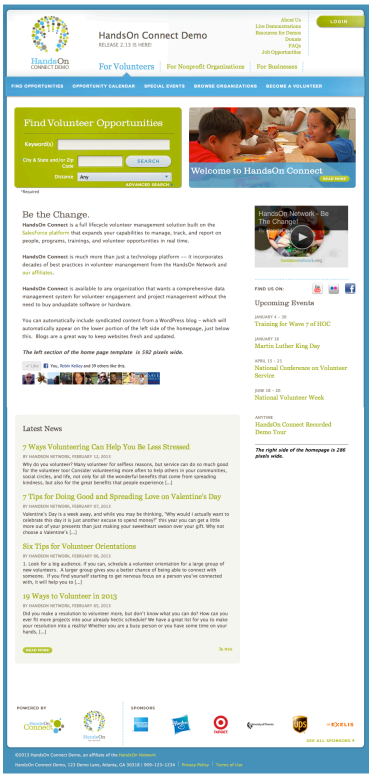
5. Simple Search Block. (for searching for Volunteer Opportunities)

6. Featured Opportunity Block

7. RSS Block

8. Footer Block

Here's what the Home Page looks like in the 'classic' HandsOn Connect template.



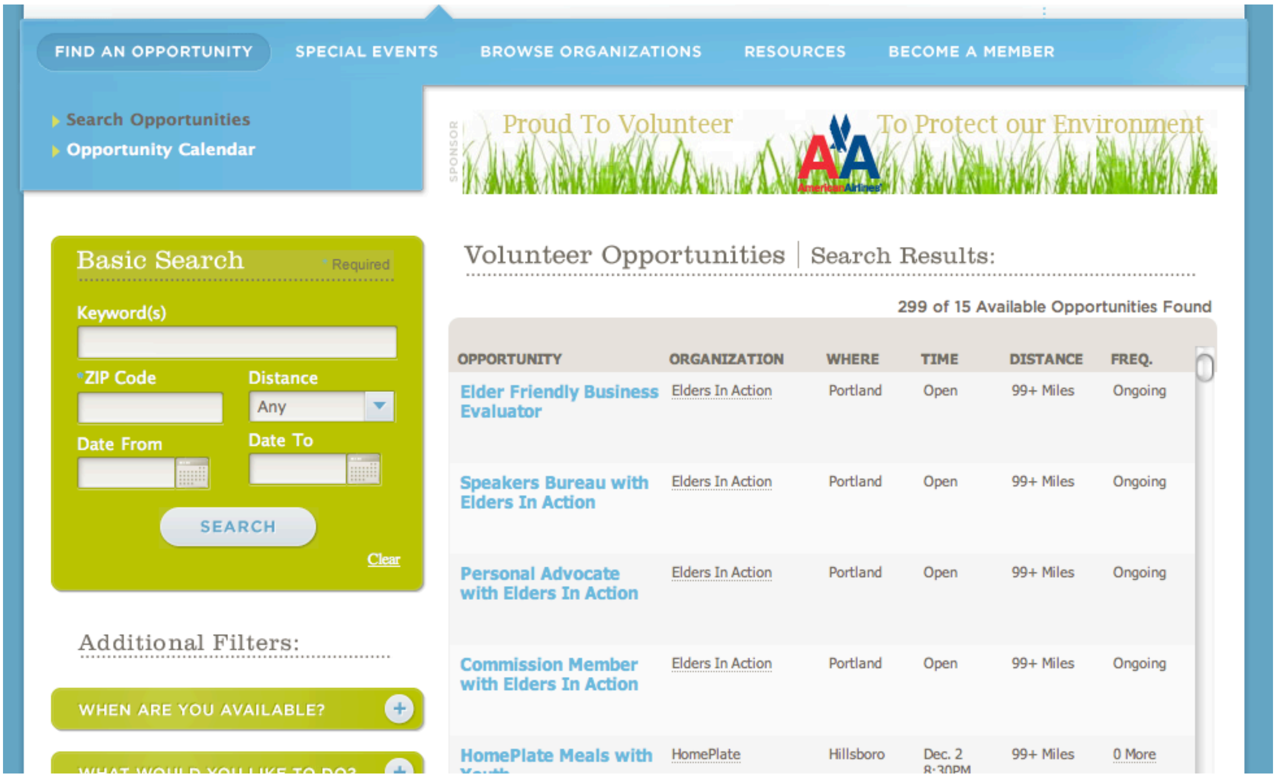
Navigating the Site

Using the Public Website - Main Navigation for Volunteers

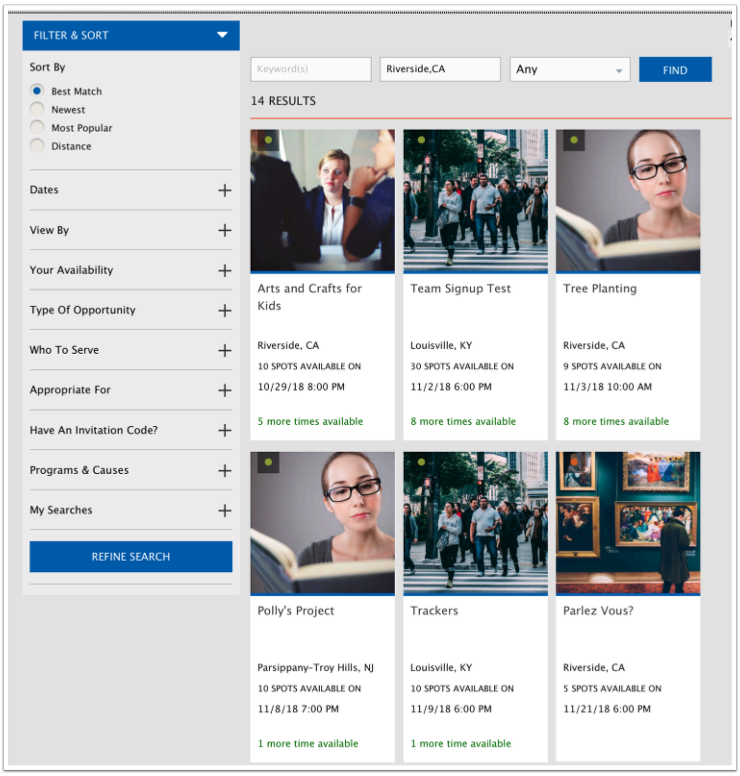
Here's a description of the main navigation items for volunteers. Note however, that the Navigation in the "For Volunteers" section is customizable using the Content Management System. You can change the names of each of these navigation items, and may find you have different elements set up in the system when you first get started.

Here we discuss the basic functionality and navigation used by volunteers.

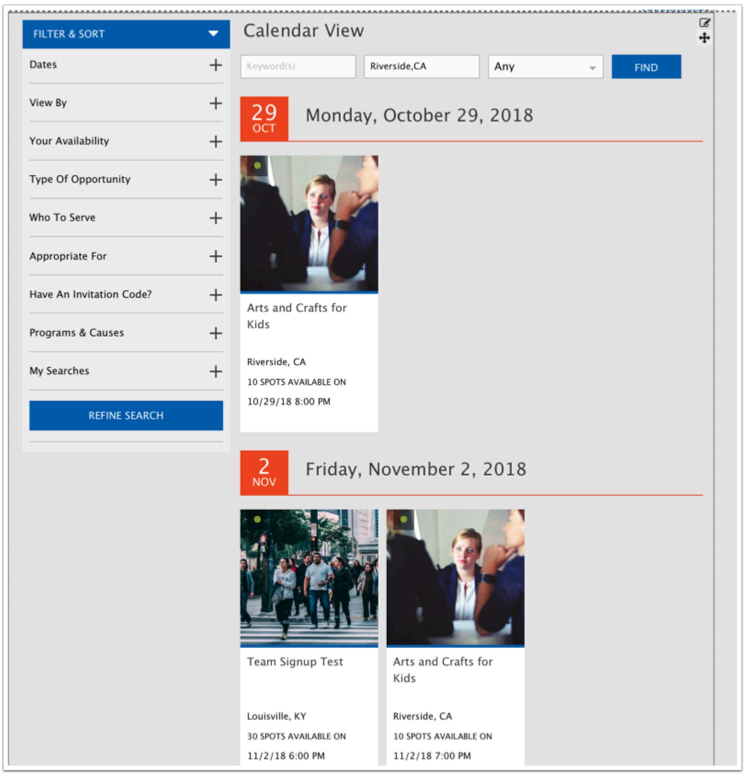
Find An Opportunity



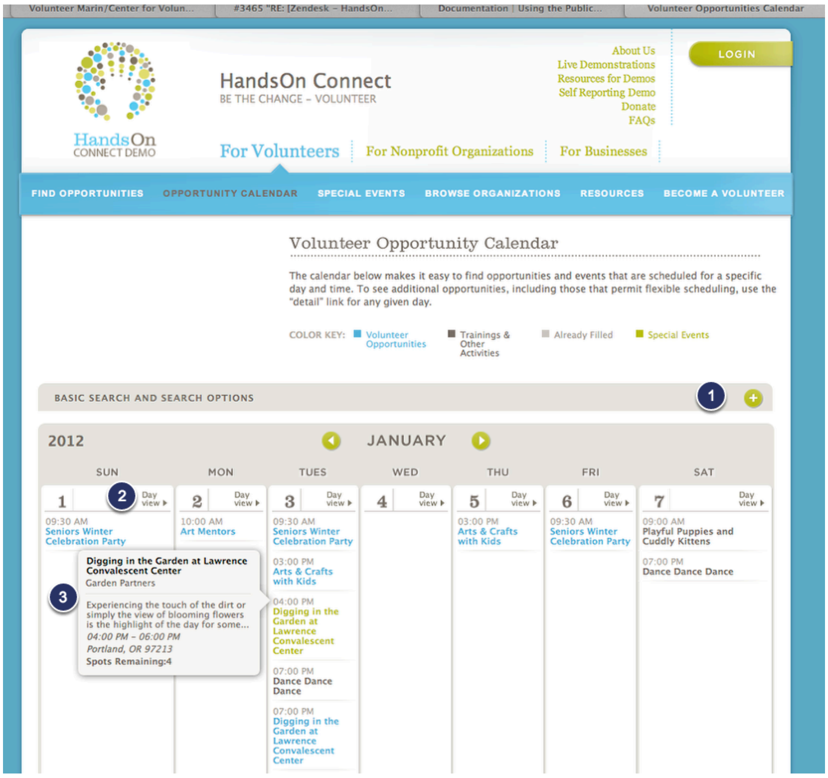
Allows volunteers to search, sort, and sign-up for opportunities. There is also a Calendar view. Some HandsOn Connect sites use the new "Search Results Block" as an alternative to /search and /calendar.   Here's what a /searchresults block on a page can look like. (This is the 'list view')



And below is the calendar view of a /search result block



Opportunity Calendar (/calendar page)



The submenu option "Opportunity Calendar" takes you to opportunities in a calendar format. (Or you can make it a separate navigation item in the horizontal menu).

Date and Time Specific Opportunities are posted to the calendar on the day on which they occur.

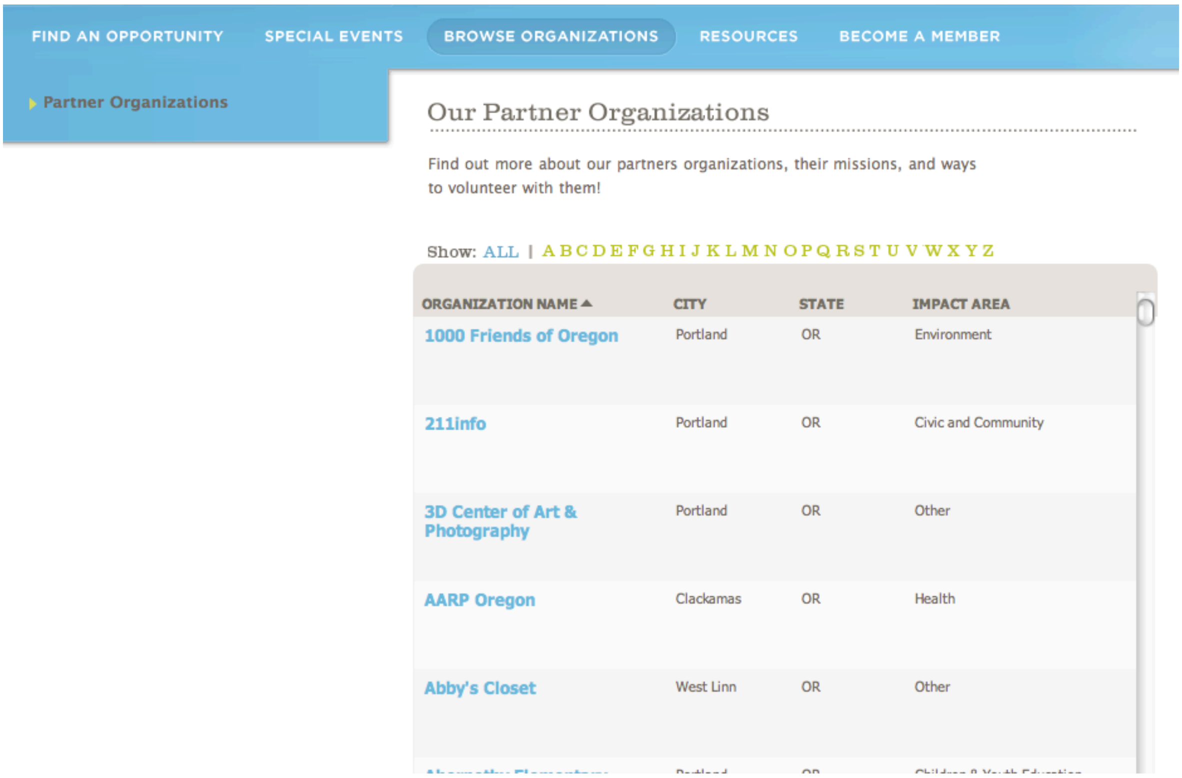
1. A dropdown 'search and search options' filter is available if you wish to narrow the opportunities that appear on the calendar.

2. The calendar links to a Day View option where you can see all opportunities that appear on that day, in case there are more than can fit on the calendar page.

3. A pop-up appears when you mouse over an opportunity with additional detail.

This is a WYSIWYG editable, flat-content page where you can publicize your upcoming large-scale events, are post links to the event description pages.

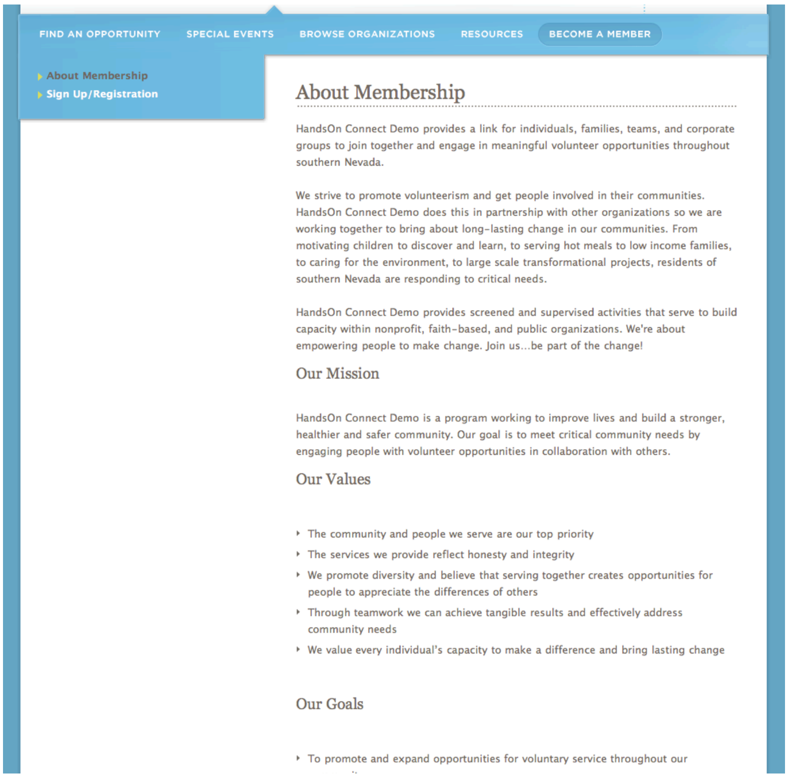
Browse Organizations



This page has a list of all your active organizational partners in a sortable view by name, city, state, or impact area. Clicking on the organization name brings up the organizational Profile view with a detailed description of the organization, its impact, its mission statement, logo, web URL etc.

Become a Member: About Membership

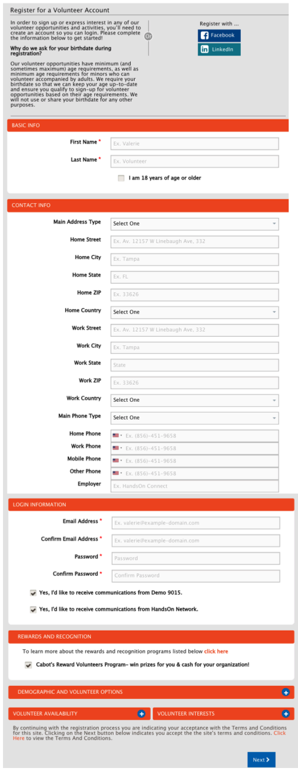
This is an optional page that many organizations present to be viewed before the actual Registration page.



This page is easily edited using the WYSIWYG editor and should explain what becoming a member of your organization is like, and any rules or terms for registering and volunteering. It should include a link to Sign Up and create an account which leads to the "Sign-up/Registration" page

Become a Member: Sign Up / Registration

The registration form on this page can be edited in the CMS, and additional pages can be added to the registration process using the Advanced Registration System add-on.



This is the online registration form that will create an account for a volunteer. You can add "Additional Questions" in the final section of this page if you wish to capture additional info from volunteers, or create more complex registration processes with the Advanced Registration System add-on.

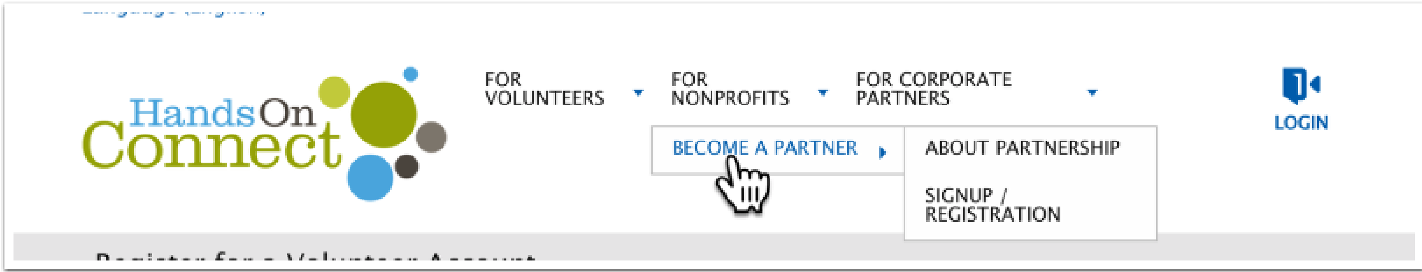
A link to your organization's "Terms and Conditions" for volunteering appears on this page.

After creating an account, or logging in, the last menu item typically changes from "Become a Member" to "My Account"

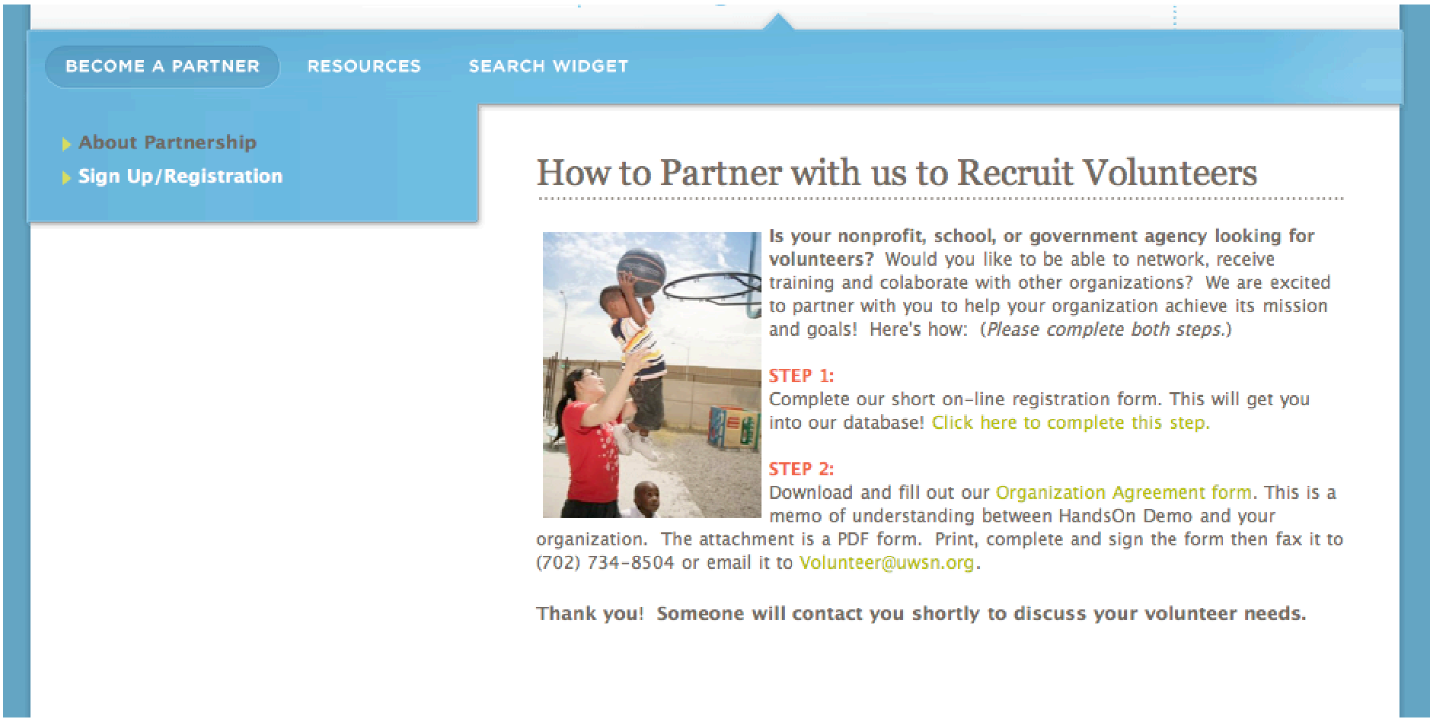
Using the Public Website - Main Navigation for Organizations

Most HandsOn Connect navigation includes a link for "partner organizations" to register. If you are not using outside partners to submit volunteer opportunities to appear on your site, you may not need this part of the HOC functionality.

Here's an overview of the typical navigation for Organizational Partners. The navigation items and names can be modified using the content management system.



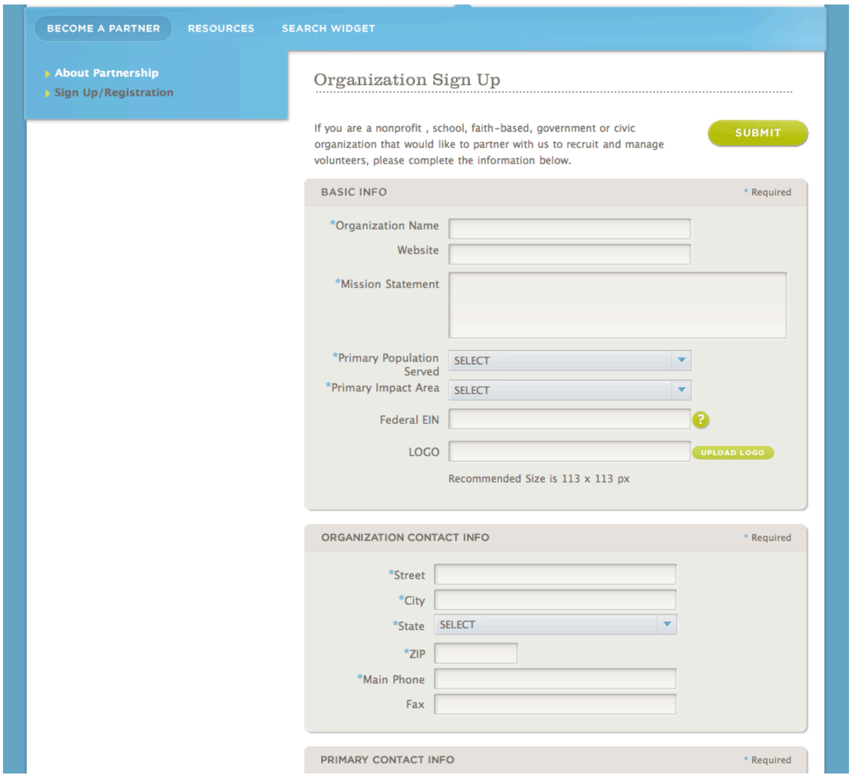
Become A Partner / About Partnership

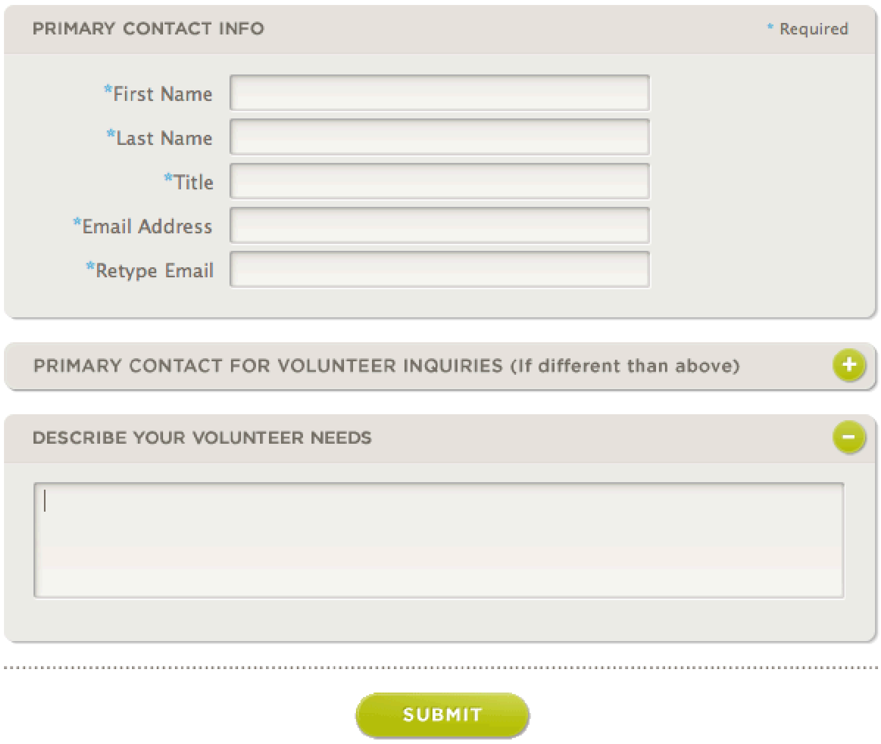


The contents of this page are customizable the CMS. This is where you can message potential nonprofit, government, civic, or faith-based organizations on how they can partner with your organization to recruit volunteers. You can create links to any documents you want to make available to them, and the Sign Up / Registration link in the navigation will take them to an online form where they can enter their basic information into your HandsOn Connect Database as a potential partner.

Sign Up / Registration

This form can be customized in the CMS to include or exclude many of its fields. If you have the Advanced Registration System (ARS) add-on for HandsOn Connect - you can create additional pages and forms to the organization sign-up process.





Clicking on the Sign-up / Registration navigation brings the partner to a form where they can enter information. Doing so will trigger an email to your Partner Approval Manager who will be able to review their application and guide them through the steps to become a partner with your organization.   Once partner status is granted, organization representatives will be able to log into the public site and enter the Partner Portal (sharing portal) where they'll be able to post opportunities, verify attendance, and run reports on their volunteer activities.

Depending on your relationship with partner organizations - you can use the CMS to add additional pages of information that are of value to your non-profit partners. You can then add additional sub-navigation to access these pages.

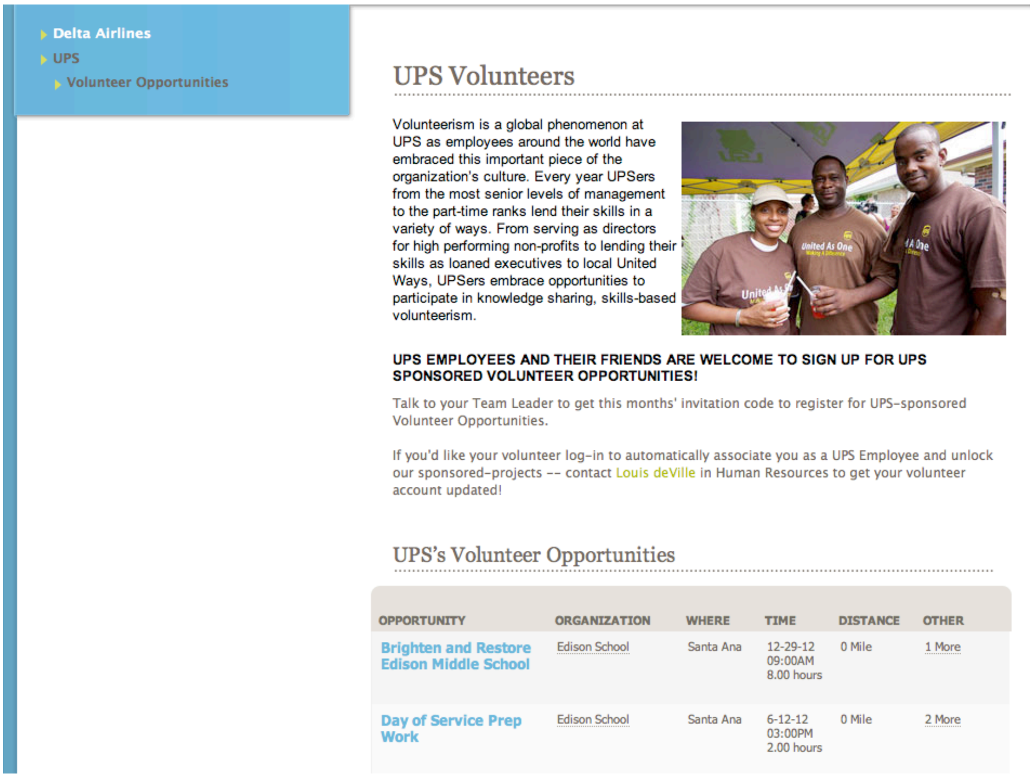
Using the Public Website - Main Navigation for Businesses

The "For Business" or "For Corporate Partners" section of the website provides a navigation for your corporate partners. It also provides access to 'business pages' where your business partner's volunteers can easily search and sign-up for their 'private' volunteer opportunities. It also gives you a place to highlight your business partners and their mission.

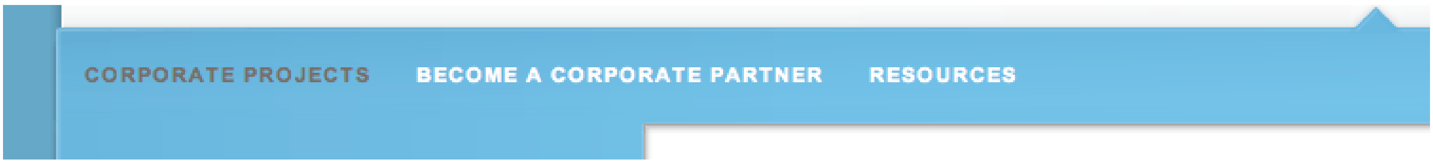
Business Pages / Corporate projects

The main functional element in the business section of the site is a series of 'business pages' where you can publicize your corporate partners, allow them to tell their story, and provide a landing page for their employees and invited guests to find their 'private' volunteer opportunities that do not appear on the main calendar or in search.

These can be found by either entering an invitation code -- which, when entered, will reveal the private opportunities, OR Volunteers who are logged in, and associated as employees of the organization will automatically see their company's private opportunities appear in the search grid on this page:



The other navigation items can be defined based on your business needs



In this illustration, "Become a Corporate Partner" describes the ways that businesses can partner with our organization. Resources provides them to links about the impact of corporate service. You can add any additional pages you wish to this segment of the website.

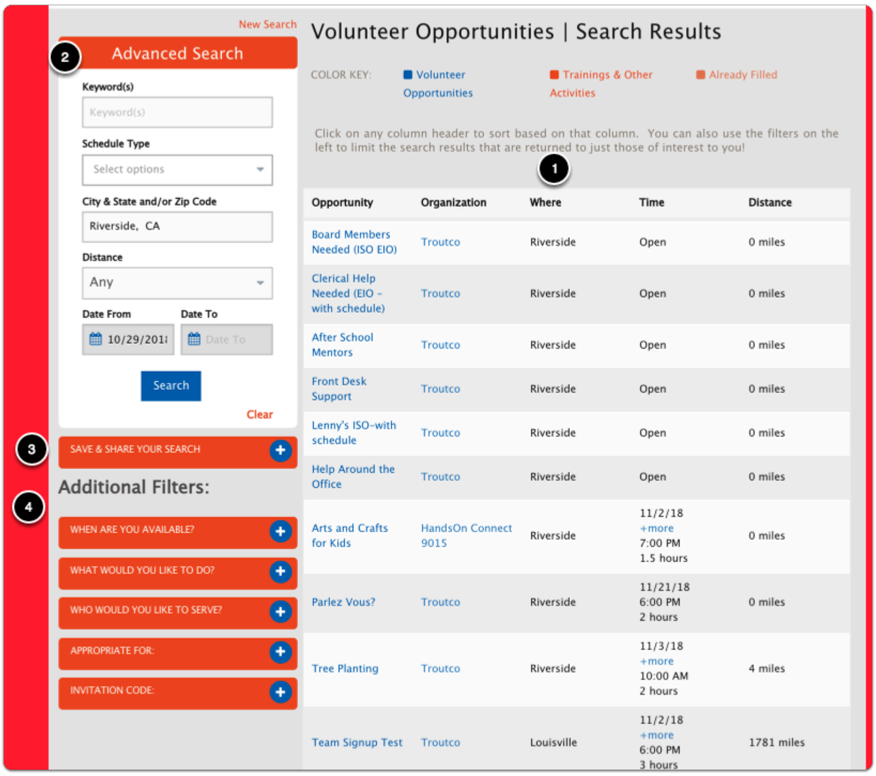
Opportunity Search Page

Opportunity Search and Signup

The Find Opportunities page offers advanced searching based on a number of filters. Here's a guide to using the Search Results Grid, and the Additional Filters on the /search page in HandsOn Connect:

Note: This is the /search page. It's also possible to create another version of search by creating a /searchresults block . It works in a similar way but has a more modern look and feel.

Search Page Layout



1. The Search Results Grid shows all the opportunities that meet the specifications of the search filters. The column headers can be clicked on to SORT results by that column heading.

2. Advanced Search Filters - here you can set the basic filters for search. Geolocation will fill in your current location, and today's date as a 'from' filter for dates. By default, everything else will start blank.

NOTE: The Keyword Search is an 'or' search. If you put in two words, it will look for opportunities that can contain one word or the other. Keyword Search looks for matches in the following fields of a volunteer opportunity record:

- Opportunity Name

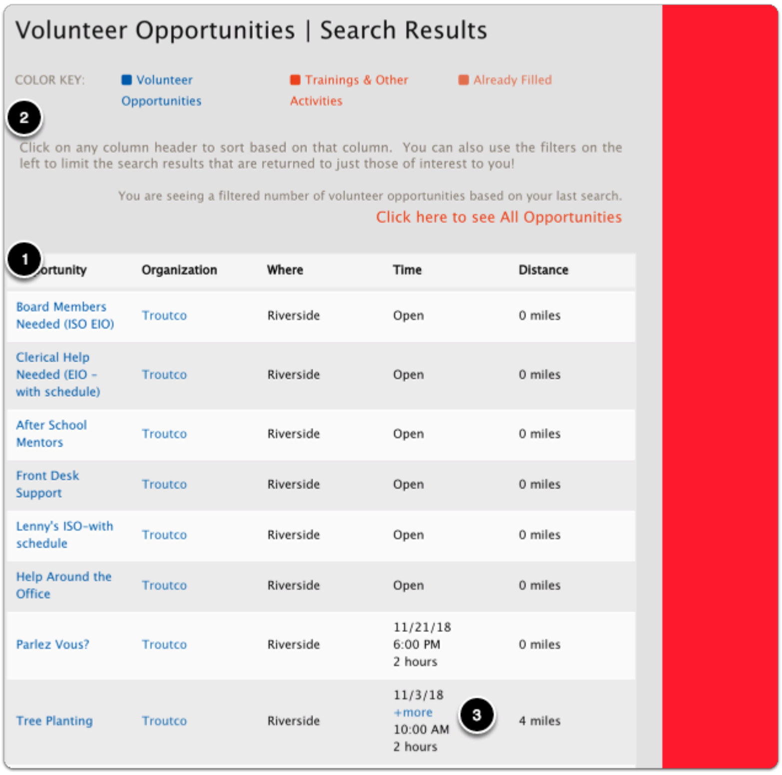
- Opportunity Description
- Primary or Secondary Impact Area
- Managing Organization and Organization Served
- Skill Categories
- Impact Area (local)
- Program Area (local)

3. The ability to Save a search (which can be shared with others, used as a navigation item, or saved as part of your account record so you can easily recall searches)

4. Additional Filters (These expand and offer more filtering options)

When you arrive at this page - the last search you did is preserved via a 'cookie'. To start a new search, click on the New Search link.

Working with the Search Results Grid



1. Clicking on an opportunity name will take you to the opportunity detail page of the NEXT occurrence coming up (which is indicated in the "Time" column.

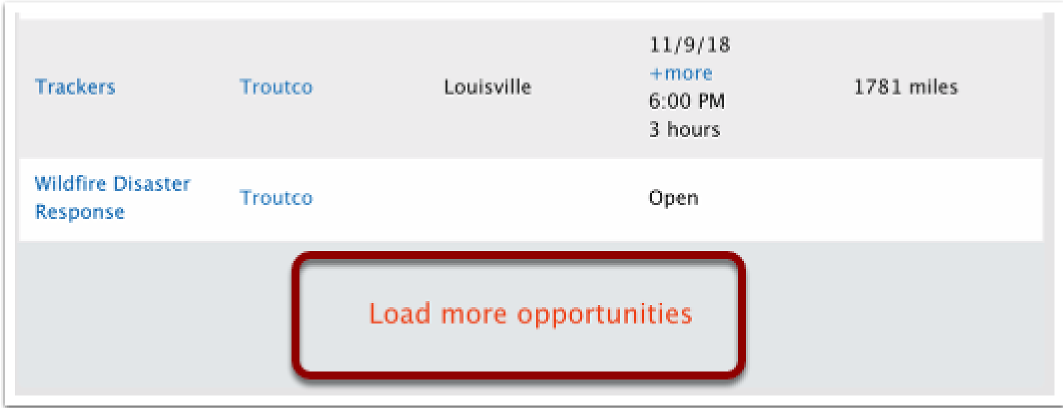
2. You can sort the search results by clicking on the header of any column.

3. If there are more than one future occurrence of any date and time specific opportunity, the Time column will say "+ More" -- clicking on that link will take you to a search results page where you'll see all upcoming dates and times for that opportunity. If the Time Column says "Open" it indicates that it is an "Individually Scheduled opportunity" with no specific date and

time indicated. (Volunteers can express interest and arrange a date and time to volunteer with the managing organization of that opportunity.

4. When you are using filters -- this section tells you that you're viewing a filtered view -- you can click on 'Click here to see All Opportunities" to get the full liust.

At the bottom of the list on each page, will be a link to "Load More Opportunities" which will bring additional data into the view.



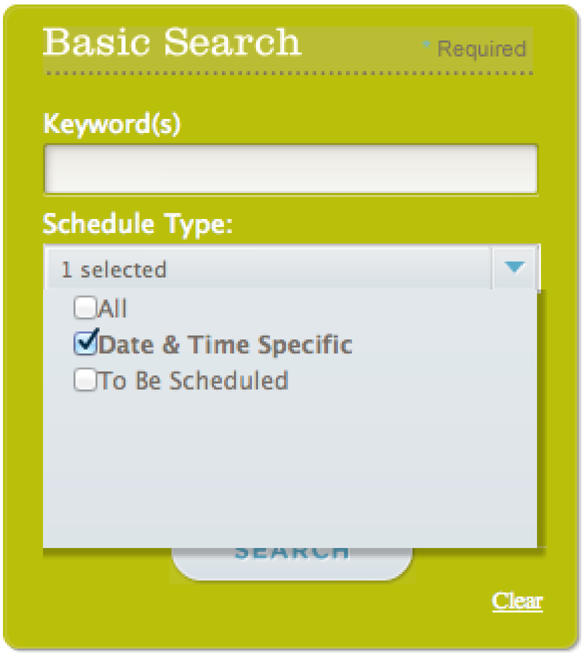
Saving and Sharing Searches

Saved Searches provide a way for volunteers to easily recall a set of search parameters. This is handy if you frequently want to find, for example, date & time specific opportunities that serve children.

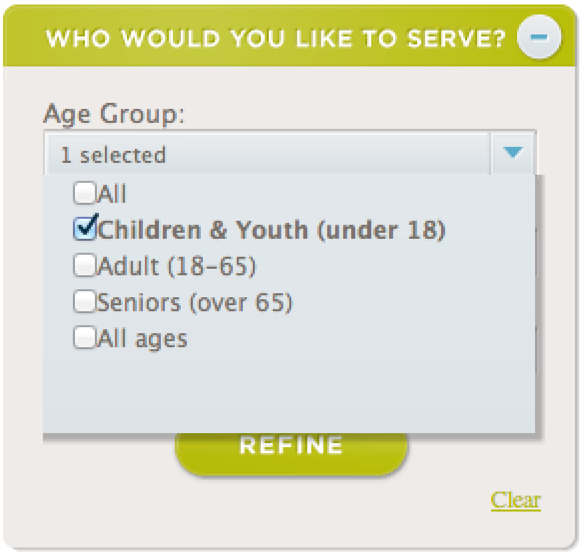
Saved searches are useful useful as they provide URLs that admins can use in the CMS for creating navigation items that display a specific saved, filtered-search result.

Searches and URLs for filtered search results can be created and saved from the Search page or from the Opportunity Calendar page.

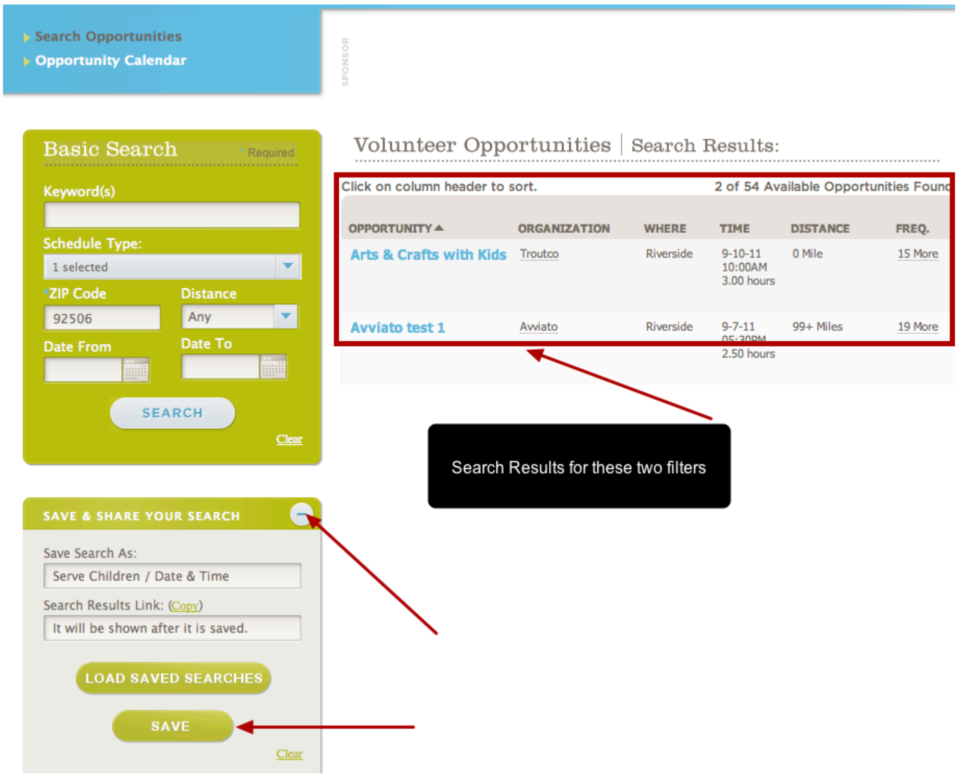
First conduct a search with any parameters you wish



Add additional parameters if desired, and then click "Refine"



View your search results and then click the "Save & Share your Search" box on the left.



The Save & Share your search box expands. Name the search so you'll remember what it is for future reference and then click save. You'll be prompted with a message: "Are you sure you want to save this search?"   click on OK.

The search is now saved, and you have a link you can copy to the clipboard and share with others

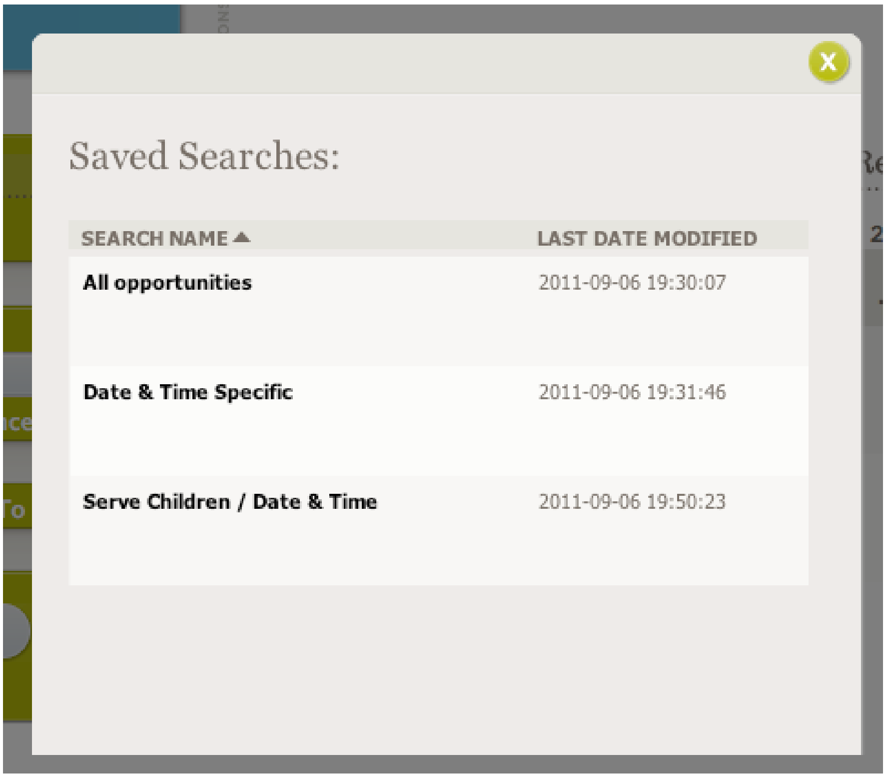
Click on the "Copy" hyperlink to save a copy of the Search Results Link that appears on your clipboard. You can then use this link to:

1) Email it to a friend.

2) Embed it as a URL on a webpage that will display a search with these parameters again.

You can also recall all your saved searches by clicking on the "Load Saved Searches" link.

The Saved Searches pop-up appears



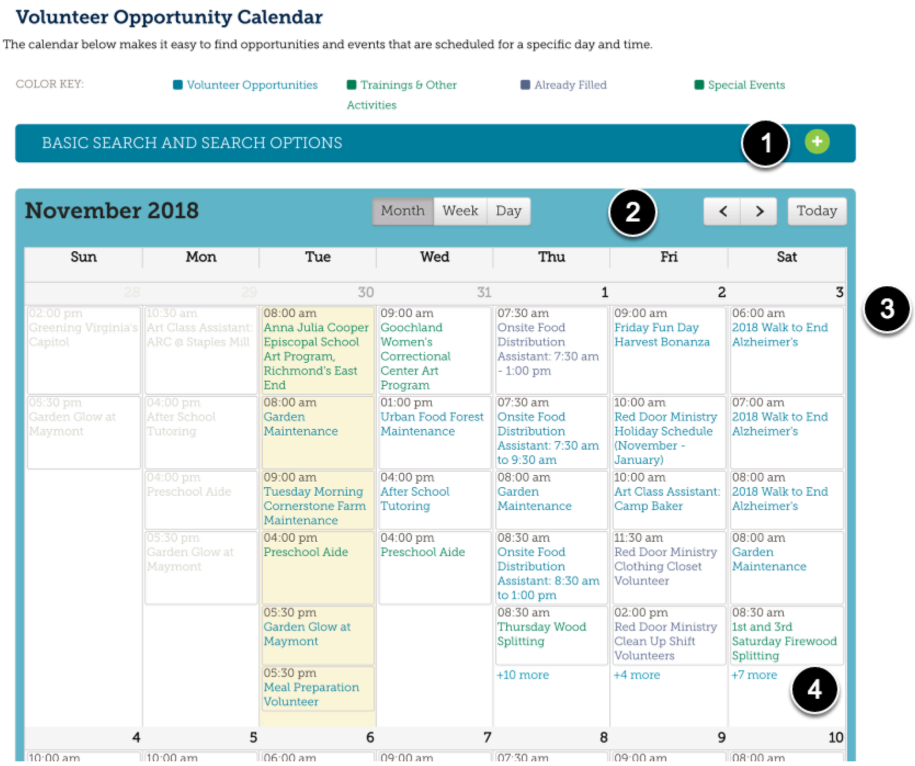
You can click on any of the Saved Search Names and the search will be rerun. (They are hyperlinked to the searches)

You can also access and manage saved searches from your volunteer account.

Volunteer Opportunity Calendar

The Volunteer Opportunity Calendar offers a graphical view of date and time specific opportunities. The calendar page is found at /calendar

Opportunity Calendar



A menu item linkiing to /calendar takes you to opportunities in a calendar format. Date and Time Specific Opportunities are posted to the calendar by the day they occur.

1. Clicking on the + here reveals filters that can allow you to search for specific opportunities on the calendar. If none are chosen - ALL date and time specific opportunities appear on the calendar below. The calendar color-codes Volunteer Opportunities (eligible for service hours) and trainings and other activities such as volunteer recognition events, seminars, socials, etc (activities that are not counted as service hours) that you want volunteers to be able to sign up or express interest in.
2. The header of the calendar allows you to select between month, week, or day views of the calendar. The left and right arrows allow you to move forward or backward to the next month, week, or day.
3. The main body of the calendar lists date and time specific opportunities. Hovering over an opportunity name produces a pop-up with more details on that opportunity. Clicking on the

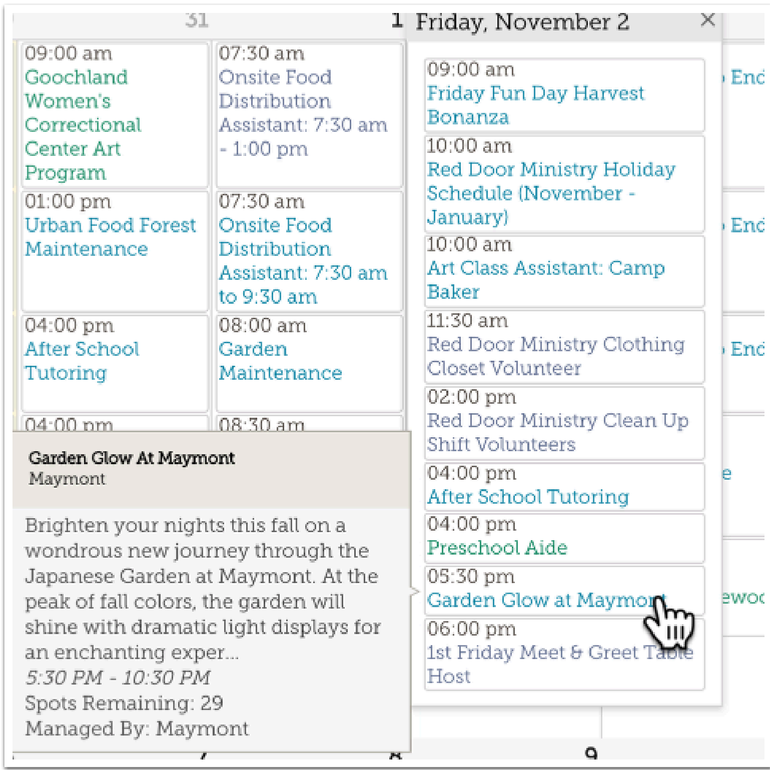
link for any opportunity will take you to opportunity detail page where you can sign up or express interest.
4. If there are more opportunities than can fit in the grid for that day, a +Xmore link is shown. Clicking on this will pop-up the day view for that day.

Special Events like days of service, holidays, etc. appear in their own color (as specified by the legend). Clicking on the name of a special event will take you to a listing of all the opportunities that take place as part of that larger event. (There are no special events on this image of the calendar)

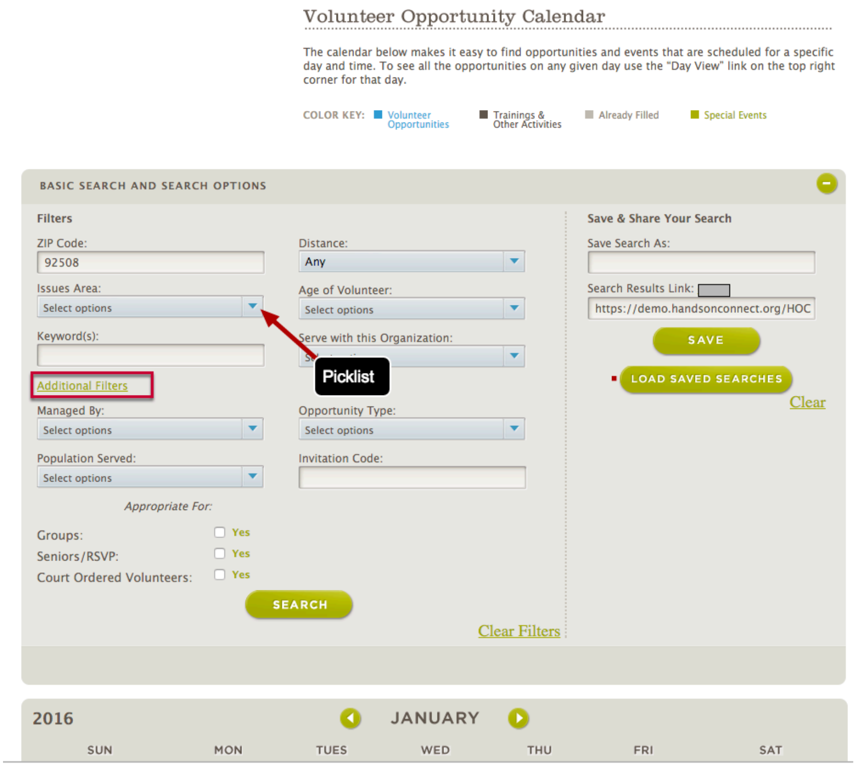
Individually Scheduled Opportunities do not show up on the calendar -- that's because they don't take place at a specific date and time, but allow volunteers to sign up for a variety of times. ISOs are found on the /search page or any list view.

Pop up view

clicking on 'X more" pops up the day view showing all opportunities for the day. Hovering over any opportunity shows additional about the opportunity in a pop-up. Click on any opportunity name to go to the opportunity detail page.



Expanding the Filters drop down allows for searching in the calendar view



Each filter can be dropped down to expose a picklist of values.

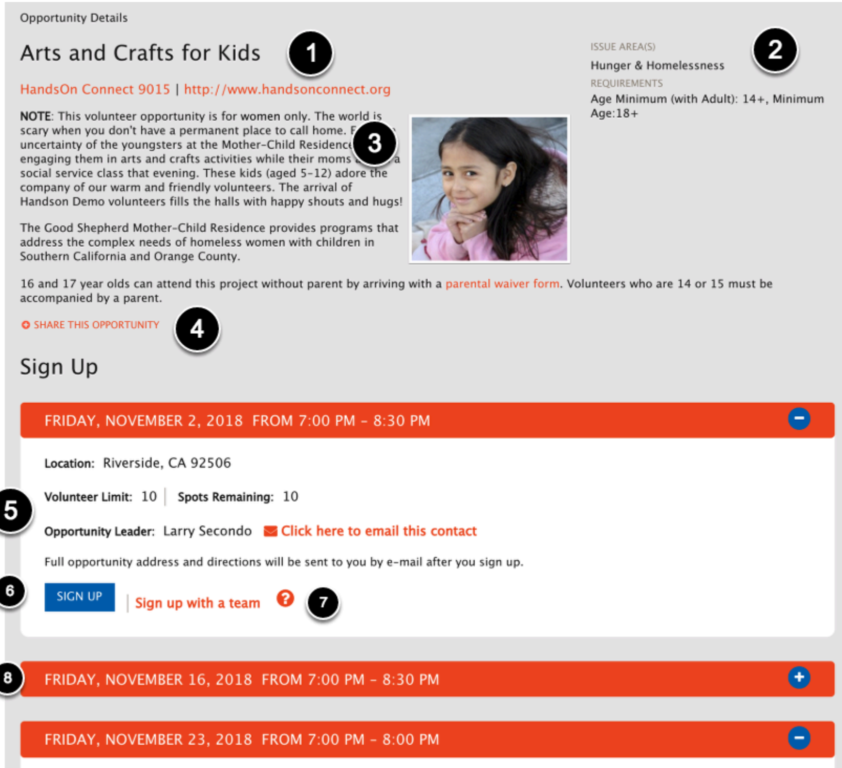
Additional Filters are initially hidden, but can be exposed by clicking on the "Additional Filters" link.

Clicking on the Search button will then filter the calendar by the choices made.

Search Parameters can be saved for the Calendar Page in the same way they can be saved on the search opportunity page.   The URL for a filtered calendar can be used as a navigation item to create custom calendars. (Example: You could create a calendar filtered URL to create a calendar that only shows opportunities for partners, or only for one specific partner.)

Opportunity Detail Page

Clicking on a link from any opportunity search result (search page, calendar page, /searchresults block, or featured opportunity block will bring you directly to the Opportunity Details page.



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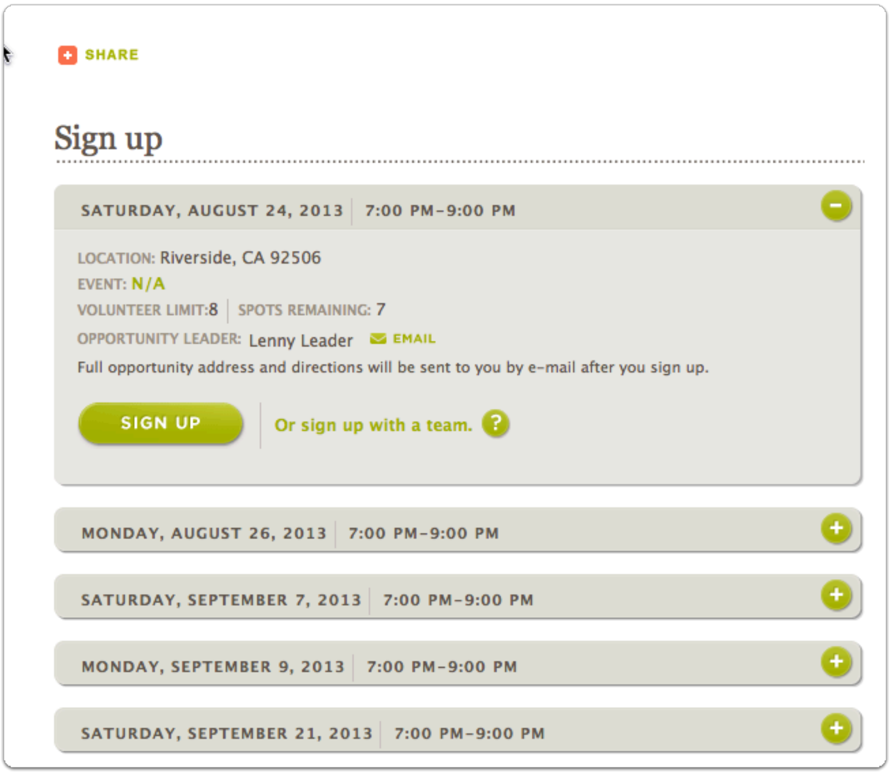
1. Opportunity Title, and a link to the organization being served by this opportunity and their website (the organization link takes you to the Organization Profile View which is found in the "Browse Organizations" section of the sitel.
2. Information about the issues, populations, type of volunteer activity, and requirements for volunteering.
3. Description of Volunteer Opportunity. Can be formatted with WYSIWYG editor for rich content including links, downloads , images and videos.
4. Share Button, when clicked, provides widget access to sharing this opportunity via facebook, twitter, email or hundreds of other social networking sites.
5. Sign up section gives date and time info about this occurrence, location, space remaining, and provides a link to contact the Opportunity leader if they have questions
6. Sign Up Button. (For opportunities without automatic sign-up an express interest button appears here. (See illustration below)
7. Link to sign-up with a Team of volunteers.

8. For date and time specific opportunities - additional dates (occurrences) for the opportunity are also listed. The + button will expand the box so you can see the info about that occurrence.

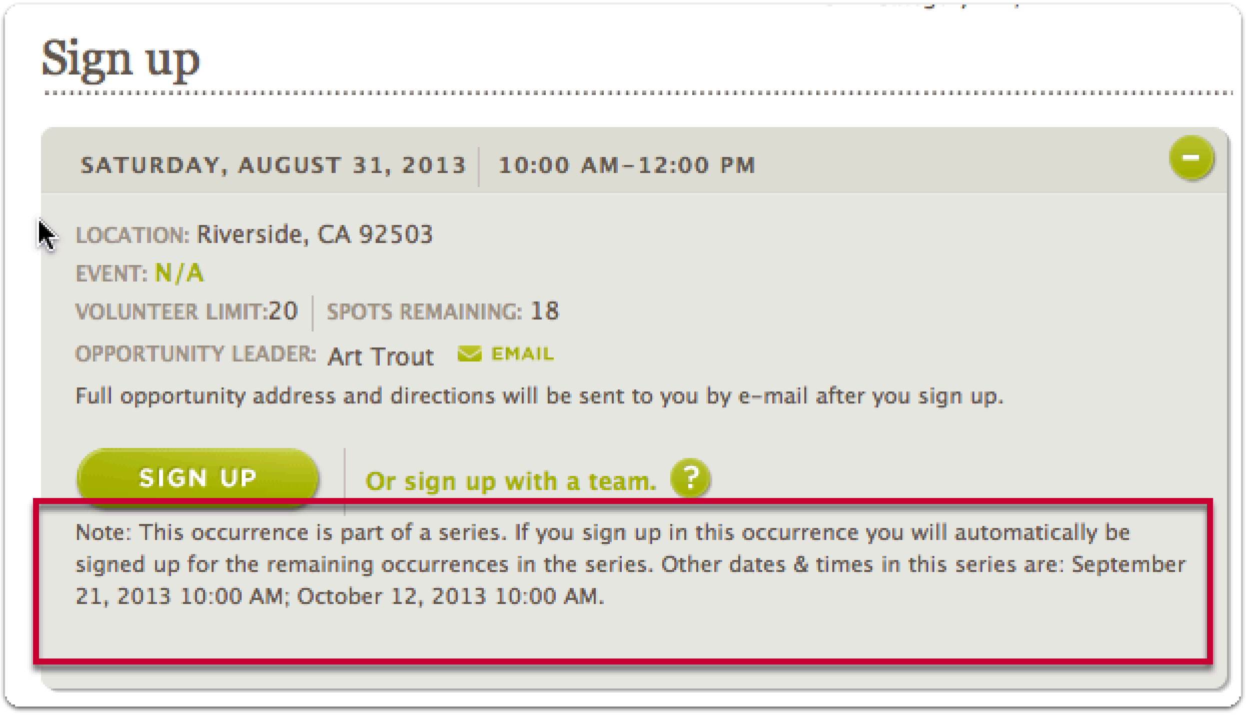
Date and Time Specific Opportunities with more than one occurrence show additional dates in expandable tabs below the next upcoming occurrence.



Note: You cannot have more than 58 active, upcoming occurrences at one time. Exceeding this limit will result in the description page returning an 'authorization required' error page.

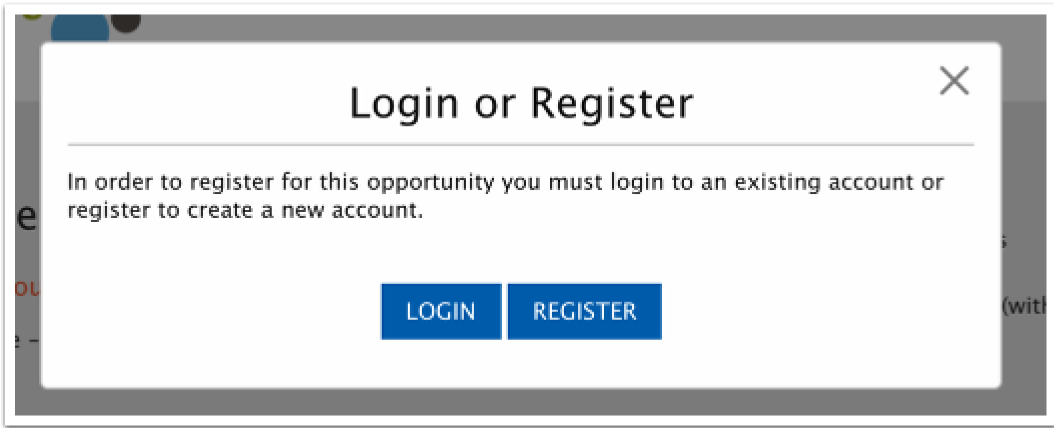
These opportunities may also have a 'custom question' as part of sign-up asking the volunteer to say when they are are interested in volunteering (based on the times when volunteers are needed). Opportunities that are 'express interest' have an express interest button - and require confirmation from the managing organization before a volunteer can attend the opportunity.

The opportunity detail page may indicate that an occurrence is part of a group of occurrences - where you are required to sign up for more than one occurrence at once.

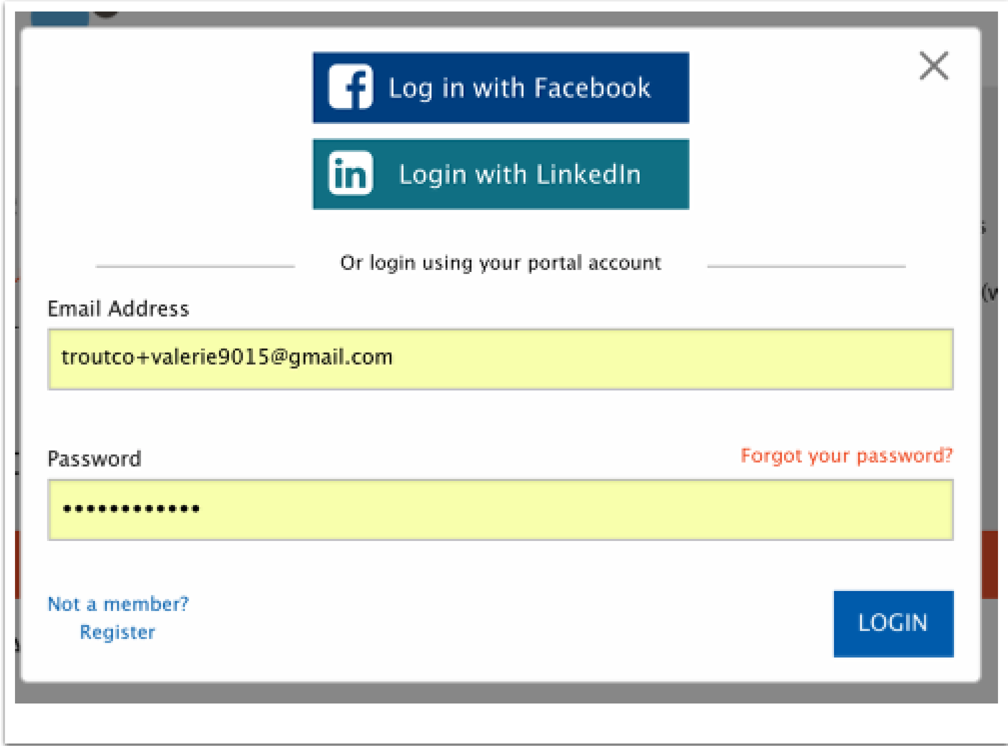


Grouped Occurrences are an 'advanced feature' which can be enabled by a system administrator if desired to meet certain business needs and to simplify signing up for projects with multiple occurrences.

If you are not logged in when you click on a sign-up button you'll be prompted to login or register



Clicking on Login will present a log-in pop-up

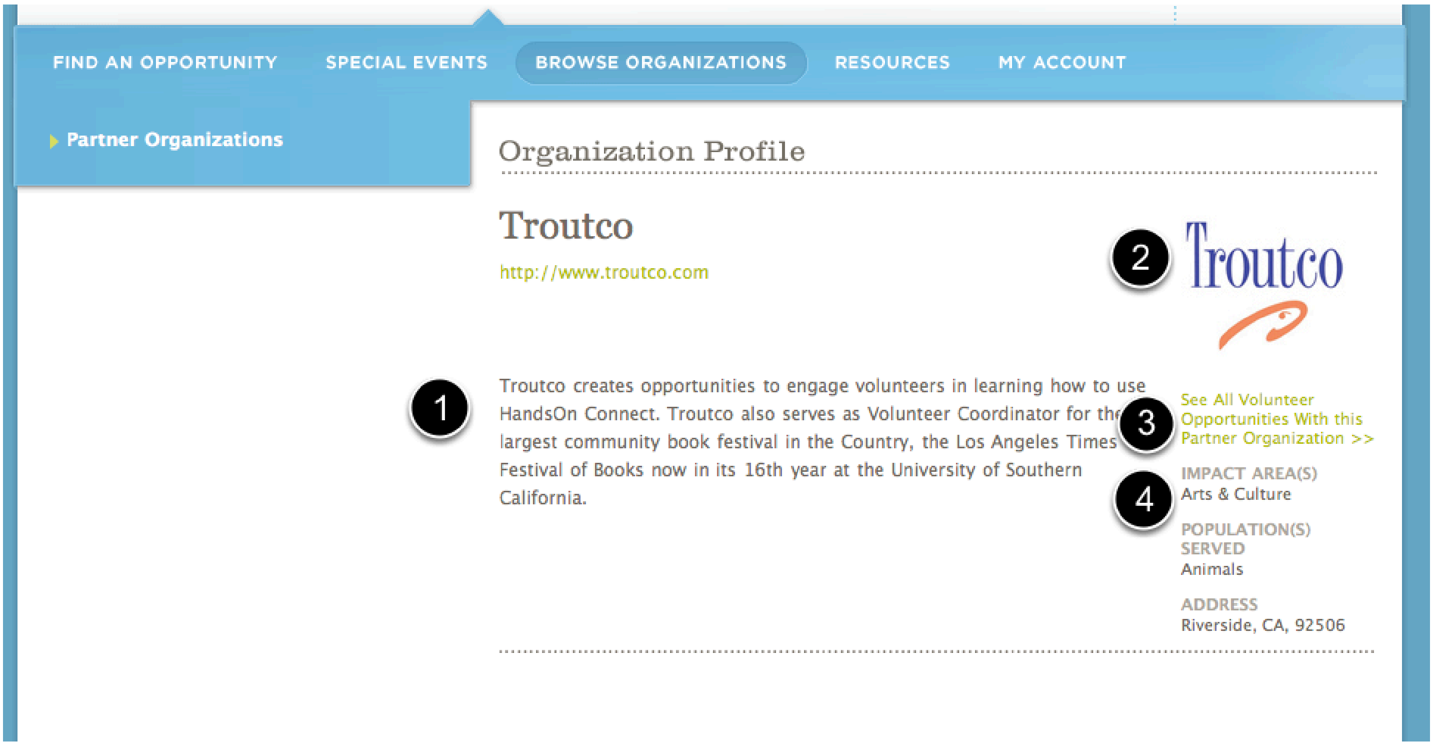


Once logged in - the sign-up / express interest process will continue.

If you don't have an account and click on Register - you'll be taken to the registration page. Once registered, your signup for the opportunity will continue automatically.

Organization Profile view

Organization Profile view



1. Mission Statement of organization

2. Logo of organization

3. Link to a search results page which shows all the organization's active volunteer opportunities in the system

4. Information about the organization from your database. (Note: You may elect to either show the full address or just city, state zip of the organization to protect their confidentiality and to prevent volunteers from showing up at their location without signing up for their volunteer opportunities on the site. Full addresses are disclosed in emails sent to volunteers AFTER sign-up.)

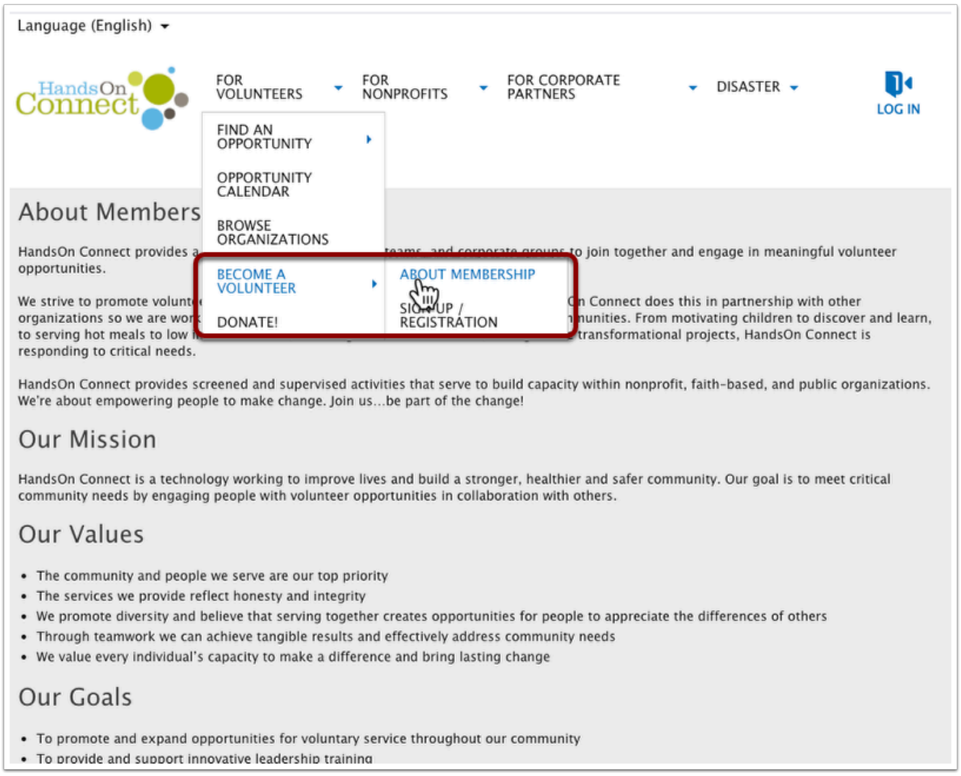
Registering as a Volunteer and Managing your volunteer account

Volunteer Registration - "Become a Member"

Before a volunteer can start signing up for opportunities - they will need to either login to their account, or click "Become a Member" to create an account on your site.

Note: The navigation on your site may be different, and can be customized however you like. In this example we have both a 'About Membership" page with content you may want a volunteer to read before registering, and then the Sign Up / Registration page itself.

About Membership sample page



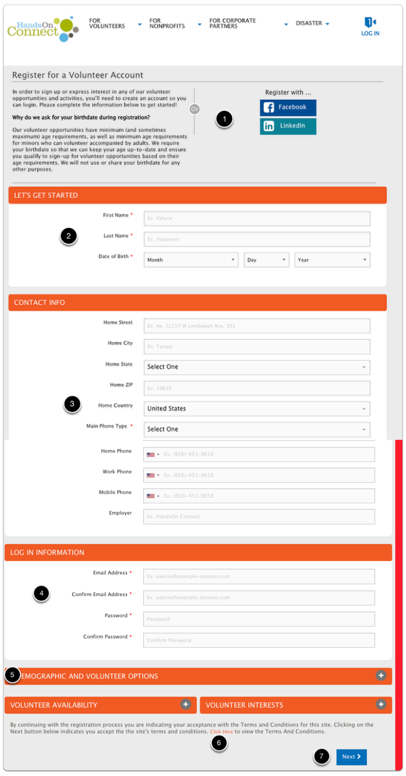
Clicking on "Become a Member" in the horizontal navigation for volunteers takes you first to the "About Membership" page.

This page is fully editable in HandsOn Connect's static page (WYSIWYG) editor. This is where you can explain basic information on what volunteering for your organization is about.

At the end of this content, you may want to post a link or instruct the reader to click on the "Sign Up/ Registration" item in the left navigation. This will take them to the sign up page.

Sign Up / Registration Page

The System form for sign up / registration can be customized to suit your registration needs for volunteers. You can edit the introductory text on the page, and choose which fields to make available for registration (and whether they are required or not).   Additionally, if you have the "Advanced Registration System" add-on, you can add additional pages, forms, and waivers to the registration process.   Here's a look at a basic registration page:



1. Customizable intro text. You can optionally enable registration through Facebook and/or Linked in.

2. Name and birthdate are required. (Note: Birthdate is used so that the system knows the exact age of a volunteer, so that age restrictions for signing up for opportunities are enforced.). By request, birthdate can be replaced with other age-related options - but if the system does not know the exact date of birth, then age-restrictions for signing up for opportunities cannot be used successfully.)

3. You can display and/or require a variety of addresses and phone number fields, and decide which are required.

4. The email address becomes your user login and is required. The email address and password is how the volunteer will log into the site in the future.

5. Demographic and volunteer options, and volunteer availability grid are optional during registration. Click on the + symbol to open up these options. (or choose not to display them when you configure the page..

6. The terms and conditions page linked here can be customized to include local terms and conditions.

7. Clicking submit completes the registration process, and sends a confirmation email to the volunteer. In this case, because the ARS is enabled for this registration page - the Next button takes you to the next page(s) of the custom registration process that you configure.   At the end of the registration process, a "Success" page is shown, which can be customized to delivering messaging about what the Volunteer can do now that they are registered!

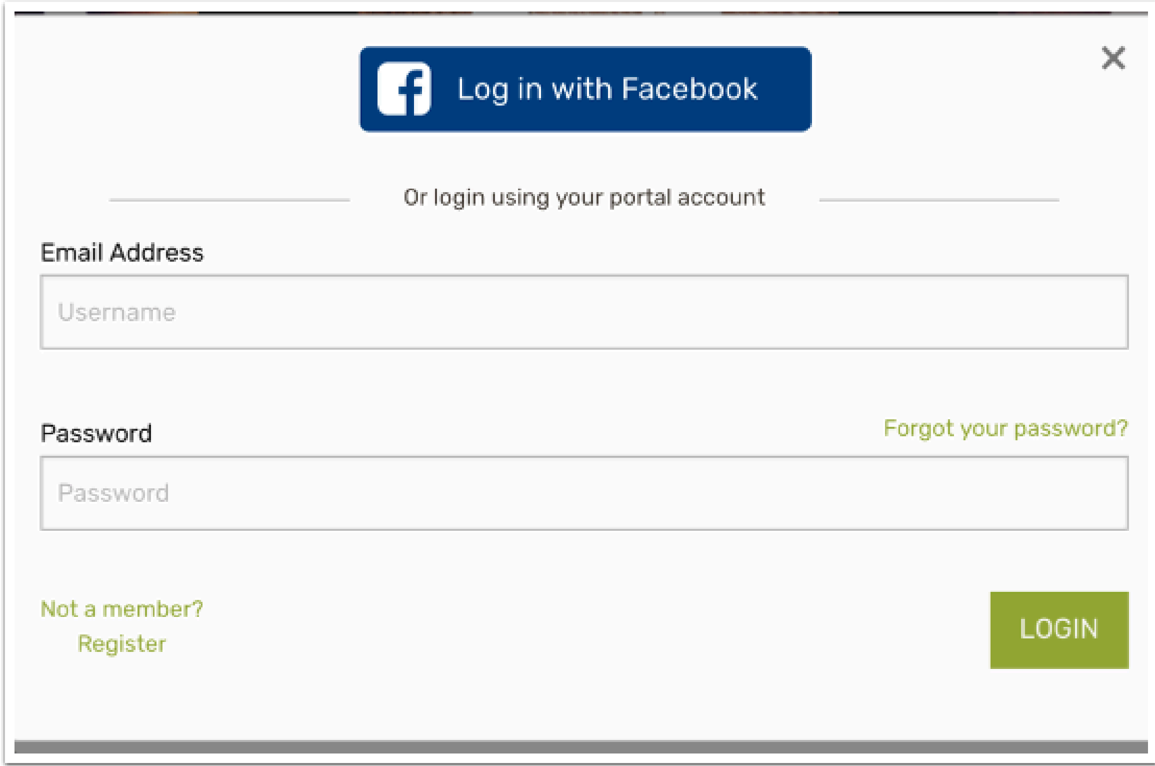
Social Login

By default, Social Login is enabled allowing volunteers to register via Facebook and/or login via their facebook account. (If you do not wish to allow login with facebook - please open a help desk ticket and request that it be disabled.

Note: Logging in with LinkedIn is optional, and can be activated for your account by request.

Here's how a volunteer can associate their Facebook account with Hands On Connect and be able to login via Facebook:

When social login is enabled on your site - you'll see the "Log in with Facebook" button on the login widgets.

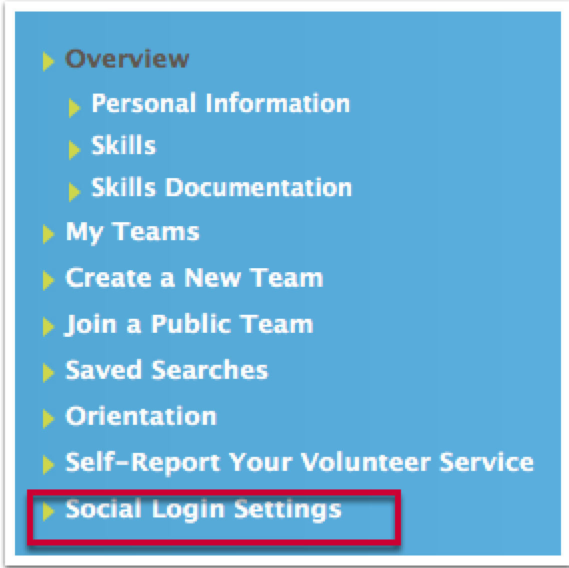


How to link your HOC login with your Facebook Account

Before being able to use the Login with Facebook button, a volunteer must associate their HandsOn Connect account with your Facebook account. To do this a user should do the following:

1. Log into HandsOn Connect normally.

2. In "My Account" click on the new menu option called "Social Login Settings" (or 'Social Login") in your navigation. If you do not have this in your navigation, create a menu item that links to /social-connections

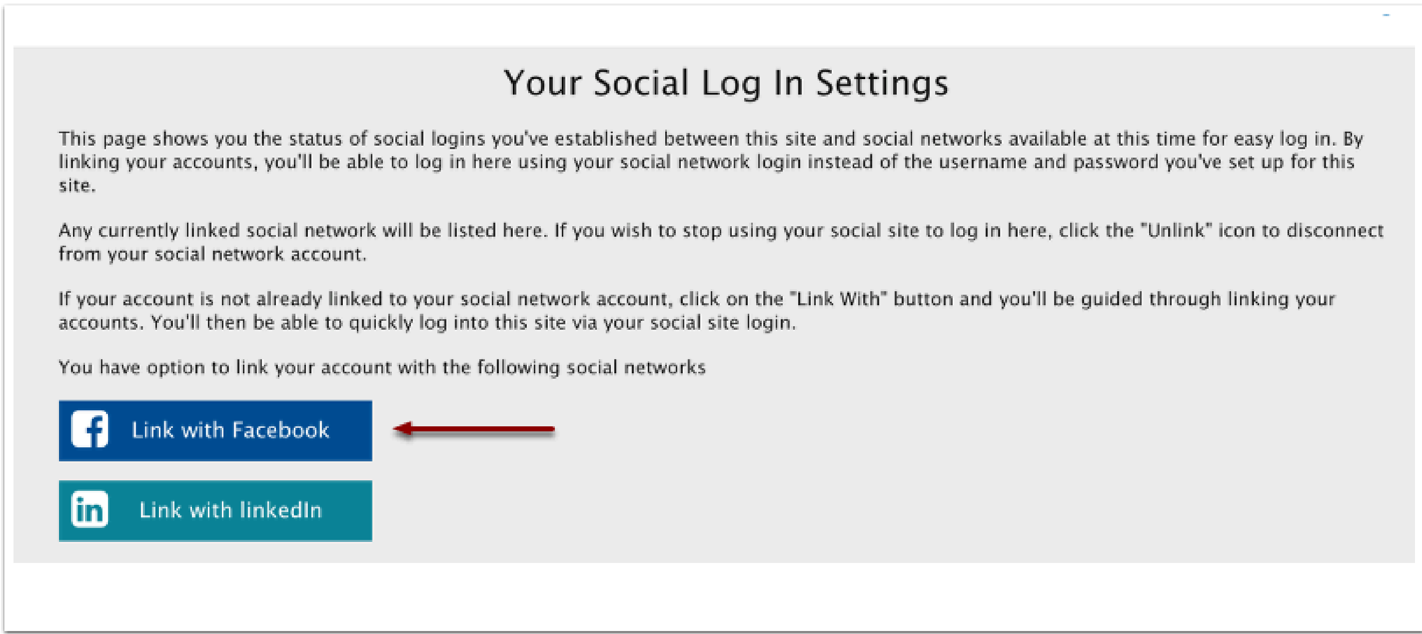


Social Login Settings page

After reading the info, users click the "Link with Facebook" button to associate their accounts:

They'll be walked through the steps to link their facebook account to their HandsOn Connect account.

Once that's been done once. They'll be able to login by clicking on the "Login with Facebook" button on the login widget on your site!



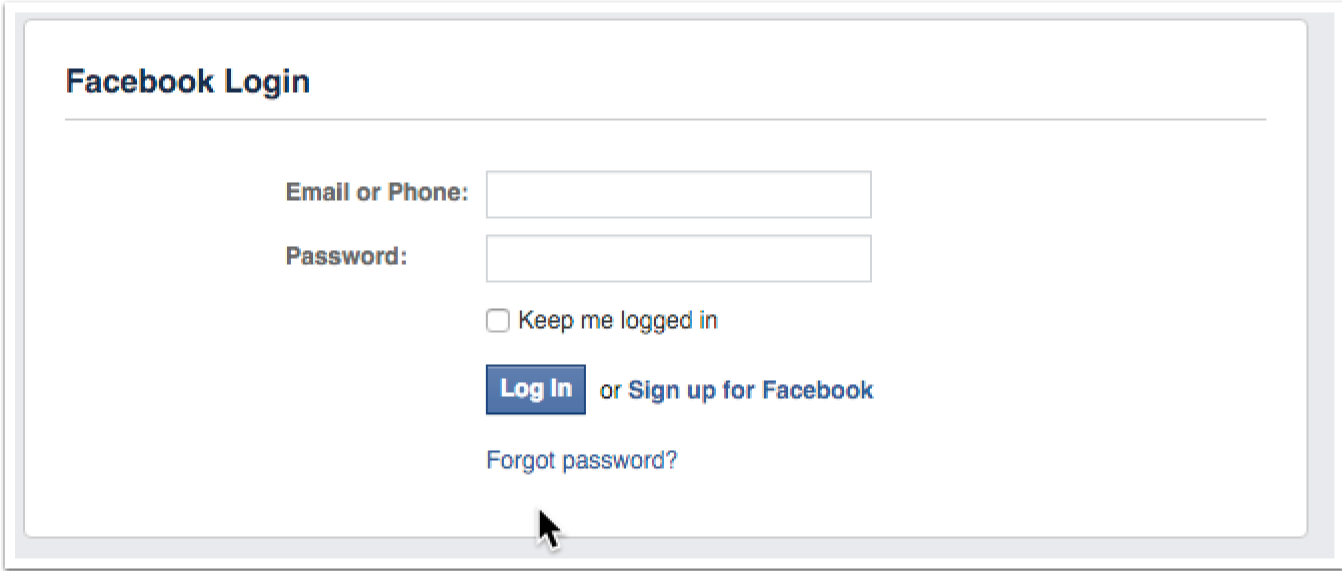
Clicking on "Link with Facebook" will take the user to a Salesforce page to create an Open ID Connect account"

If they are not already logged into Facebook when they click "Link with Facebook" - they'll first be taken to a Facebook login page.

If they are already logged into Facebook they will be taken directly to the screen shown below.

Clicking on "Link Account" will complete the process and the volunteer will now be able to use the "Login with Facebook" button in the login widget for future logins!

Logging in via Facebook



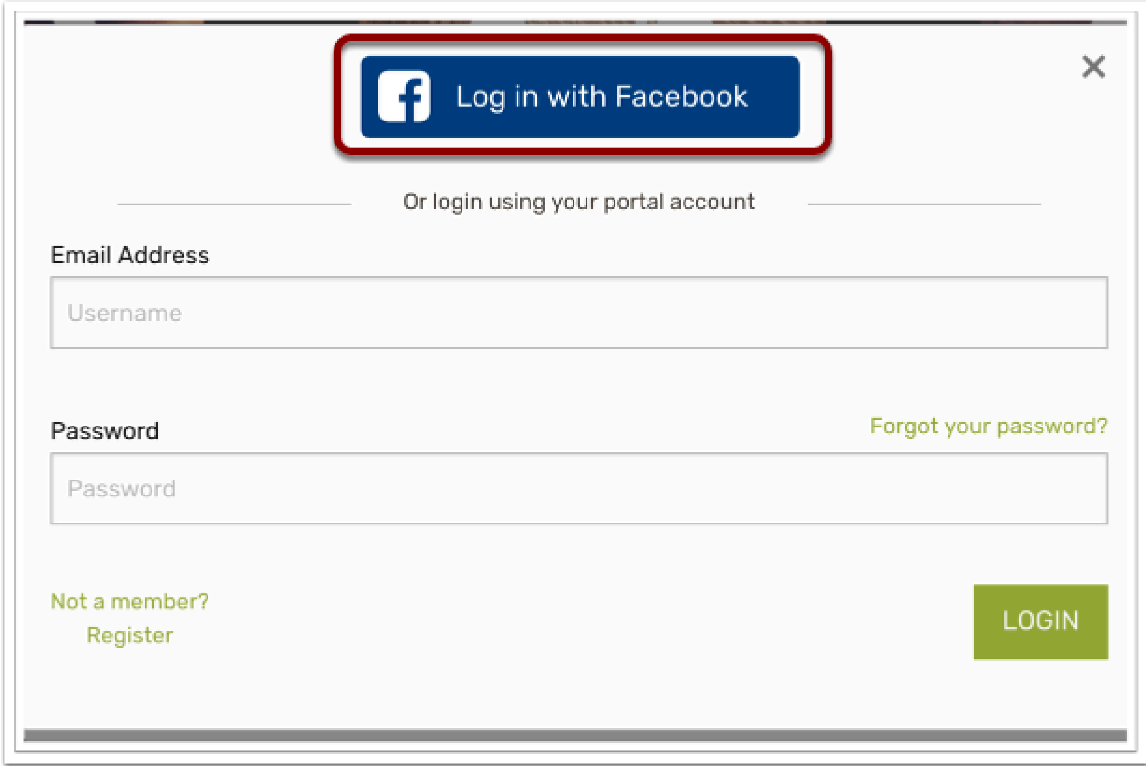
Once a user has associated their HandsOn Connect account with their Facebook account, they'll be able to use the new Login with Facebook button on the login widget.

Clicking on Log in with Facebook on the login widget will do one of two things:

- If you are not currently logged into Facebook on your computer, you may be asked to log into your Facebook account.
- If you're already logged into Facebook, you'll be taking to the "Continue as ...." screen.

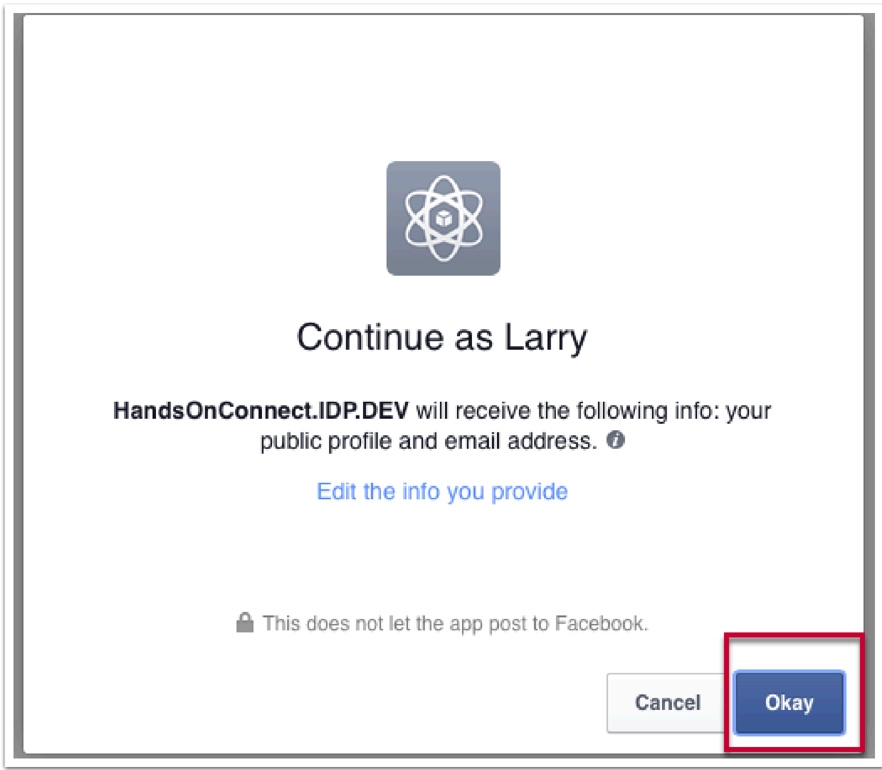
Logging in via Facebook after you accounts are linked

Now that your accounts are linked - you'll be able to click on the Log in with Facebook button and quickly be logged into HandsOn Connect with no password required.

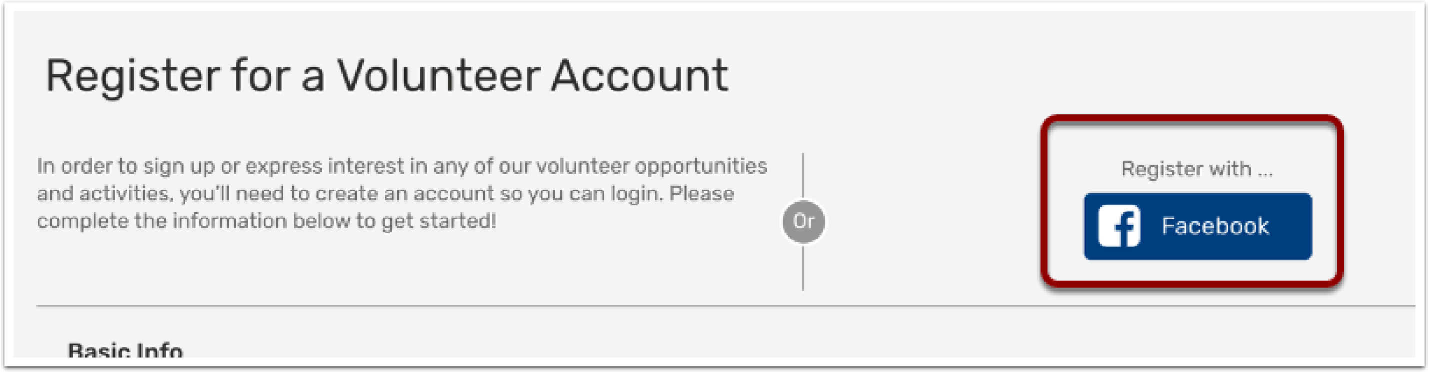


Continue as confirmations Screen

You'll be presented with a "Continue as...." screen. Click Okay and you'll be logged in to HandsOn Connect.   That's it!



You can also Register via Facebook.

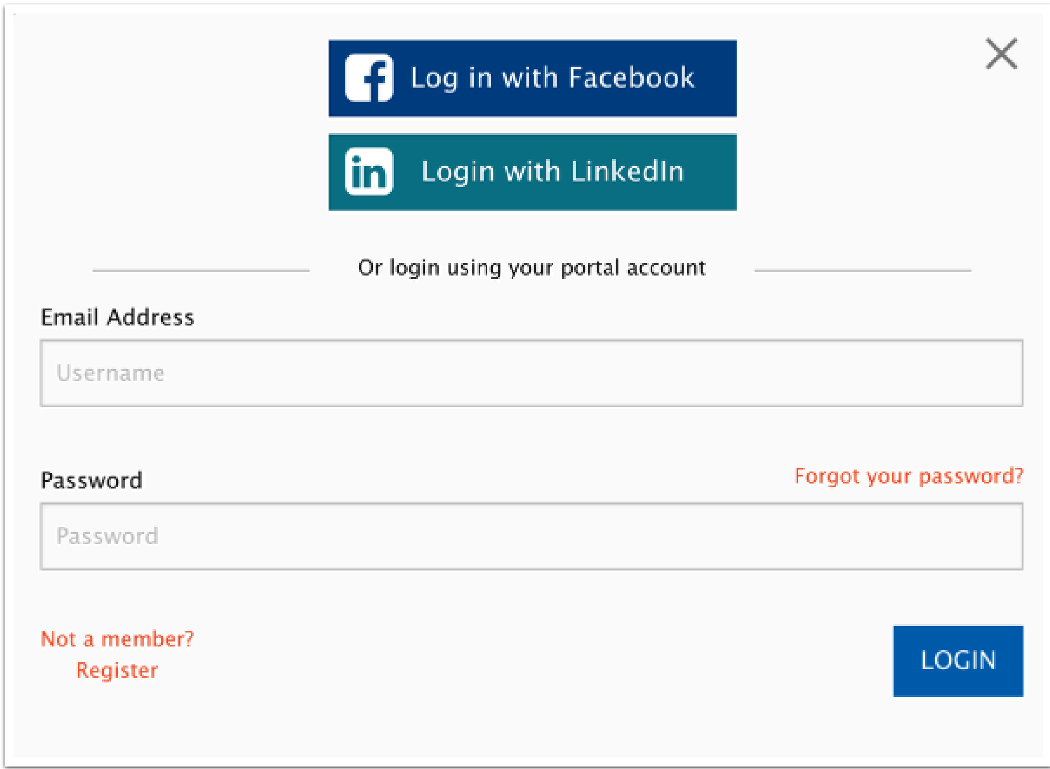


Registering via Facebook pre-populates many of the fields in the registration form with the info that Facebook has. To complete registration you'll need to fill in any other required fields.

Login (or register) using Linked In

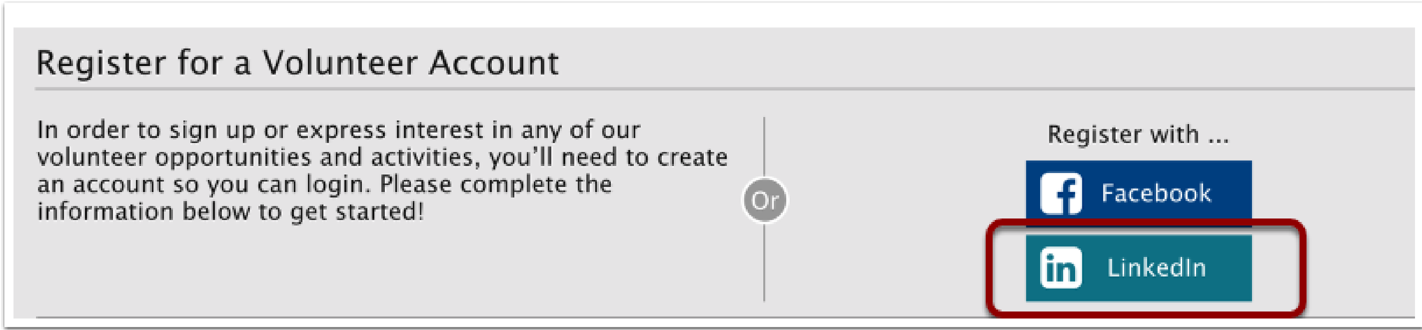
Login with LinkedIn is not enabled by default - but if you wish to add this as another social login option - open a support request and we can activate it for you.

When enabled, the login page will show the following:

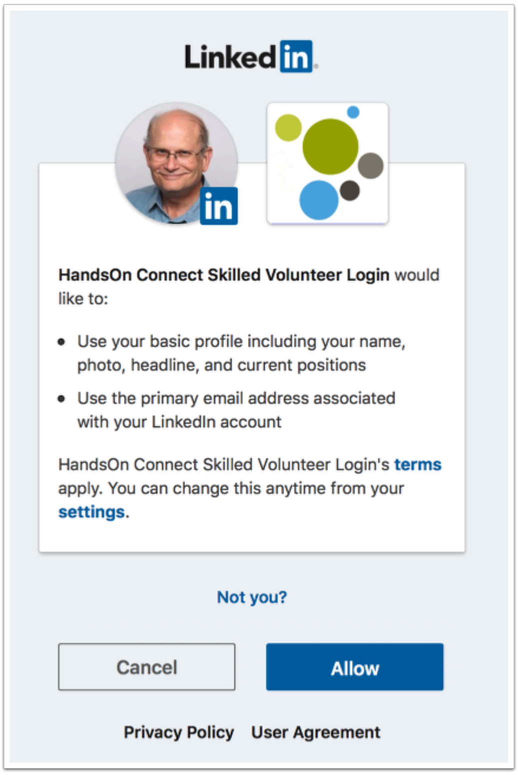


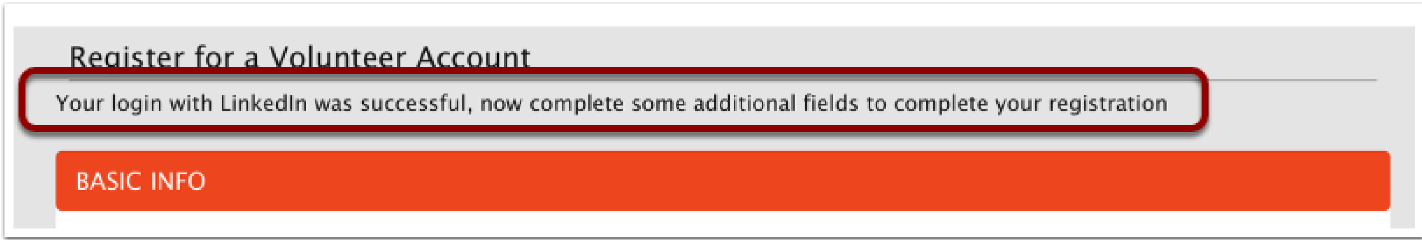
Volunteers will have two options in Social Log In Settings:

Registering with Linked In



Registering with Linked In presents the following:


Linked in
HandsOn Connect Skilled Volunteer Login would like to:
Use your basic profile including your name, photo, headline, and current positions
Use the primary email address associated with your LinkedIn account
HandsOn Connect Skilled Volunteer Login's terms apply. You can change this anytime from your settings.
Not you?
Cancel
Allow
Privacy Policy
User Agreement

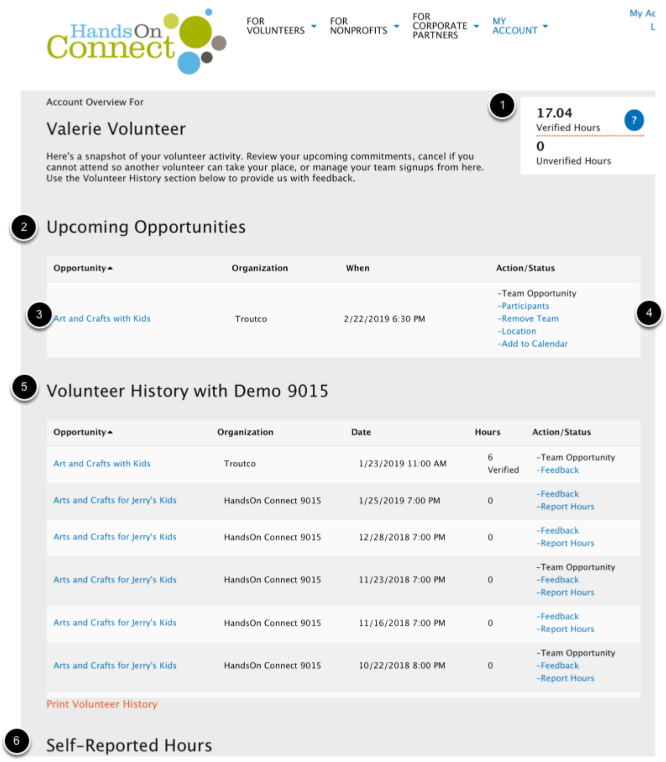

Register for a Volunteer Account
Your login with LinkedIn was successful, now complete some additional fields to complete your registration
BASIC INFO

Managing Your Volunteer Account

Logging in and Managing your Volunteer Account

Once a volunteer has registered on the site, they are given immediate access to their volunteer account. The "Become a Member" link changes to a "My Account" link and this gives the volunteer access to manage their volunteer account.

Overview



When you first login you will be taking to the Volunteer Account overview Page. Here you'll see:

1. A total of all your verified hours of service, and your 'total hours' which includes self-reported hours that have not yet been verified.

2. Upcoming Opportunities -- a scrollable, sortable list (click on column headers to sort), of your upcoming opportunities.

3. Link to the opportunity detail page

4. Info on your sign-up status for your upcoming opportunities. This will include some or all of the following:

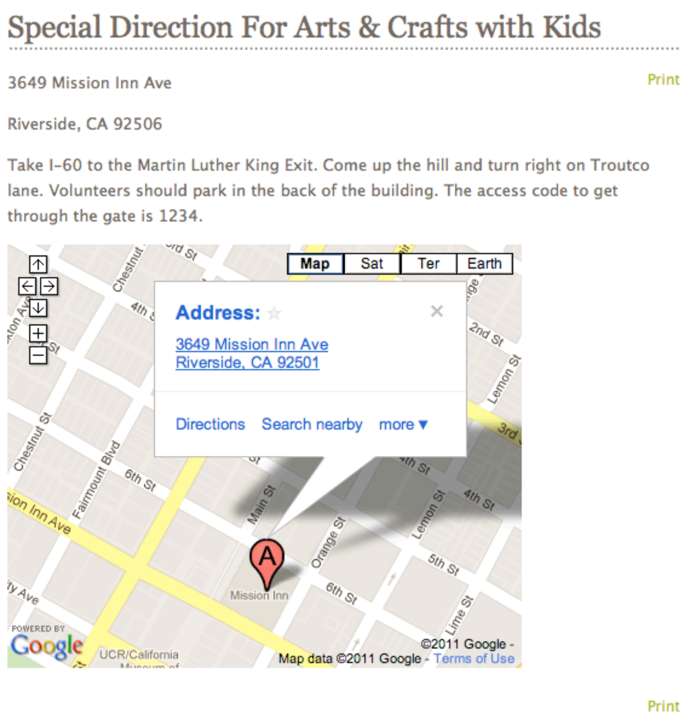
- The words "**Pending Approval**" -- will appear if you have expressed interest in an opportunity but have not yet been confirmed by the Opportunity Leader.
- "**Remove me" link** (to cancel and remove yourself from attending the opportunity)
- The words "**Team Opportunity**" (if you are signed up as part of a team)
- "**Participants"** link. Appear if you are signed up as the team captain of a team. Clicking on this allows you to see who on your team is signed up, and alter the participation list.
- "**Remove Team**" link. Appears if you are signed up as the team captain and wish to cancel the entire team from attending.
- "**Location Details**" hyperlink. Will open a page with location information and a google map to the volunteer opportunity.
- "**Add to Calendar**" link. Will allow you to choose your personal calendar type and automate the process of adding it to your personal calendar.

5. Volunteer History - lists all your past connections. Has the following possible Actions / Status:

- **"Team Opportunity"** will indicate if you attended as part of a team
- "**Feedback"** link allows you to give feedback on the opportunity, and rate it on a scale of 1-5 stars.
- "**Report Hours"** link allows you to self-report your hours of service, in situations where the opportunity leader hasn't already verified your attendance.

6. Self-Reported Hours - this section appears in organizations that have self-reporting enabled. It will list all the opportunities a volunteer has self-reported.

Location Details Page



In the upcoming opportunities section there is also a link "Location Details" clicking on this takes you to the Location Details Page.

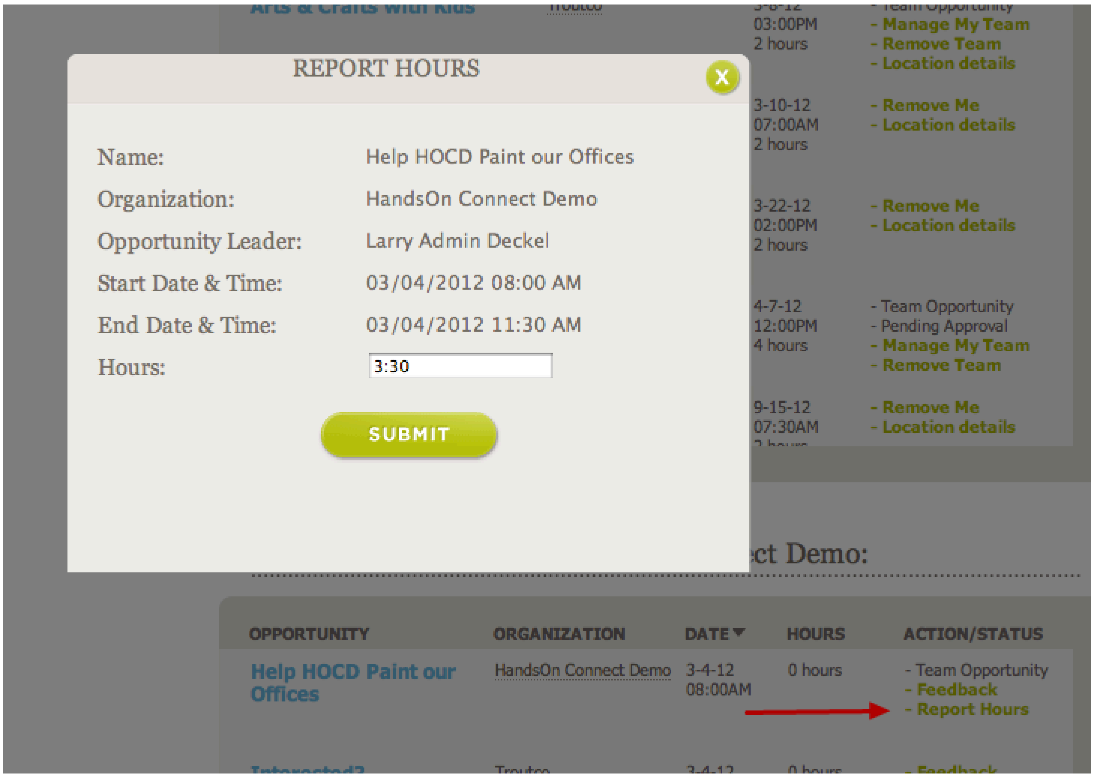
Any information in the "Locations" object will appear here including special directions on parking, transit, etc. Also a working google map will appear allowing the volunteer to get driving directions from any location.

Volunteer History indicates whether or not hours are verified.

For Volunteer Opportunity appearing in Volunteer History, those opportunities where you have had attendance and service verified will appear with the word **Verified** underneath it.

For past service where the Opportunity Coordinator has now yet verified service, volunteers can click on "Report Hours" to self-report their hours.

Self-Reporting Hours for your volunteer history

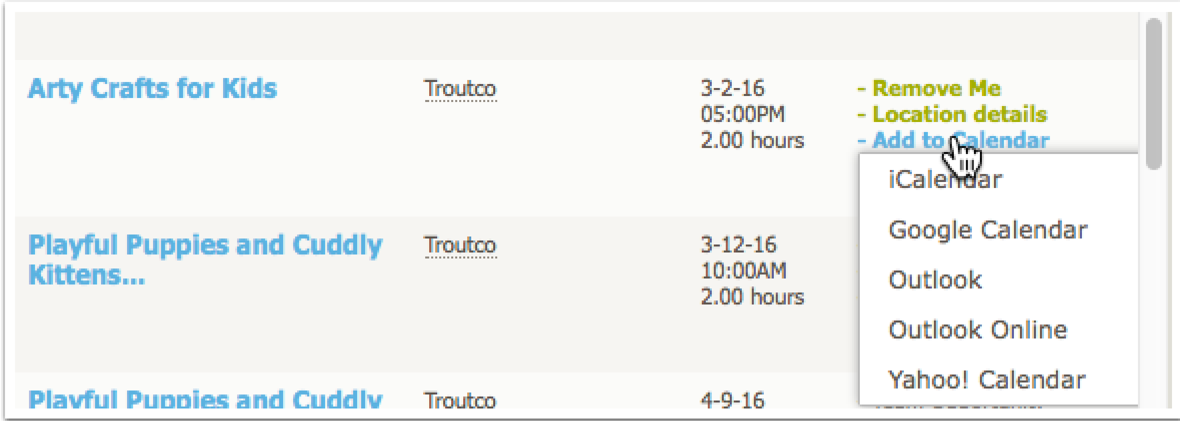


If a volunteer sees that the opportunity coordinator for a past volunteer opportunity has not yet verified their attendance, they can click on the "Report Hours" link and self-report their hours of attendance. This will trigger an email to be sent to the Opportunity Coordinator requesting that they verify the self-reported hours.

Add to Calendar

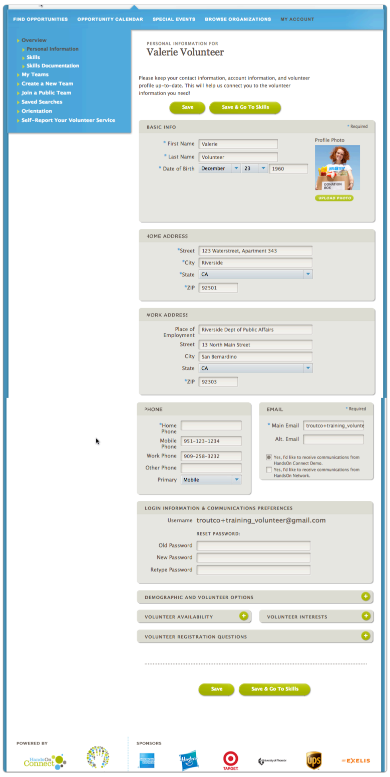
The Add to Calendar option will be presented to you when you first sign up for a "Sign Up" project. The link will appear on the success page. For any opportunities that were express interest, or to get to this link later, you'll find it in your upcoming opportunities for all your confirmed connections.

Click on the link to choose your calendar format:


Arty Crafts for Kids
Troutco
3-2-16
05:00PM
2.00 hours
- Remove Me
- Location details
- Add to Calendar
iCalendar
Google Calendar
Outlook
Outlook Online
Yahoo! Calendar
Playful Puppies and Cuddly Kittens...
Troutco
3-12-16
10:00AM
2.00 hours
Troutco
4-9-16

Personal Information

On this page volunteers can update the personal information that they entered during registration. The system administrator can customized this page, choosing which fields of information the volunteer can edit or require on this page. (See customizing the registration page).



After updating any information on this page, click Save.

Clicking "Save & Go to Skills" which take the volunteer to the skills profile page.

Creating a Skills Profile

Volunteer can create a skills profile that can be used to qualify them for volunteer opportunities that require specific skills.

This skill profile is also used by the site administrators and partner staff organizations to find suitable matches for volunteers with specific skills who they can invite to skill-based opportunities.

Skills

Clicking on the left subnavigation "Skills" in the My Account section of the website allows a volunteer to self-report on their skill levels in a wide variety of areas.

1. They can specify whether they accept invitations to volunteer for opportunities that have been matched for their skills

2. They can specify how far they are willing to travel to use those skills for a volunteer opportunity

3. They can expand any of the Skill Categories to reveal the specific skills within each category

4. They can use the slider to indicate if they have that skill, and to what extent: Low, Medium, High or Expert

5. They can optionally click on 'Add Training/Certification' to add documentation about the skill

Custom skills categories added locally to the default list will always appear alphabetically AFTER the default categories

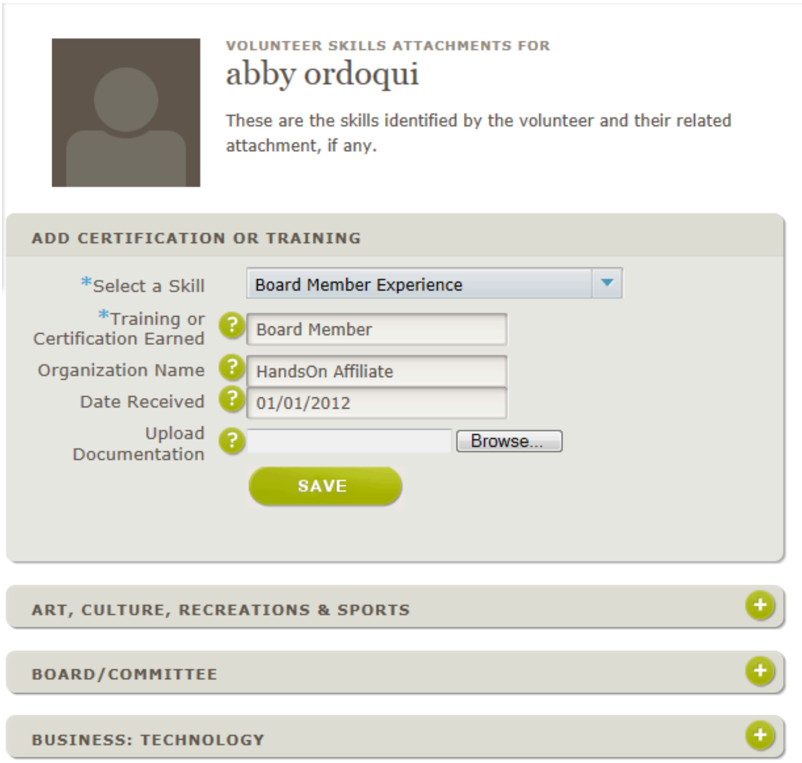
In this instance, the custom skill category "Event Management" was added to the default list. So it appears after the last default value "Volunteering Management"

Adding Skill Documentation (Training / Certification)

Volunteers can upload files providing physical evidence and details of training and certifications that will be kept as part of your skills database.

Adding a document to a skill

When a volunteer provides a skill rating, they are given the option to provide additional information by clicking on the "Add Training/Certification" button.



When a volunteer clicks on the "Add Training/Certification" button they are taken to a new page where they can provide that information.

Select a Skill - provides a dropdown and is pre-populated with the skill that they were rating when they clicked on the "Add Training/ Certification" button.

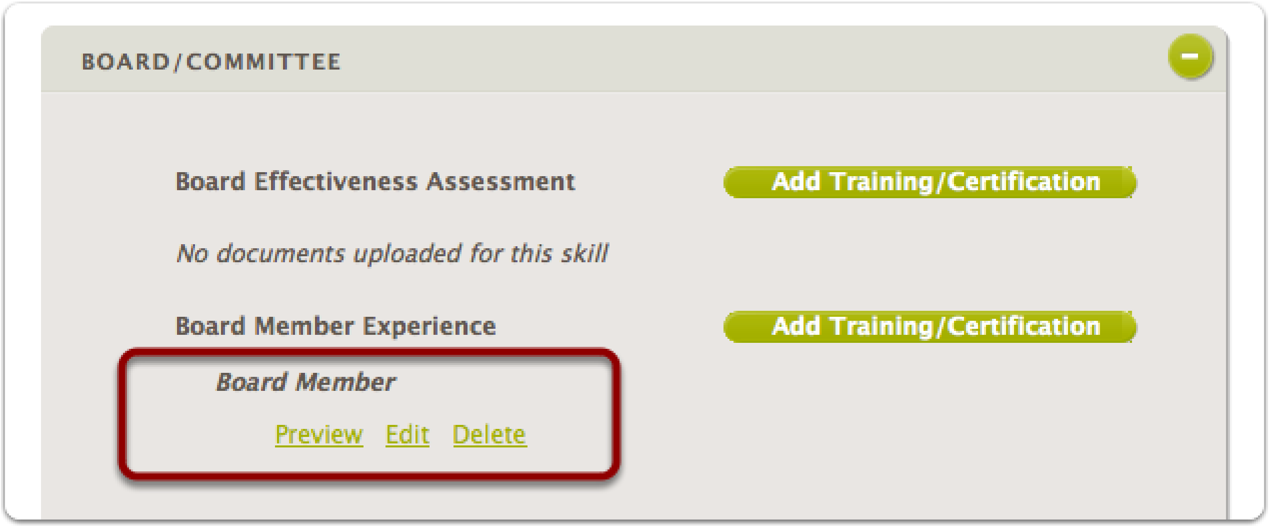
Training or Certification Earned - Volunteers must provide the name of the certification or training earned. It doesn't have to be the official name, it can be descriptive such as "Board Member" or "Substitute Teacher"

Organization Name - Volunteers can provide the name of the organization, school or business that provided them the training or experience.

Date Received - Volunteers can provide the date that they received the certification or started the experience.

Upload Documentation - Volunteers can provide scans of their certifications or trainings. Note: Only one file can be uploaded. Files must be smaller than 10mb and be in the following formats (.jpg, .pdf, .doc, .txt, .png).

After a document has been uploaded - the volunteer can view, update, or delete it by looking at the specific skill



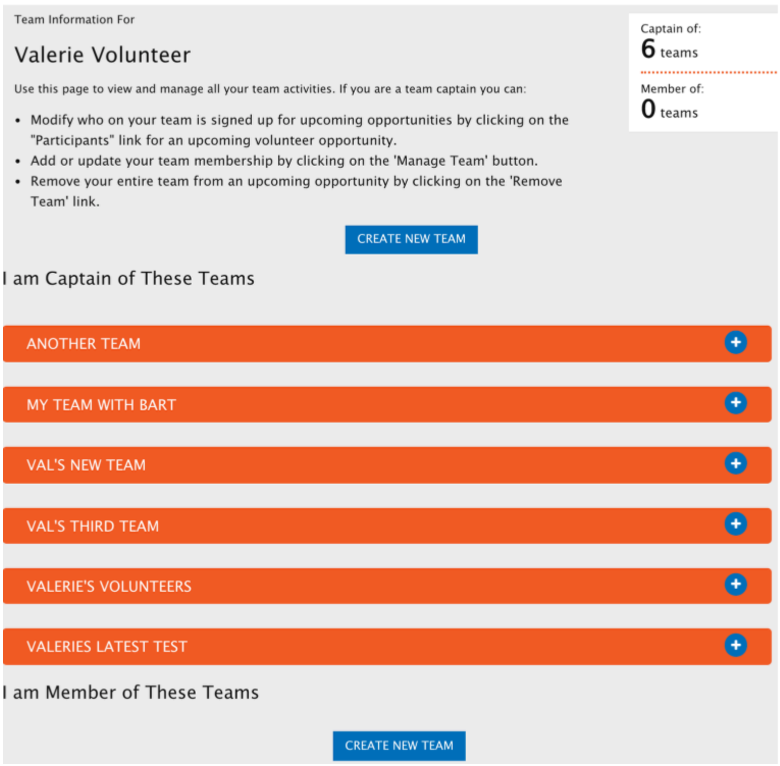
Creating Volunteer Teams

Volunteer Teams make it possible for one person, the Team Captain, to sign-up others for volunteer opportunities. This creates an easy way for a family to volunteer together (and makes it possible for a parent to sign up children under the age of 13 for age-appropriate opportunities since federal law does not allow accounts on the site for those under 13).

Teams are also used by corporate groups (where one person wants to handle the sign-up of an entire group of employees) and college clubs.

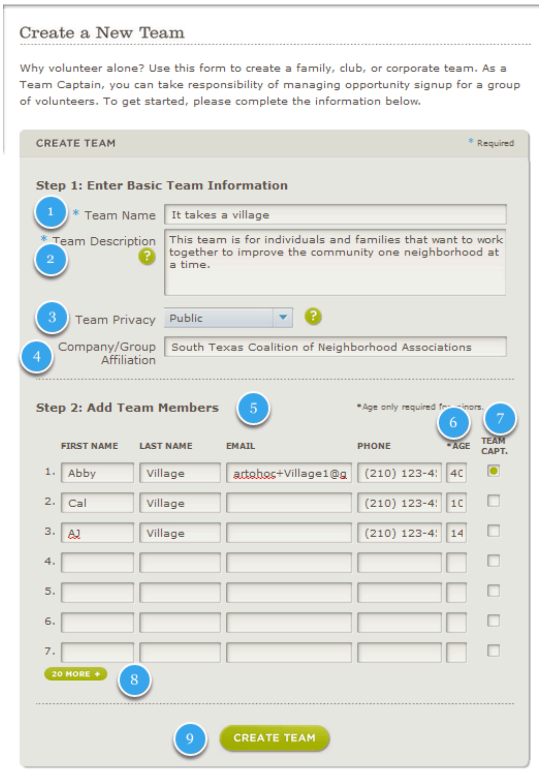
Teams can be created either during opportunity sign-up, or they can be created from the /myteams page in your navigation.

The Teams Dashboard



The My Teams page lists all the teams you are team captain of, as well as teams where you are just a member.

Create a New Team



1) Team Name- Every Team must have a name, but it doesn't have to be unique. If the group you a creating a team for didn't provide you one you can use the name of the Company or Group that they are associated with or if they are a family, then use the " The [surname] Family Team" or something similar.

2) Team description- This is required, but can simply be something along the lines of "Employees or Members of _______". If this is going to be a public team then the description is shown with the team and helps other volunteers learn more about the team to see if they are interested in joining so the descriptions should provide more details, such as how often they volunteer, is it intended for residents of a a specific neignborhood or students for a specific school, etc.

3) Team Privacy- This can be set as "Public" or "Private". If you are unsure, set it to Private and it can be modified later.

4) Company/ Group Affiliation- This field is optional,but does have implications in the next section. If a group or company name is entered in this field then you only need to provide contact information for the other team captains. If there is no company or group affiliation then you will need to enter at least an email address or phone number for each team member.

5) Add Team Members- This is where you list all the team members associated with this team. If you have not provided a company or group affiliation, you will need to provide at least one form of contact information for each member added. Emails must be unique, but phone numbers do not need to be. If an email is provided a notification is sent to the individual with either that:

a) They have been invited to participate in a project as a member of _______ team, and they are invited to confirm their participation and register on the site.

b) If they are already registered, then they receive an invitation to confirm their particpation in the team.

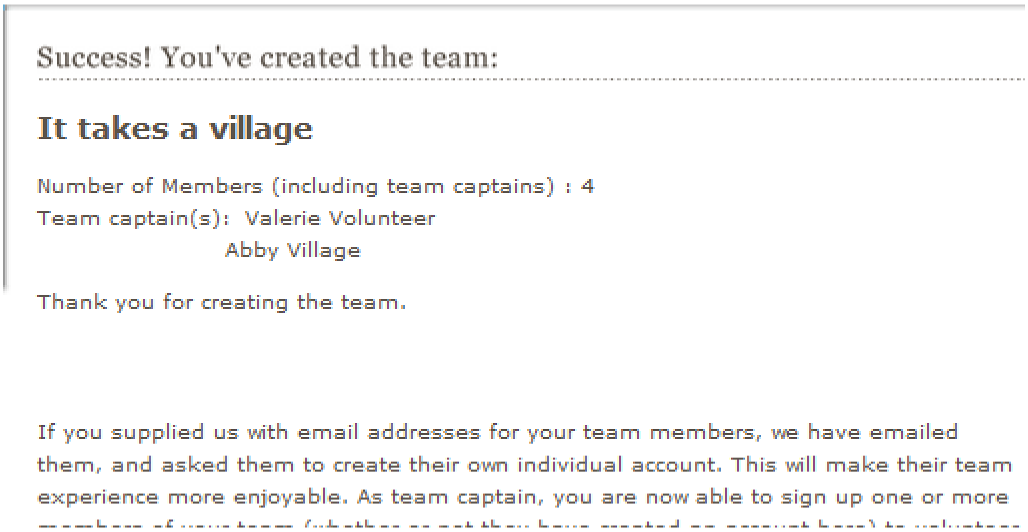
NOTE: Even if they don't ever confirm their participation in the team, the team captain can still manage them as a member of the team and sign-up that individual for projects that the team registers for.

6) Age- This field is only required if the volunteer is a minor, but helpful for all volunteers.

7) Team Captains- By default, the contact that is creating the team is identified as a team captain. You can make other members a team captain by clicking on this box in their row. Team Captains have the added permission of being able to add members to the team, sign-up the team for volunteer opportunities, modify the team's participation, and edit and modify the team and team members. An e-mail address must be provided in order to be a team captain. There is no limit to the number of team captains.

8) 20 more +- Click here to add more rows of team members

9) When you have completed filling out all the information click "Create Team"

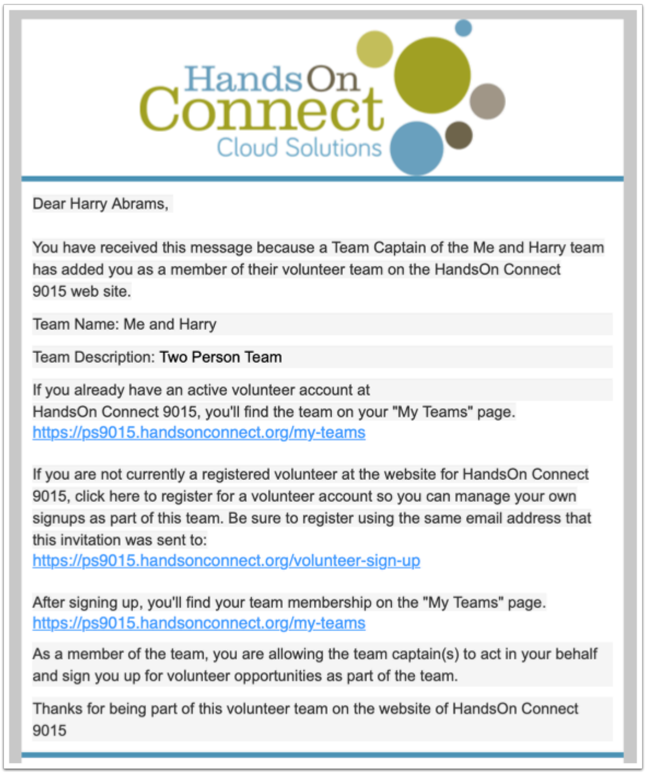


Make sure to confirm that the right number of members were added and that the right members are identified as Team Captains.

The rules above are HandsOn Connect's default team creation rules. They provide the most flexibility in creating teams. However, if you wish to change which fields are present in the team signup form, and/or require (or not require) certain fields) the support team can customize the team creation process for you. Just open a support ticket and explain what changes you wish to make.

Emails are sent to new team members

Each team member you add (where you've included an email address), will be sent an email informing them that they have been added to your team.


HandsOn Connect Cloud Solutions

Dear Harry Abrams,

You have received this message because a Team Captain of the Me and Harry team has added you as a member of their volunteer team on the HandsOn Connect 9015 web site.

Team Name: Me and Harry

Team Description: Two Person Team

If you already have an active volunteer account at HandsOn Connect 9015, you'll find the team on your "My Teams" page.
https://ps9015.handsonconnect.org/my-teams

If you are not currently a registered volunteer at the website for HandsOn Connect 9015, click here to register for a volunteer account so you can manage your own signups as part of this team. Be sure to register using the same email address that this invitation was sent to:
https://ps9015.handsonconnect.org/volunteer-sign-up

After signing up, you'll find your team membership on the "My Teams" page.
https://ps9015.handsonconnect.org/my-teams

As a member of the team, you are allowing the team captain(s) to act in your behalf and sign you up for volunteer opportunities as part of the team.

Thanks for being part of this volunteer team on the website of HandsOn Connect 9015

Viewing or Editing Volunteer Teams and Participation

There are two things you typically do with an existing team:

1) Add or modify the people who are are your team. You do this by clicking on "Manage Team"

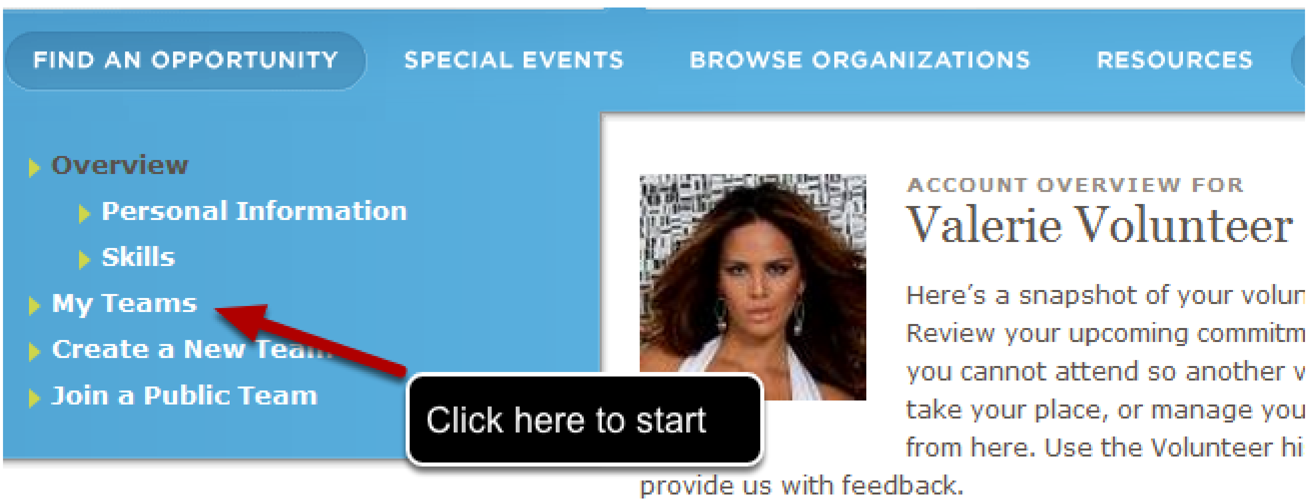
2) You want to change the sign-up of your team for a particular volunteer opportunity by removing some team members and possibly signing up others. You do this by clicking on the "Participants" Link for a particular volunteer opportunity.

If you want to add new team members AND sign them up -- you first have to add the team members through "Manage Team" - AND then be sure to click on "Participants" and add those new team members to the list of participating team members for one or more opportunities your team is signed up for.

Adding a new team member to the team roster is not the same thing as signing that team member up to participate in an opportunity.

A team is a group of people you manage. For each opportunity you can sign up one or many team members to participate for that opportunity!

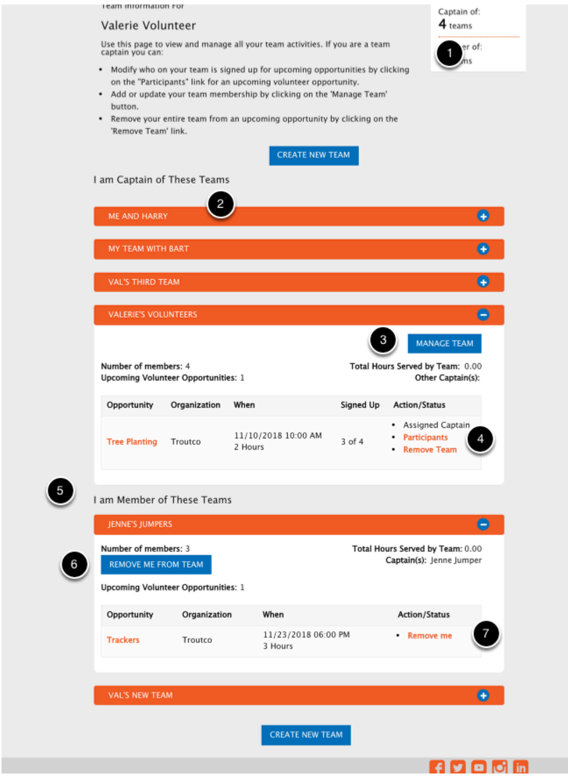
View My Teams



My Teams Page

On this page you can create new teams, edit existing teams, or manage your team member's participation in an opportunity you are already signed up for.

Click on the + sign to expand the info about each team.



1) Member of/ Captain of-   Provides a summary of the your number of teams you are associated with.

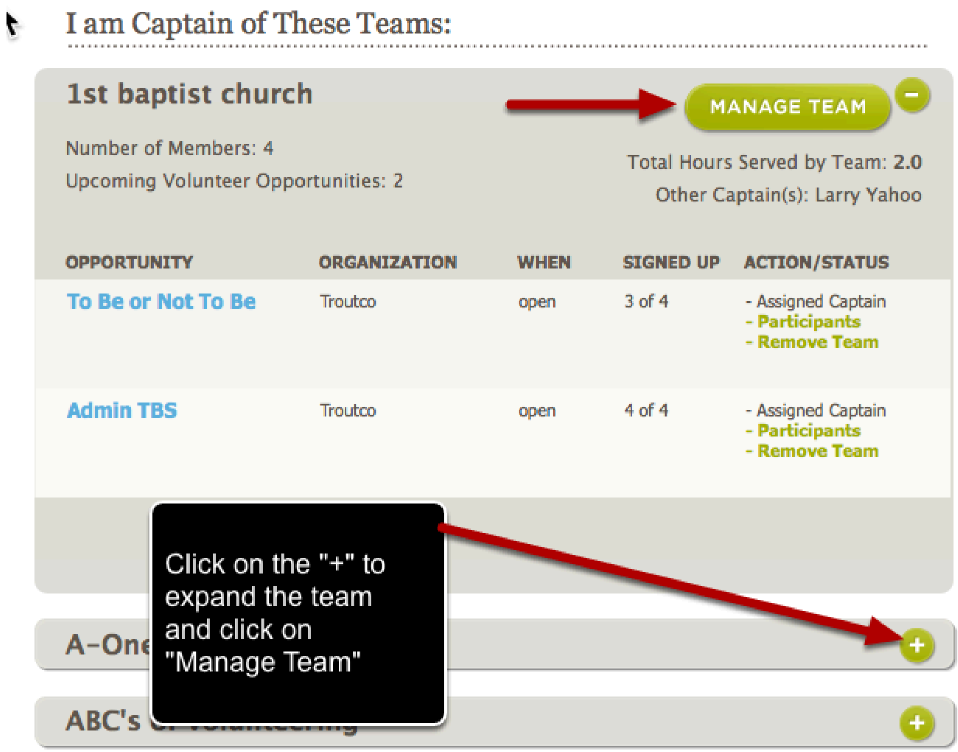
2) I am Captain of- Lists all the teams that you are a captain for and allowed to manage or sign-up for opportunities

3). Click on MANAGE TEAM to add (or remove), or edit who is on your team roster.

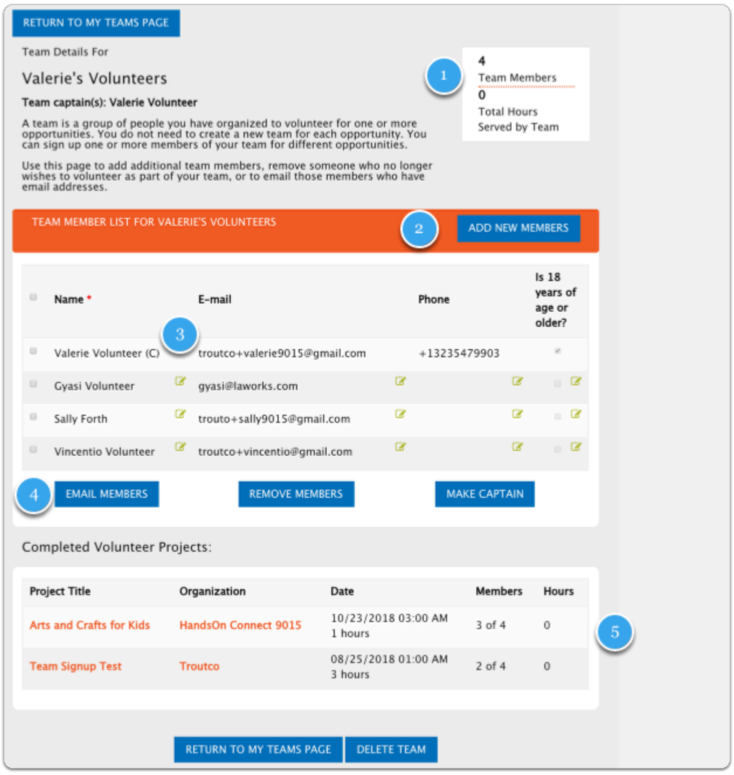
4) Click on "Participants" to edit the team members who are signed up for the listed opportunity.   Or click on "Remove Team" to remove all registered team members from the opportunity you've signed them up for.

5) I am a Member of- Lists the teams that you are a member of and allows you to remove yourself from the team (6). It also shows you the opportunities that you are signed-up to participate in as a member of this team and provides you the opportunity to remove yourself from the volunteer opportunity (7)

Manage Team Page



You can click on the + sign to see details of teams where you are the captain and have additional options.



1. This section has summary information about the team

2. Click on "Add New Members" to add additional members to your team. (Note: Adding them to the team roster does not sign them up for volunteer opportunities. You'll need to go back to the My Teams page and click on Participants, to add your new team members to the opportunity sign-up.

3. You can edit existing team members info here IF they have not yet registered themselves on the public site. (i.e. you an add an email address to a team member you previously didn't have an email for!)

4.   You can select team members using the check box to the left of their name, and then Email the selected team members, Remove them from the team if desired, or promote someone to a captain.   (Note: Captains must have an email address!)

5.   You can see the team's history in this section.

Detailed information on the team itself (not the team's signups for upcoming opportunities) - can be found by clicking the **Manage Team** button.

1) Team Members and Hours Served-   Provides a quick summary about the team

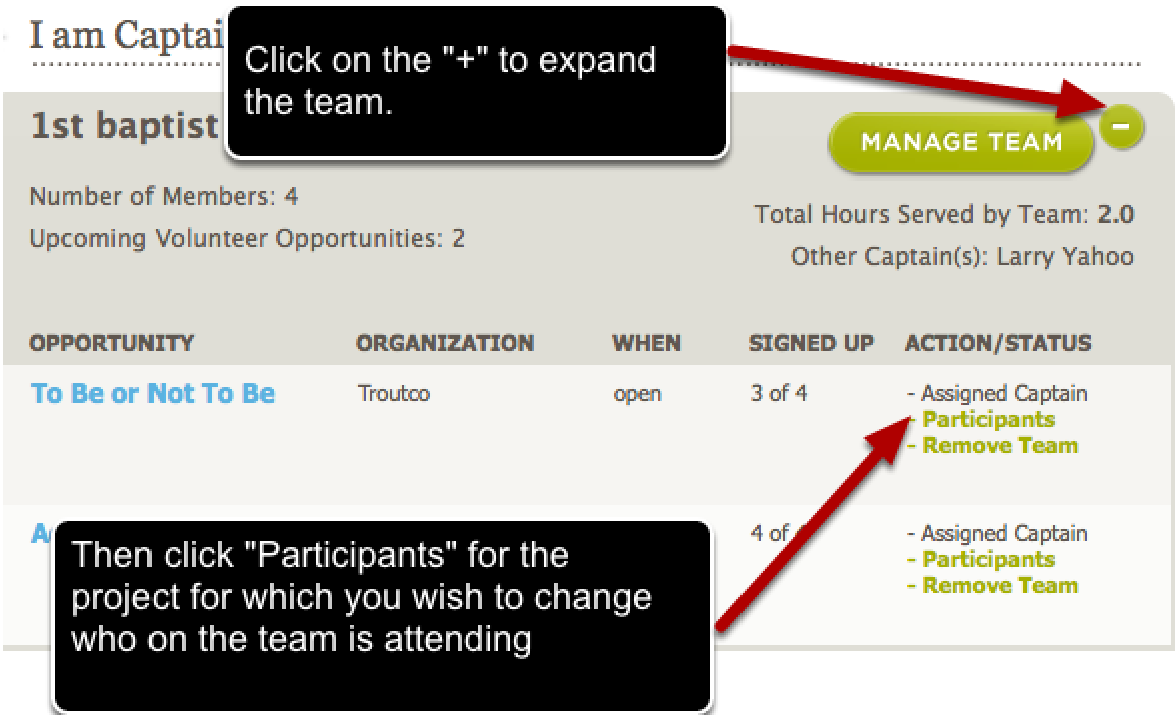
2) Team Captains- Lists <u>all</u> the team captains for the team

3) New Member- When you click on this button, a window opens allowing you to add new members as you did when creating a team. Please note that if you do not have a company or group association with this team, then all new team members must have an e-mail address and/or phone number. Also, age must be provided for minors, but it recommended for all team members. And to mark someone as a team captain, you must provide an e-mail address.

4) Email Members, Remove Members, Make Captain- By clicking on the box box to the left of the member's name, you can perform any of these three options. Remember, to make someone a team captain they must have an e-mail address.

5) Completed Volunteer Projects- Shows you the history of the team's participation, regardless of your partcipation in that project.

Managing Participation



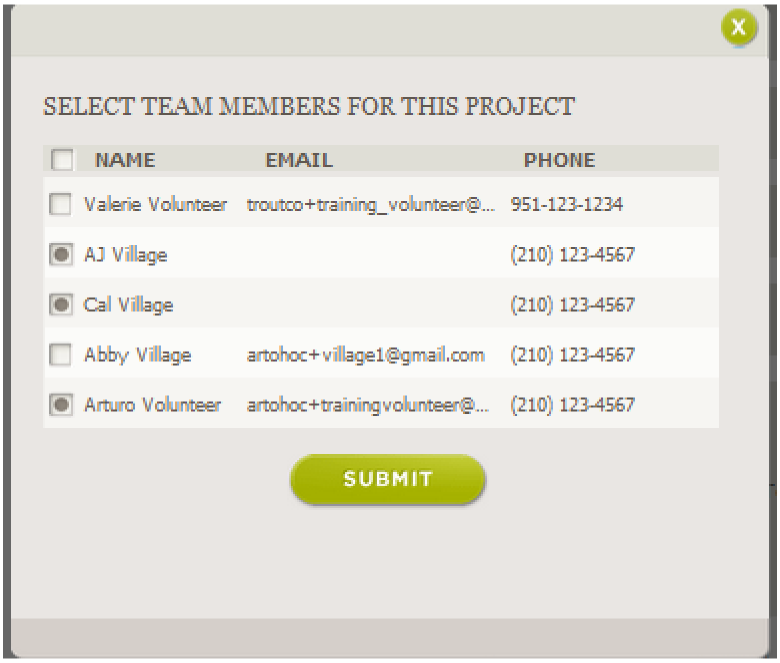
When you click on "Participants" a window opens on the screen with a list of all the team members.

The members that are currently participating will have the box to the left of their name marked, while those that aren't will not.

To add a team member to this project, simply click on the box to the left of their name. If there is still space available for the opportunity, they will be added when you click submit.

To remove a team member from this project, simply click on the box to the left of their name to remove the mark.

After making all the modifications, click "Submit."



You will then see who is currently signed up to participate as part of your team, and can remove or add team members to this opportunity as desired.

NOTE: If space is tight on an opportunity - we recommend REMOVING team members from the opportunity first, Submitting it-- thereby freeing up space . Then modify participation again and sign up others. Because the removals may take place at the same time as the signups -- you may be told there isn't sufficient space to sign up the new members.   (because the system hasn't updated the removals yet).

Viewing your saved Searches

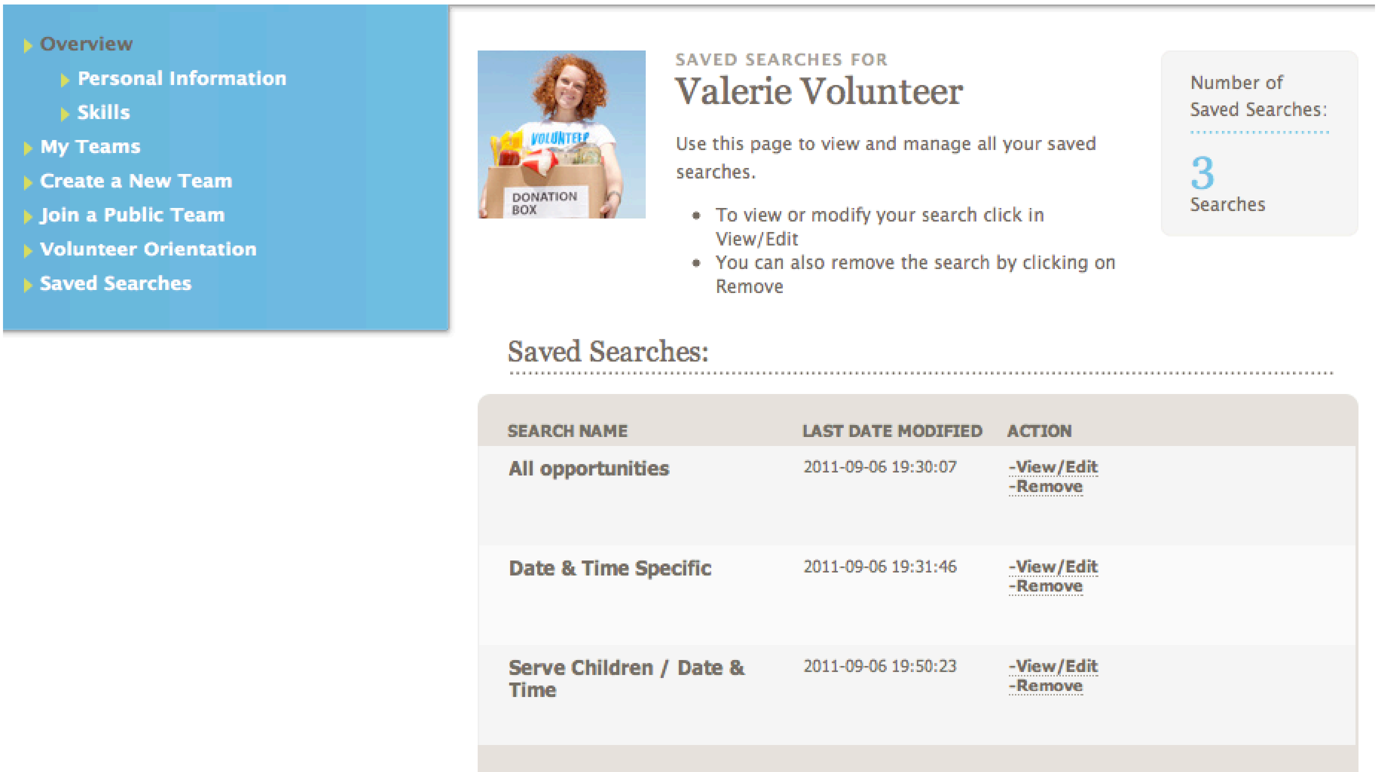
Searches that you've filtered on the "Find an Opportunity" page can be saved after the search has been executed. From the "My Account" tab you can also recall your saved searches and go directly to a search result.

You can also remove saved searches from your account.

Saved Searches

Clicking on the Saved Searches link will open up a list of any searches you've saved from the "Find an Opportunity" page or the Calendar Page.

Saved Searches view



You can view and recall any of your saved searches, or remove them from your saved search list.

Self-Reporting Volunteer Hours

Volunteers Can Self-Report service hours for Volunteer Opportunities that weren't found on your public site. This enables them to keep a complete volunteer history on the site.

Note: Self-Reporting may be on or off for your public site. It can be enabled or disabled by request.

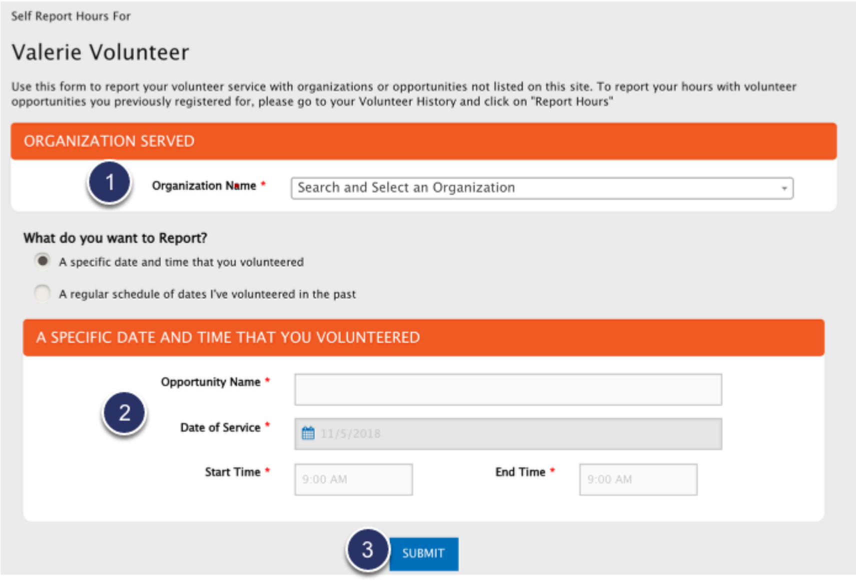
When Self-Reporting is turned on for your organization - you have several options to customize self reporting:

1) You can allow (or not allow) reporting a regular schedule of dates (i.e. Every Monday during the last two months).

2) You can allow or not allow self-reporting to non-partner organizations.

See this article for the various options that are available for self-reporting.

Click on the link for "Self-Report Your Volunteer Service" found in the "My Account" section of the navigation



This takes the user to the system page /self-reported-hours.   (*Note: This page must be enabled by the system administrator using the [CMS system](). It can be placed here in the My Account section (default) Or it can be placed elsewhere in the navigation. It should only be visible as a navigation option when the user is in a logged in state.)*

1. Volunteers can search for a partner organization by typing in the name. If found, simply select the organization your wish to report your service for. If the organization cannot be found, then the text "Can't find your organization? Click here to enter a new organization" appears - and you are prompted to enter the organization name, contact name, and email address.   (Note: this prompt does not appear if you choose NOT to enable self-reporting to outside organizations.)

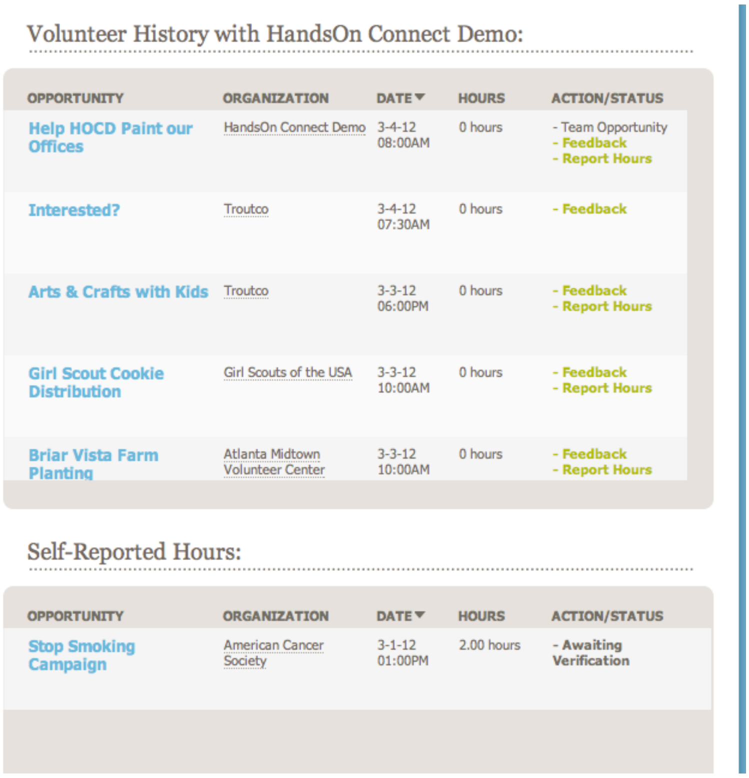
2. Volunteers fill out this section to describe the name, date, start and end time of the opportunity they wish to self-report.

3. Clicking submit creates an opportunity and adds it to the Self-Reported Hours part of the My Account overview, in status "Awaiting Verification"

An email is sent to the organization asking them to verify the hours.

If the organization is not one of your partners, a separate email workflow is triggered (if report to outside organization is enabled).

The Self-Reported Opportunity shows up in the "Self-Reported Hours" section of the Overview page:



Volunteer History with HandsOn Connect Demo:

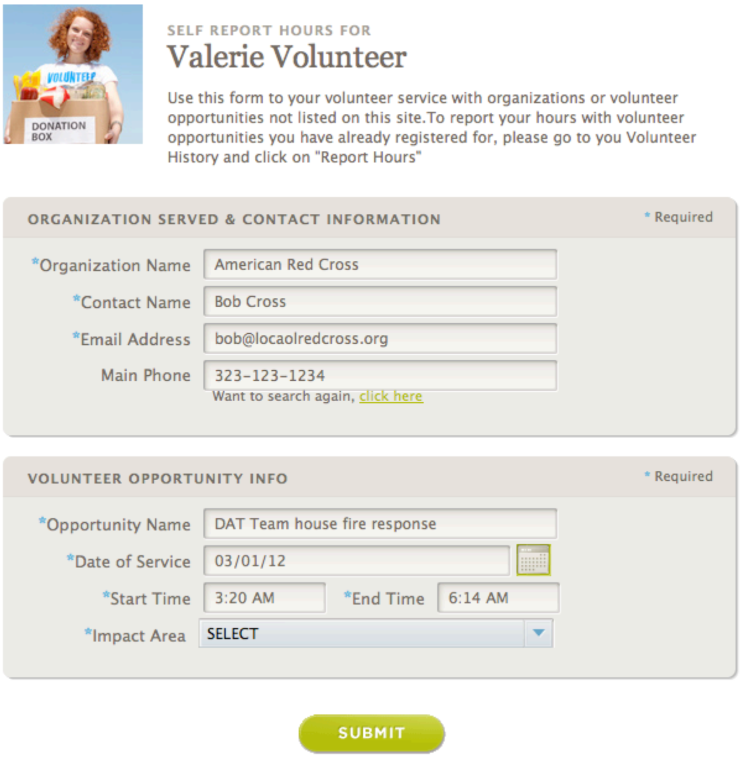
OPPORTUNITY	ORGANIZATION	DATE ▾	HOURS	ACTION/STATUS
Help HOCD Paint our Offices	HandsOn Connect Demo	3-4-12 08:00AM	0 hours	- Team Opportunity - Feedback - Report Hours
Interested?	Troutco	3-4-12 07:30AM	0 hours	- Feedback
Arts & Crafts with Kids	Troutco	3-3-12 06:00PM	0 hours	- Feedback - Report Hours
Girl Scout Cookie Distribution	Girl Scouts of the USA	3-3-12 10:00AM	0 hours	- Feedback - Report Hours
Briar Vista Farm Planting	Atlanta Midtown Volunteer Center	3-3-12 10:00AM	0 hours	- Feedback - Report Hours

Self-Reported Hours:

OPPORTUNITY	ORGANIZATION	DATE ▾	HOURS	ACTION/STATUS
Stop Smoking Campaign	American Cancer Society	3-1-12 01:00PM	2.00 hours	- Awaiting Verification

It remains there while awaiting verification, and when it gets verified it will be moved into the regular "Volunteer History" grid.

Self-Reporting Hours form if you click on "Don't see your organization, click here"


SELF REPORT HOURS FOR
Valerie Volunteer
Use this form to your volunteer service with organizations or volunteer opportunities not listed on this site.To report your hours with volunteer opportunities you have already registered for, please go to you Volunteer History and click on "Report Hours"

ORGANIZATION SERVED & CONTACT INFORMATION
* Required

*Organization Name: American Red Cross
*Contact Name: Bob Cross
*Email Address: bob@locaolredcross.org
Main Phone: 323-123-1234
Want to search again, click here

VOLUNTEER OPPORTUNITY INFO
* Required

*Opportunity Name: DAT Team house fire response
*Date of Service: 03/01/12
*Start Time: 3:20 AM *End Time: 6:14 AM
*Impact Area: SELECT

SUBMIT

The Volunteer enters the name and contact info for an organization that isn't an active partner of yours.

An email will be sent to the entered contact's email address, asking them to consider becoming one of your partner organizations and requesting they verify the volunteer's service.

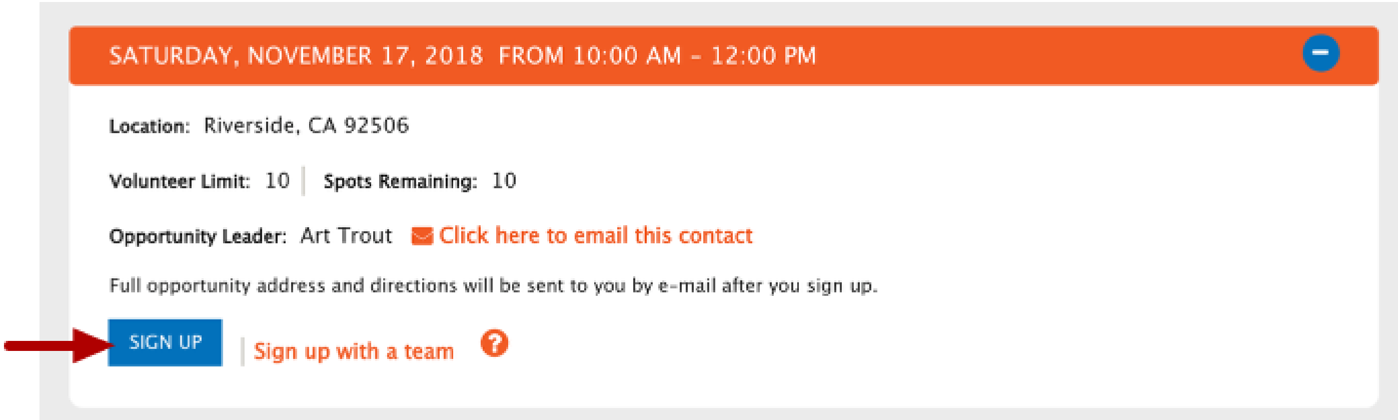
A connection record is created on the back end of the system.

Signing up for Volunteer Opportunities

Signing up for date and time specific opportunities

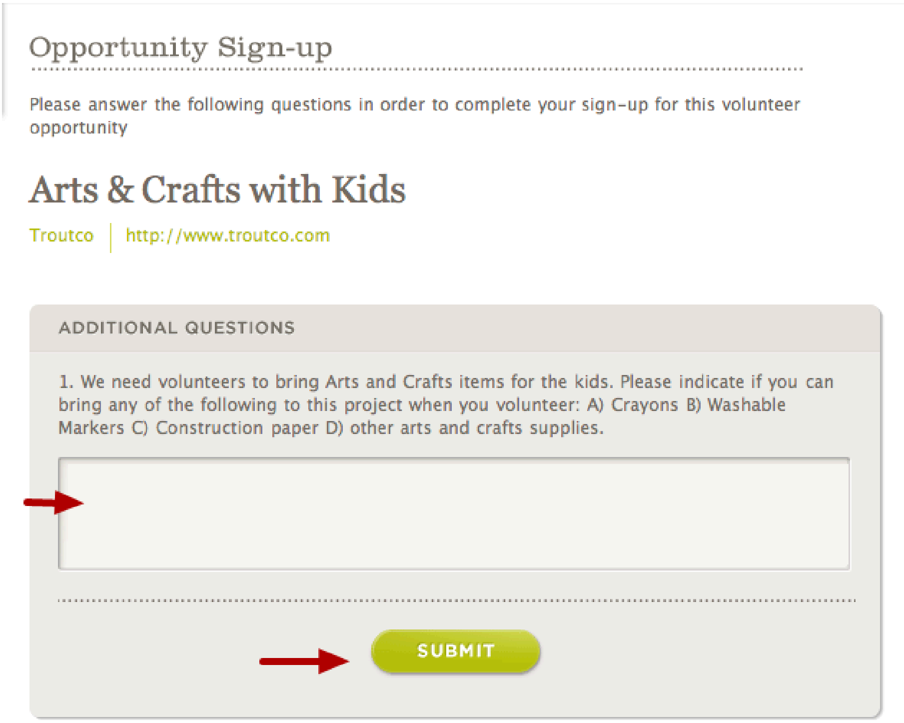
Clicking on sign-up from an opportunity detail page initiates the sign-up process:

Click on the sign up button to begin the sign-up process



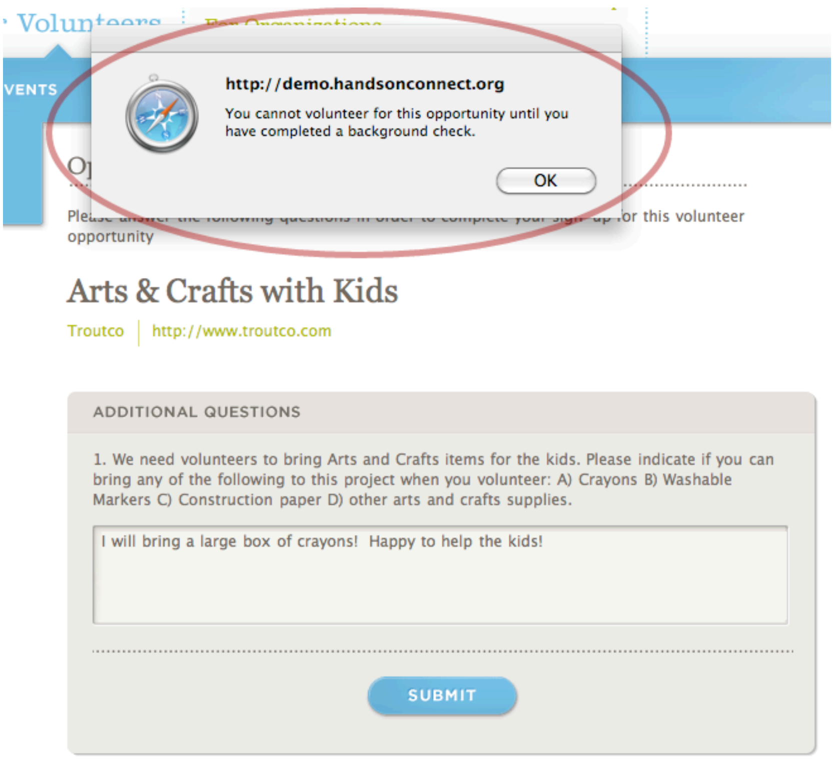
Each opportunity can present additional questions of volunteers before they complete the sign-up process.

Additional questions can be asked either using HOC's "volunteer questions" functionality, OR significantly more can be added to the Volunteer Opportunity Sign-Up Process. (additional questions, forms to fill out, donations or fees paid, etc) if you are using the optional "Advanced Registration System" add-on for HandsOn Connect.



When you've answered the additional question(s) click on the SUBMIT button.

Restrictions are checked before completing sign-up

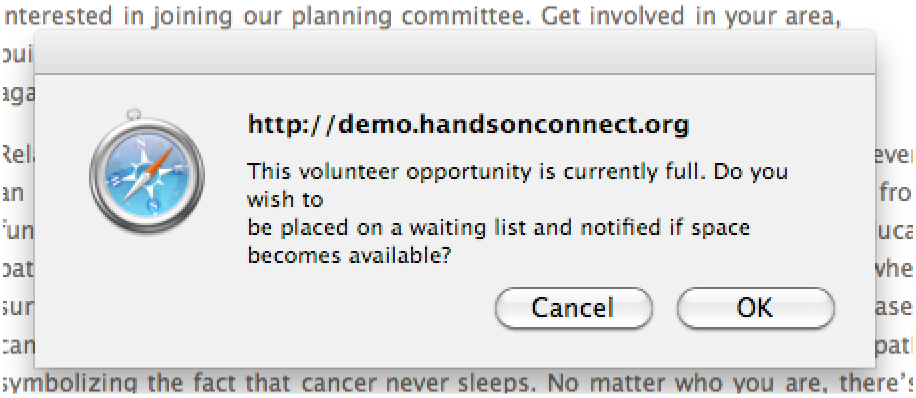


If any restrictions have been placed on sign-up a popup will advise the volunteer of why they cannot sign up for this opportunity.

Restrictions may include:

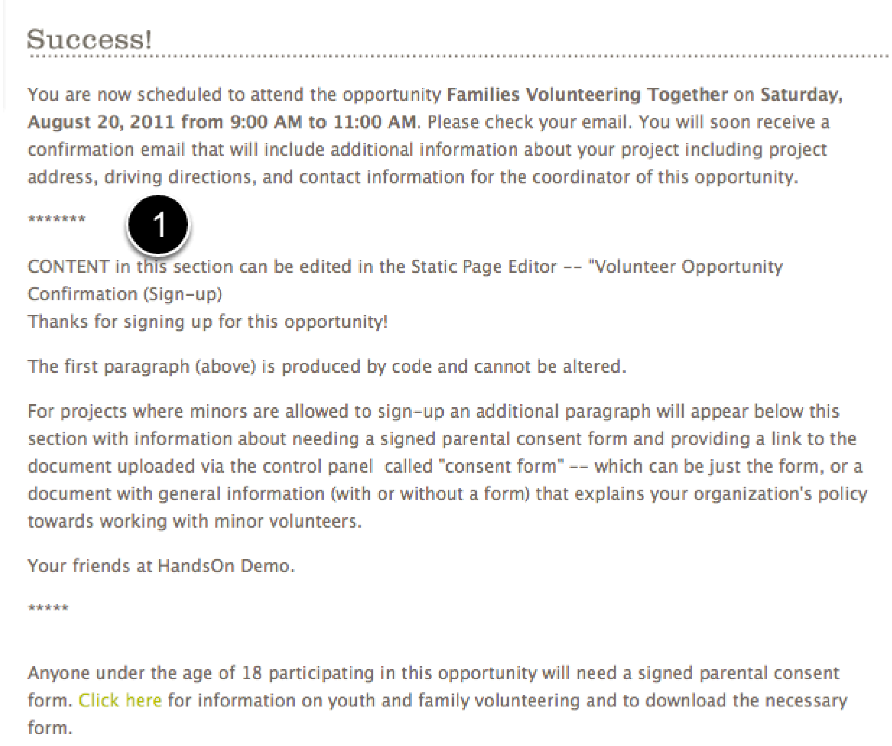
- inappropriate age
- orientation required
- background check required
- not appropriate for court-ordered volunteers

If the occurrence has reached its sign-up limit and option to be a put on a waiting list is presented.



If the opportunity has reached its sign-up limit, the system will offer the volunteer a chance to be put on a waiting list where they will be notified via email if spaces for that occurrence become available.

Upon successful sign-up a SUCCESS page is reached and emails are sent out



Success!

You are now scheduled to attend the opportunity **Families Volunteering Together** on **Saturday, August 20, 2011 from 9:00 AM to 11:00 AM**. Please check your email. You will soon receive a confirmation email that will include additional information about your project including project address, driving directions, and contact information for the coordinator of this opportunity.

****

1

CONTENT in this section can be edited in the Static Page Editor -- "Volunteer Opportunity Confirmation (Sign-up)
Thanks for signing up for this opportunity!

The first paragraph (above) is produced by code and cannot be altered.

For projects where minors are allowed to sign-up an additional paragraph will appear below this section with information about needing a signed parental consent form and providing a link to the document uploaded via the control panel called "consent form" -- which can be just the form, or a document with general information (with or without a form) that explains your organization's policy towards working with minor volunteers.

Your friends at HandsOn Demo.

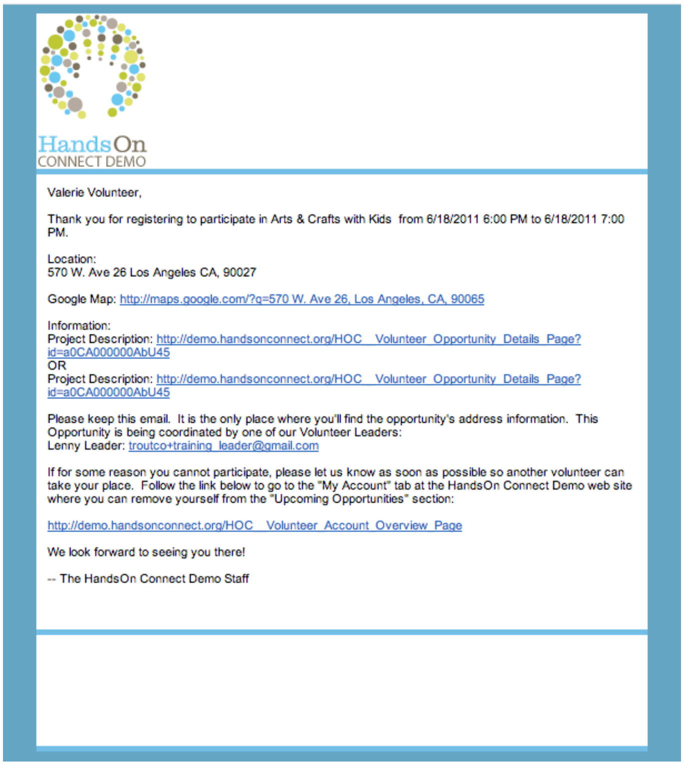
*****

Anyone under the age of 18 participating in this opportunity will need a signed parental consent form. Click here for information on youth and family volunteering and to download the necessary form.

The success page content tells the volunteer their sign-up has succeeded.

1. Editable messaging about next steps for the volunteer

Behind the scenes emails are dispatched


HandsOn
CONNECT DEMO

Valerie Volunteer,

Thank you for registering to participate in Arts & Crafts with Kids from 6/18/2011 6:00 PM to 6/18/2011 7:00 PM.

Location:
570 W. Ave 26 Los Angeles CA, 90027

Google Map: http://maps.google.com/?q=570 W. Ave 26, Los Angeles, CA, 90065

Information:
Project Description: http://demo.handsonconnect.org/HOC__Volunteer_Opportunity_Details_Page?id=a0CA000000AbU45
OR
Project Description: http://demo.handsonconnect.org/HOC__Volunteer_Opportunity_Details_Page?id=a0CA000000AbU45

Please keep this email. It is the only place where you'll find the opportunity's address information. This Opportunity is being coordinated by one of our Volunteer Leaders:
Lenny Leader: troutco+training_leader@gmail.com

If for some reason you cannot participate, please let us know as soon as possible so another volunteer can take your place. Follow the link below to go to the "My Account" tab at the HandsOn Connect Demo web site where you can remove yourself from the "Upcoming Opportunities" section:

http://demo.handsonconnect.org/HOC__Volunteer_Account_Overview_Page

We look forward to seeing you there!

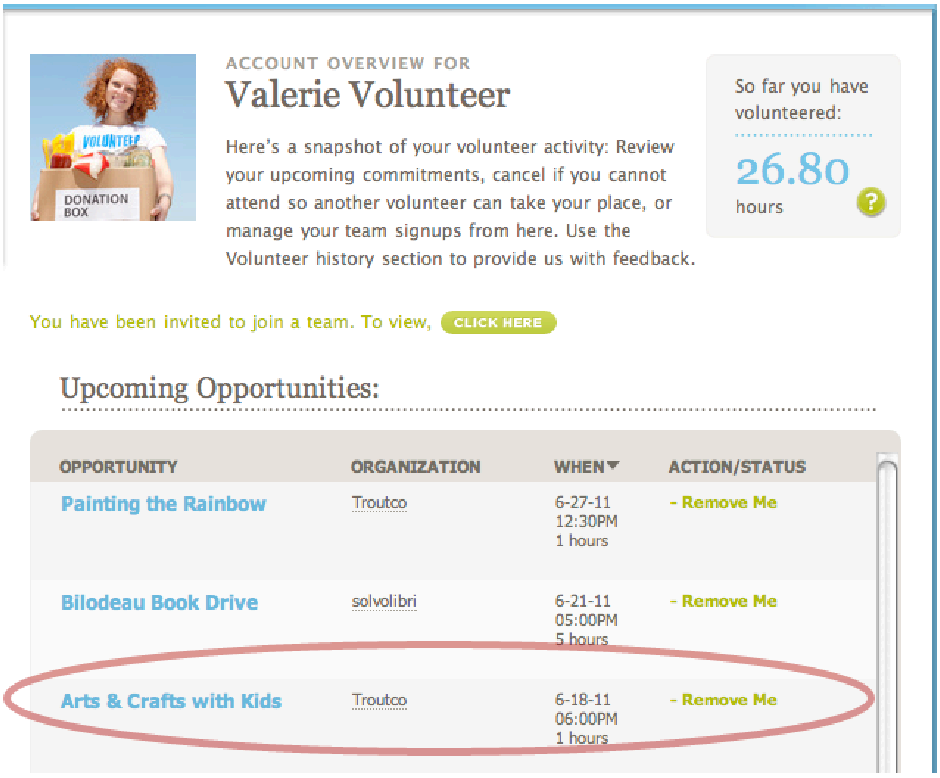
-- The HandsOn Connect Demo Staff

An email with information about the opportunity is sent to the volunteer confirming the sign-up. This includes the full directions to the project location and a link to a google map.

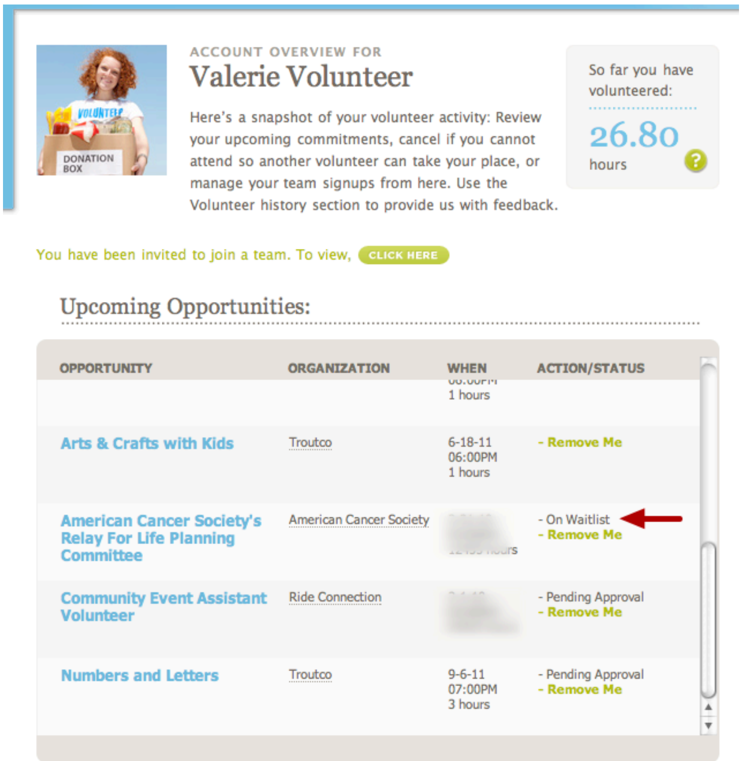
It also provides a link to the volunteer's member center where they can "remove themselves" if they are unable to attend the opportunity.

An email is also sent to the Opportunity Coordinator notifying them of the sign-up and telling them how many 'slots' have been filled.

The My Account page is updated showing the upcoming opportunity and providing a 'remove me' link if the volunteer must cancel



If a volunteer has been placed on a waitlist it will indicate that in the action/status column of their upcoming opportunities

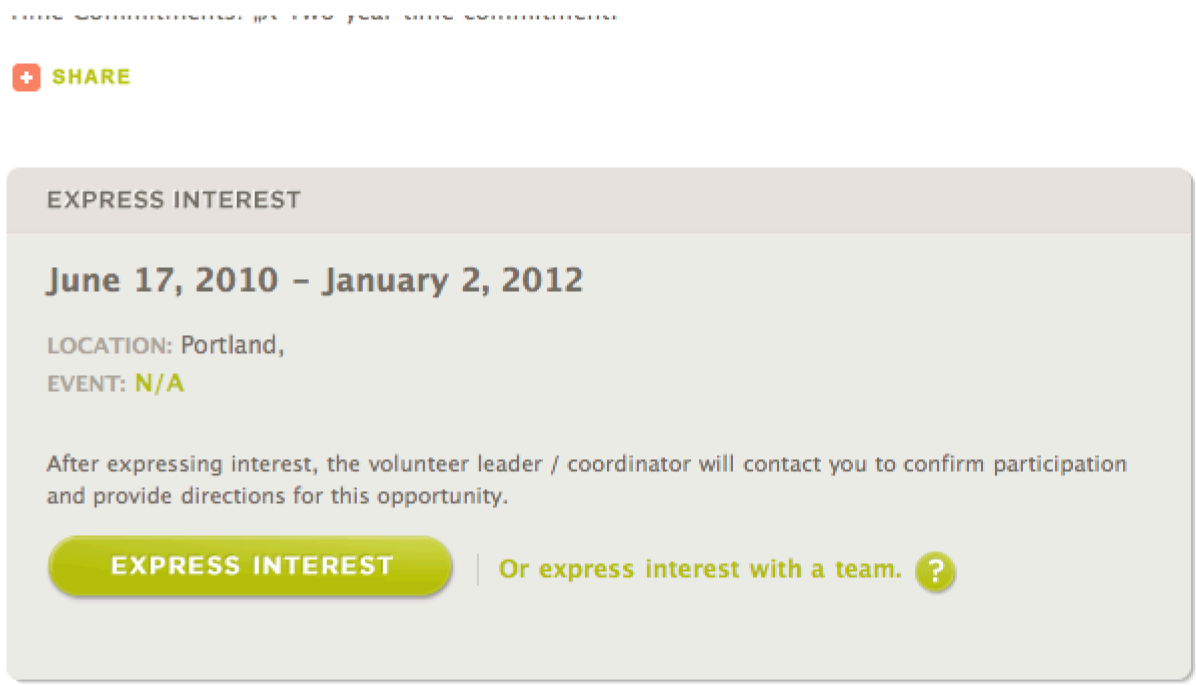


If the Volunteer Opportunity is of the type "Date and Time Specific - Express Interest" - then instead of a signup button, the button will say "Express Interest" and a different success page and email will be sent out.

The volunteer overview will indicate that the upcoming opportunity is "Pending Approval"

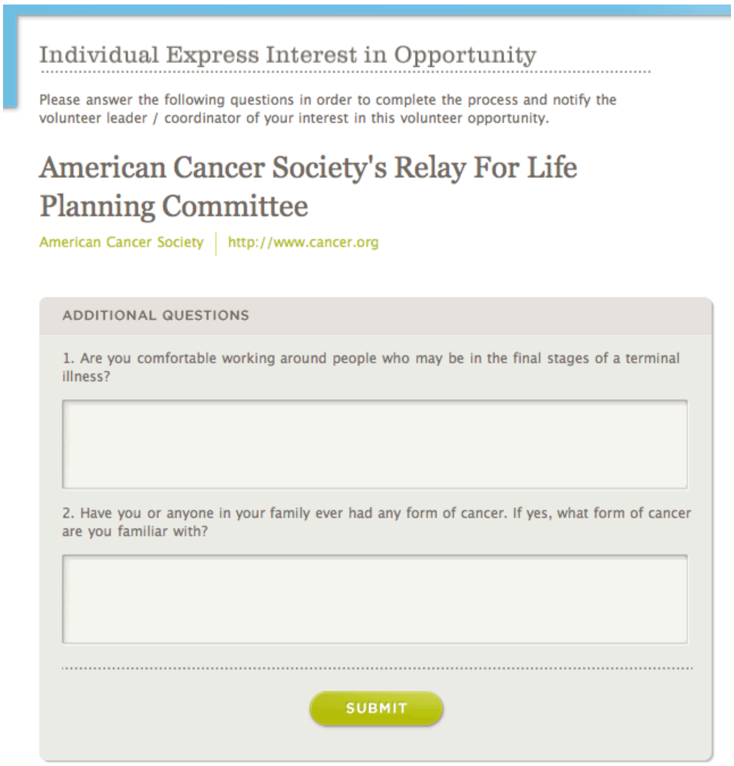
Expressing Interest in opportunities

If an organization wants to review the volunteer before 'approving' them and confirming them as a volunteer - they may choose to designate the project as "Express Interest" rather than "Sign Up". In this scenario an Express Interest Button appears instead of a Sign Up Button



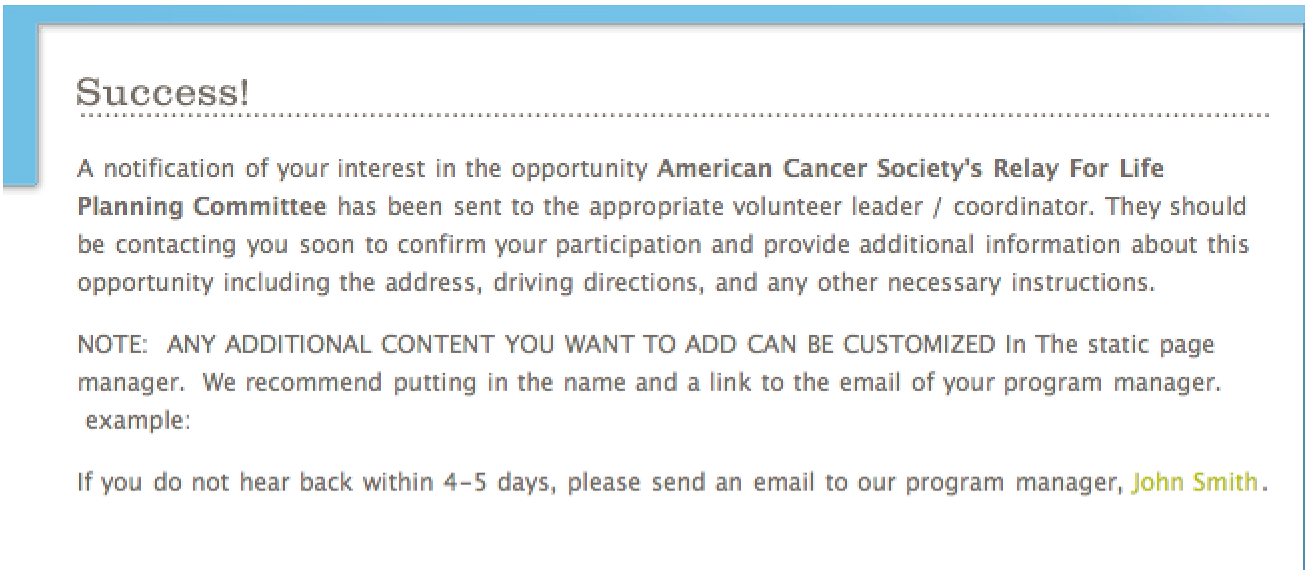
Clicking on the Express Interest button will then take the volunteer to the Additional Questions Page.

Additional Questions



If there are 'qualifying questions' you wish to ask a volunteeer to aid with deciding whether to confirm them as a volunteer, this is a good way to get that information into the system for review.

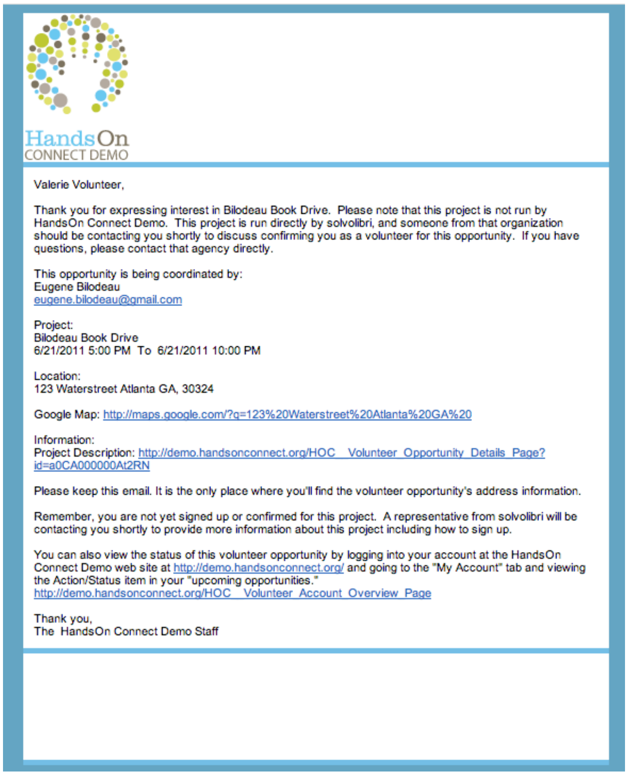
Success Page



Volunteers reach the success page that informs them they will be contacted by the organization with more information.

If this opportunity is a 'to be scheduled' opportunity - this provides the start of communications by which the volunteer will be scheduled for a specific time to volunteer by the managing organizaton.

Behind the scenes emails are dispatched



HandsOn CONNECT DEMO

Valerie Volunteer,

Thank you for expressing interest in Bilodeau Book Drive. Please note that this project is not run by HandsOn Connect Demo. This project is run directly by solvolibri, and someone from that organization should be contacting you shortly to discuss confirming you as a volunteer for this opportunity. If you have questions, please contact that agency directly.

This opportunity is being coordinated by:
Eugene Bilodeau
eugene.bilodeau@gmail.com

Project:
Bilodeau Book Drive
6/21/2011 5:00 PM To 6/21/2011 10:00 PM

Location:
123 Waterstreet Atlanta GA, 30324

Google Map: http://maps.google.com/?q=123%20Waterstreet%20Atlanta%20GA%20

Information:
Project Description: http://demo.handsonconnect.org/HOC__Volunteer_Opportunity_Details_Page?id=a0CA000000At2RN

Please keep this email. It is the only place where you'll find the volunteer opportunity's address information.

Remember, you are not yet signed up or confirmed for this project. A representative from solvolibri will be contacting you shortly to provide more information about this project including how to sign up.

You can also view the status of this volunteer opportunity by logging into your account at the HandsOn Connect Demo web site at http://demo.handsonconnect.org/ and going to the "My Account" tab and viewing the Action/Status item in your "upcoming opportunities."
http://demo.handsonconnect.org/HOC__Volunteer_Account_Overview_Page

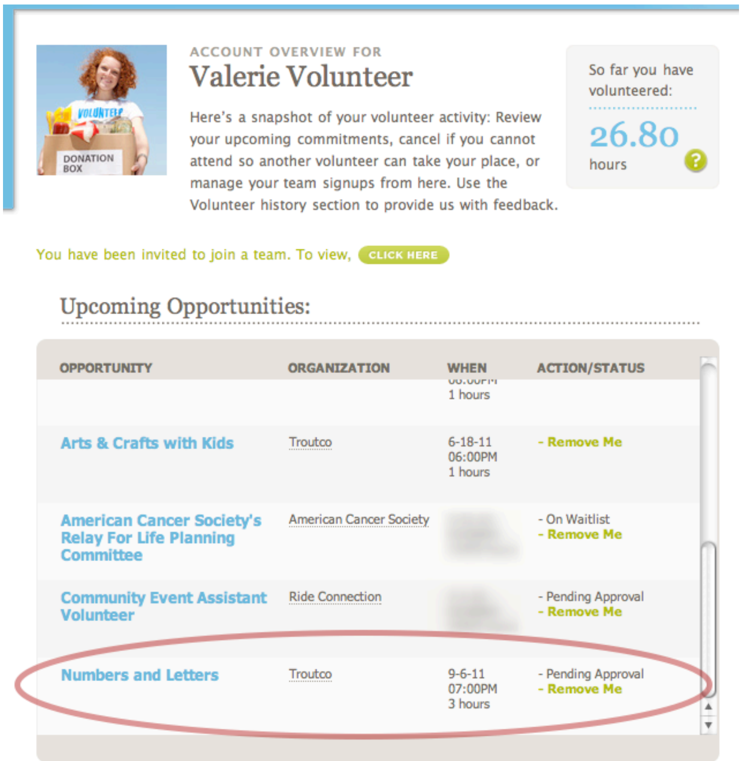
Thank you,
The HandsOn Connect Demo Staff

An email with information about the opportunity is sent to the volunteer confirming the sign-up. This includes the full directions to the project location and a link to a google map.

It reminds the volunteer that they have only expressed interest and are not yet signed up for the opportunity.

An email is also sent to the Opportunity Coordinator notifying them that they should review and confirm the volunteer.

The Upcoming Opportunities section of the volunteer's account



Express interest opportunities in the volunteer's account are marked as "Pending Approval" - which lets them know its upcoming - but they are not yet confirmed.

How volunteers Express Interest for Individually Scheduled Opportunities

Individually Scheduled Opportunities appear on the pubic site as 'express interest' opportunities.

There are two types of Individually Scheduled Opportunities (ISO)

ISO with Schedule - volunteers are shown when volunteers are needed, and can sign up for one or more dates that fall within the announced schedule of volunteer needs. They are in pending status for these proposed 'connections' until the Opportunity Coordinator confirms their proposed volunteer schedule.

ISO express interest Only -- An Express Interest button appears, but there is no info on when volunteers are needed. This type of opportunity just allows a volunteer to inform the posting organization that "I'm interested". This is great for broad opportunities like "Become a Board Member" or "Keep me notified of upcoming disaster response opportunities" or Virtual Opportunities.

These opportunities don't need to have a location, as they are just an expression of interest. What the Volunteer Coordinator chooses to do with this information is up to them, and volunteer's do not see these opportunities in their upcoming opportunities (as they don't take place at a specific date and time - Unless the opportunity coordinator decides to administratively schedule them to attend.)

Individually Scheduled Opportunities do not appear on the public site calendar - but do appear in search list view. (They can't show up on a calendar, because they don't take place at a specific date and time -- but rather, allow the volunteer to schedule themselves, subject to the organization's approval.

In search, Individually Scheduled Opportunities appear as "Open"

This is because they don't take place at a specific date and time. (They are flexibly scheduled for each individual)

After School Mentors	Troutco	Riverside	Open	0 miles
Front Desk Support	Troutco	Riverside	Open	0 miles
Help Around the Office	Troutco	Riverside	Open	0 miles

Individually Scheduled Opportunity - Express Interest with Schedule

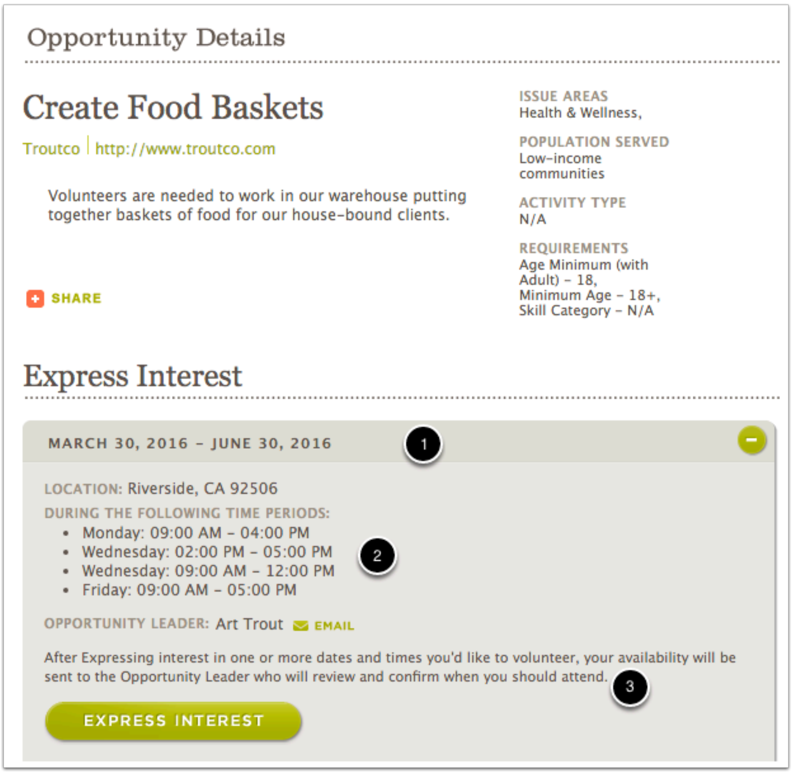
The Opportunity Detail Page provides specific information about when volunteers are needed.

1. The dates when volunteers are needed are displayed. If start date is in the past, then the text will read "Volunteers needed through...." (see 2nd screenshot)

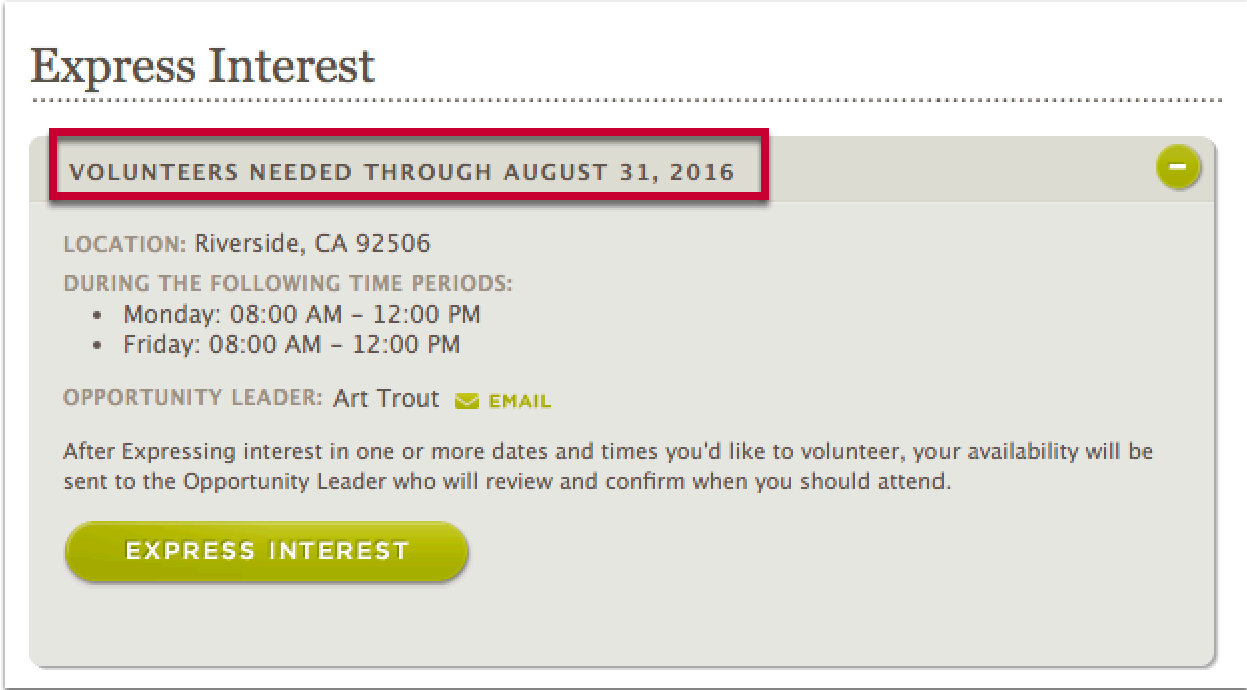
2. The schedule you created is displayed so volunteers know what days and times you need volunteers each week.

3. Messaging makes it clear that volunteers will be proposing their availability and the Opportunity leader will review and confirm the dates they wish you to attend.

A volunteer clicks on "Express Interest" to proceed.

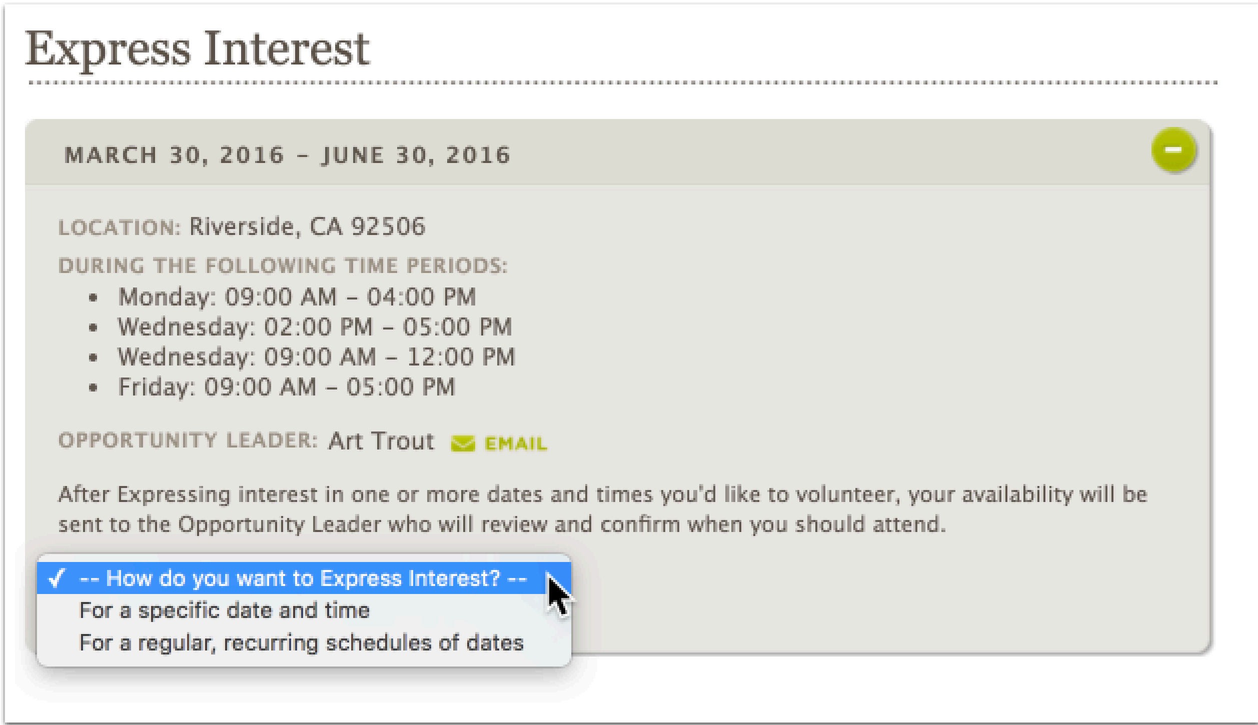


How the dates needed appear after the start date has passed.



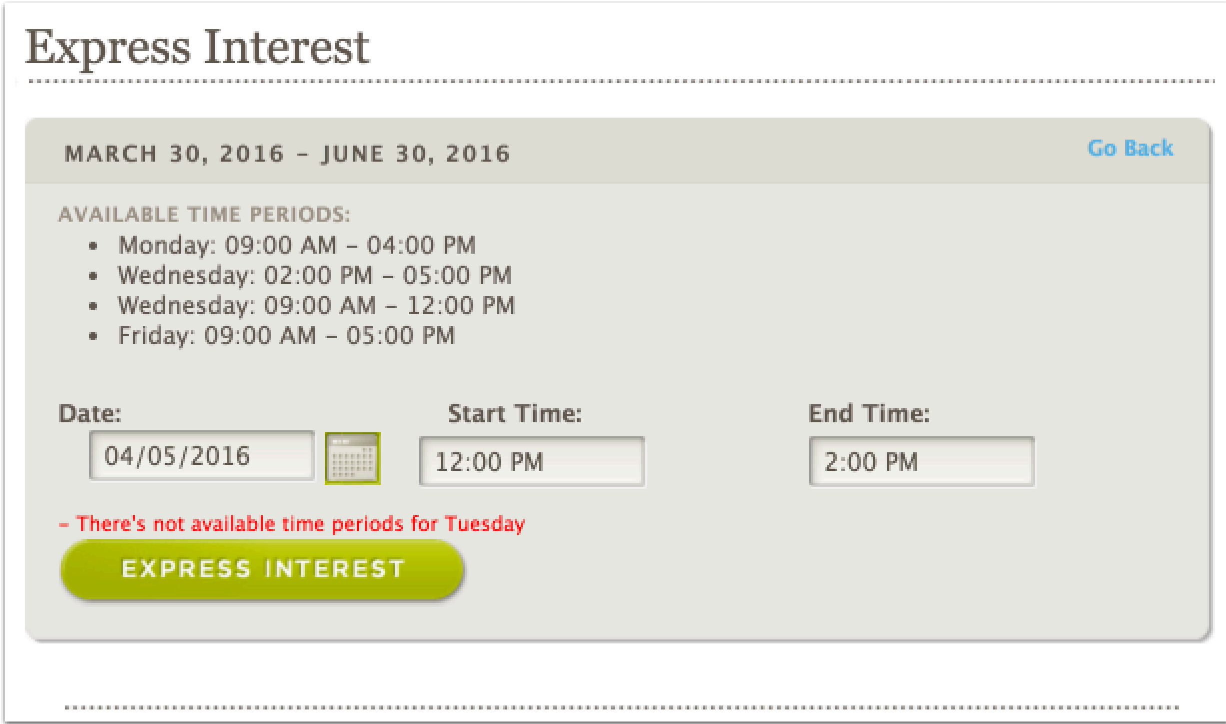
After clicking the Express Interest Button

You are asked "--How do you want to Express Interest?--" and have two options:



Choosing "For a specific date and time"

Allows you to create one date and time you wish to volunteer.   The time you choose must be within the schedule that has been listed for this opportunity. If you propose a time outside the schedule you'll get a clear message explaining that its not a valid time.



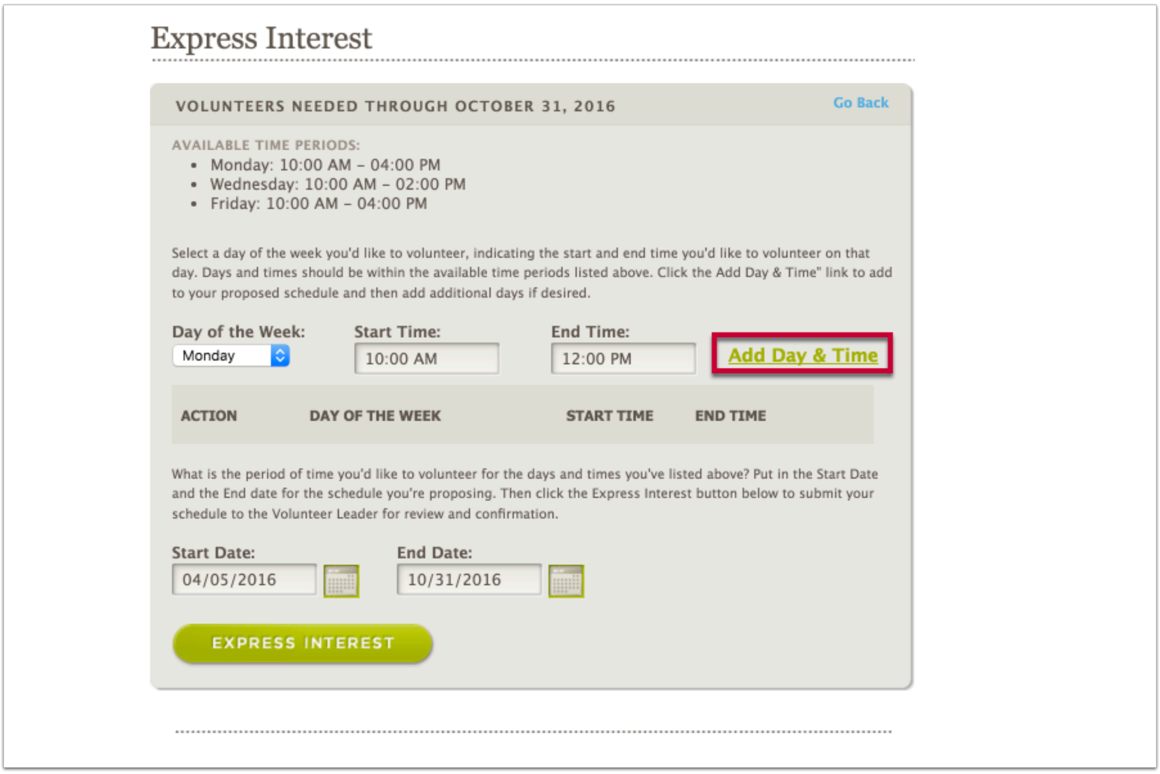
Choose a date and time within the 'available time periods" and click express interest and you'll reach the opportunity sign up Success Page.

Expressing interest in a recurring pattern of dates (multiple connections)

When a volunteer selects "For a regular, recurring schedule of dates" they have an interface where they can select a day of the week, a start and ending date, and a start and End time. They then click 'Add Date & Time" to indicate availability of that day of the week, at that time, for that period of dates.

The Day of the Week selector is 'smart' and only shows days that are part of the schedule for this opportunity.   The default dates and time period are pre-populated but can be edited by the volunteer so that they can self-schedule for any period of time within the time period you need volunteers.

Here the volunteer has chosen Monday, from 10:00 a.m. - 12:00 p.m. as the recurring day they wish to schedule.   Once they click "Add Day & Time" it will be added to the schedule section below.



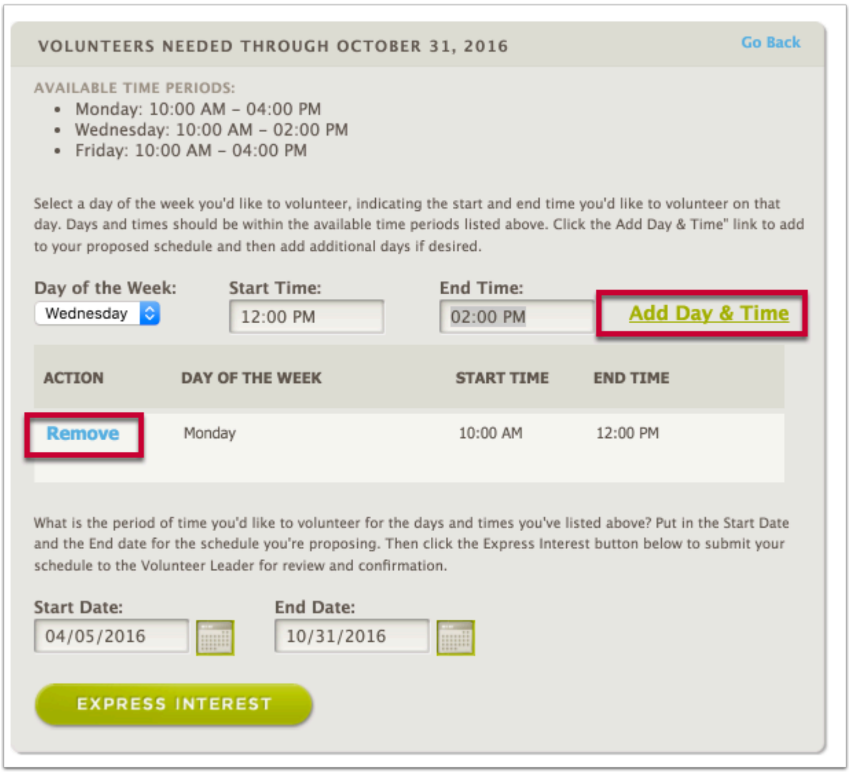
After clicking 'Add Date and Time" you can add additional schedules if you wish

In this case, the volunteer also wishes to volunteer on Wednesdays! And on Wednesdays they'd like to volunteer from Noon - 2 pm.

Again they click, 'add date & time"

If they wish to change a schedule, they can click 'remove'.

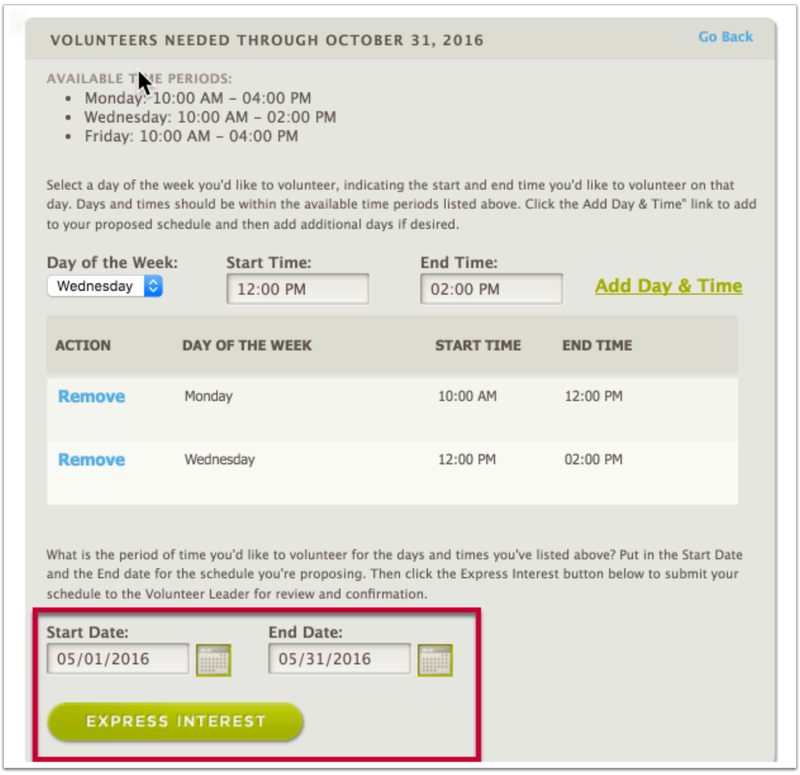
This allows a volunteer to see all the days and times they are proposing before they submit the schedule duration.



When the schedule is complete, set the start date and end date

The start date and end date are automatically populated from today until the end date of the opportunity - but in our case we only want to volunteer on Mondays and Wednesdays through the month of May, so we update the Start Date and End Date to reflect the duration of time we wish to volunteer for the schedule we're submitting.

After setting the Start Date and End Date - click the Express Interest button to submit your proposed scheduled to the Opportunity Leader. The opportunity leader will then review the submitted connections and confirm , decline, or reschedule them.



The Volunteer will then reach the 'Success" page

The volunteer will receive only one email notification that the connections they created have been submitted for approval. (They will not get one for every connection they create during one submission).   The email template with the messaging to the volunteer can be found in setup / administration setup / communication templates / email templates.   This template is called: "Opportunity Signup Acknowledgement for Individually Scheduled"

The opportunity coordinator will get only one email saying that the volunteer has expressed interest in one or more dates and is awaiting confirmation. The opportunity coordinator can then log in and review the connections that have been created and simply confirm or decline them without having to contact the volunteer as to when they wish to volunteer. The email template for this notification can be found in setup / administration setup / communication templates / email templates. This template is called: "Volunteer Interest Notification for Individually Scheduled"

See this next article on how to review and confirm volunteers for their individually scheduled connections.

Individually Scheduled Opportunity - Express Interest Only

These opportunities do not have a schedule - so volunteers are just able to express interest. When they express interest, the Opportunity Coordinator is notified. The volunteer receives an email letting them know they will be contacted if anything further is required of them.

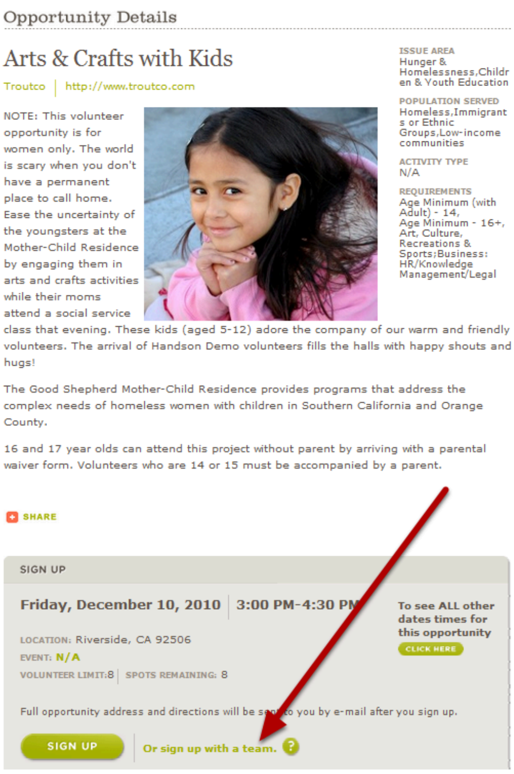
Signing up a Team for a Volunteer Opportunity

This post shows how to create a Volunteer Team via the public portal. We will start out in the admin/ staff portal, but once we switch to the public portal the steps are the same as if we had logged in as a volunteer from the public site to begin with.

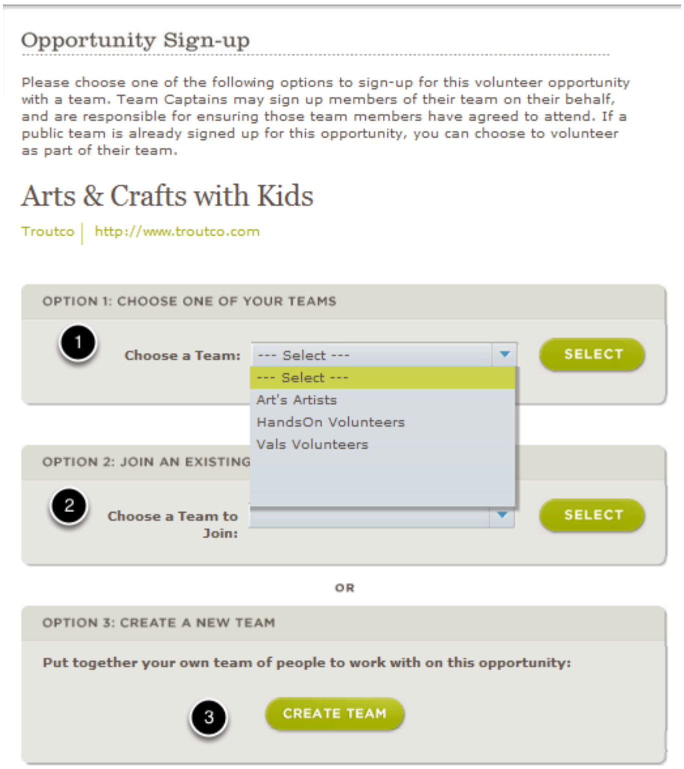
Signing up for a Volunteer Opportunity

Find the opportunity that you would like to volunteer for using the "Find an Opportunity" from the menu bar. For more infomation on how to search for opportunities, click here.

From the Volunteer Opportunity Detail, click on "Or sign up with a team."



Selecting the Team



You have three options for the types of teams to sign-up for the opportunity.

1) If you are a Team Captain, the teams which you captain will be available from the drop down in "Option 1"

2) As an individual, if there are any Public Teams that have registered for this opportunity, they will be listed in this drop down and you can sign-up with them and also join their team.

3) If you wished to you could create a new team. After you create the team you will have the opportunity to return to this step to sign-up the team. If you need help creating a team, [click here.](#) After you create a team, you'll be returned to this page and can then choose Option 1 to select that team and proceed with signup.

If you select option 1, then the page will re-load with the information related to the team you selected.

Selecting the Team Members

After you select the team to participate, a team member list appears for you to select which members will be participating.

All the Team Captains (1) are already pre-selected to participate, but their participation is not required, so you can unmark the box to the left of their name. It is however, recommended that at least one Team Captain is signed up for the opportunity to ensure that project related information is being received by the team since some team members may not have email address and therefore would not receive the notices or reminders and only a team captain can continue to manage the team signup.

To sign-up any of the other team members (2) simply mark the box to the left of their name. If they have an e-mail address provided they will receive the notification of the sign-up and any other related notices and reminders.

To see all of your team members, use the scroll bar (3).

If there any extra questions related to this opportunity, they will be presented in this area (4). A response is required. (You will have to answer the question based on all the members of your team).

The click "Submit".

After clicking submit, you'll see a "success" confirmation screen. The project will also be listed in your team's upcoming opportunities. To learn how to manage the team's particiaption in an opportunity, click here.

Registering as a Partner Organization

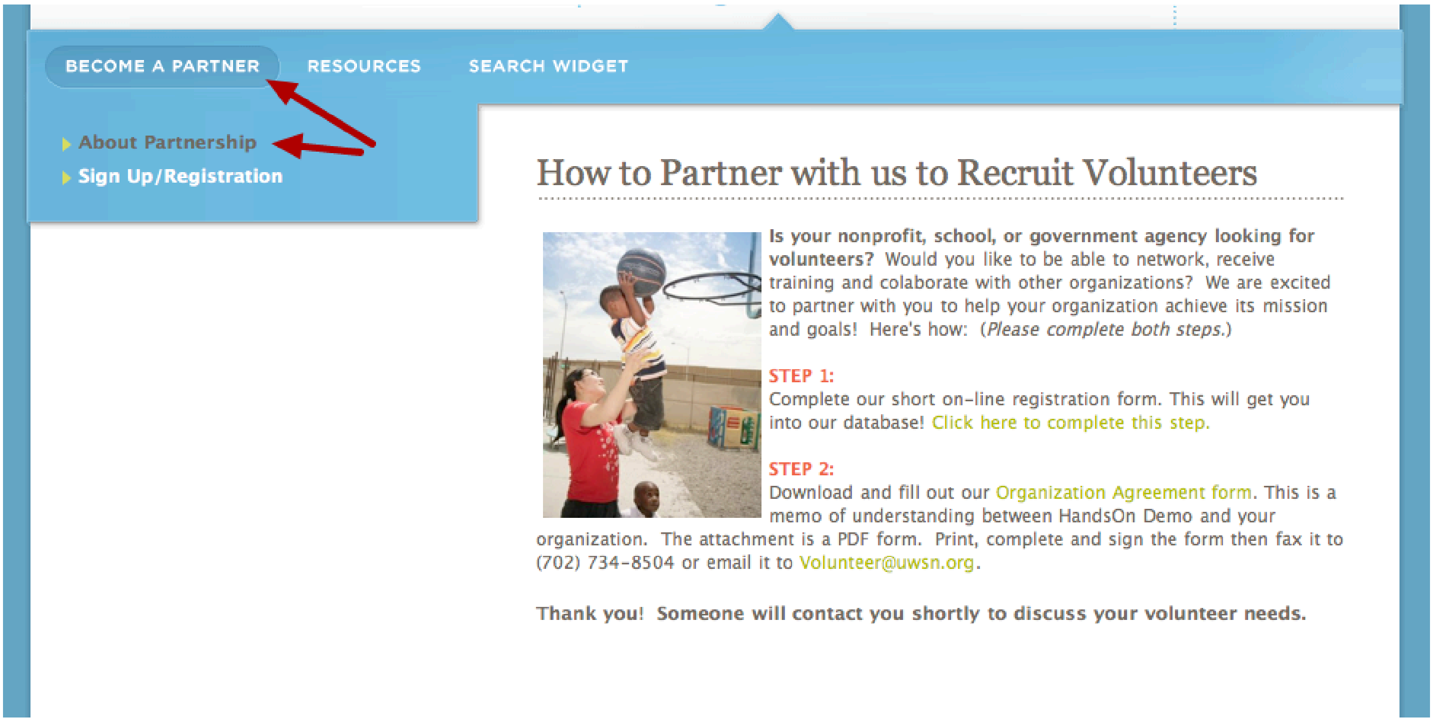
Registering to be a Partner Organization

Organizations that wish to post volunteer opportunities on your website and manage volunteer sign-ups first need to register to be a partner organization

They navigate to the "For Organizations" portion of the website, which by default will bring them to the Become a Partner Page

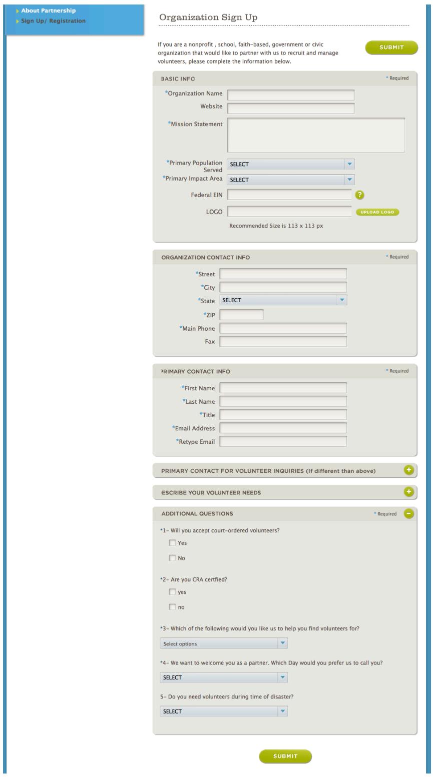
Note: Like all pages in HOC, the /partnership page is optional. You can customize the navigation to go directly to the partner registration page if you desire.

About Partnership



The contents of this page are customizable in the CMS. This is where you can message potential nonprofit, government, civic, or faith-based organizations on how they can partner with your organization to recruit volunteers. You can create links to any documents you want to make available to them, and the Sign Up / Registration link in the subnavigation will take them to an online form at /organization-sign-up where they can enter their basic information into your HandsOn Connect Database as a potential partner.

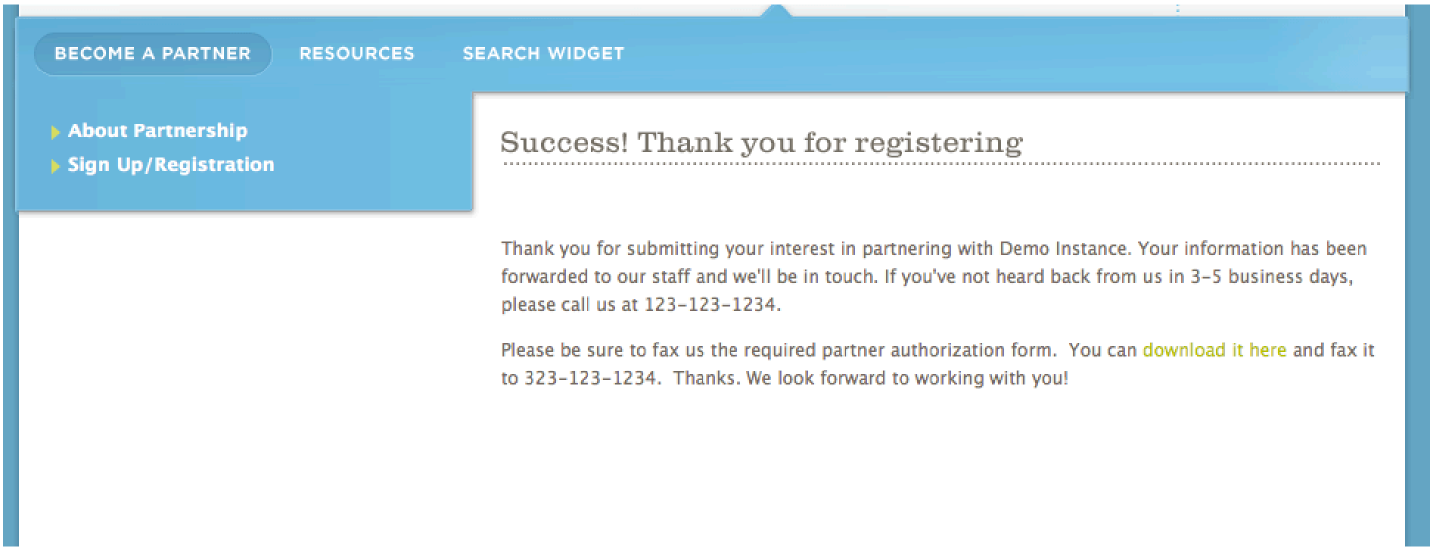
Sign Up / Registration Page



The fields that are present on the organization sign-up page can be customized in the CMS. Organizations with the optional Advanced Registration System (ARS) can deeply customize the registration process, and include additional pages allowing direct upload of documents, charging membership fees, and getting additional information during the registration process.

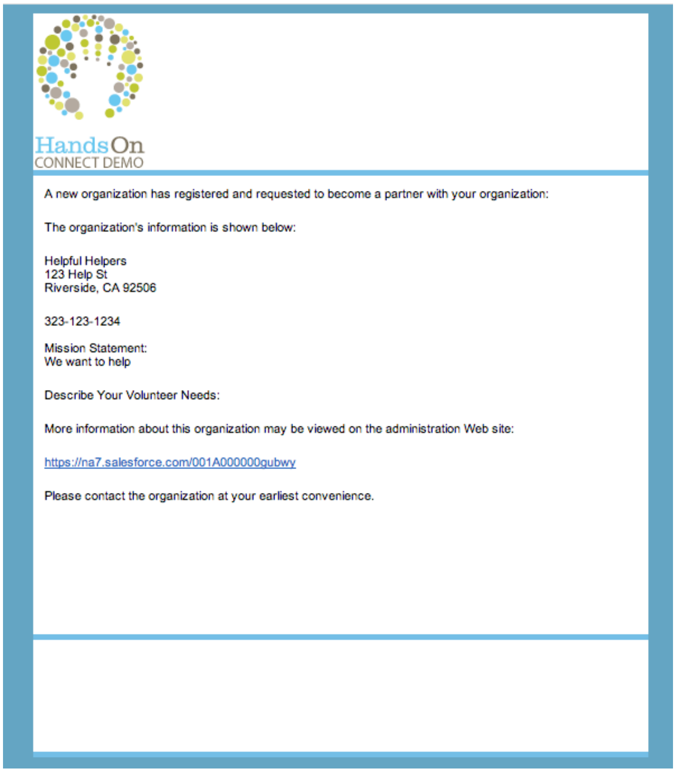
Organizations enter their basic information into this form which is populated to the HandsOn Connect Database.

After the form is submitted the Success page is displayed.



This page can be customized in the WYSYWYG editor with further instructions on your business processes for partner organizations.

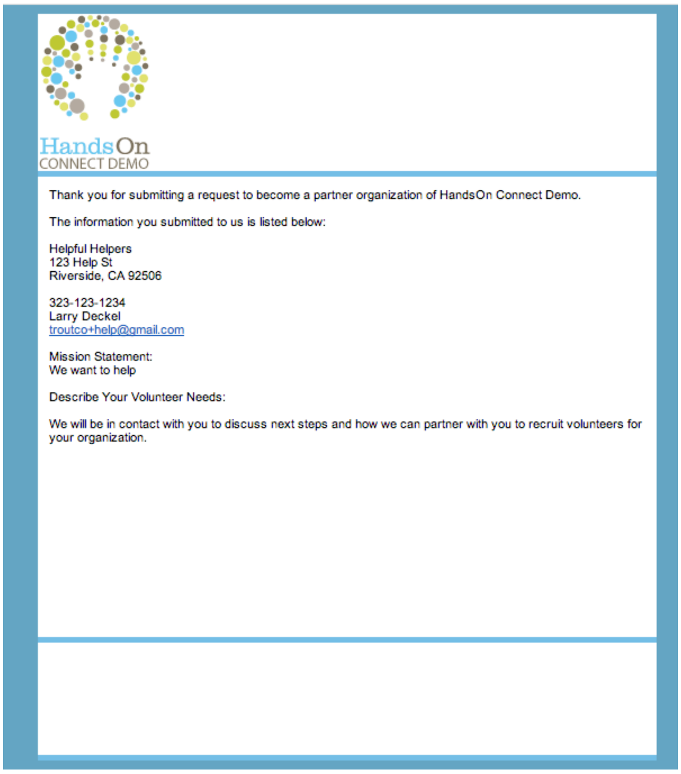
After the form is submitted, an email notification is sent to your organization's Partner Approval Manager notifying them of the submission



Instructions on approving partner organizatioins and granting them log-in access to the 'partner customer portal" are found in Lesson 2 of this training.

An email is also sent to the partner organization who submitted the form notifying them that their application is being reviewed.

An email is also sent to the partner organization


HandsOn CONNECT DEMO

Thank you for submitting a request to become a partner organization of HandsOn Connect Demo.

The information you submitted to us is listed below:

Helpful Helpers
123 Help St
Riverside, CA 92506

323-123-1234
Larry Deckel
troutco+help@gmail.com

Mission Statement:
We want to help

Describe Your Volunteer Needs:

We will be in contact with you to discuss next steps and how we can partner with you to recruit volunteers for your organization.

The contents of all email templates can be customized to meet your business needs.