Basic Portal - for Partner Organizations and Self Organizers

Table of Contents

Quick Start Videos 4

HandsOn Connect 1-2-3 Quick Start Videos (Basic Portal) 5

Logging in and getting started 6

Logging In and getting started 7

Volunteer Management Portal Navigation 11

Managing your Organization and Personal information 14

Organization Information 15

Organization Contacts 17

Updating your personal information 19

Creating Volunteer Opportunities 22

Creating a Volunteer Opportunity - Step 1 23

Creating a Volunteer Opportunity - Step 2 25

Creating a Volunteer Opportunity - Step 3 30

Creating a Volunteer Opportunity - Step 4 34

Creating a Volunteer Opportunity - Step 5 37

Creating a Volunteer Opportunity - Step 6 40

Managing Existing Opportunities 42

Managing Existing Opportunities 43

Viewing and Editing the Opportunity Detail Page 47

Creating a New Occurrence 49

Managing Volunteers for each Occurrence 52

Occurrence Detail View 53

Connection Grid overview 56

Using the Connection grid to send emails to volunteers 58

How to add 'guest' volunteers to an occurrence (basic) 61

Marking Attendance and verifying service hours 63

Creating a New Recurrence 66

"Express Interest" Connections - confirming or declining volunteers 69

When should I create a To Be Scheduled Opportunity (ongoing) instead of a lot of occurrences? 73

Confirming and Scheduled Volunteers for To Be Scheduled (ongoing) volunteer opportunities (Basic Portal) 77

Adding Volunteers administratively to an Occurrence (creating administrative connections) 81

Opportunity Locations 88

Creating New Locations 89

Editing existing Locations 91

Volunteers 94

Manage Your Volunteers Individually / Volunteer Detail Records 95

Verifying Hours for Volunteers 97

Quick Start Videos

HandsOn Connect 1-2-3 Quick Start Videos (Basic Portal)

These three short videos quickly give you an overview of the three main activities you'll be doing in HandsOn Connect:

- How to create Volunteer Opportunities and submit them for publication on the public website
- How to confirm and schedule volunteers for 'express interest' and 'to be scheduled' opportunities
- How to report and verify volunteer attendance

1. Creating a Volunteer Opportunity

Creating a volunteer opportunity is quick and easy using the 6-step "Create Opportunity" navigation. Here we show you the basic steps for creating an opportunity.

(See the written documentation below for additional information on creating volunteer opportunities that include custom questions, skills and use other schedules or multiple occurrences.)

2. Verifying Volunteer Attendance

After the project is over, volunteers are counting on you to verify their participation. This video shows you how to quickly and easily verify volunteer attendance.

3. Confirming and Scheduling Express Interest Volunteers

In the first video above we created a date and time specific, "sign up" opportunity. For these opportunities confirmation is automatic. But if you create "express interest" opportunities, you'll need to go in and review the volunteers who have expressed interest, and confirm their participation. For "To Be Scheduled" opportunities, you'll also need to schedule each volunteer individually. This video shows you how:

Logging in and getting started

Logging In and getting started

Welcome to HandsOn Connect!

As a Partner Organization of an organization using HandsOn Connect technology, you'll have special access to a "Partner Staff" portal for your organization where you'll be able to:

- Update your organizational information
- Create and request publication of volunteer opportunities
- Edit existing volunteer opportunities
- Monitor signs ups of volunteers for date & time specific opportunities
- Confirm volunteer participation for 'express interest' opportunities
- Schedule volunteers for ongoing volunteer opportunities
- Email volunteers
- Report attendance and service hours
- and more.

Because HandsOn Connect websites can be customized in a number of ways, not all the features described in this manual may be available to you, and the exact navigation shown here may be different in your circumstances.

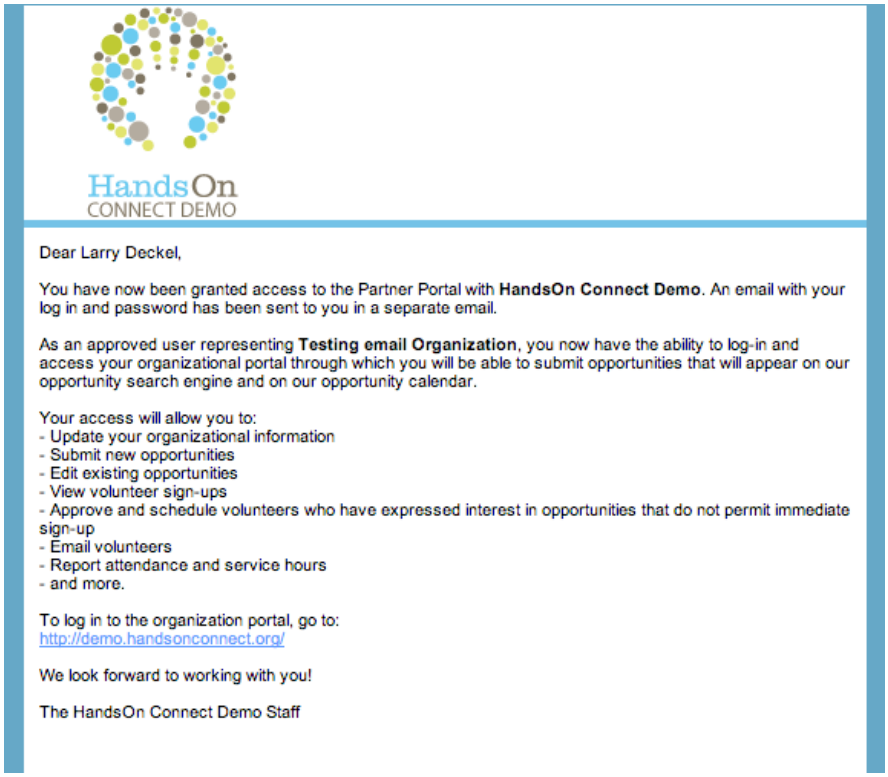
Additional features may be available in some organizations.

The layout and colorization of pages as shown in this manual may be different from what you see in your portal.

But this guide will introduce you to the basics of working with HandsOn Connect!

Let's get started!

You will receive two email notifications from your host organization when your partner account has been approved.



HandsOn
CONNECT DEMO

Dear Larry Deckel,

You have now been granted access to the Partner Portal with **HandsOn Connect Demo**. An email with your log in and password has been sent to you in a separate email.

As an approved user representing **Testing email Organization**, you now have the ability to log-in and access your organizational portal through which you will be able to submit opportunities that will appear on our opportunity search engine and on our opportunity calendar.

Your access will allow you to:
- Update your organizational information
- Submit new opportunities
- Edit existing opportunities
- View volunteer sign-ups
- Approve and schedule volunteers who have expressed interest in opportunities that do not permit immediate sign-up
- Email volunteers
- Report attendance and service hours
- and more.

To log in to the organization portal, go to:
http://demo.handsonconnect.org/

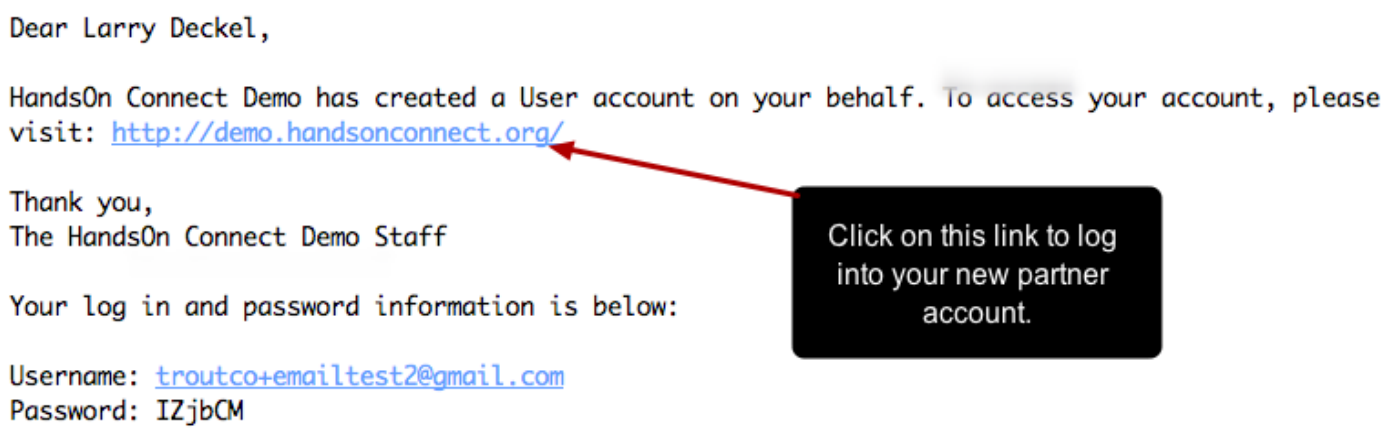
We look forward to working with you!

The HandsOn Connect Demo Staff

One email will notify you that your request has been approved.

The second email will notify you of your user name (This will be your email address), and a temporary password.

There will be a link to the website of your host organization in the email.



Dear Larry Deckel,

HandsOn Connect Demo has created a User account on your behalf. To access your account, please visit: http://demo.handsonconnect.org/

Thank you,
The HandsOn Connect Demo Staff

Your log in and password information is below:

Username: troutco+emailtest2@gmail.com
Password: IZjbCM

Click on this link to log into your new partner account.

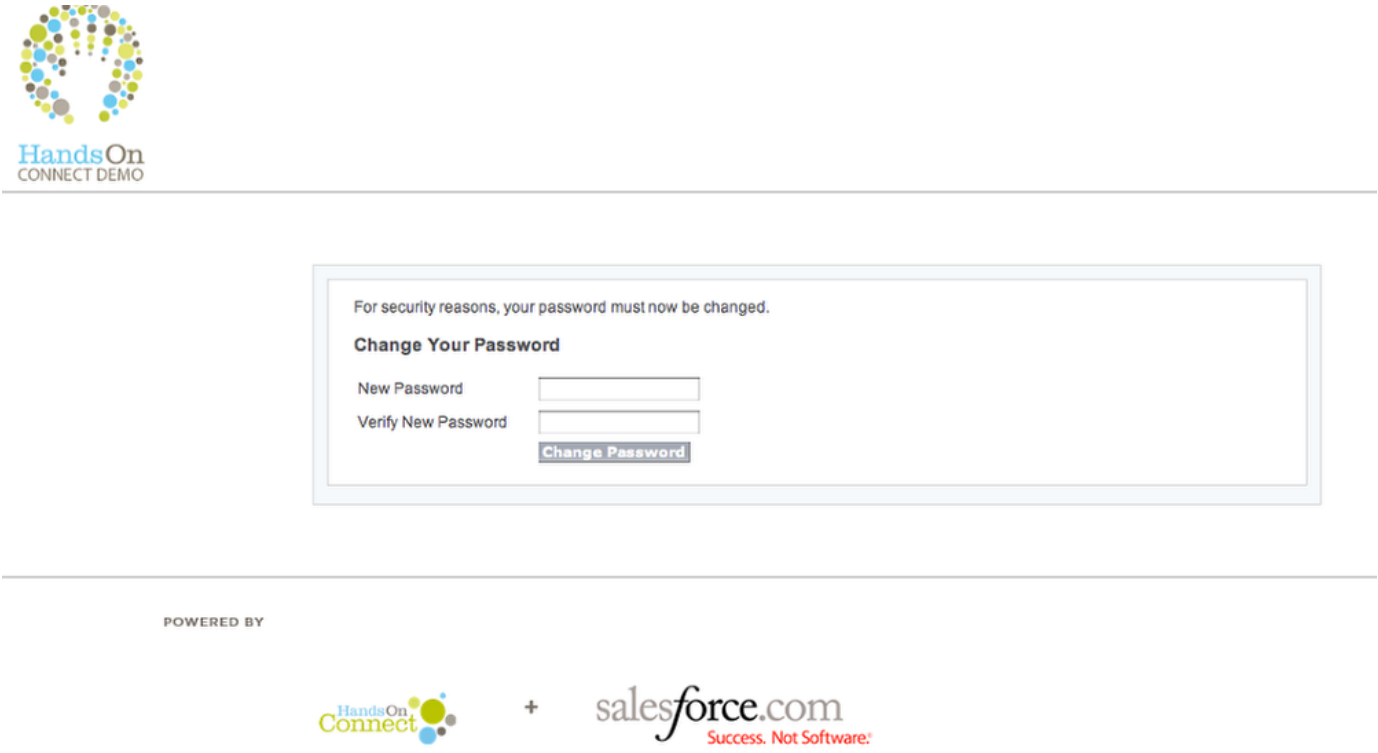
In some cases -- you may instead receive specific instructions from your host organization that an account has been set up - and that in order to receive your temporary password you'll need to enter your email address and click the "Forgot Password" button. Just follow whatever instructions you're given in the email(s) you receive.

Go to the website and on the home page, click on the Login widget on the top right of the page and enter your username and temporary password.

The temporary password is case-sensitive - so type it carefully.

Click on login. The first time you do this, you'll be prompted to reset your password for security reasons.

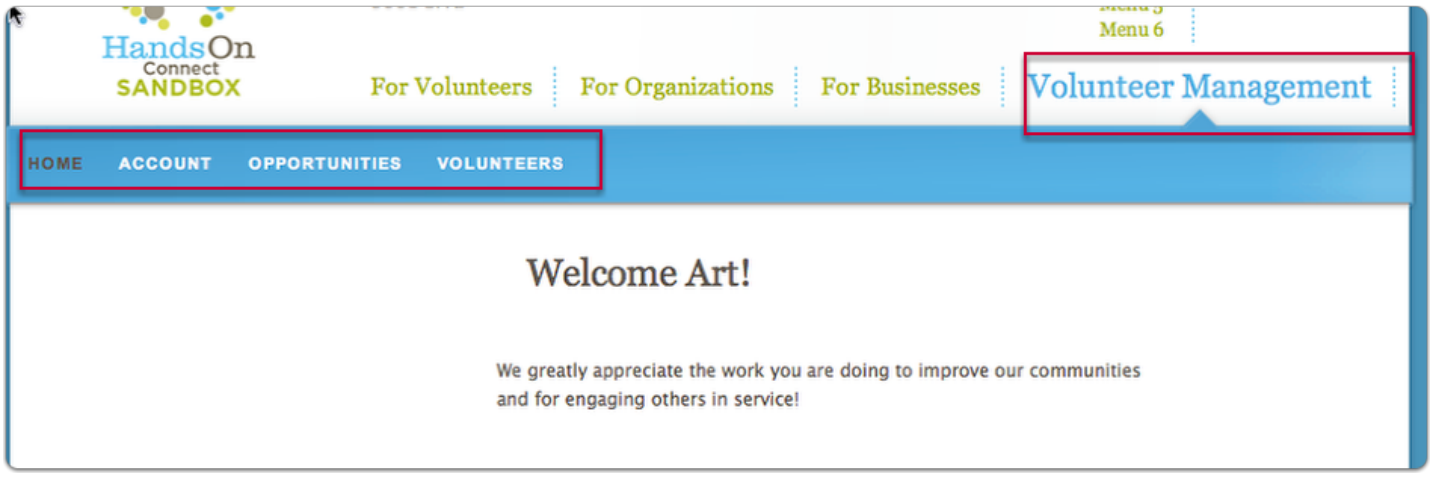
Change your password screen



You will now set your permanent password. It is case sensitive, so don't forget it! This is the password you'll use in the future to log into the site.

Volunteer Management Portal Navigation

Home

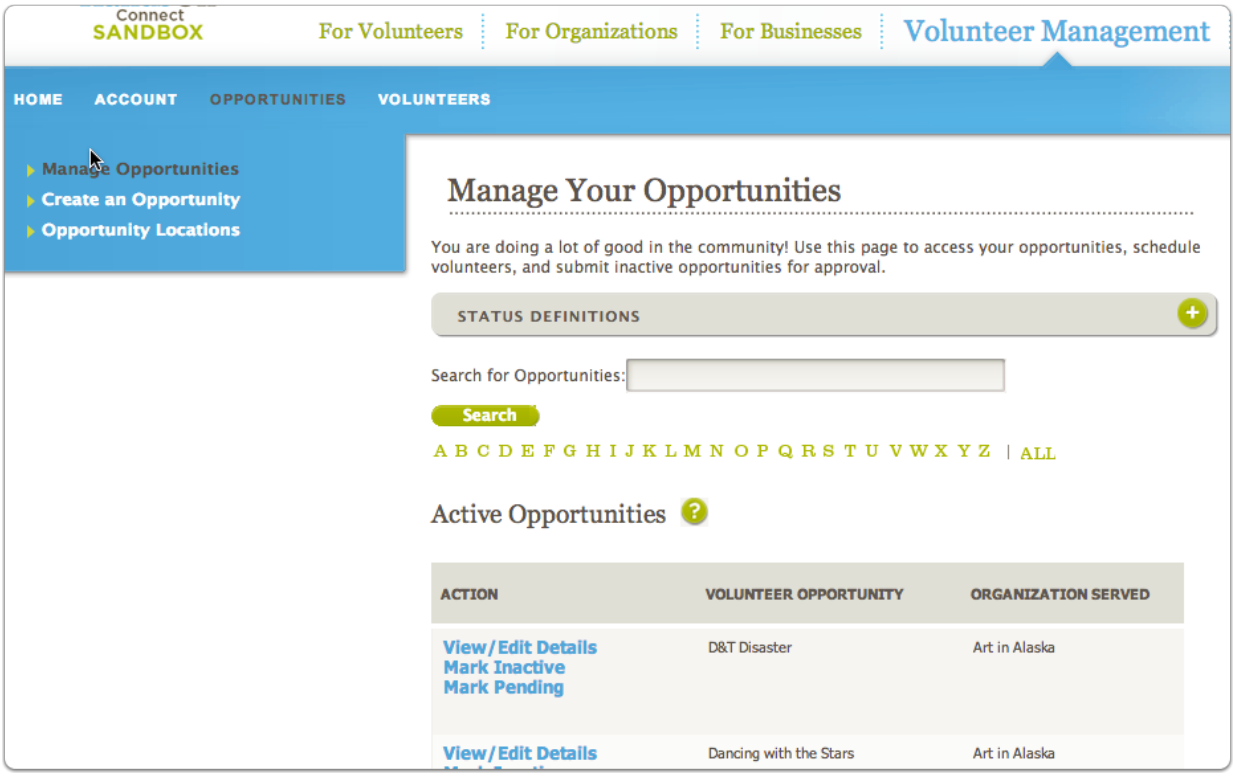


The Home Tab has a simple welcoming message and where you'll arrive when you first log into the portal.

Account Menu

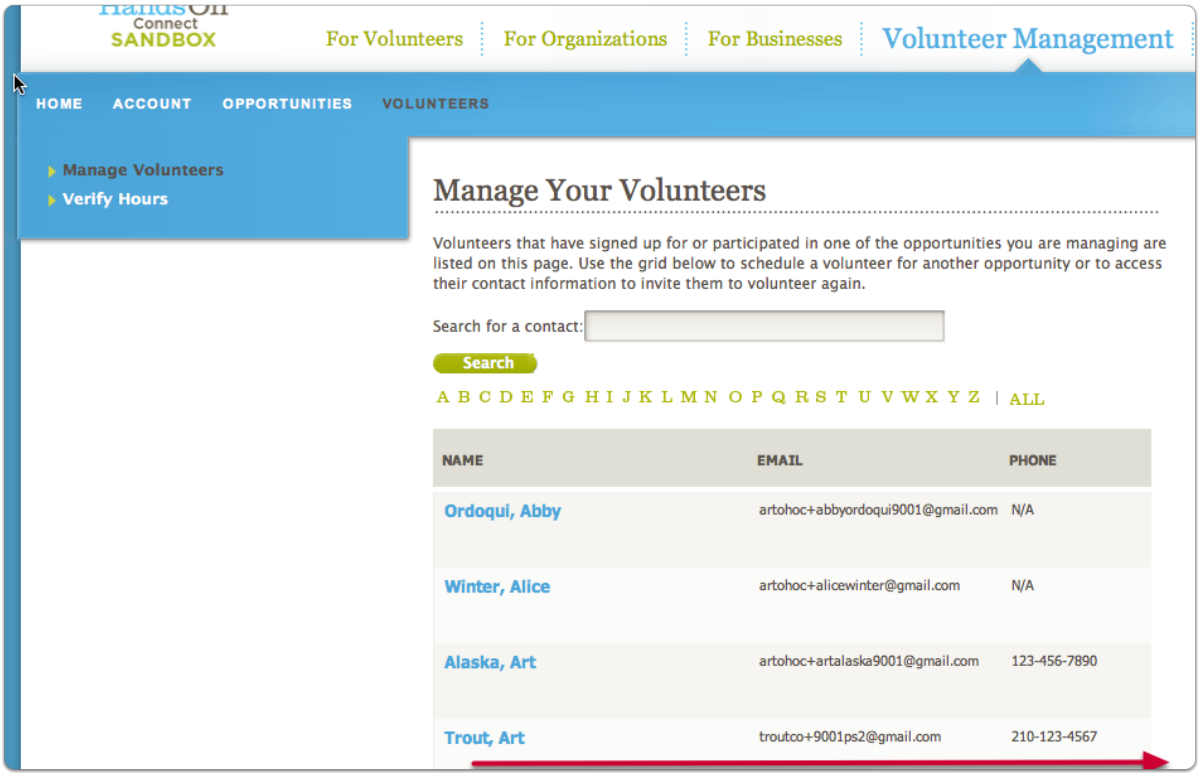
The Account menu provides access to Organization information as well as easy access to your personal information. Note: Only the primary contact for your organization can edit the information in your Organization Information and Organization Contacts..

Opportunities Menu



In the Opportunities Menu you'll be able to manage any of your existing opportunities, or create new ones. You can also view and edit existing volunteer locations.

Volunteers Menu



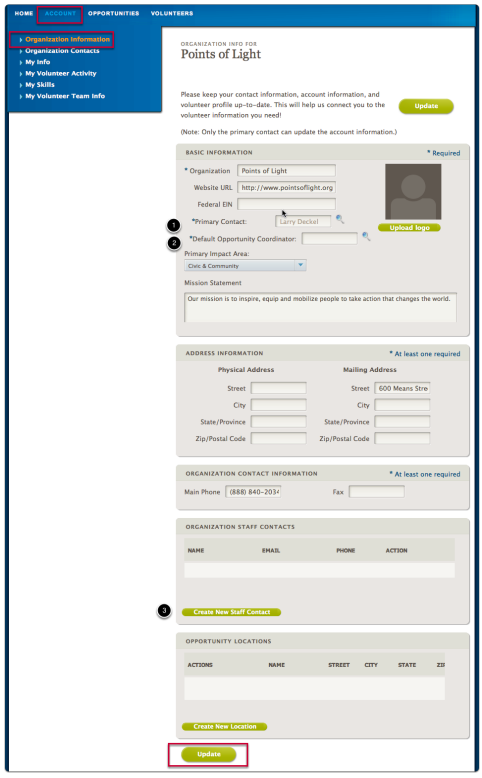
In the Volunteers Menu you'll be able to view the records of your individual volunteers, as well as verify their attendance and hours of service.

In some versions of the portal additional navigation may be available

Sites that use self-organizing volunteers may add additional menu items for the convenience of volunteers who organize projects. These may include direct navigation into the volunteer menu giving easy access to 'my account' and search pages.

Managing your Organization and Personal information

Organization Information



This record can only be edited by the Primary Contact of your organization. They can edit:

- Organization Name
- Website URL
- Federal EIN (in you have one this should be populated)
- Upload your organizational logo (Note: it must be a square image, 113 x 113 pixels recommended. If it is not square it will be stretched and distorted to fit the square format used on the public site for partner logos.
- Primary Impact Area
- Mission Statement
- Address Information
- Contact Information (Organizational main phone numbers)

1. **Primary Contact:** Use the magnifying glass icon to look up the name of someone else in your organization if you wish to change the primary contact. **Important:** if the primary contact changes the primary contact to someone other than themselves, once they save this record they will be unable to edit this page. Only the person currently designated as the organization's primary contact is able to update the information on this page.

2., **Default Opportunity Coordinator:** You can use the magnifying glass to look up any of your existing staff members who have access to the portal, and choose which one is the default Opportunity Coordinator.

3. If you wish to create a contact for a NEW staff member, and request that they be given a log-in to access your partner portal, click on the CREATE NEW STAFF CONTACT button. This will

enable you to create a new contact record (and automatically send a request to your system administrator to grant this new contact access to your partner portal. Note: anyone you add to the partner portal will have access to all your volunteer opportunities, occurrences, connections and contact records. So only create contacts for new staff members you wish to have this level of access. (Once they have been granted this access, you can look them up and make them the default opportunity coordinator or new primary contact if desired.)

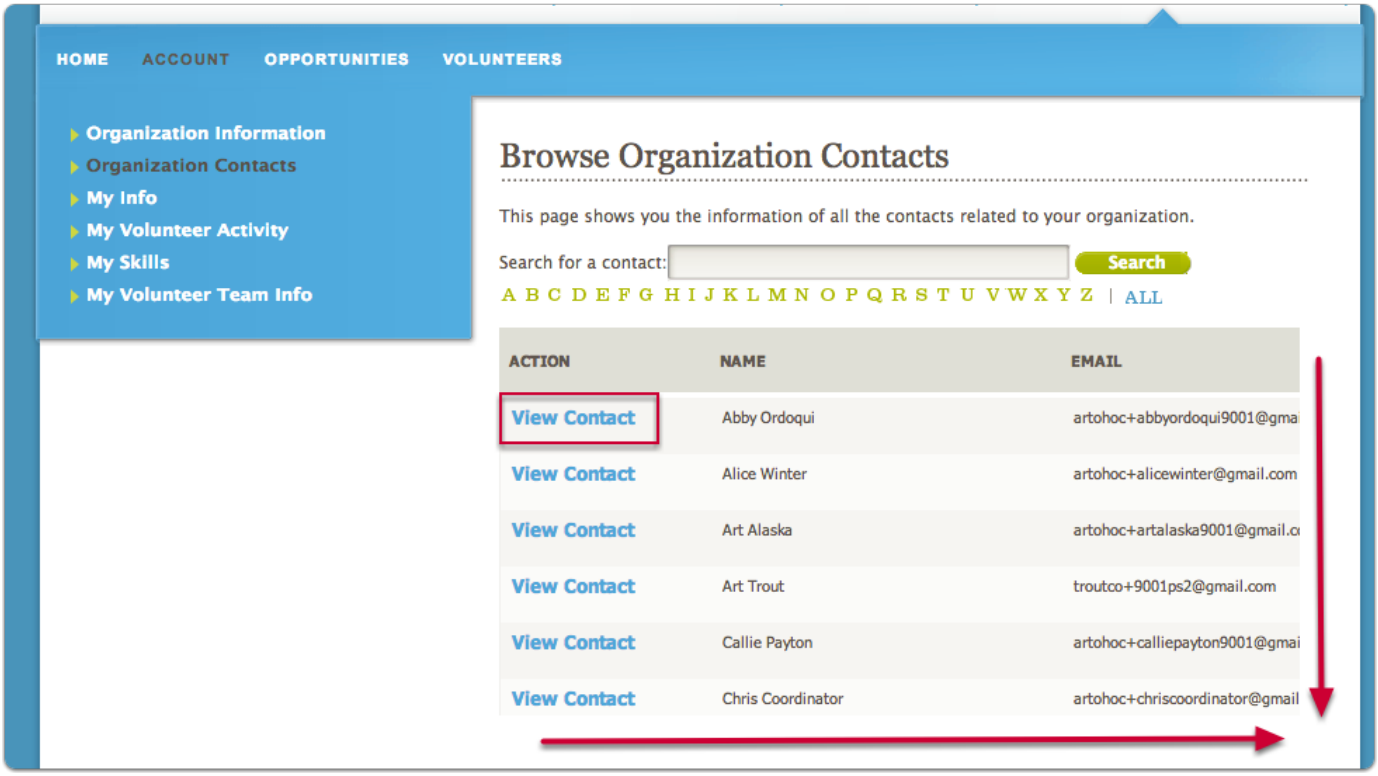
IMPORTANT: When the primary contact updates any of this information, they need to click the UPDATE button found on the top or bottom of the page to record the changes.

Organization Contacts

The Organization Contacts Navigation (in the Account Menu) allows you to see ALL contacts that have a relationship to your organization. This will include:

- All your staff members
- All of your Volunteers

HOC User Acceptance Testing | Organization Contacts



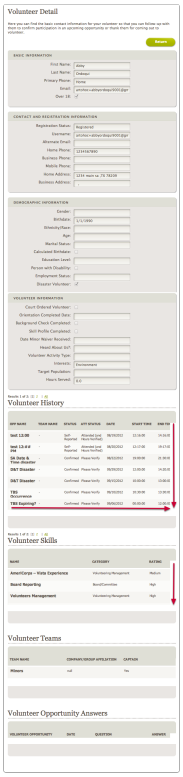
All your organization's contacts are presented in a scrolling view, alphabetically by first name.

To find a specific record you can either use the Search box, OR click on an alphabet letter to get everyone whose first name begins with that letter.

The info presented in the grid can be scrolled to the right and additionally shows their phone number, age, and total hours served.

To view a detailed record of any contact, click on the VIEW CONTACT link in the action column. From here you can see (but not edit) their volunteer profile, history, skills, teams, and answers to custom questions.

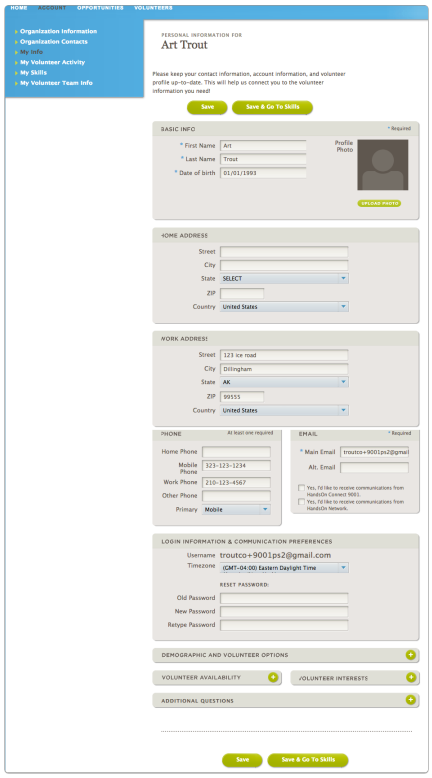
Volunteer Detail View



Updating your personal information

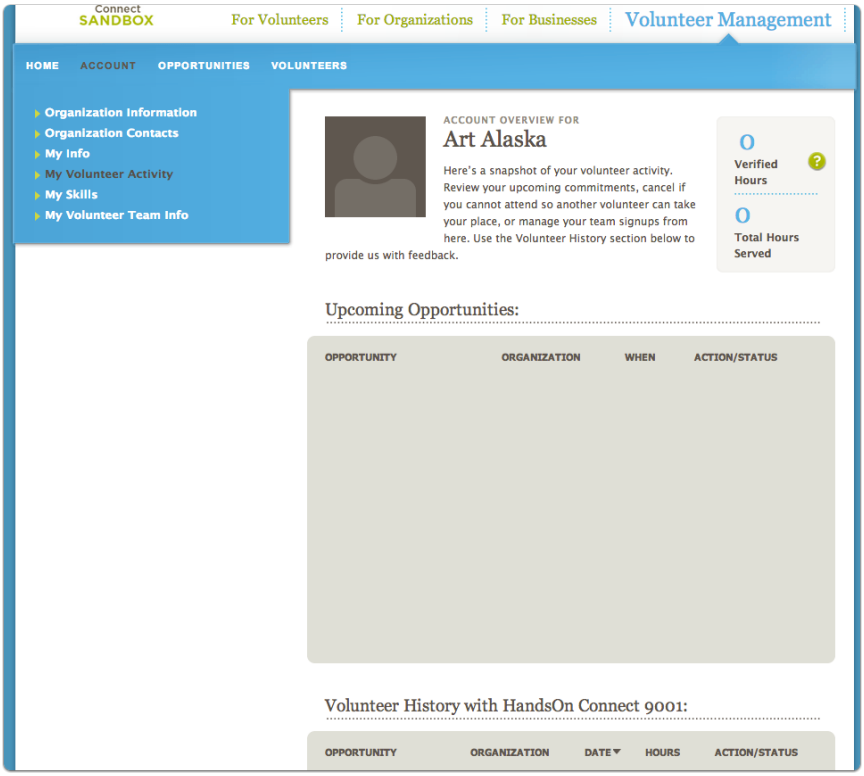
In the Accounts Navigation there are Four Subnavigation items that mirror the navigation found in Volunteer / My Account. They are presented here to make it easy for you to update your personal information or view your own volunteer history without leaving the Volunteer Management Portal. If you do not volunteer with other organizations - you probably will not make use of the My Volunteer Activity or My Volunteer Team Info tabs or My Skills navigation items - but they are there for your convenience if you do. You can edit your personal information in the My Info navigation item

My Info



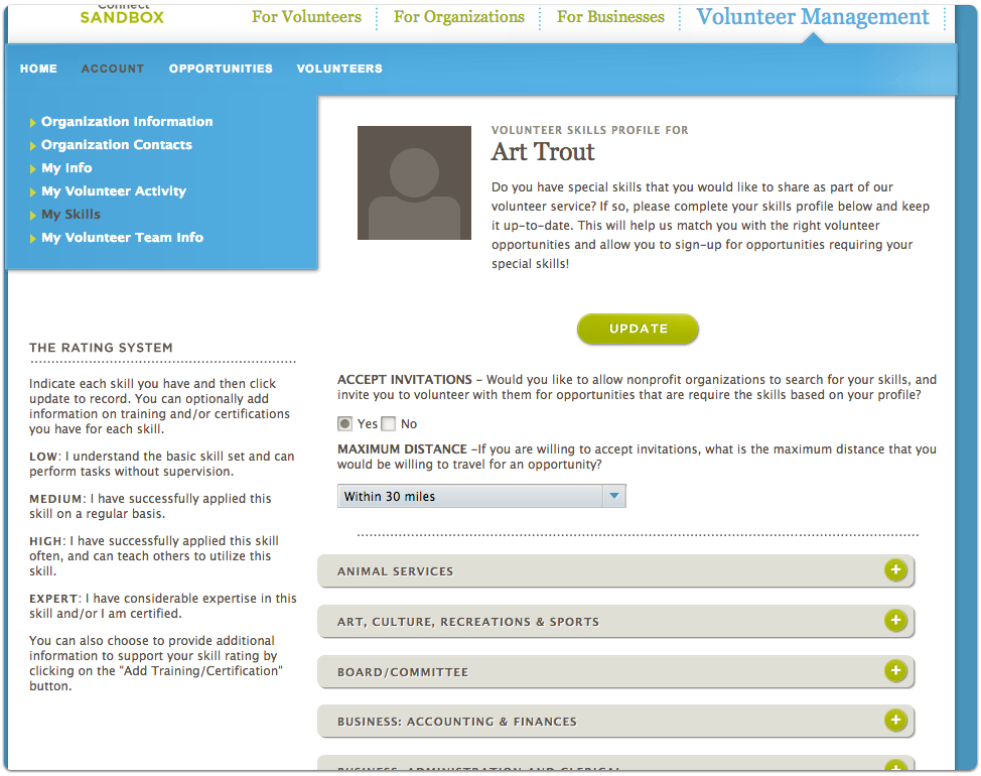
My info allows you to update your personal information, address, phone, email, and reset your password. Click SAVE to save your changes.

My Volunteer Activity



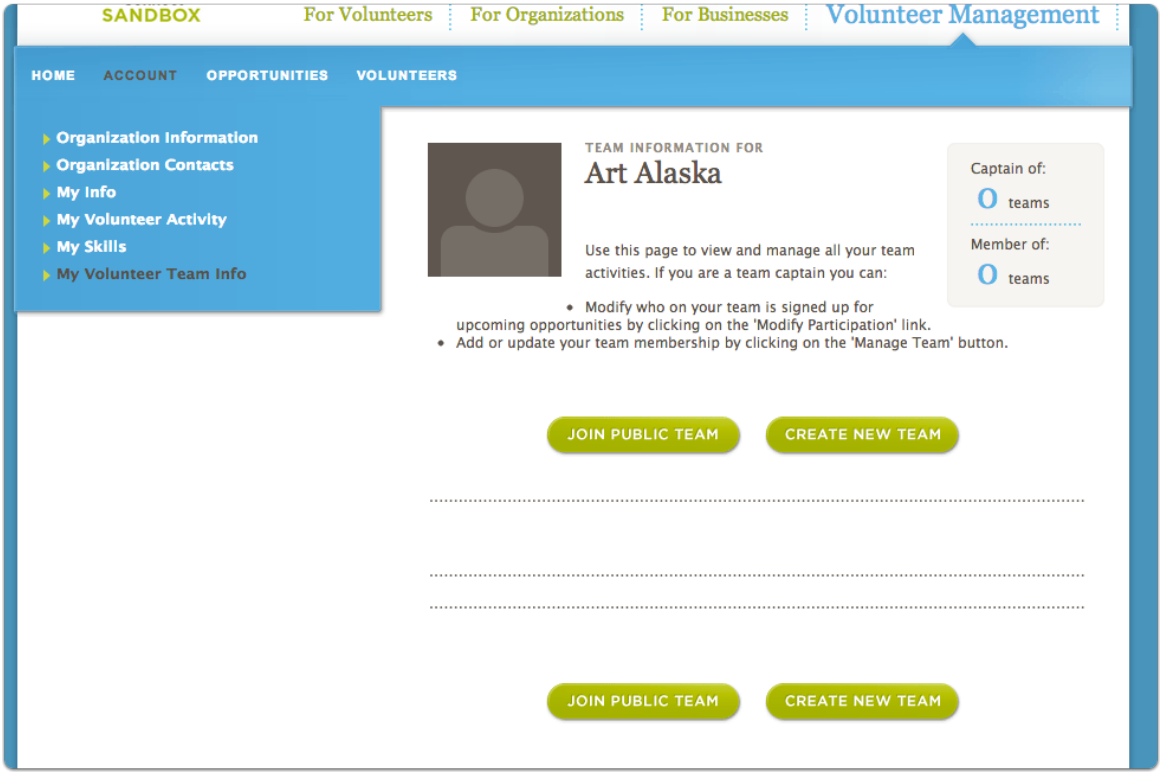
If you volunteer for other organizations, you'll find your personal volunteer history here and can see your upcoming and past opportunities.

My Skills



Allows you to set your personal skill profile (if you want to volunteer for skill-based opportunities or to be found in skilled volunteer search)

Volunteer Team Info



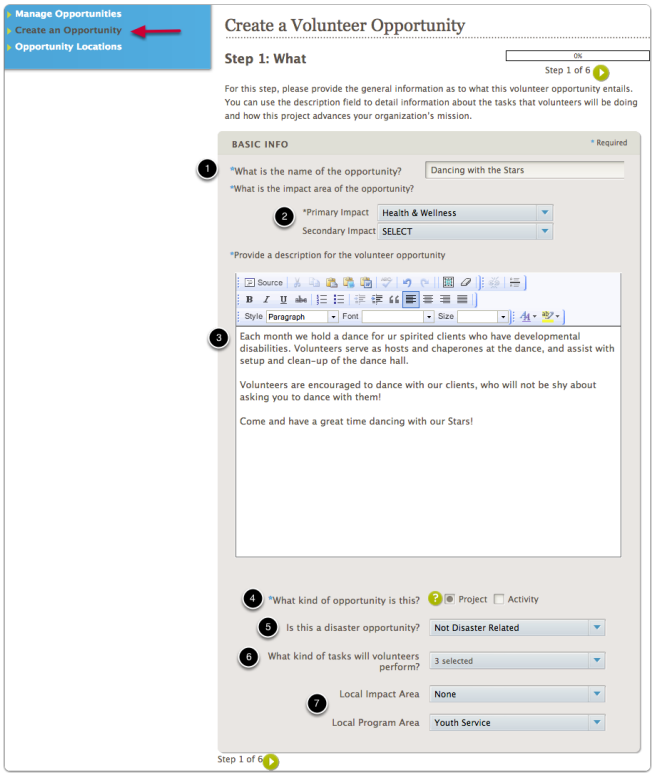
Here you can create volunteer teams where you are serving as a volunteer team captain and manage any of your existing teams. (For more information on volunteer teams, see this post)

Creating Volunteer Opportunities

Creating a Volunteer Opportunity - Step 1

When you click on "Create an Opportunity" you are led through 6 steps in the process.

HOC User Acceptance Testing | What



In this first part you'll provide basic information about the volunteer opportunity itself:

1. Give the opportunity a descriptive name

2. Choose from the picklist of impact areas. A primary impact is required, you can add a secondary impact if desired.

3. Give as much detail in the description of what a volunteer will be doing in this field. (You will fill out time, date, and location later). This is a description of the opportunity itself, to help volunteers determine if this is something they wish to volunteer for. You can type text directly into the field, and use the features of the WYSIWYG editor to enliven the text if desired. A few notes on using the WYSIWYG editor.

- Do not paste text directly into the field from word or other applications. If you DO wish to paste text, click on the **paste** icon for any text editors, or the "**Paste from Word**" icon if pasting from word. When pasting from word into the paste from word screen that opens, always select the options "Ignore Font Face Definitions" and "Remove style

definitions" - this will remove extraneous html code coming over from word. You can format the text IN the editor after its been pasted with external definitions removed.
- If you are using an external html editor, you can click on the **Source** icon, and see the raw html code, and/or paste html directly in here. (Only use if you are familiar with html and .css coding.
- You can use the **bold** icon and the **italic** icon to emphasize text.
- Use the **number list** or **bullet list** icons to create bullets.
- You can align or indent text using the other icons in the 2nd row.
- **Style** - this is the best way to set up headlines and get a consistent look to your listing. To see the effects of each of the style options in this menu, view this page which has illustrations of all the styles and how they are rendered on a page.
- If you don't wish to use the pre-defined styles in HandsOn Connect, you can optionally choose to set the **Font** and relative **Size** of the fonts. However, different browsers will render these differently. We recommend using either no styles - or the Style picklist for making posts look stylish.

4. Is the project a Project or an Activity? Click on the Help tip (green question mark) for an explanation of the difference. (Projects provide value to the community and earn service hours, activities are other things and if selected you'll be asked what activity type it is:

- Recognition - (a recognition event -- like a volunteer aware banquet)
- Training - training for volunteers or partners (If you select Training you'll be asked to specify the training type)
- Academy - this is short for 'citizen's academy" - and is an educational gathering that makes a volunteer a better citizen. Examples: Film Series, book clubs, discussion groups"
- Social - any outing that is just for fun. (luncheon for volunteers or partners)
- Other

5. Is this a disaster opportunity?

6. What kinds of tasks will volunteer perform? You can choose as many items from the list as you like. Aids in search for matching volunteer opportunities.

7. Local Impact Area / Program Area. May or may not have options relevant to your local market.

Creating a Volunteer Opportunity - Step 2

In the 2nd step you'll give information about WHEN the opportunity takes place.

There are two main types of "When" opportunities. You pick which by answering the question "Is this an ongoing opportunity?"

- If yes -- you are creating what's called a "To Be Scheduled" opportunity. This type of opportunity is used when you need volunteers over a long period of time, and each volunteer is individually scheduled to attend at a different time that meets the schedule of you and your volunteer. An example of this might be an opportunity where you need office help, Monday - Friday any time in the morning or afternoon. Volunteers will express interest in this opportunity - and you will work with them to schedule WHEN they will volunteer after they have expressed interest.
- If no - you are creating what's called a "Date and Time Specific" opportunity. This is an opportunity in which a certain number of volunteers are scheduled to attend at the same time. (That date and time is called an 'occurrence". An opportunity that is date and time specific can have more than one occurrence (so its ongoing in a different sort of way). But at each occurrence, a group of volunteers all are scheduled at the same date and time. An example of this might be a dance held for developmentally disabled adults, that is held on the 3rd Friday of every month. For each Friday dance, you need 12 volunteers from 6 pm - 9 pm. So you'll create multiple occurrences on this date and time specific opportunity. In this case - volunteers already know the date and time they are volunteering for!

Ongoing Opportunity = YES

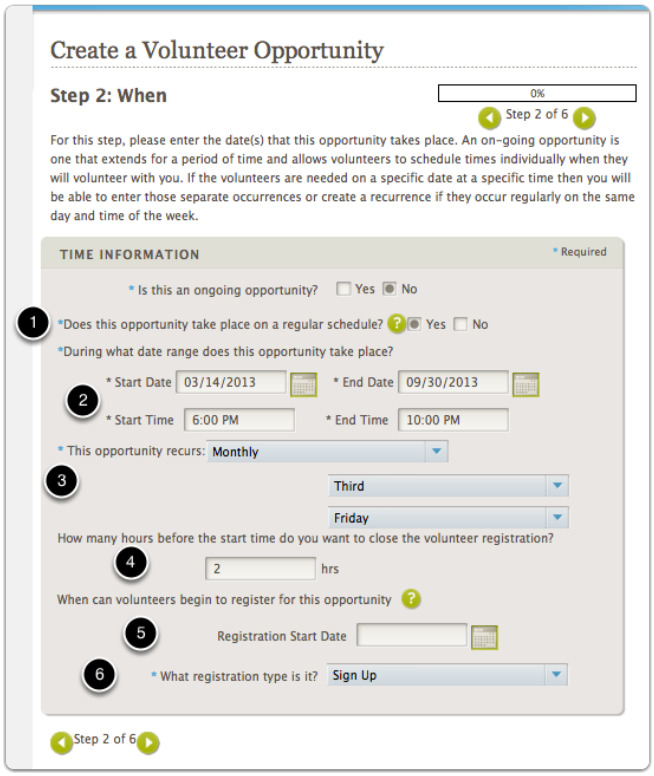
Ongoing opportunities are kind of like 'classified ads' -- they put out a call for volunteers in general terms, and scheduling is worked out later for each volunteer.

1. Start Date and End Date -- When do you want this opportunity to appear on the public site, and when should it end. (NOTE: We recommend not setting the end date more than 6 months in the future. You can always extend the end date later (and will get a reminder email) - but this way you'll ensure the contact info for the opportunity is always up to date in case you have staff changes.

2. Specify the days and times you need volunteers. (These are not time specific, but morning, afternoon or evening, by day)

3. Registration Start Date. By default, people can register for the opportunity as soon as it is approved and published. Leave this blank if that's your desire. Put in a date if you wish it to appear on the site but not allow people to register until a future date.

Ongoing Opportunity = NO



Saying "No" to Ongoing Opportunity allows you to create one or more date and time specific occurrences.

1. **Does this opportunity take place on a regular schedule?** If you say Yes, you'll be prompted to define a recurring schedule so you can make multiple occurrences at once. If you say No, you'll only be asked for the date and time of the one occurrence you are creating now. (Note: you can add additional occurrences at a later date, as many as you like. If the occurrences don't follow a regular pattern - you'll just create additional occurrences one at a time after the opportunity and its first occurrence is created.

2. **Start Date / End Date / Start Time / End Time.** In this case, we are creating a recurring pattern, so we're prompted over what period of time we wish to create multiple occurrences. All occurrences should have the same start time and end time. If it isn't a recurring series of dates, you'll just enter the one date or dates you wish to create and click on the "add date" button to add that date. (See screenshot below)

3. here you'll set the parameters for the recurring occurrences. You can set monthly, weekly, or daily recurrence patterns. In this case, we've chosen a monthly recurrence on the third Friday of every month. (Note: You cannot create more than 30 occurrences at one time - so do not set the end time more than 6 months in advance -- and do not create a pattern that would create more than 30 occurrences. (example: A daily recurrence on Monday, Wednesday and Friday set over a 3 month time span would try create 36 occurrences and result in an error message. (You can always create more occurrences later if necessary. Best practice: Do not create occurrences more than 6 months in advance)

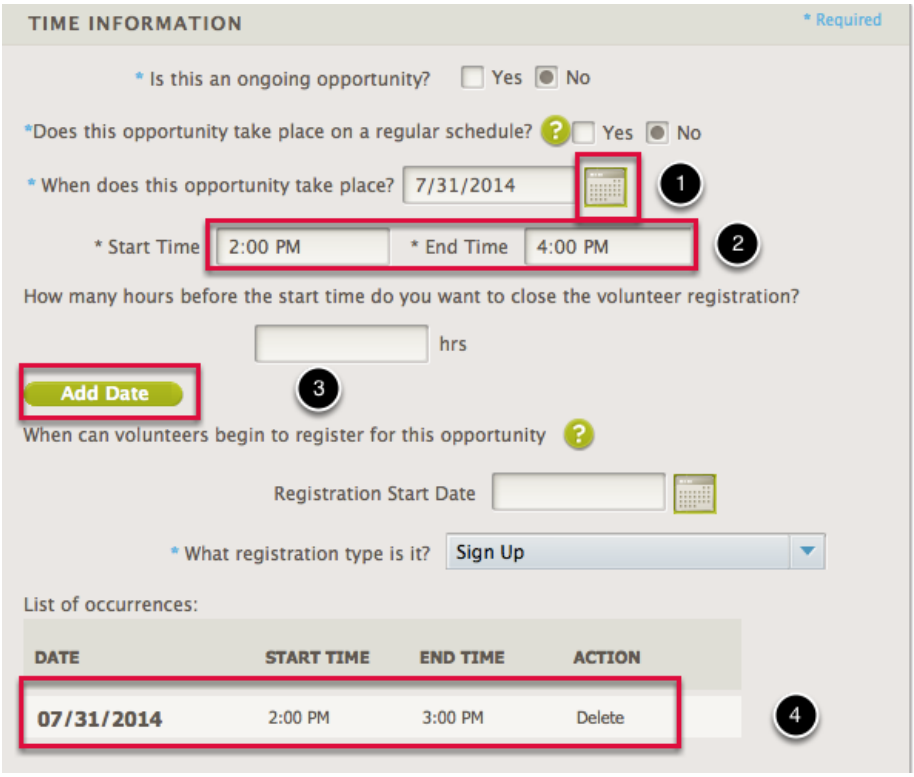
4. How many hours before the occurrence starts do you want to close registration?

5. Registration Start Date. By default, people can register for the opportunity as soon as it is approved and published. Leave this blank if that's your desire. Put in a date if you wish it to appear on the site but not allow people to register until a future date.

6. **What Registration type is it?** You have two choices here:

- **Sign Up** - in this registration type - you define how many volunteers you need, and volunteers are in **confirmed status** for the opportunity if they meet the age restrictions you will assign. When you reach your maximum number of volunteers, registration will be closed (though volunteers can choose to be added to a waitlist).
- **Express Interest** - in this registration type - volunteer can only 'express interest' in the opportunity, and will be in **pending status** , and you will have to review their connection and either confirm or decline the volunteer. Use this registration type if you need to contact the volunteer and ensure they have a background check, or you have some other screening you need to do before allowing someone to volunteer. (Note: This does take a bit of extra work on your part, whereas with Sign Up, the entire process is automated as volunteers are automatically confirmed if they are the correct age.)

Step 2 when you are creating non-recurring dates



To create one or more non-recurring occurrences:

1. Click on the date icon and select a date
2. Set the start time and end time
3. Click on the Add Date button
4. The occurrence you are creating appears in the 'list of occurrences"

You only need to create one occurrence, but can create more than one recurrence by repeating steps 1 - 3 to create multiple occurrences of this volunteer opportunity. (This is handy when you want to create more than one occurrence but they are not in a recurring pattern as in the previous example).

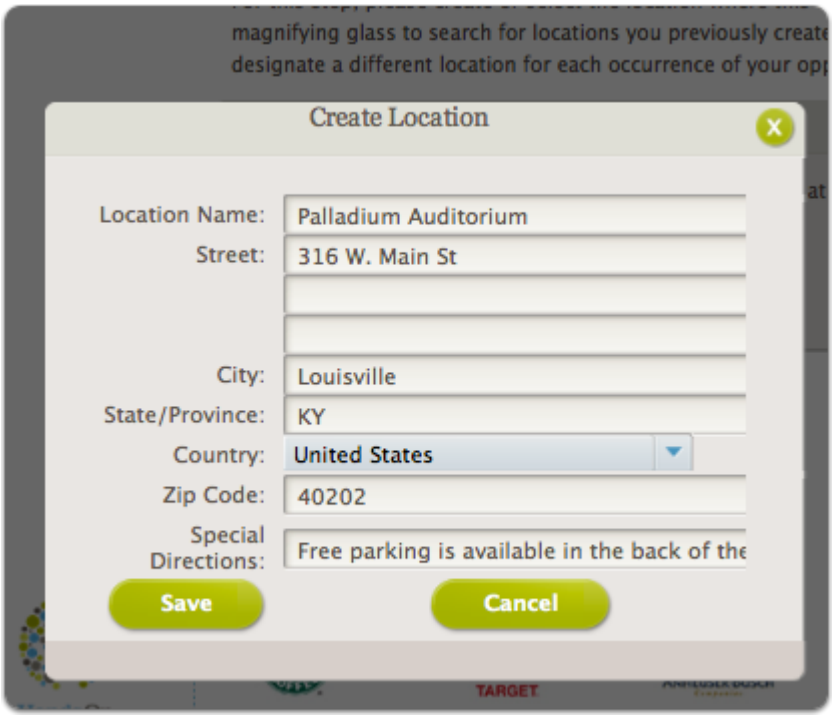
Creating a Volunteer Opportunity - Step 3

Here you define WHERE the opportunity will take place. This creates a 'location' record. All occurrences may take place at one location, or you can select different locations for each occurrence you are creating.

Do all the occurrences of this Opportunity Occur at a single location? = Yes

If all the occurrences you specified in step 2 take place at the same location, say YES to this question. If this is a location you've created before for another opportunity or occurrence, then you can look it up using the magnifying glass to the right of the location field, and select from all your existing locations. OR, you can click on 'Create New" to create a location you've not created before.

Create Location window

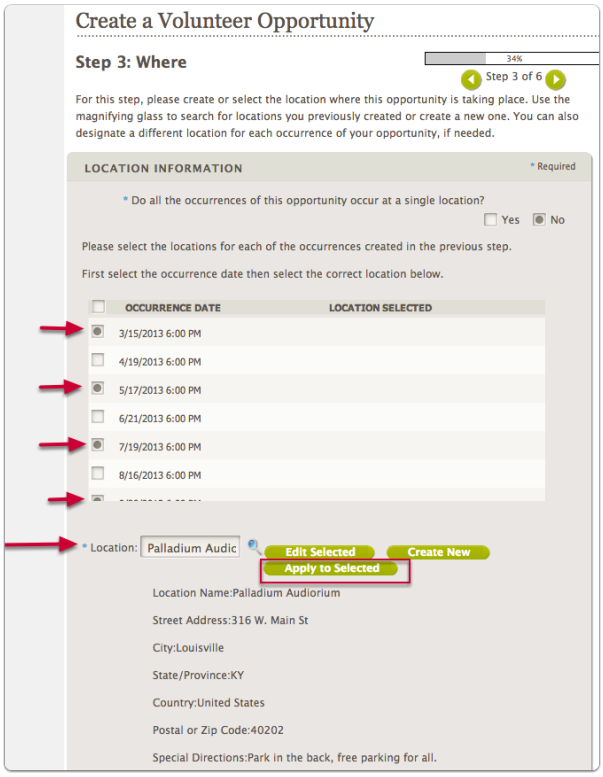


When you create a new location, give it a 'name' (so you can recall it for later use, and input the street, city, state, country and zipcode.

The Special Directions field is optional but can be used for any other info folks may need (parking information, etc). A google map will automatically be created and added to the location based on the address you've provided. Click SAVE to save your new location.

When you do, it will automatically be populated in the location lookup field. You can also edit it after its been created (click on the 'edit' button).

Do all the occurrences of this Opportunity Occur at a single location? = No

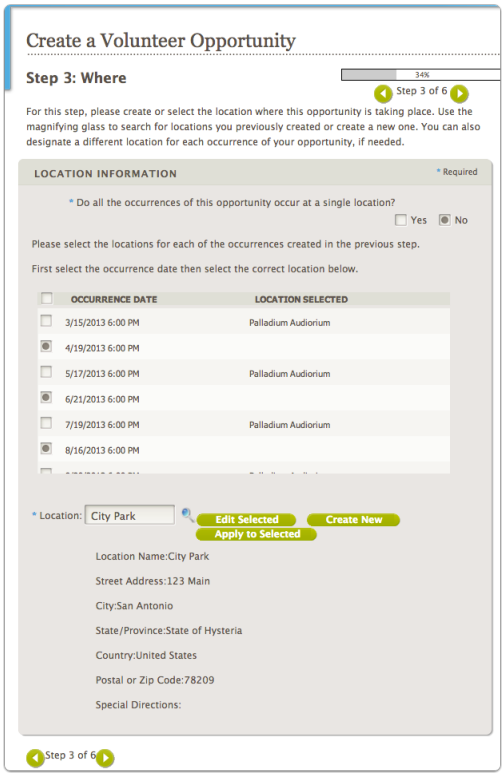


Answer NO to the question if you wish to assign different locations to each of the occurrences you created in step 2.

Then look up the first location you are assigning (using the magnifying glass) -- or create a new one... and place check marks next to to occurrences you're creating that take place at that location. Then click APPLY To Selected.

In the scenario above, the location will be Palladium Auditorium every other month.

Now repeat for your second location, until you have assigned a location to each occurrence you've created!

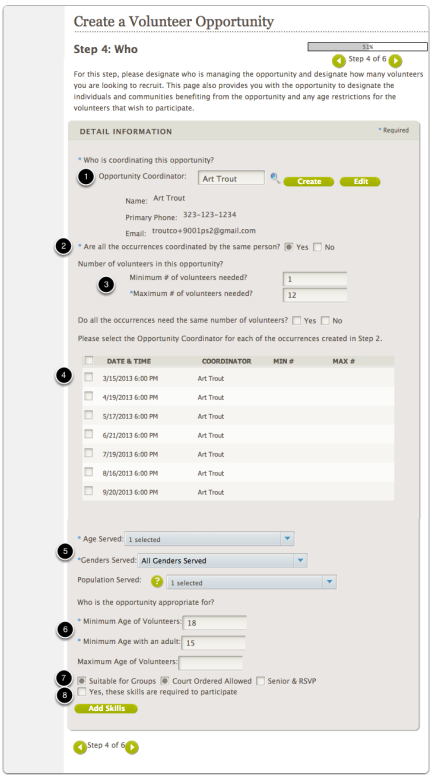


Now we can choose the remaining occurrences, and set them to our outdoor dance location in City Park. Just click on Apply to Selected.

IMPORTANT: Make sure each occurrence has a location selected before going on to the next step.

Creating a Volunteer Opportunity - Step 4

Here you will define details about the people involved in the opportunity.



1. **Opportunity Coordinator -** this is the person on your staff who will be the main point of contact for the volunteers and supervise them in the volunteer activity. You can use the magnifying glass to look up any of your existing contacts, or click on the CREATE button to add a new staff contact.

2. **Are all the occurrences coordinated by the same person -** If you answer yes, the person selected above will be assigned to all the occurrences you created in step 2. If you select No, you'll have the option of assigning different coordinators to different occurrences.

3. **Minimum and Maximum # of volunteers needed.** The minimum number is optional (in case you want to keep track of it. The maximum number determines the cutoff for the number of confirmed connections that will be allowed. It has no effect on the number of 'express interest' connections that are in pending status.

4. View of the occurrences you are creating, so you can assign the appropriate Opportunity Coordinator to each. (Note: In this case we answered YES to question #2) so the one opportunity coordinator is automatically assigned to all of occurrences. (If you choose "No" to question 2, you assign coordinators to each occurrence in the same way as we did locations in the previous step).

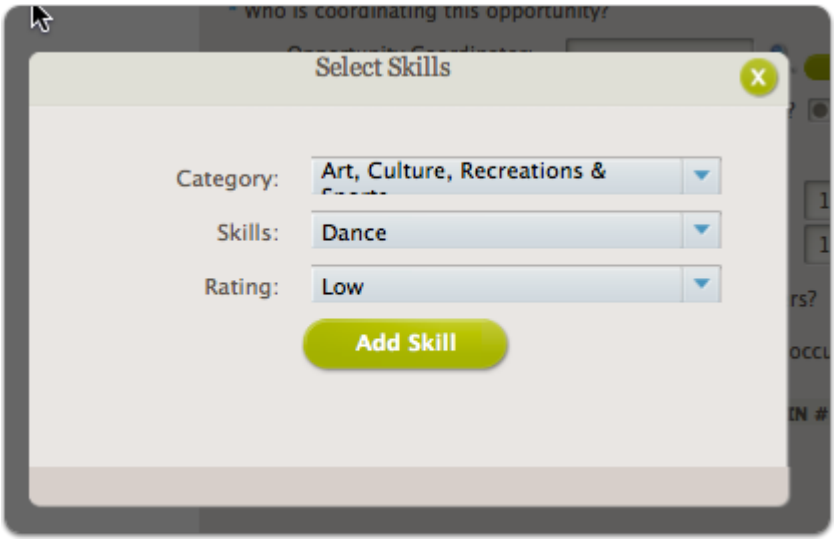
5. **Ages Served, Genders Served, Population Served.** These picklists give volunteer information about WHO benefits from their volunteer service.

6. **Minimum Age of Volunteers** - the minimum age for an unaccompanied person to volunteer. (This restriction is applied during full sign-up opportunities to keep underage volunteers from signing up and being confirmed. **Minimum Age of with an adult** - you can set an age wherein an adult can bring a younger volunteer here. The adult will have to sign up the younger volunteer as part of a family team, but this makes an opportunity more family friendly! You can make both these ages the same, if for example no one under 18 should attend. **Maximum age of Volunteers** is an optional field - if you want to restrict the opportunity to volunteers UNDER a certain age.

7.Optional search characteristics. Is the opportunity a good one for groups? Do you allow court ordereed volunteers to attend? Is it suitable for seniors and RSVP volunteers? (RSVP is a federal funded volunteer program for seniors)

8. **Yes, these skills are required to participate.** If you only wish volunteers who have completed a skill profile, and have skills that match the skills you can add by clicking the ADD SKILLS button - then check YES. This will restrict anyone who does not have matching skills from signing up. If you leave this box unchecked -- you can still associate skills with the opportunity, but they will not be required (just useful to have)

Adding Skills

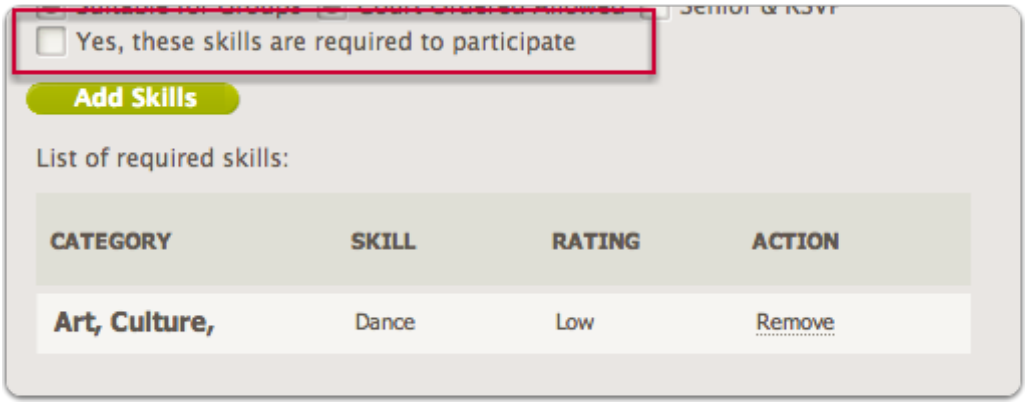


When you click on the ADD Skills button - you can add one or more skills to associate with the opportunity.

A popup window lets you choose the skill category, the skill itself, and the level of experience needed (skill rating). After you add a skill it will appear in the 'list of required skills' below.

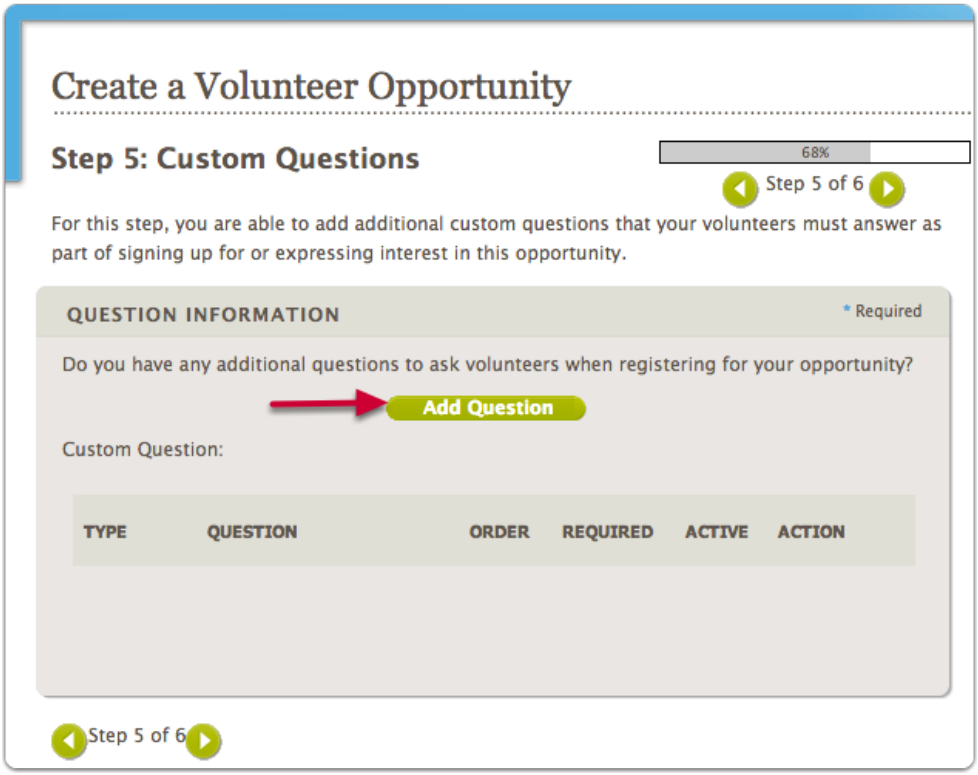
(NOTE: the skill swill only be required IF you check the box that says "Yes, these skills are required to participate." If unchecked, these skills become 'nice to have' and just help volunteers to find opportunities that could take advantage of their skills. Only check the skills required button if you want to restrict volunteers who have not filled out a matching skill profile from signing up for SIGN UP based projects. (They can still sign up for express interest

opportunities where restrictions are not applied, since you will be reviewing and approving volunteers administratively).

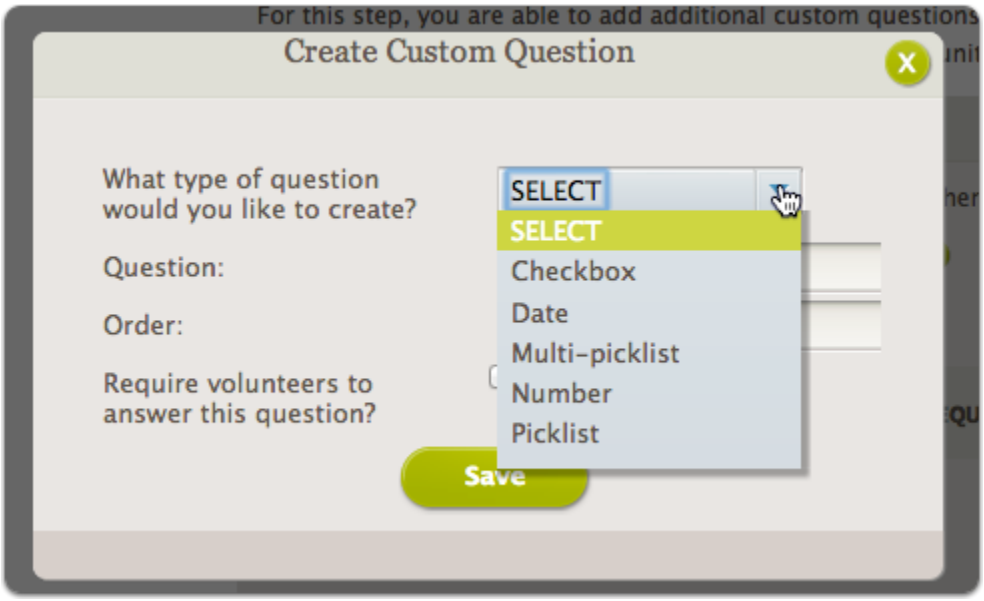


Creating a Volunteer Opportunity - Step 5

In this step you can optionally create questions that will be asked of volunteers during the signup process. You can skip this step if you do not want to add additional questions.



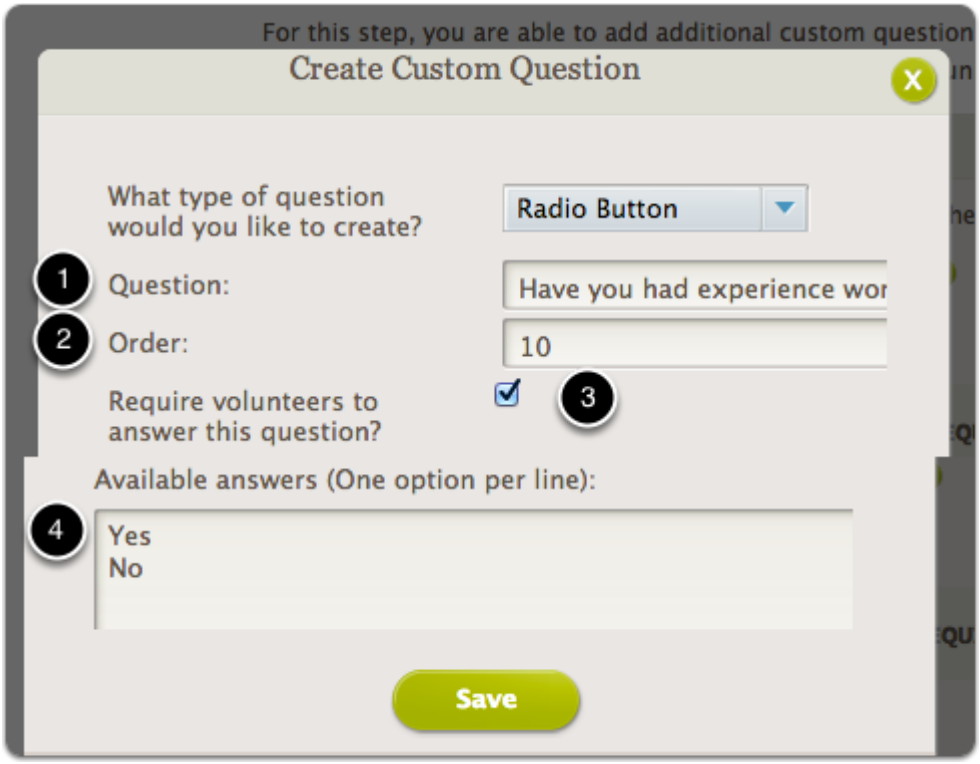
HOC User Acceptance Testing | Custom Questions



There are seven types of questions you can create:

1. Checkbox = a series of answers to the question, with a checkbox next to each. User can pick multiple checkboxes.
2. Multi-Picklist = a series of answers to the question, but in a drop-down menu that takes up less space if you have a lot of answers. Users can select multiple picklist values.
3. Radio Button = a series of answers to the question, with a checkbox next to each. User can only pick one answer!
4. Picklist - a series of answers to the question, but in a drop-down menu that takes up less space if you have a lot of answers. Users can only pick on answer!
5. Number = returns a numerical value only.
6. Date = presents a calendar, and user can select a date.
7. Text = user can enter text as an answer. (good for open ended questions)

HOC User Acceptance Testing | Custom Questions



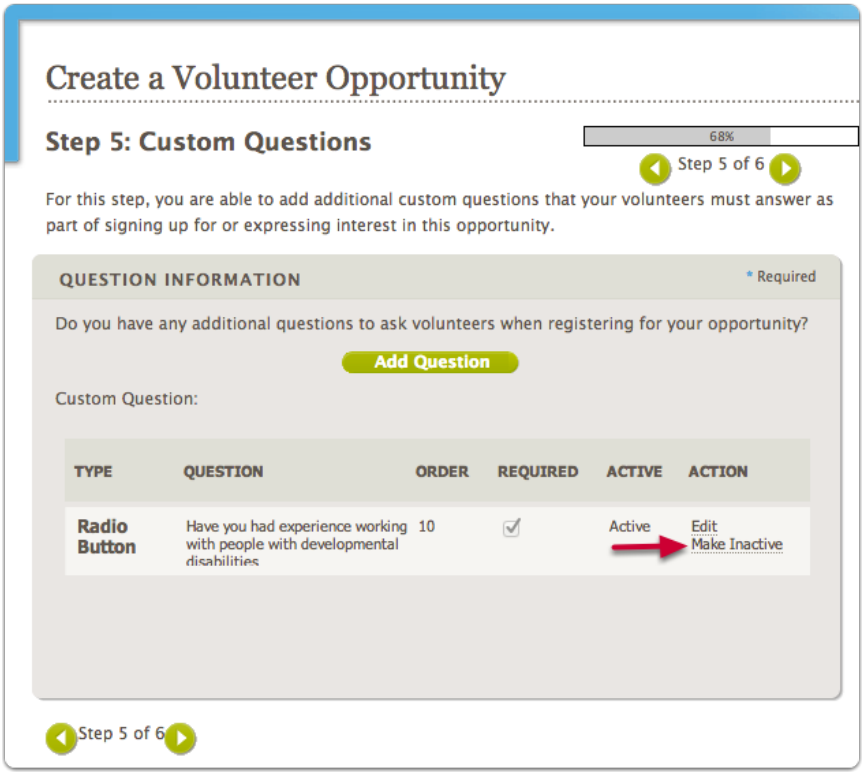
1. **Question** - put the exact text of the question in this field.

2. **Order** - to allow for multiple questions to be asked, this will determine the ORDER that the questions will appear. Instead of numbering questions 1, 2, 3 etc we recommend numbering them 10, 20 , 30. (This makes it easy for you if you want to move question 3 to question 2, as you can change its number from 30 to 15 (and 15 would be between 10 and 20 :-)

3. **Require Volunteer to answer this question:** If checked, volunteers can not sign up with providing an answer. Leave unchecked if the question is optional.

4. **Available Answers:** For checkboxes, radio buttons, multi picklists and picklists - list the answer options, one option to a line. Keep the answers short as long answers may not fit into picklists

cleanly or may wrap around awkwardly.Note: For checkboxes and multi-picklists, the total number of characters in all the answers you provide can not exceed 250 characters. It will cause errors if a user selects all the options and the returned answer is over 250 characters. You are better off creating multiple questions if you have a lot of answer values.



If you wish to add additional questions, click on the Add Question button and add another.

You can also see your existing questions, their order, and whether or not they are required and edit them as desired.

Note: You cannot delete a question after it has been created, but if you no longer wish to ask the question, click the "Make Inactive" link. Inactive questions do not appear during sign up.

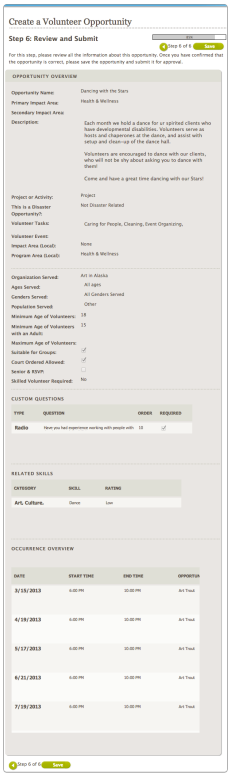
You can edit a question after you've created it or at any time in the future, however, **Note:** you should not change the question type after a question has been created. If you do - you will get an error in step 6 when you try to save the edited opportunity. (if you need to change the question type, make the current question inactive, and create a new question of the correct question type!)

When you're done creating questions (or if you create none), click on the arrow and move to Step 6.

Creating a Volunteer Opportunity - Step 6

In this step you REVIEW AND SUBMIT your Volunteer Opportunity.

HOC User Acceptance Testing | Review and Submit



If everything looks satisfactory , click on the SAVE button at the bottom to finish creating your opportunity, its occurrences and locations, and submit them for approval to your host organization.

NOTE: If you are creating multiple occurrences, going back can cause some problems as you'll have to redo all the occurrences, locations, etc. It is often easier to save the opportunity now, and then go back and edit issues after the opportunity and its occurrences have been created. (For example, if you want to get back to Step 1 -- you are far better off Saving, and then just editing the opportunity by clicking on "Manage Opportunities" - then hitting the back button 6 times and possibly having to reenter a lot of info.

You will see a Success screen when you have done this successfully.

HOC User Acceptance Testing | Success

From here you can Create another opportunity or Manage your Existing Opportunities.

Managing Existing Opportunities

Managing Existing Opportunities

After a Volunteer Opportunity has been created, you can edit it, add additional occurrences or recurrences, as well as make changes to existing occurrences. This is done through the Manage Opportunities navigation item.

Here's the layout of the Manage Opportunities navigation item.

Status Definitions

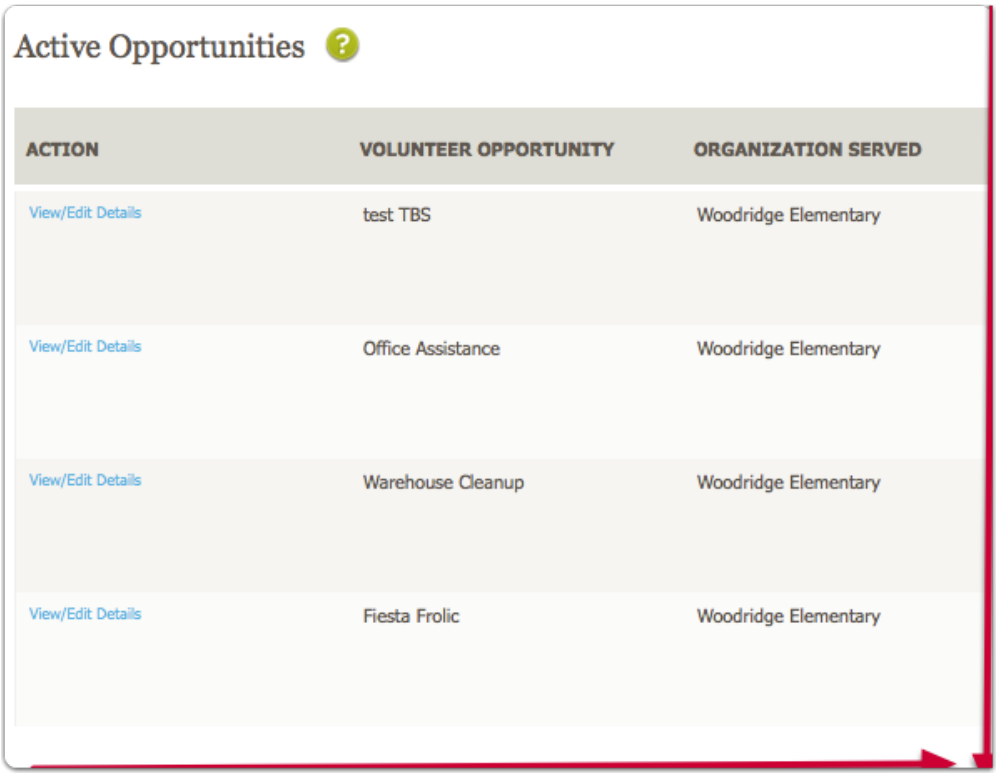
Each Opportunity and its Occurrences can be in one of the four possible statuses indicated above.

Search for Opportunities

You can search for a specific opportunity by typing in the opportunity name in the search box, and clicking search.

You can also filter the opportunities that appear in the two grids below by the first letter in the opportunity name. This makes it easy to get to a specific opportunity record to view or take action on it.

Active Opportunities appear in the Active Opportunities Grid



The opportunities that appear in this grid are currently active and appear on the public site.

Scrolling to the right will show additional columns of information:

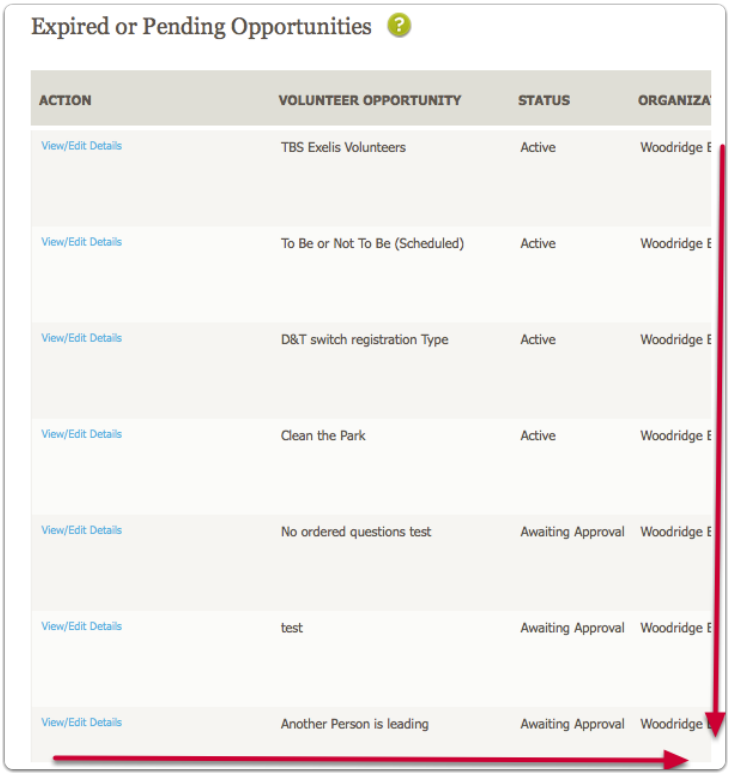
- Schedule Type
- Start Date

- End Date
- # of occurrences of this opportunity (This is the total number of 'active' occurrences - and may include occurrences in the past which are no longer on the public site).

You can view any opportunity and edit its details, as well as add occurrences by clicking on "View/Edit Details"

Note: You cannot delete an opportunity or occurrence after its been created (it is still maintained for data purposes as it may have occurrences and connections associated with it). If you wish it to no longer appear on the public site, you need to edit its occurrence record. (For 'To Be Scheduled' Opportunities - just move the occurrence end date to yesterday's date and it will no longer appear on the site. For 'Date and Time Specific" opportunities - cancel any future occurrences and the opportunity will no longer appear on the public site.

Expired or Pendings Opportunities appear in the lower grid and are not visible on the public site.



These opportunities are not visible on the public site, but you can view or edit them from here by clicking on the View / Edit Details link.

Opportunities that are in this list but have a status of active have been previously approved, but do not have any occurrences for future dates. Adding new occurrences or extending the end date of a 'To Be Scheduled" occurrence will once again submit the opportunity for approval to be published.

Scrolling to the right will show additional columns of information:

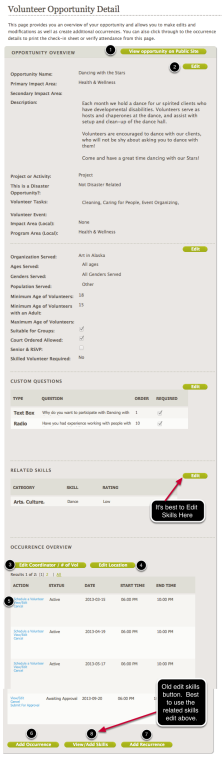
- Organization Served

- Schedule Type
- Start Date
- End Date
- # of active occurrences of this opportunity (including those that were active in the past)

Viewing and Editing the Opportunity Detail Page

You can see, and edit many of the details of existing volunteer opportunities (whether active or pending or submitted for approval). Clicking on the View/Edit Details link in Opportunities / Manage Opportunities brings up the

Volunteer Opportunity Detail View



The Opportunity Detail Page provides you with link to perform a lot of different actions:

1. **View Opportunity on Public Site -** this will open the public site search page to the volunteer opportunity. It only works when an opportunity is active and search has been refreshed and updated. If you click the link before the opportunity has been published and search re-indexed - you will not find the opportunity to view on the public site.

2. **EDIT -** Edit buttons appear in various sections of the opportunity description. Clicking on edit will take you back to the volunteer opportunity creation six-step process, where you can edit and update certain items in the opportunity itself, edit or add custom questions, edit or add related skills, You will be brought to the appropriate 'step' in the volunteer opportunity creation process - and need to proceed to Step 6 and SAVE your edits.

3 **Edit Coordinator / # of Volunteers** - takes you to ALL the existing occurrences, where you can update the Opportunity Coordinator or the min/max # of volunteers for each occurrence.

4. **Edit Location** - takes you to ALL the existing occurrences, where you update the Locations of any or all the upcoming occurrences.

5. **Occurrence Overview Grid -** This scrollable view shows you all your existing occurrences associated with this volunteer opportunity. You can perform the following actions on any one occurrence from here:

- **View / Edit** - View the existing occurrence record, print the check-in sheet for that occurrence, and/or edit the occurrence record details. You can also see all the voluteers who have signed up or expressed interest in the opportunity here.
- **Cancel -** click on this link if you wish to cancel the occurrence and notify the volunteers that this occurrence has been cancelled.
- **Mark Inactive -** permanently archives this occurrence so that it never takes place. (Note -- you shouldn't do this if you have volunteers signed up!) We recommend using Cancel instead so they are notified!
- **Submit for Approval -** if the occurrence is still in pending status - click on this link to submit the occurrence for approval so it is published on the public site.

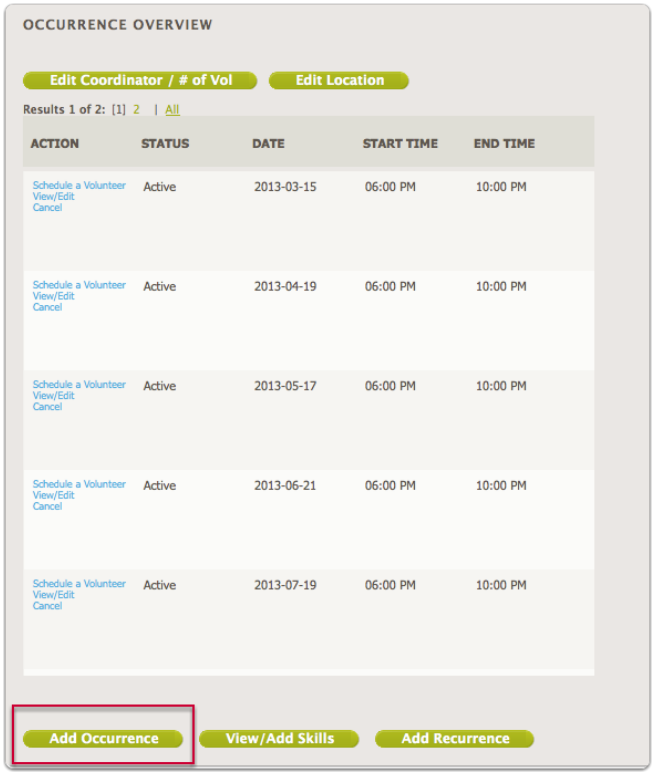
6. **Add Occurrence** - use this button when you want to add a new occurrence to the volunteer opportunity

7. **Add Recurrence -** use this button when you want to add a recurring pattern of new occurrences to the volunteer opportunity.

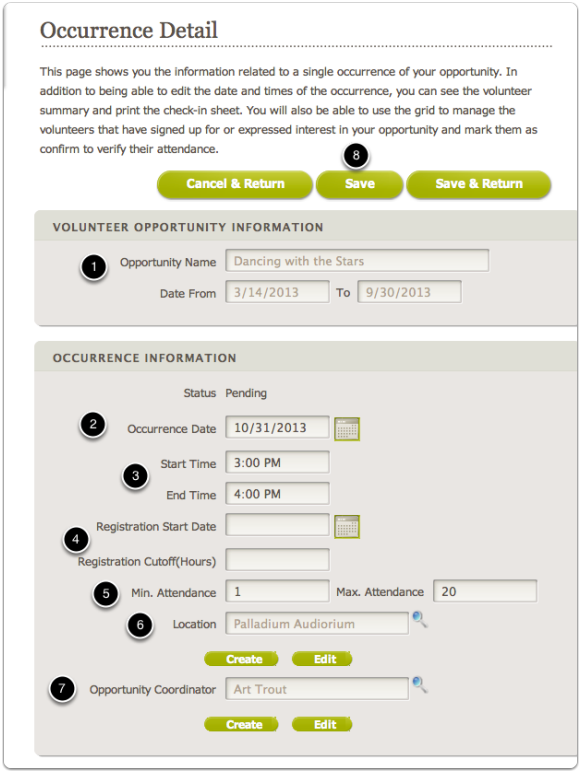
8. This button goes to an older, less efficient interface for working with skills. Please ignore. (It will be removed in the next release!)

Creating a New Occurrence

From the Volunteer Opportunity Detail page - click the button "Add Occurrence"



The Occurrence Detail page is used to create new occurrences (as well as editing existing ones)



The page for creating a new occurrence is the same page used for editing an existing one. But creating a new occurrence is easy -- just fill out the Occurrence info section of the page:

1. The Volunteer Opportunity Information just recaps the info of the opportunity you're creating a new occurrence for. Don't worry if the end date is in the past or earlier than the new occurrence you wish to create. The volunteer opportunity end date will be updated to match the date of the latest occurrence you create.

2. Occurrence Date: Use the popup calendar, or enter the date here. It must be in the format xx/xx/xxxx

3. Start and End Time. (by default, the current time will be filled in - be sure to update the fields with your desired start and end time and preserve the formatting which must include AM or PM

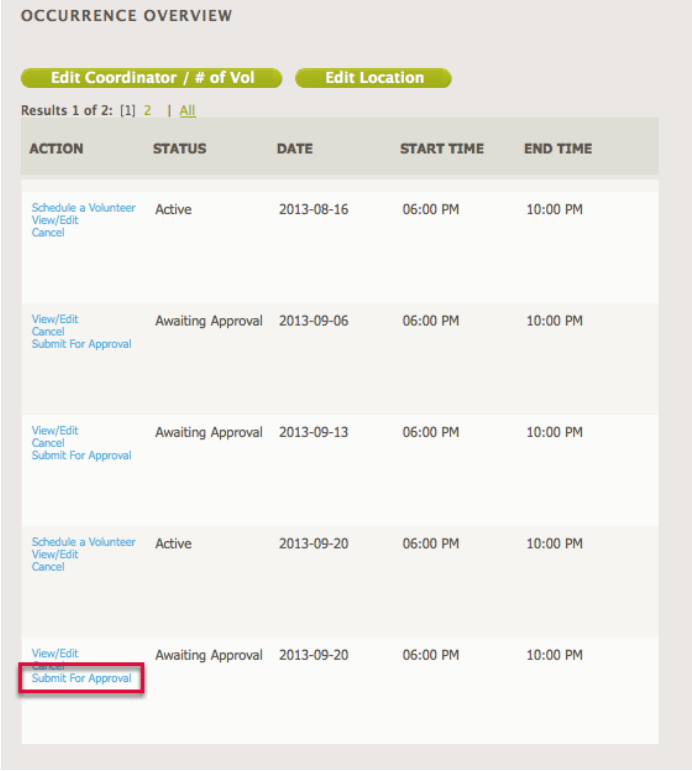
4. Registration Start Date and registration Cutoff (Hours) - If left blank, the defaults from the volunteer opportunity will be brought ovber.

5. Min. Attendance / Max Attendance: If left blank, the defaults from the volunteer opportunity will be brought over. *(NOTE: When saved - if it is a known and temporary bug that the fields are reversed and the max attendance is listed as the min. attendance and vice versa).*

6. The default location is automatically populated - but you can use the magnifying glass to lookup other existing locations, create a new location, or edit the existing location.

7. Opportunity Coordinator - the default Opportunity Coordinator is brought over, but you can look up other staff members who can be opportunity coordinators, and the primary contact for your organization can create or edit staff contacts here.

Important - After creating a new occurrence - be sure to click the SUBMIT FOR APPROVAL button from the saved opportunity detail record / Occurrence overview. It will not be published and remain in pending status until you submit it for approval.

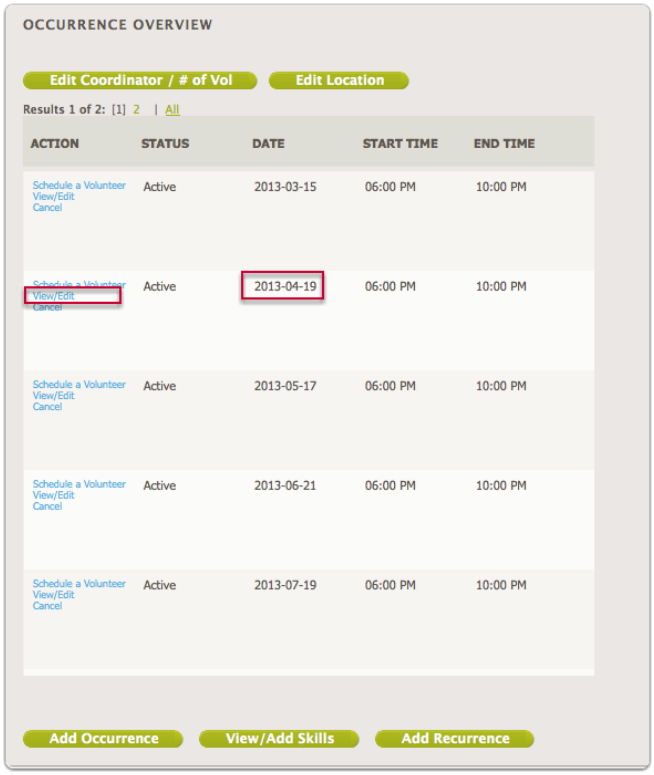


Managing Volunteers for each Occurrence

Occurrence Detail View

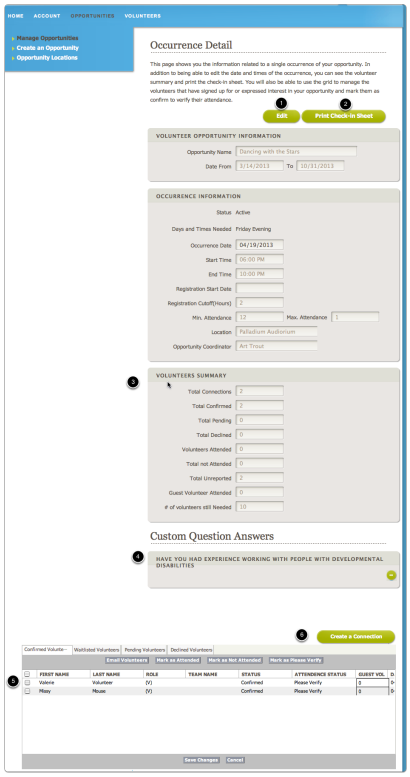
On the Volunteer Opportunity Detail Page, find the occurrence overview at the bottom of the record, and click on View/Edit to get to the Occurrence Detail View

Volunteer Opportunity Detail Page / Occurrence Overview



To see who is signed up for the April 19th occurrence of Dancing with the Stars, click on "View/Edit". (It's the 2nd option, right below, "Schedule a Volunteer") This will open the Occurrence Detail Page.

Occurrence Detail



1. Click on **EDIT** if you wish to update any details for this particular occurrence. If you change the start date and time, and/or end date and time, volunteers will be notified that a change has been made to the occurrence they are signed up for.

2. **Print Check In Sheet** - opens a separate tab with a check-in sheet for all connected volunteers, that you can use to check-in volunteers with, on-site. (see below)

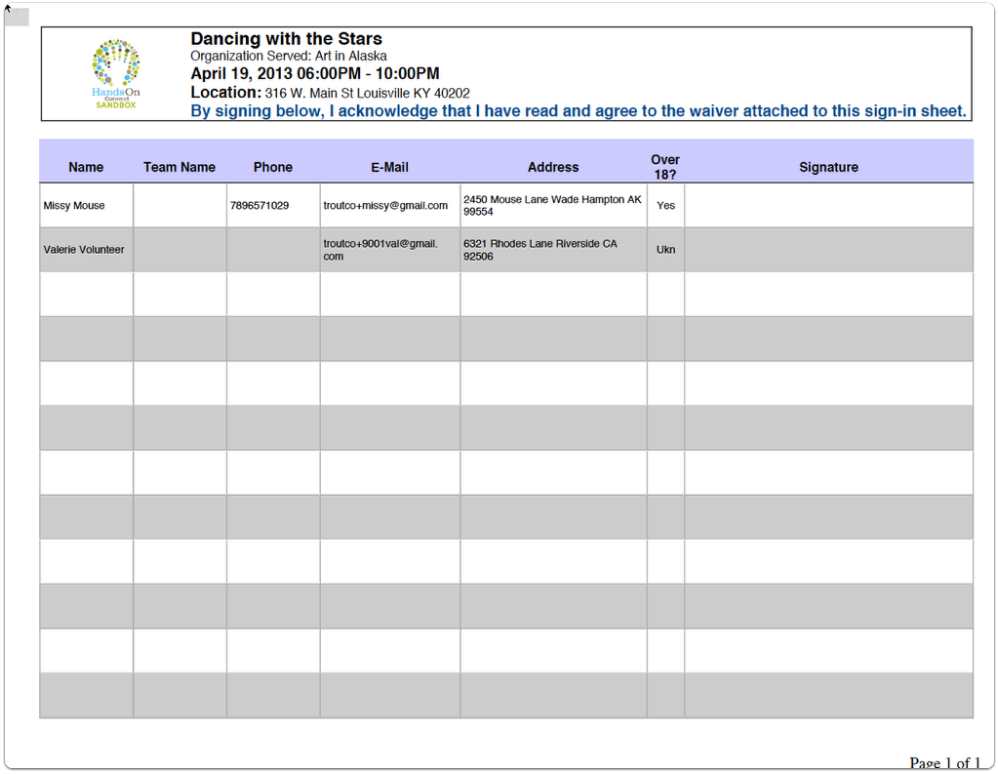
3. **Volunteer Summary** - This section is auto-populated with stats pertaining to this occurrence.

4. **Custom Question Answers** - If the opportunity had custom questions, and volunteers have given answers to those questions - the answers will appear here in this section. Click on the + button to expand this section and reveal the answers.

5. **Connections Grid** - used to see all volunteer connections for this occurrence, as well as to report attendance, assign guest volunteers, send emails etc. This is where you'll do the majority of your volunteer management for this occurrence of the opportunity. See the next few lessons for details on working with the Connections Grid.

6. **Create a Connection / Schedule a Volunteer** - This button will say "Create a Connection" when its for a Date and Time Specific Opportunity and "Schedule a Volunteer" for To Be Scheduled Opportunities. [See this post for details on how to connect or schedule a volunteer to an occurrence.]

Print Check-In Sheet .pdf



Dancing with the Stars
Organization Served: Art in Alaska
April 19, 2013 06:00PM - 10:00PM
Location: 316 W. Main St Louisville KY 40202
By signing below, I acknowledge that I have read and agree to the waiver attached to this sign-in sheet.

Name	Team Name	Phone	E-Mail	Address	Over 18?	Signature
Missy Mouse		7896571029	troutco+missy@gmail.com	2450 Mouse Lane Wade Hampton AK 99554	Yes	
Valerie Volunteer			troutco+9001val@gmail.com	6321 Rhodes Lane Riverside CA 92506	Ukn	

Page 1 of 1

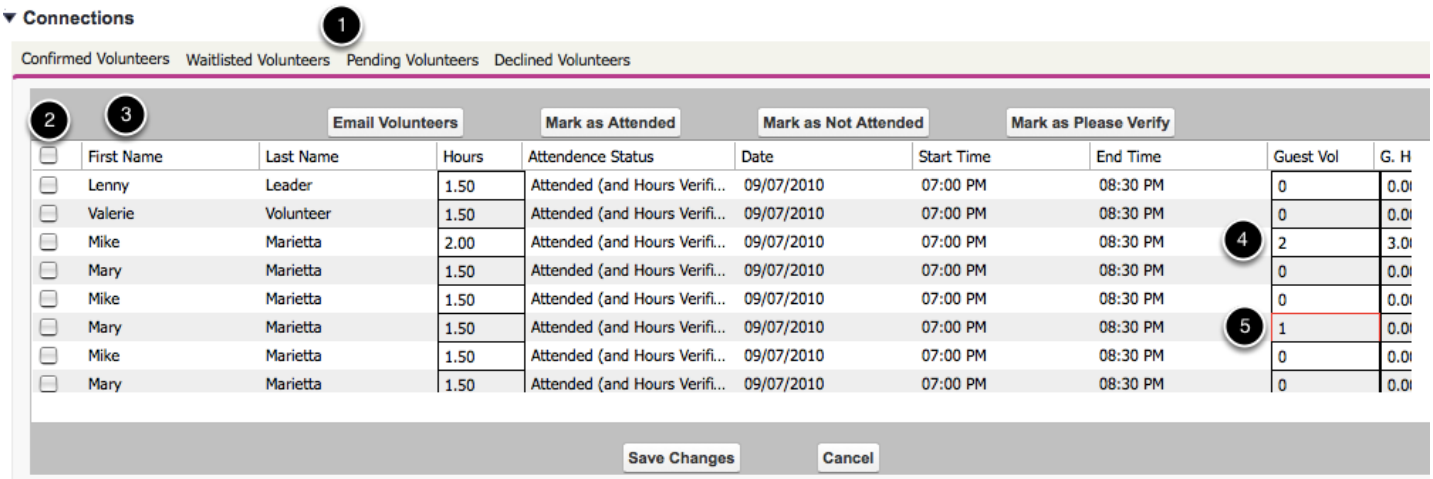
Clicking on the Print Check-In Sheet button will open a .pdf with your confirmed volunteers which you can take on-site to keep track of attendance. (You'll report attendance back into the system after the occurrence has taken place. See [verifying attendance and service hours.]

Connection Grid overview

The most powerful component in the Occurrence Record is the Connections Grid.

It allows you to view all the connections made to this occurrence, and to take actions on more than one connection at a time.

The Connections Grid



1. The Connections View has four 'tabs' to view different types of connections:

- Confirmed Volunteers (shows all volunteers that have been confirmed to attend an occurrence)
- Waitlisted Volunteers (shows all volunteers on the waitlist)
- Pending Volunteers (shows volunteers who has expressed interest, but not yet been confirmed by the opportunity coordinator)
- Declined Volunteers (shows volunteers who have either been declined by the opportunity coordinator, or have removed themselves from the occurrence)

2. Action Buttons allow you to take action on the volunteers in the rows where you check their names. (Check the connections you wish to take action on, and then click the appropriate button to update all selected connections).

3. Column headings allow you to sort connections based on any of the column headings.

4. Any cell with a black border around it can be edited. (In this view, "Guest Volunteers" can be edited. So can Hours (though this field isn't editable until after you've reported and verified attendance).

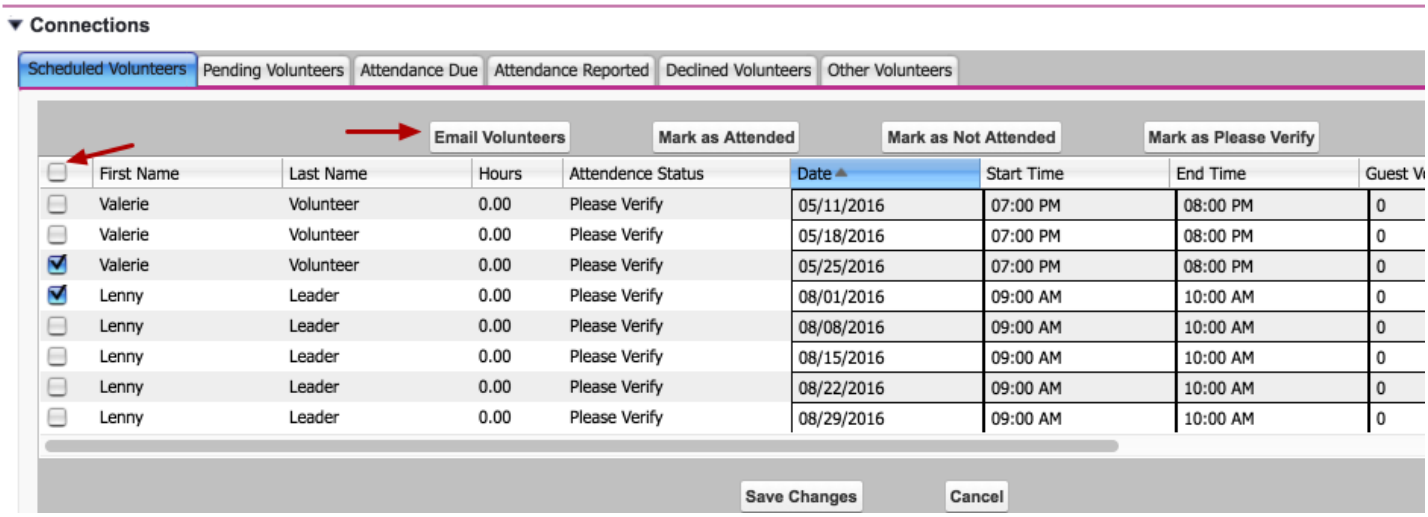
5. Any changes to individual cells (black boxes), will give those cells a red border. To save the changes in individual cells, click on the SAVE CHANGES.

NOTE: There are additional columns available in the grid. To see them, horizontally scroll or use the right arrow key to go to the right. (Macintosh users may not readily see the horizontal scroll controls due to the way scroll bars are handling in OSX. (Columns not shown in the above screenshot include:

- Guest Hours
- Decline Reason
- Role
- Team Name
- Rating
- Created Date

Using the Connection grid to send emails to volunteers

It's easy to email volunteers individually, or as a group, directly from the occurrence grid.



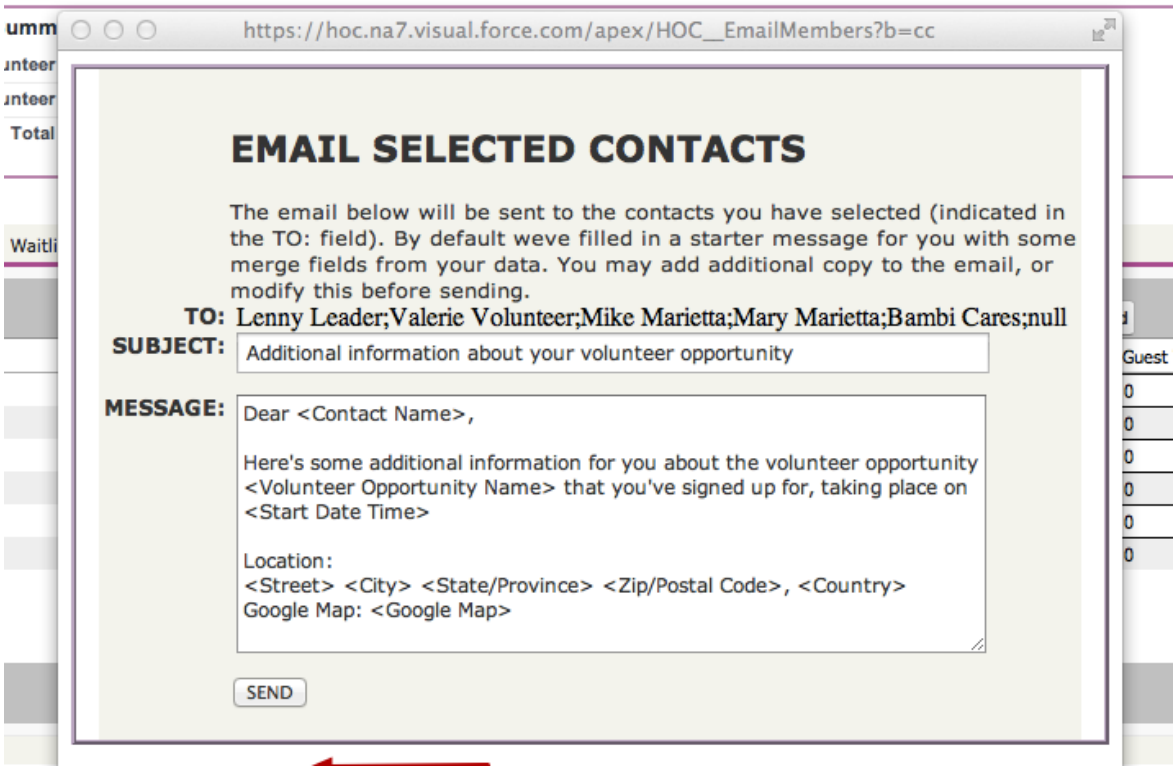
First Name	Last Name	Hours	Attendence Status	Date	Start Time	End Time	Guest V
Valerie	Volunteer	0.00	Please Verify	05/11/2016	07:00 PM	08:00 PM	0
Valerie	Volunteer	0.00	Please Verify	05/18/2016	07:00 PM	08:00 PM	0
Valerie	Volunteer	0.00	Please Verify	05/25/2016	07:00 PM	08:00 PM	0
Lenny	Leader	0.00	Please Verify	08/01/2016	09:00 AM	10:00 AM	0
Lenny	Leader	0.00	Please Verify	08/08/2016	09:00 AM	10:00 AM	0
Lenny	Leader	0.00	Please Verify	08/15/2016	09:00 AM	10:00 AM	0
Lenny	Leader	0.00	Please Verify	08/22/2016	09:00 AM	10:00 AM	0
Lenny	Leader	0.00	Please Verify	08/29/2016	09:00 AM	10:00 AM	0

Any actions you take in the connection grid start by adding a check-box in the row for the connection or connections you wish to take action upon.

Note: *If you put a checkbox at the top of the column, it will automatically check ALL the connections in that tab of the grid. Very useful for date and time specific occurrences -- less useful for individually scheduled and to be scheduled where the same volunteer will be scheduled for different dates.*

We Then Click on the Email Volunteers button.

A popup window presents the default text of a reminder email for that occurrence, which will be addressed to each of the selected contacts.

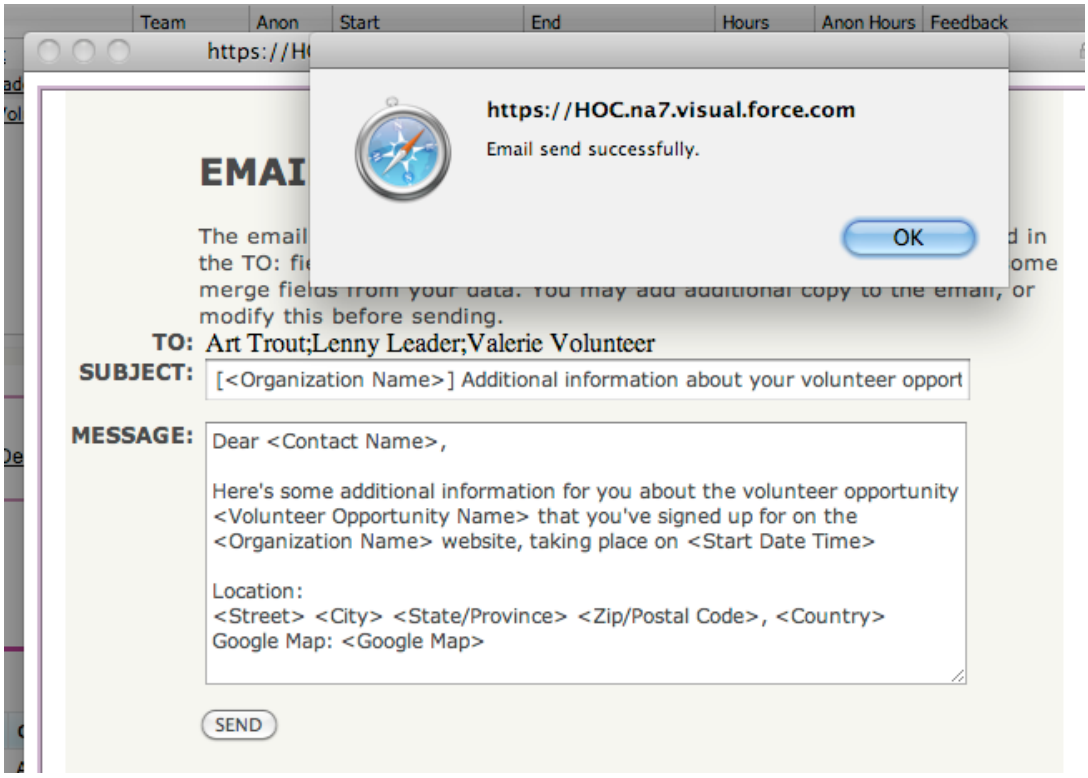


The email contains a number of merge fields to personalize the email with details of this occurrence.

You can edit the message as you wish, adding additional content and/or deleting the default information.

Click SEND to send the email to each of the volunteers.

Confirmation pop-up.



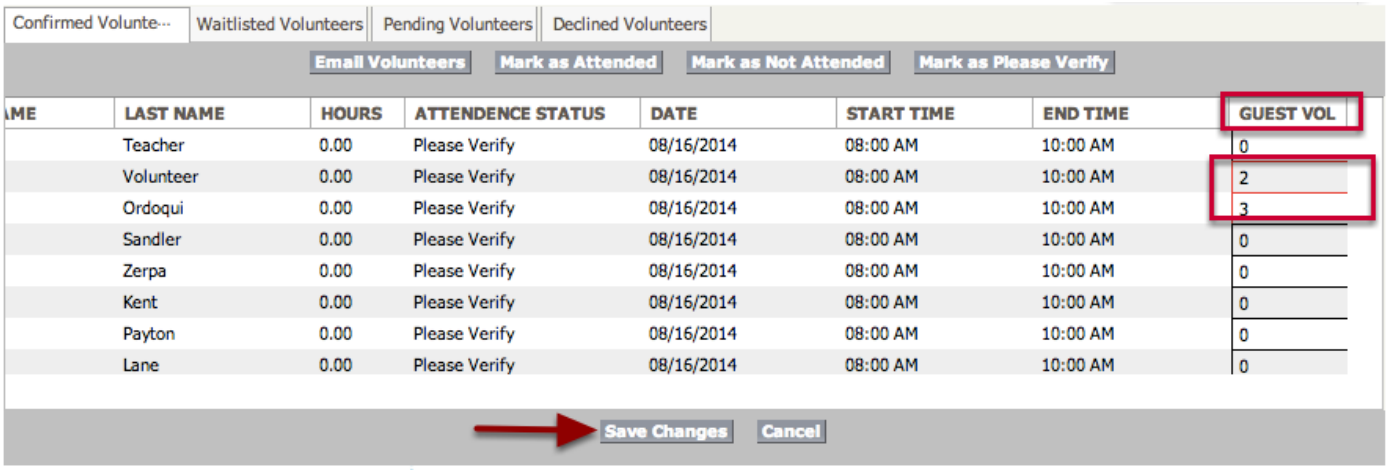
How to add 'guest' volunteers to an occurrence (basic)

Sometimes your registered volunteers will contact you notifying you that they'll be bringing guests, family, or friends with them to volunteer and they'd like you to reserve space for them.

Ideally, the volunteer would encourage their friends to sign up on the website and make a genuine connection. Alternately, they could create a team, and as team captain they could connect their volunteers themselves.

But sometimes they just call you and say, I'm bringing three friends. Sometimes they just show up with the friends at the project. You want to track the service hours of these anonymous volunteers, but don't want to create new contacts for these 'guests' -- so you can add them to the connection grid as Guest Volunteeers.

How to add Guest Volunteers (Anonymous volunteers)



ME	LAST NAME	HOURS	ATTENDENCE STATUS	DATE	START TIME	END TIME	GUEST VOL
	Teacher	0.00	Please Verify	08/16/2014	08:00 AM	10:00 AM	0
	Volunteer	0.00	Please Verify	08/16/2014	08:00 AM	10:00 AM	2
	Ordoqui	0.00	Please Verify	08/16/2014	08:00 AM	10:00 AM	3
	Sandler	0.00	Please Verify	08/16/2014	08:00 AM	10:00 AM	0
	Zerpa	0.00	Please Verify	08/16/2014	08:00 AM	10:00 AM	0
	Kent	0.00	Please Verify	08/16/2014	08:00 AM	10:00 AM	0
	Payton	0.00	Please Verify	08/16/2014	08:00 AM	10:00 AM	0
	Lane	0.00	Please Verify	08/16/2014	08:00 AM	10:00 AM	0

To do so, just put the number of guests in the Guest Volunteer column next to the person who is bringing them. (Note - the Guest Volunteers column is to the right of the initial view - so you'll need to scroll horizontally to the right to get to the Guest Vol column. (The screenshot above shows the view scrolled to reveal this column)

Do this by double-clicking on the 0 in the Guest Vol column, and then put in the number. The box will turn red to indicate the data has been edited.

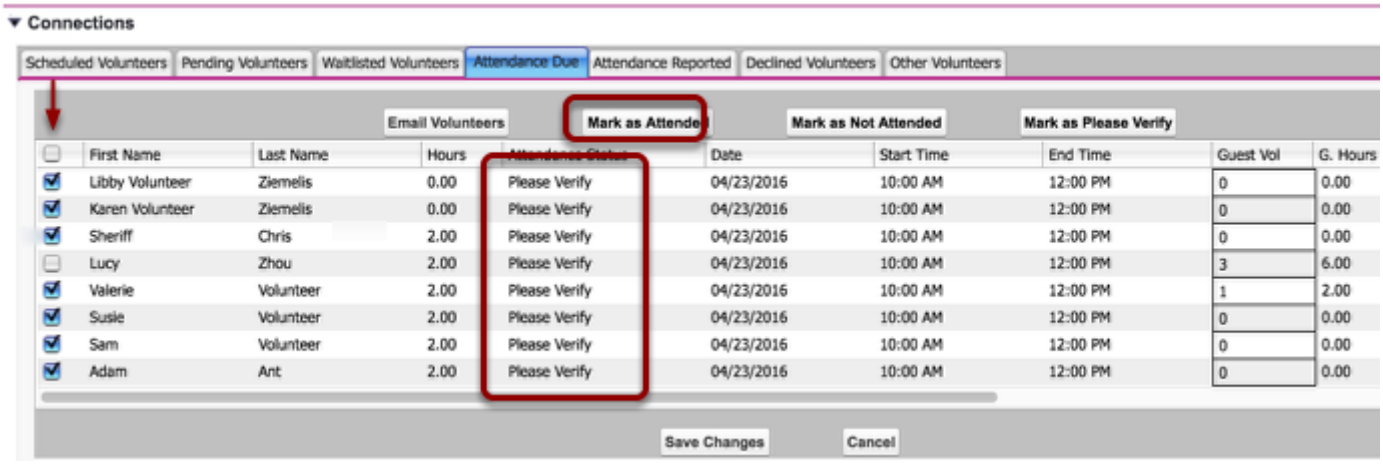
If they are not connected to anyone else -- connect them to the volunteer leader.

Click SAVE CHANGES to record the changes to one or more connections.

Marking Attendance and verifying service hours

After an occurrence has taken place, best practices dictate that you should verify the attendance and service hours of all confirmed, connected volunteers. This updates their volunteer service history in their account on the public site, and updates their civic transcript.

Go to the Attendance Due Tab in the occurrence's connection grid



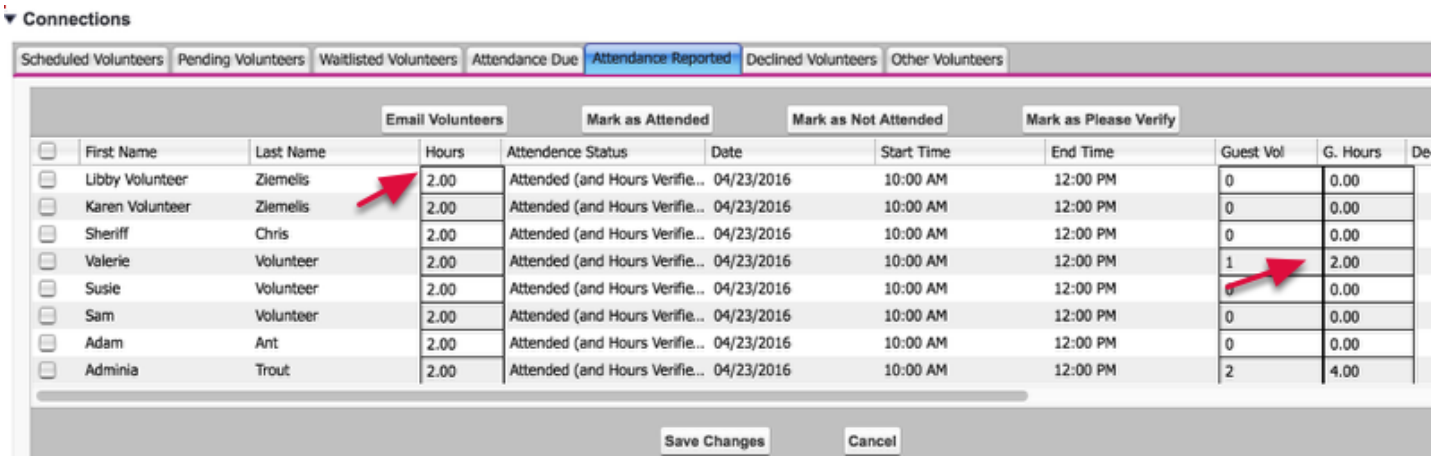
Put a checkbox next to each volunteer who attended, and click the "Mark as Attended" button.

The connections will automatically have their hours and guest hours calculated (based on the start time and end time) and the connections will be moved to the "Attendance Reported Tab"

Then repeat the process for anyone who did not attend. Put a check box next to those who didn't attend and click the "Mark as Not Attended Button".

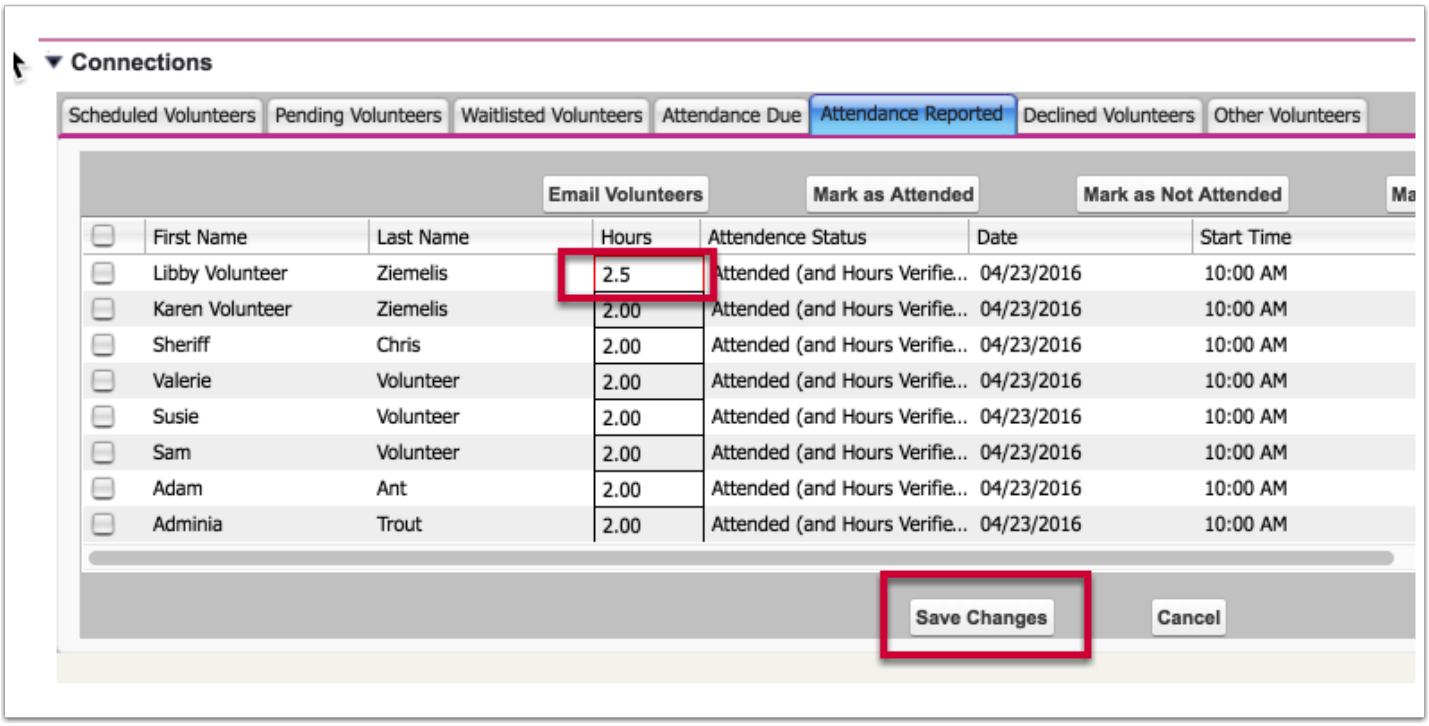
You want to ensure that no one is left with a status of "Please Verify". Then your attendance will be completed for this occurrence. (Note: If you make a mistake, you can change a connection back to "Please verify".

The Hours for volunteers and any ANON guests will be automatically calculated based on the start and end time of the occurrence



First Name	Last Name	Hours	Attendence Status	Date	Start Time	End Time	Guest Vol	G. Hours
Libby Volunteer	Ziemelis	2.00	Attended (and Hours Verifie...	04/23/2016	10:00 AM	12:00 PM	0	0.00
Karen Volunteer	Ziemelis	2.00	Attended (and Hours Verifie...	04/23/2016	10:00 AM	12:00 PM	0	0.00
Sheriff	Chris	2.00	Attended (and Hours Verifie...	04/23/2016	10:00 AM	12:00 PM	0	0.00
Valerie	Volunteer	2.00	Attended (and Hours Verifie...	04/23/2016	10:00 AM	12:00 PM	1	2.00
Susie	Volunteer	2.00	Attended (and Hours Verifie...	04/23/2016	10:00 AM	12:00 PM	0	0.00
Sam	Volunteer	2.00	Attended (and Hours Verifie...	04/23/2016	10:00 AM	12:00 PM	0	0.00
Adam	Ant	2.00	Attended (and Hours Verifie...	04/23/2016	10:00 AM	12:00 PM	0	0.00
Adminia	Trout	2.00	Attended (and Hours Verifie...	04/23/2016	10:00 AM	12:00 PM	2	4.00

If someone stayed longer than the scheduled time you can edit the hours



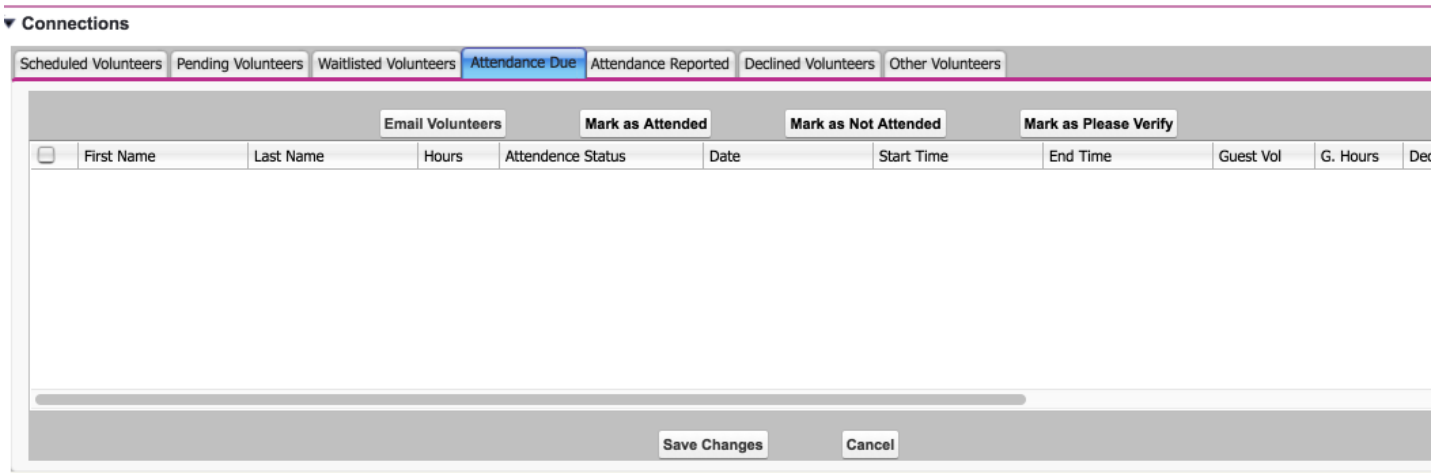
First Name	Last Name	Hours	Attendence Status	Date	Start Time
Libby Volunteer	Ziemelis	2.5	Attended (and Hours Verifie...	04/23/2016	10:00 AM
Karen Volunteer	Ziemelis	2.00	Attended (and Hours Verifie...	04/23/2016	10:00 AM
Sheriff	Chris	2.00	Attended (and Hours Verifie...	04/23/2016	10:00 AM
Valerie	Volunteer	2.00	Attended (and Hours Verifie...	04/23/2016	10:00 AM
Susie	Volunteer	2.00	Attended (and Hours Verifie...	04/23/2016	10:00 AM
Sam	Volunteer	2.00	Attended (and Hours Verifie...	04/23/2016	10:00 AM
Adam	Ant	2.00	Attended (and Hours Verifie...	04/23/2016	10:00 AM
Adminia	Trout	2.00	Attended (and Hours Verifie...	04/23/2016	10:00 AM

Click on the Hours column and change the hours as desired. Press on Save Changes to record the change in hours.

Volunteers marked as 'not attended' will get 0 hours.

Note: When volunteers post feedback from the public site, you'll see star ratings appear in the rating column (scroll to the right to see this column). Click on the related list of connections below the connection grid, to go to an individual connection and read the feedback.

Make sure your attendance due tab is empty and you'll know all attendance for that occurrence has been recorded.



All attendance due connections are now in the attendance reported tab - you're done!

The statistics from the completed attendance information will be rolled up in the summary fields after you've refreshed the page

Occurrence Summary Stats

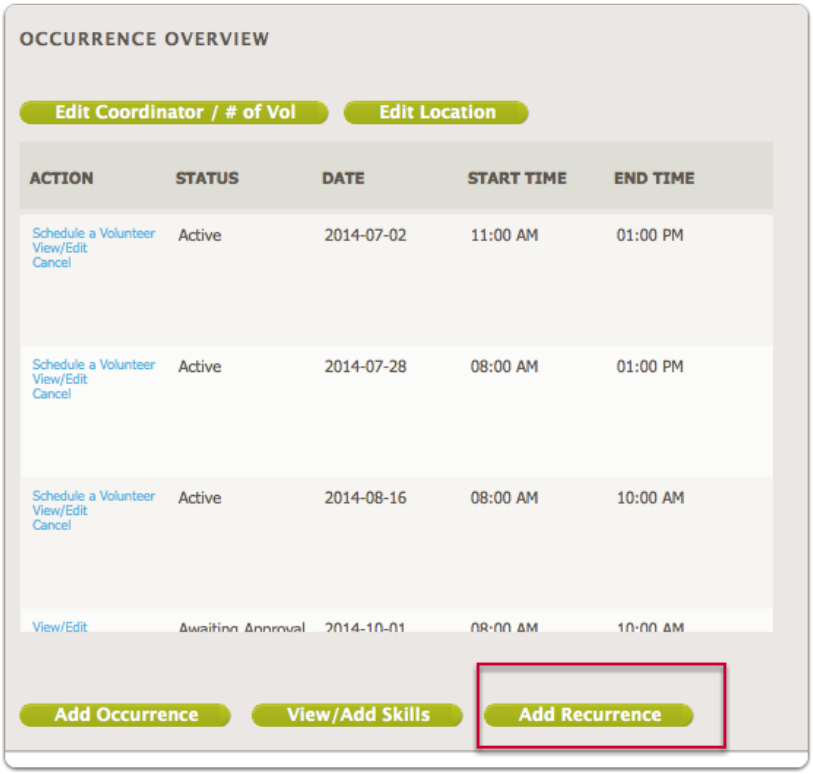
Total Connections	9	Volunteers Attended	8
Total Pending	0	Guest Volunteers Attended	3
Total Confirmed	15	Total Attended	11
Total Declined	0	Total Not Attended	1
Volunteers Still Needed	37	Total Unreported	0
		Volunteer Hours Served	16.50
		Guest Volunteer Hours Served	6.00
		Total Hours Served	22.50

The exact layout of the occurrence statistics will vary depending on the way your portal is set up. Be sure to refresh the page if you want to view the statistics right away.

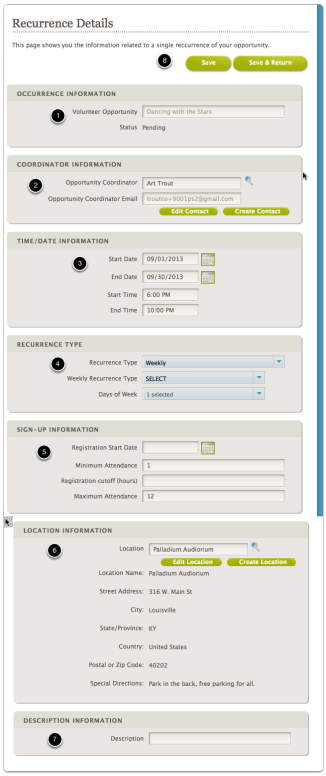
Creating a New Recurrence

If you wish to create multiple occurrences (that have some recurring pattern) at the same time, click on the Add Recurrence button found on the opportunity Details Page.

From the Volunteer Opportunity Detail page - click the button "Add Recurrence"



Recurrence Details Page



The process of creating a new recurrence is essentially the same as when you first create a volunteer opportunity.

1. Volunteer Opportunity name and status. (It will be in pending status because you've not submitted it for approval yet)

2. Coordinator Information (the default will be brought over for you), you can change if you wish. (NOTE: all occurrences will have the same opportunity coordinator. You can edit individual occurrences after they are created if you wish different opportunity coordinators for different locations.

3. Time / Date Info - specify the date range of your recurrences, and the start and end time for each occurrence.

4. Recurrence Type: Set the parameters for the recurrence here.

5. Sign Up Information - default information from the volunteer opportunity is brought over, you can change as desired.

6. Location Information - default location is brought over - you can look up other locations, or create a new one. (NOTE: all occurrences will have the same location. You can edit individual occurrences after they are created if you wish different ones to take place at different locations).

7. Description Information (for internal use only - you can specify a simple description of what sort of recurrence it is. (Weekly for the month of September). Can be left blank.

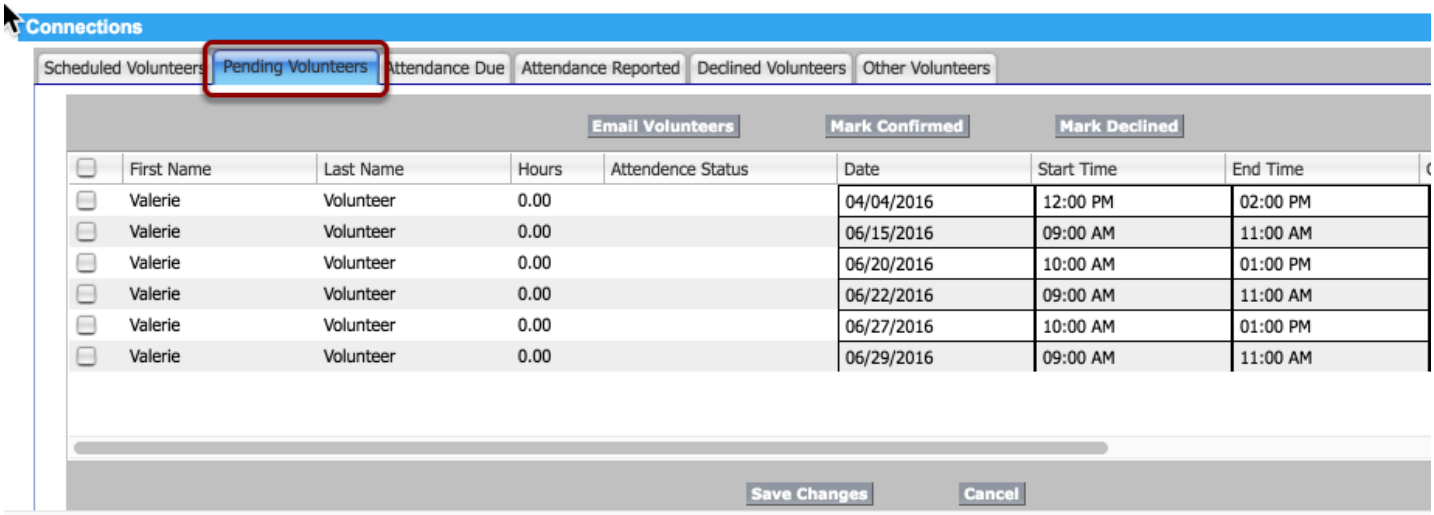
8. Click SAVE at the top of the screen to save the recurrence and create all the respective occurrences.

"Express Interest" Connections - confirming or declining volunteers

When a volunteer signs up on the public site for an 'express interest' opportunity, an email is sent to the Opportunity Coordinator letting them know that a volunteer has expressed interest in the opportunity, and that they need to confirm the volunteer's connection. The link in the email will take you directly to the connection record. (Be sure to log in first before clicking on the link!)

The managing organization can view the pending connection in the pending volunteers tab of the connections grid in that record, and email the volunteer directly if they want them to do more before confirming them. (Example: You might ask them to submit to a background check).

The volunteer coordinator will visit the occurrence record for this volunteer opportunity, and can click on the PENDING VOLUNTEERS tab to see volunteers who have expressed interest but not yet been confirmed



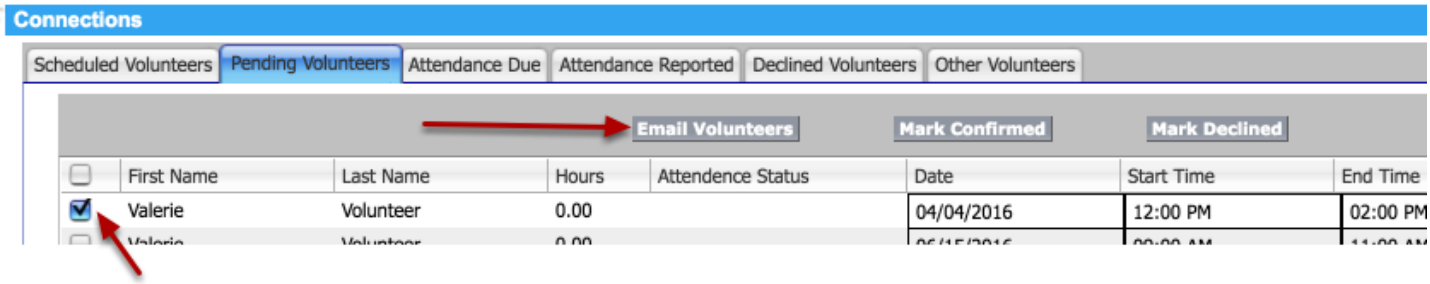
If they want to find out more about a volunteer, you can view their contact record:

In the premium portal - click on the volunteer's name in the connections related list below the grid.

In the basic portal, go to the volunteers tab, and click on the name of the volunteer.

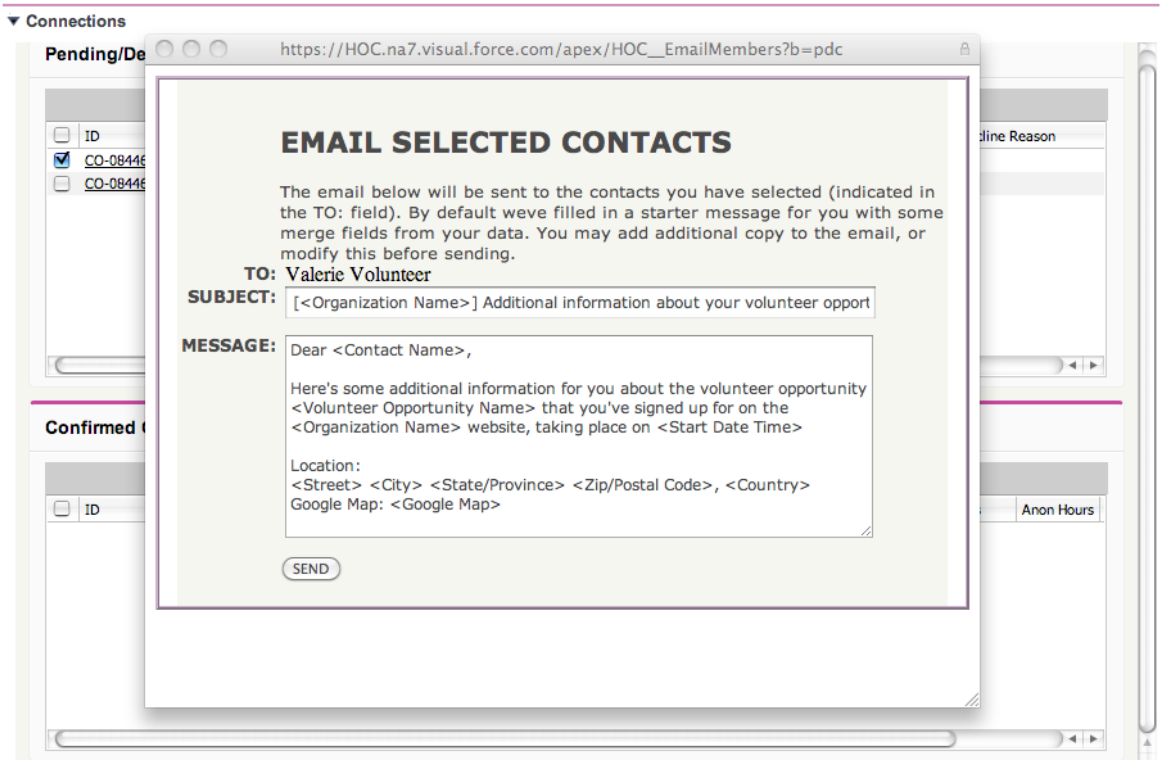
In the contact record you can find out more about the volunteer, their contact info, phone number, volunteer history, etc.

The coordinator can email the volunteer to ask questions to them before approving the opportunity if they wish.



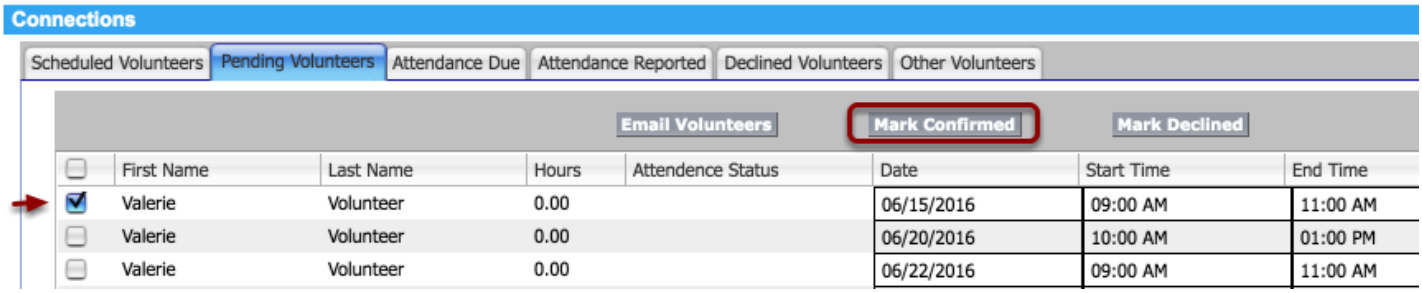
Check the box of the volunteer you wish to email, and then click on the Email Members button. (If you wish to email multiple volunteers at once, put a check box next to the name of each connection!

An email screen popup opens with default text that sends important information about the opportunity. You can then add additional text and customize the message.



Click send to send the message automatically. It will be sent from YOUR email address, and send to each volunteer you put a check box next to in the connection grid.

To confirm a volunteer's participation in the occurrence put a check box next to the name of the volunteer you wish to confirm, and then click the "Mark Confirmed" button



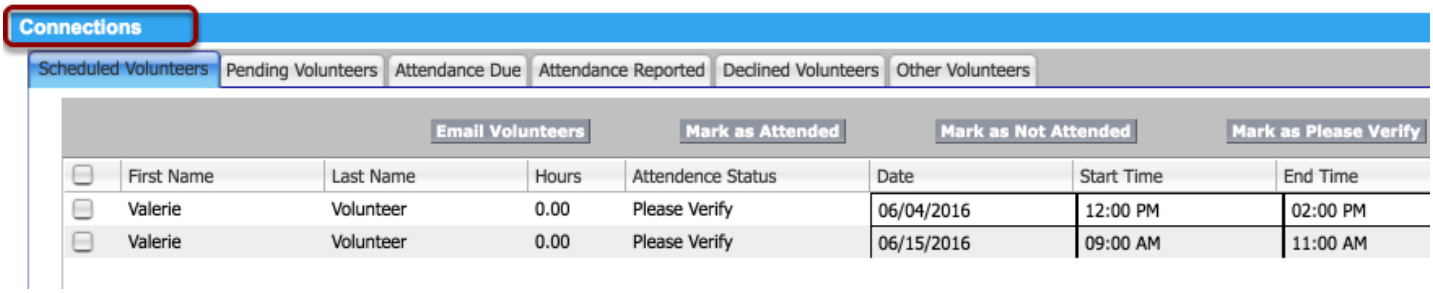
For Date and Time Specific opportunities the date, start time and end time will already be populated for you.

For Individually Scheduled Opportunities, the date, start time and end time(s) the volunteer wishes to schedule themselves for will be filled in for you.

For To Be Scheduled Opportunities, the date, start time and end time will not be correct (as there is no way for the volunteer to indicate when they wish to volunteer. You must edit the start date, start time and end time, and click SAVE CHANGES before marking the connection as Confirmed. (This is why we suggest no longer creating volunteer opportunities with this schedule type - it takes more work to confirm them :-(

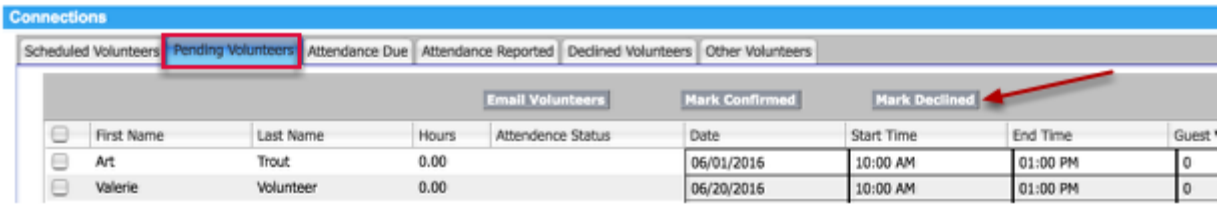
Put a check mark next to the volunteer(s) you wish to confirm for the listed dates, start times and end times, and click theMark Confirmed Button.

Doing this will move them from the Pending Volunteers Tab, to the Scheduled Volunteers Tab



We've now confirmed Valerie as a volunteer. Her attendance status is "Please verify" and will remain that way until you mark attendance after the opportunity has taken place. (Note: if it's a To Be Scheduled opportunity and you didn't update the date and times - it may show up in the wrong tab as the dates will be inaccurate.)

Back in the pending tab, After contacting Art Trout, we've decided to decline him as a volunteer.



To do so, check the box next to her name and click the mark Declined button.

Clicking the "Mark Declined" button gives you a list of options, so you can note why the volunteer was declined.

If a volunteer removes themselves from an opportunity themselves (which they can do in their member account), the connection will appear marked as DECLINED - Removed Themselves.

The declined status of a volunteer will appear in the "Decline Reason" column for easy reference.

After selecting a decline reason, the volunteer will be moved to the Declined Volunteers Tab

When should I create a To Be Scheduled Opportunity (ongoing) instead of a lot of occurrences?

There is a fine line between creating a recurrence that occurs daily, and a Volunteer Opportunity that is really just an ongoing opportunity. How do you decide which is appropriate to use? Consider these guidelines?

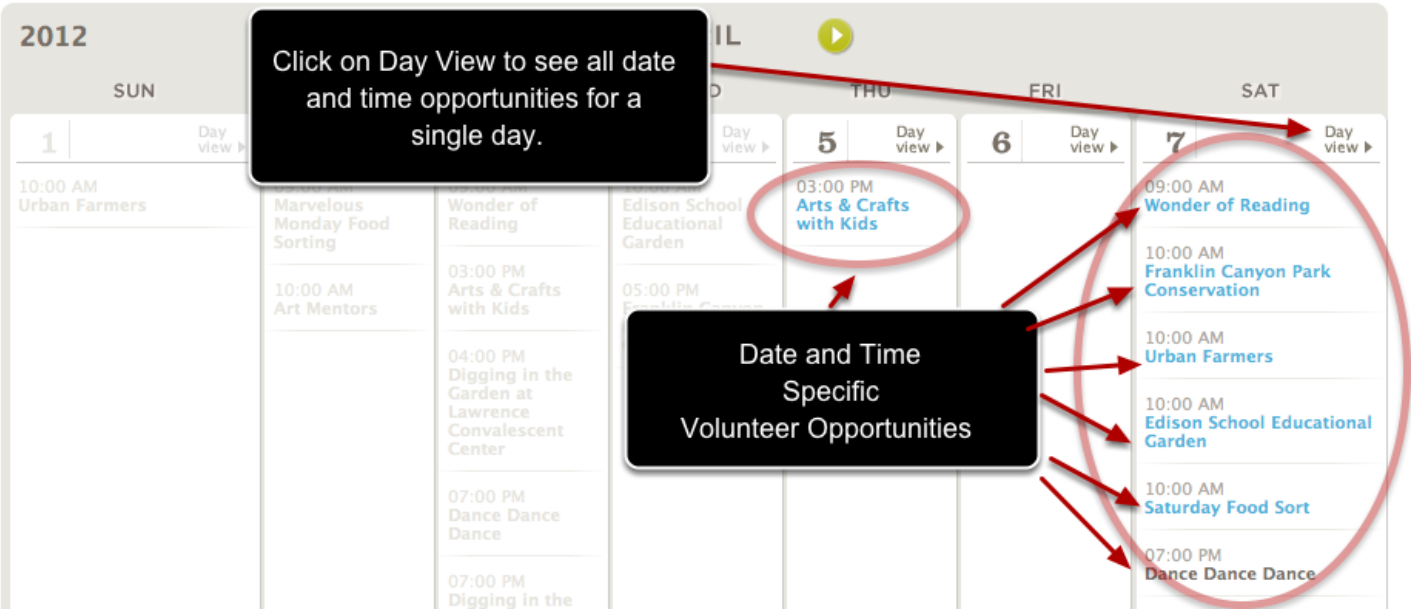
Does the Volunteer Opportunity use volunteers at the same time each day, and all volunteers start and end at the same time each day?

If you need 5 volunteers every Monday - Friday from noon - 2 p.m. -- then its best to create this as a recurrence of date and time specific opportunities. There is no need to schedule, as you need a specific number of volunteers at the same time each day. Note however, that you cannot create more than 50 occurrences in a single recurrence.

Do you need volunteers whenever they are available each day, and each volunteer can arrive or leave irrespective of other volunteers?

If you would like to have 5 volunteers, any time they are available, Monday - Friday from noon - 5 p.m., and each can come and go anytime during that time period (working whenever its convenient for them), then its best to list this as a "To Be Scheduled", ongoing opportunity that needs volunteers every Monday - Friday in the afternoon. In this case, you'll be contacting each volunteer individually to determine when they'll be arriving -- and reporting a variety of different start and end times when you report their attendance. In this case, do not create it as a series of date and time specific occurrences.

How does this affect the calendar view?



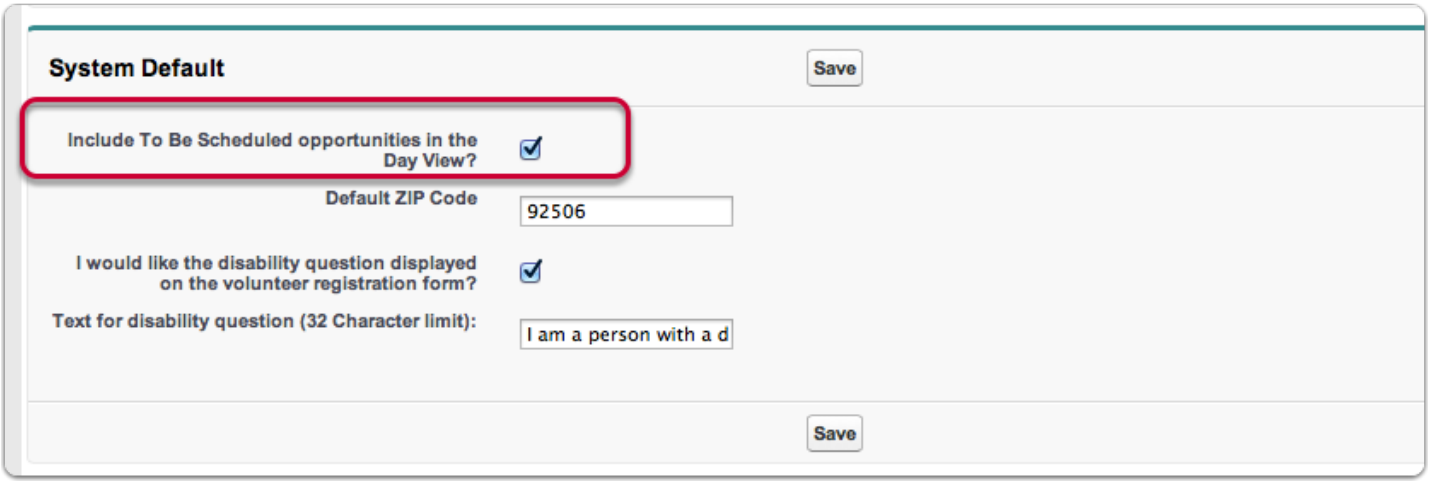
Date and Time Specific Volunteer Opportunities appear on the calendar. The DAY VIEW button reveals all date and time specific opportunities for that day (even if they don't fit into the calendar grid).

Ongoing opportunities do not appear on the calendar, but are accessible on the SEARCH (FInd Opportunities) page where ALL opportunities are found based on the filter applied.

Ongoing opportunities do not appear on the calendar but have additional information in their Volunteer Opportunity Detail Record

To be scheduled opportunities list the flexible days and general time of day that volunteers are needed as part of the Opportunity Detail view. If you have access to creating 'custom questions' for Volunteer Opportunities - it is a good practice to add a custom question asking the volunteer to indicate a time they'd like to volunteer. (i.e.: "We need volunteers on Monday and Tuesday Evenings from 7 p.m. - 11 p.m., Wednesday afternoons from 1-3, and Thursday Friday mornings from 9 - 12. We also need volunteers Saturday from 9 - 5. When would you like us to schedule you to volunteer. Please propose a date and time, let us know how long you're available that day, and we'll be in touch to confirm you for the schedule you requested!"

Ongoing Opportunities show up in Day View of the calendar IF enabled to do so by the system administrator.



In some instances of HandsOn Connect, ongoing opportunities appear in the 'day view' of the calendar. Whether they do or not is controlled by your System Administrator. Ongoing opportunities that take place during the appropriate day of the week appear in the Day View of the calendar, AFTER the date and time specific opportunities occurring on that day, if enabled in your organization.

System Administrator Note: If you wish Ongoing Opportunities to appear in the Day View of the Calendar. Go to the Control Panel and check the box "Include to Be Scheduled opportunities in the Day View"

Day View IF show ongoing opportunities is enabled:

Confirming and Scheduled Volunteers for To Be Scheduled (ongoing) volunteer opportunities (Basic Portal)

"To be scheduled" opportunities - are ones that need volunteers over a wide range of dates and times.

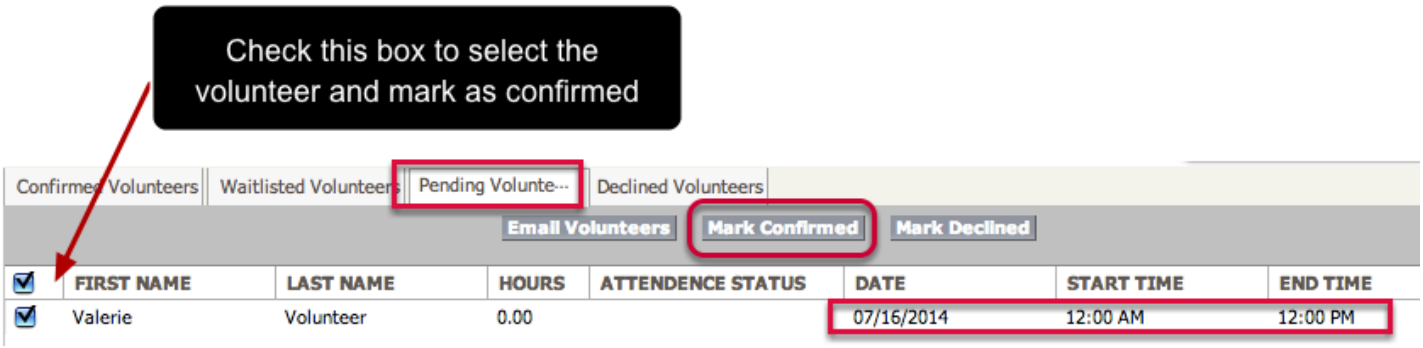
Unlike date and time specific opportunities, in which a certain number of volunteers are all scheduled to attend at the same time, "to be scheduled" opportunities offer complete flexibility in scheduling.

Volunteers express interest in the opportunity, and then the Opportunity Coordinator arranges with the volunteer the date and time that one volunteer will attend. The same volunteer may attend a 'to be scheduled' opportunity multiple times, and they do not need to 'sign up' each time, as the scheduling will be arranged with the Volunteer Coordinator.

"To be scheduled" opportunities have only **one occurrence record** associated with them. This occurrence record is unique in that the date and time for each connection can be different, and the same volunteer can be connected to the occurrence on more than one date and time. This way -- this 'ongoing' occurrence serves as a 'time sheet' -- that shows all connections made with this long-term opportunity.

Best Practice: Given that volunteers who express interest in "to be scheduled" opportunities will need to tell you when they'd like to volunteer -- use custom questions to ask the volunteer what day and time they'd like to serve or meet with you.

When someone expresses interest in a 'to be scheduled' opportunity - they can be found in the Pending Volunteers Tab



You'll receive an email telling you that a volunteer has expressed interest, and it has a link that will take you to the occurrence record. (Be sure to log in before clicking on the link!)

Click on the "Pending Volunteer Tab" in the occurrence record. (You'll see any volunteers who are still 'pending approval' - but since this is a 'To Be Scheduled" opportunity, the start date and time will not be accurate. (It's showing the start date as the day you first posted the opportunity. You'll update the date and time you want the volunteer to attend AFTER you first confirm the volunteer. See below)

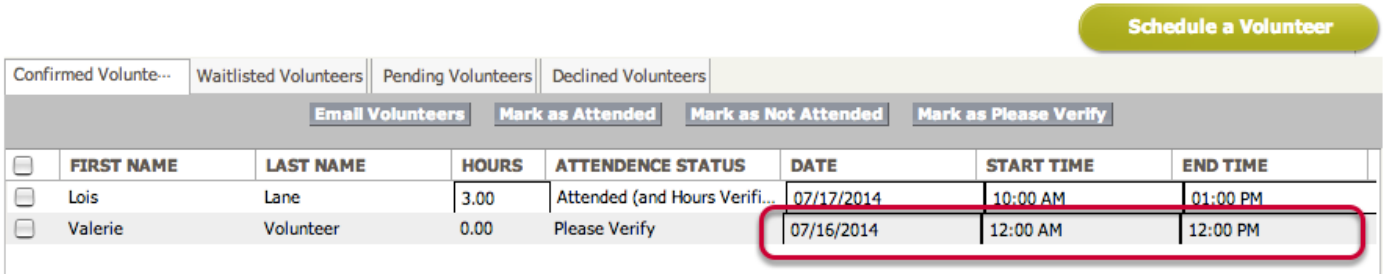
You can contact the volunteer via email or phone and arrange a time and date for them to volunteer. Or, if you follow the best practice above - you'll have added a custom question asking the volunteer when they wish to be scheduled. When you are ready to confirm and schedule them.

1. Click on the checkbox next to the name of the volunteer you wish to confirm.

2. Click on the "Mark Confirmed" button.

This will move them to the Confirmed Volunteer Tab where you will set the date they'll volunteer and the start time and end time they'll be volunteering.

Go to the Confirmed Volunteer Tab and scroll and find the volunteer you've just confirmed.



In the Confirmed Volunteer Tab, find the connection you just confirmed. (It appears mixed in with the other volunteers you've already confirmed and volunteered, so remember the name and scroll and find them. (Tip: You can sort by clicking the column headers to help you find the one you like if you have a long list of connections already in this 'time sheet' for this occurrence.)

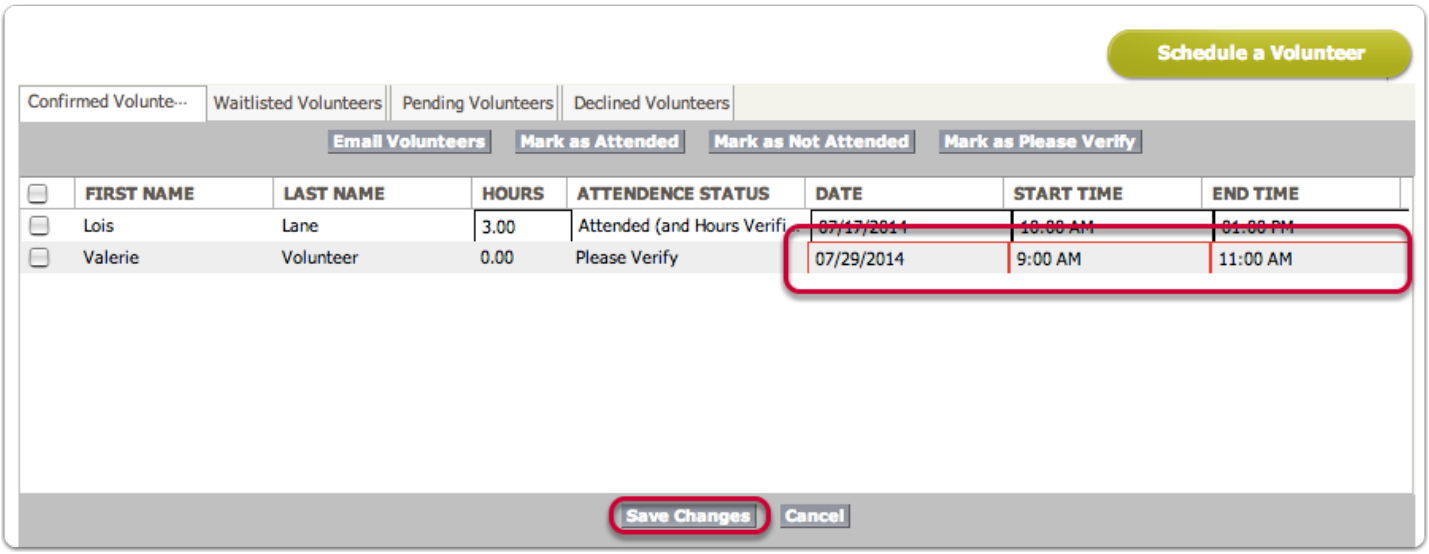
Notice, we see here that Lois Lane had been scheduled for 7/17/2014 and her attendance has already been verified. But Valerie's date and time are the defaults for this TBS occurrence which are 7/17/2014 12:00 am - 12:00 pm. So we need to update these three fields with the actual date and times we've arranged for Valerie to come in and volunteer.

Double click on the field "Date" and put in the date you are scheduling them for. (Initially you'll see the default start date of the TBS Opportunity. (The start time of 12 a.m. is also a default, and the end time of 12 pm is the 'end' of the full duration of the TBS opportunity)

Double click on the Date Field and put the correct date:

Double click on the Start Time and End Time fields and put in the times.

Don't forget to hit Save Changes to save the new schedule for Valerie.



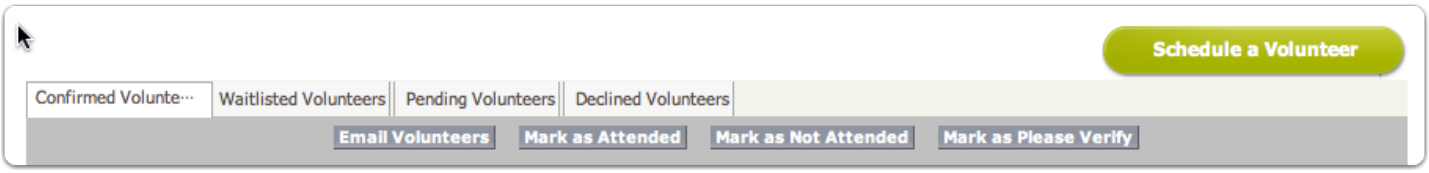
Note: The Date must be in the format xx/xx/xxxx and times must be in the form xx:xx with the AM or PM indicated.

When you make the changes, the boxes appear highlighted in red, indicating that the info has not yet been saved.

Click on the SAVE CHANGES button to record these changes and now your volunteer is scheduled for the correct date and time.

NOTE: It's important you always schedule a volunteer after confirming them. If you don't do so, they will log into their account and find they are scheduled to volunteer for the entire duration of the TBS opportunity :-(

If you wish to schedule a volunteer for another date and time for this ongoing, To Be Scheduled opportunity, click on "Schedule a Volunteer"

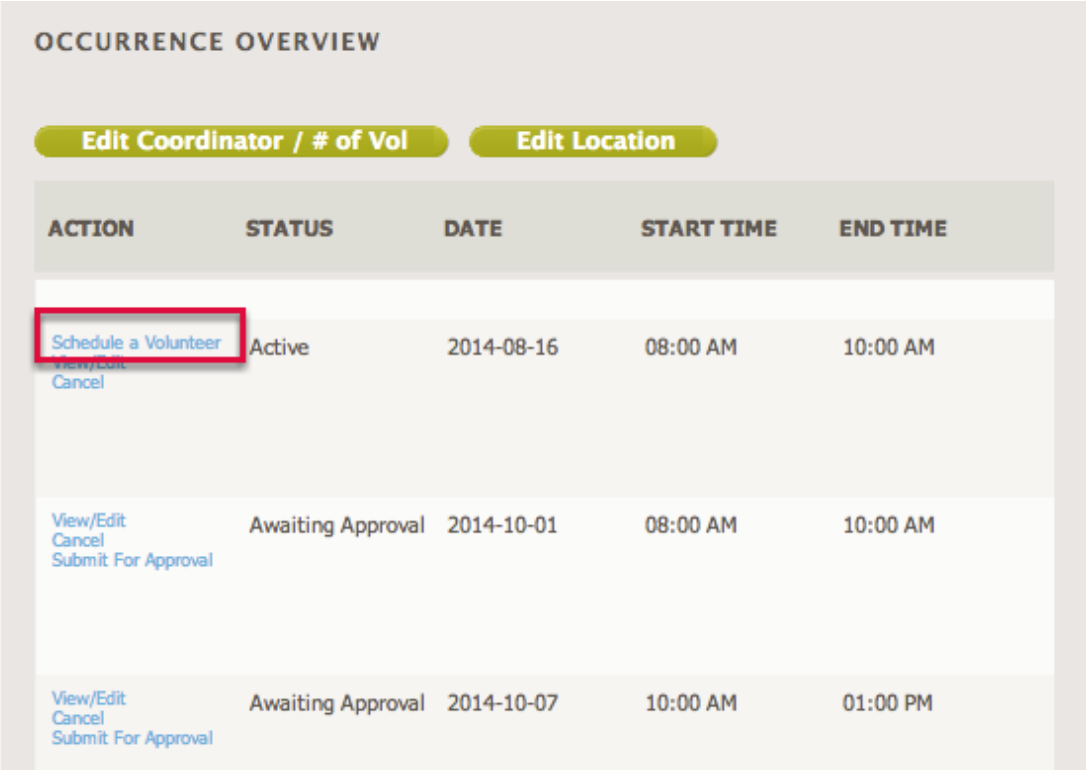


The Schedule a Volunteer button is just above the connections grid. [See this post for how to schedule volunteers]

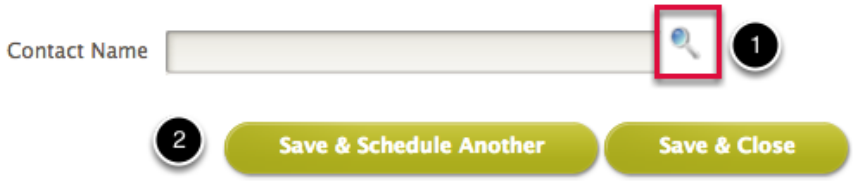
Adding Volunteers administratively to an Occurrence (creating administrative connections)

There are several ways to administratively create a connection for a volunteer, adding them to an occurrence or scheduling them for a date and time for a "To Be Scheduled" opportunity:

1. From the Volunteer Opportunity Detail Page, click on "Schedule a Volunteer" for the occurrence you wish to add someone to.



This will bring you to the schedule a volunteer page

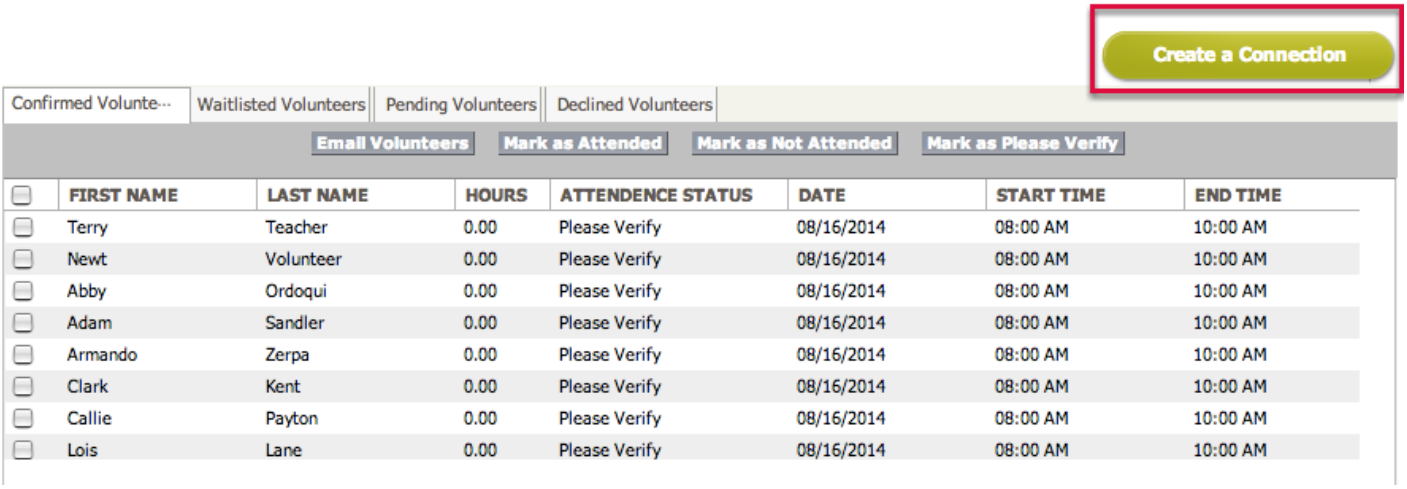


You'll notice that the occurrence you selected is already chosen out of the occurrences available.

1.Use the magnifying glass icon to look up and select the contact you wish to schedule.

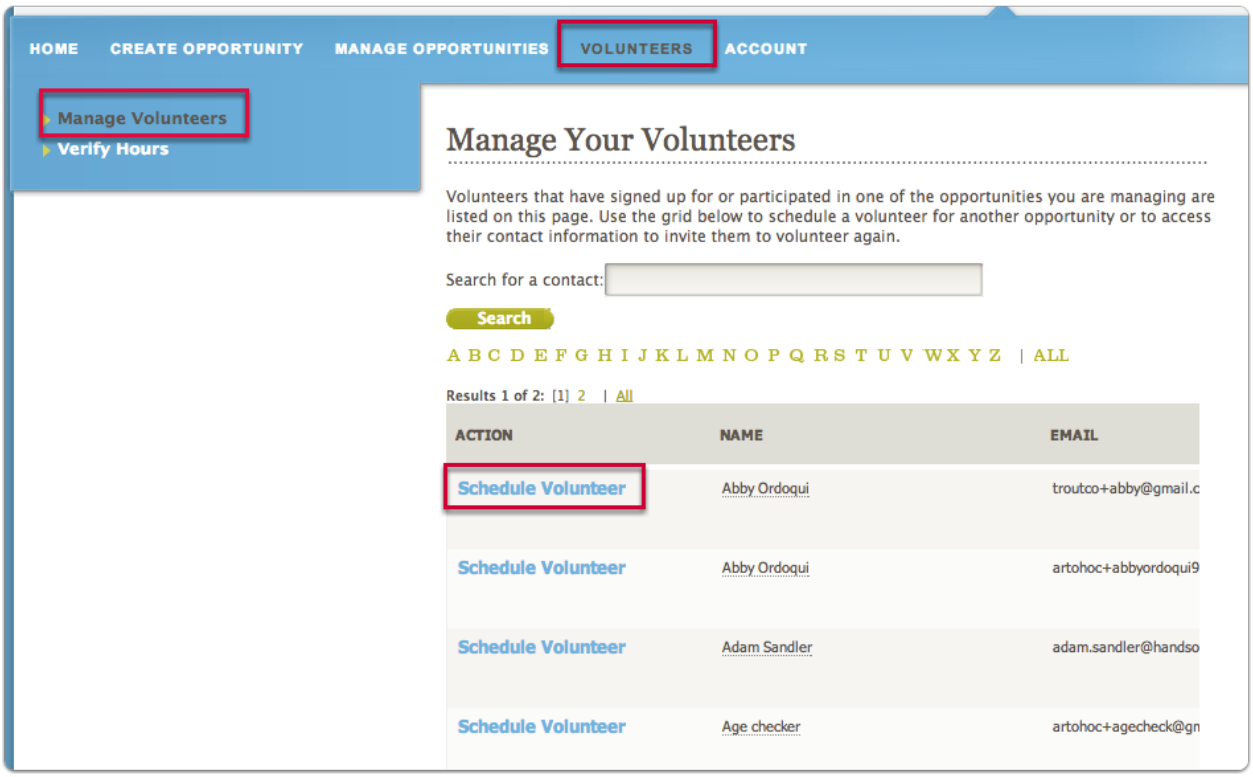
2 Click on either Save Button. (Save & Schedule another keeps you on this page to schedule additional volunteers. Save & Close brings you back to the Volunteer Opportunity Detail page).

2. If you're already on the occurrence page, click on the "Create a Connection" button above the connection grid.



Clicking on "Create a Connection" will bring you to the Schedule a Volunteer page shown above. Look up the contact. and Save as described above.

3. You can also schedule a volunteer from the Volunteers Menu by clicking on the action button "Schedule a Volunteer"

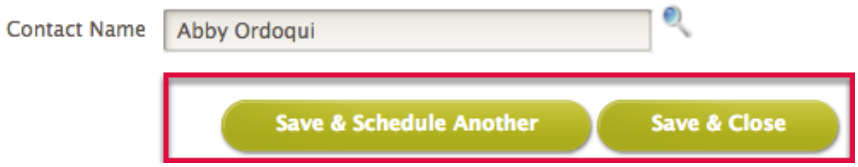


Scroll or search for the volunteer you wish to schedule, and click on the "Schedule a Volunteer" link in the action column.

You'll then be shown a list of all opportunities you can schedule that volunteer for:

Click "Select" in the action column for the opportunity you wish to schedule the volunteer for.

You'll then select which occurrence you want to schedule the volunteer for



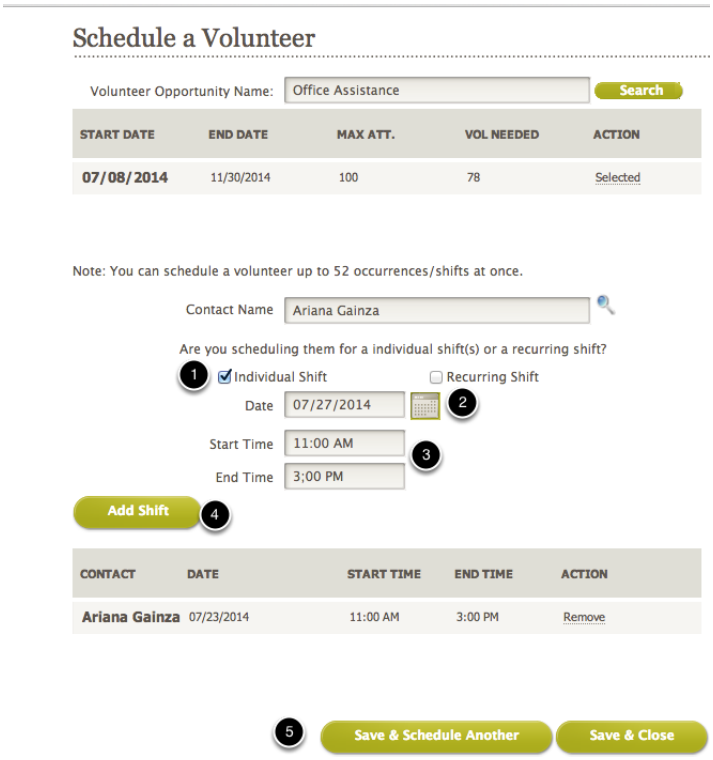
Click Select in the action column of the occurrence you wish to schedule, and then click either Save & Close or Save & Schedule Another" to save the connection.

To Be Scheduled Opportunities have only one occurrence - which serves as a time sheet for volunteers

A To Be Scheduled Opportunity has only one occurrence and its connection grid is used to record all the connections made to the opportunity over the duration of the TBS Opportunity (which may be months or years). Because a volunteer can be scheduled for multiple dates and times of this ongoing opportunity - (and each date and time will be different), when you schedule a volunteer for a TBS occurrence/opportunity -- you are asked for a Date, Start Time and End Time for the connection. Click Save to Save the new connection which will send an email to the volunteer letting them know they are confirmed as a volunteer for that opportunity. (They can log into their account to see exactly when you've scheduled them!)

You have the option of scheduling them for one or more single date(s) and time(s) ("Individual Shift") or to create a recurring pattern of shifts for a volunteer who is going to come to this opportunity more than once on a regular schedule!

Scheduling for one or more individual shift(s) for a To Be Scheduled Opportunity



When scheduling for an individual shift:

1) Click on Individual Shift

2) Click on the calendar to pick a date

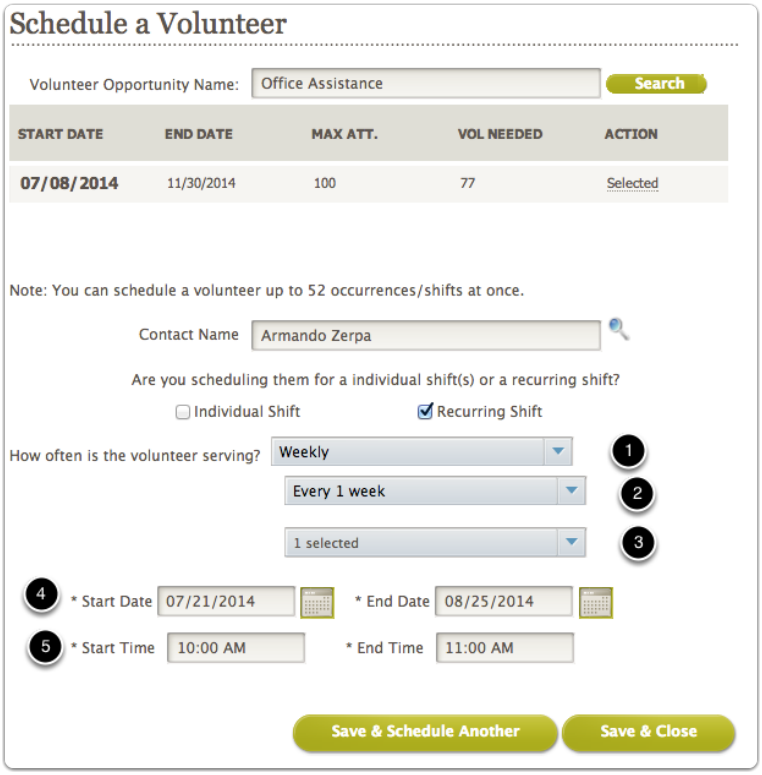
3) Set the Start Time and End Time

4) Click on "Add Shift". (You can add multiple shifts here if you like, before saving the schedule. Just repeat steps 1 and 2 and 3 for each shift you want to enter)

5) Click either Save and Close or Save and Schedule Another to record these schedules.

In the example above, you'll see we've already scheduled Ariana for 7/23/2014 at 11:00 am - and are about to add another shift for her on July 27. (When we click on Add Shift .. the 2nd schedule will be added.) When you have the shift or shift(s) you wish to schedule, click on one of the save buttons.

Scheduling Recurring Shifts for a contact for a TBS Opportunity



When you choose 'recurring shift"you can schedule someone who will be attending on a regular basis that has some pattern to it. To do so click on the recurring Shift check box and:

1. You specify whether the volunteer will be attending daily, weekly or monthly.
2. The frequency of the repetition
3. The day(s) of the week
4. The start and end date for the recurring pattern of connections
5. The Start and end time for each connection (shift).

Click one of the save buttons to complete the scheduling!

Note: You can create up to 52 connections at one time.

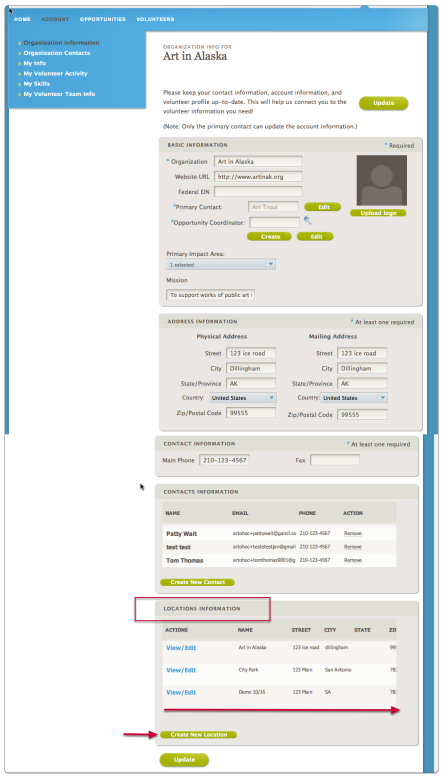
Note: Connections must be between the start date and end date of the opportunity as seen on the top of the page. If they are not, then first edit the occurrence record to extend the end date of the opportunity.

Note: When you schedule a volunteer for a date in the past, the volunteer will be marked as 'attended' and have their hours verified. This makes it easy to enter attendance for people for past dates!

Opportunity Locations

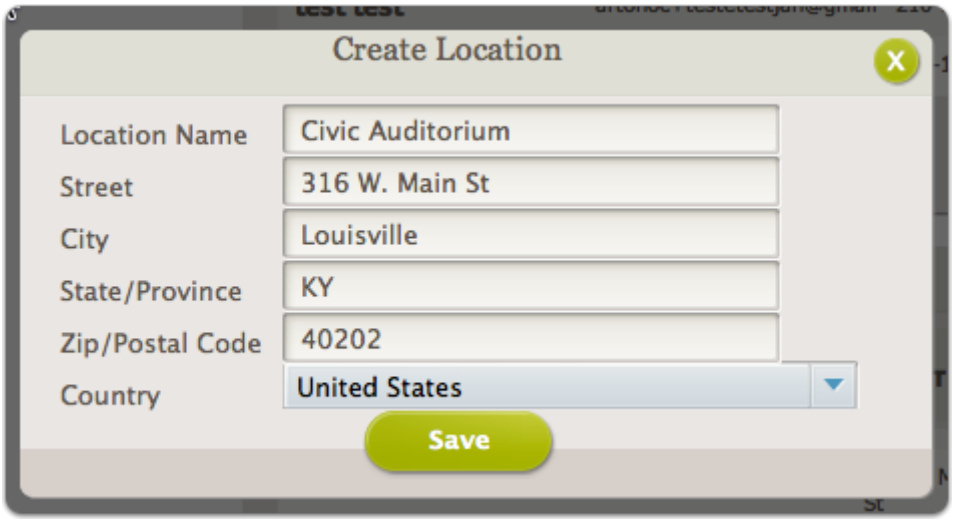
Creating New Locations

Account / Organization Information has a LOCATION related list at the bottom of the page.



Click on Create New Location to open the New Locations window.

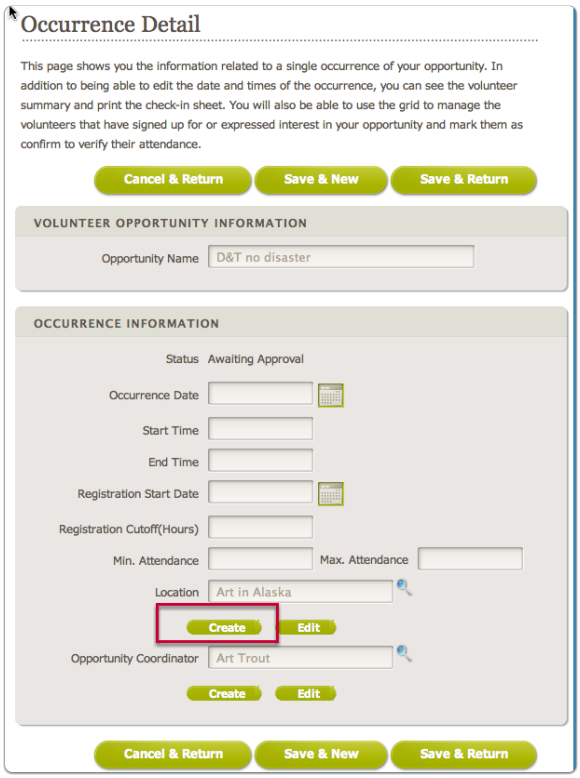
New Location popup



Click Save to Save the Location.

NOTE: You cannot add special directions to the location in this dialog. You'll have to edit the opportunity after its been created to add the special directions.

For self-organizers and others who do not have access to this navigation item - you can add locations when you create a new occurrence:

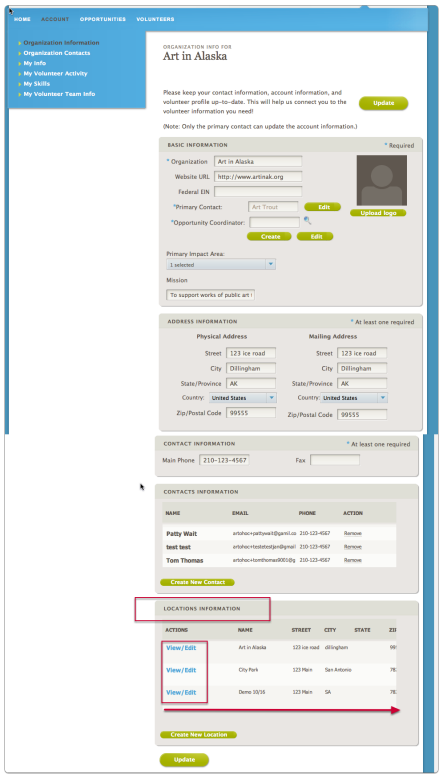


When adding a new occurrence to an opportunity you can easily create a new location by clicking on the Create Button below the field in which you look up and designate the occurrence location.

Editing existing Locations

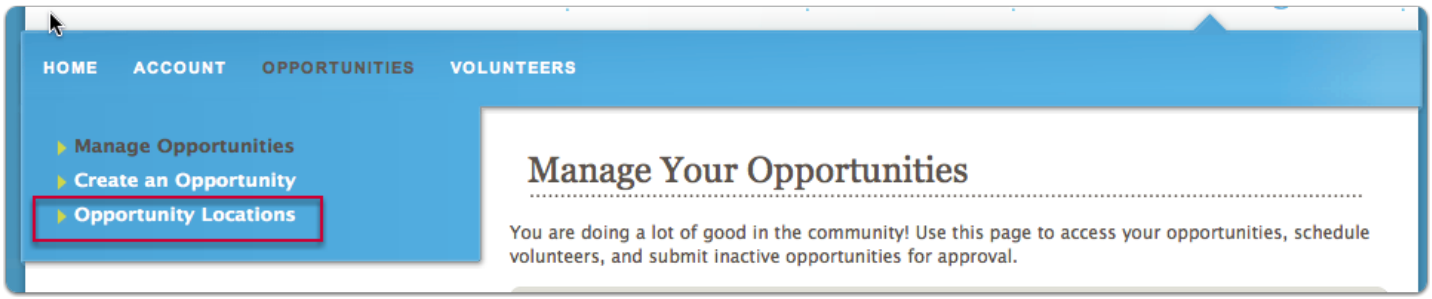
There are two ways you can get to your existing locations to edit them. Either from the related list in My Opportunities -- or directly through Opportunities / Opportunity Locations.

1) Account / Organization Information has a LOCATION related list at the bottom of the page.



Click on View to see info on the location, or Edit to edit the existing information. (Note: you can scroll the locations information view to the right to see more columns of info).

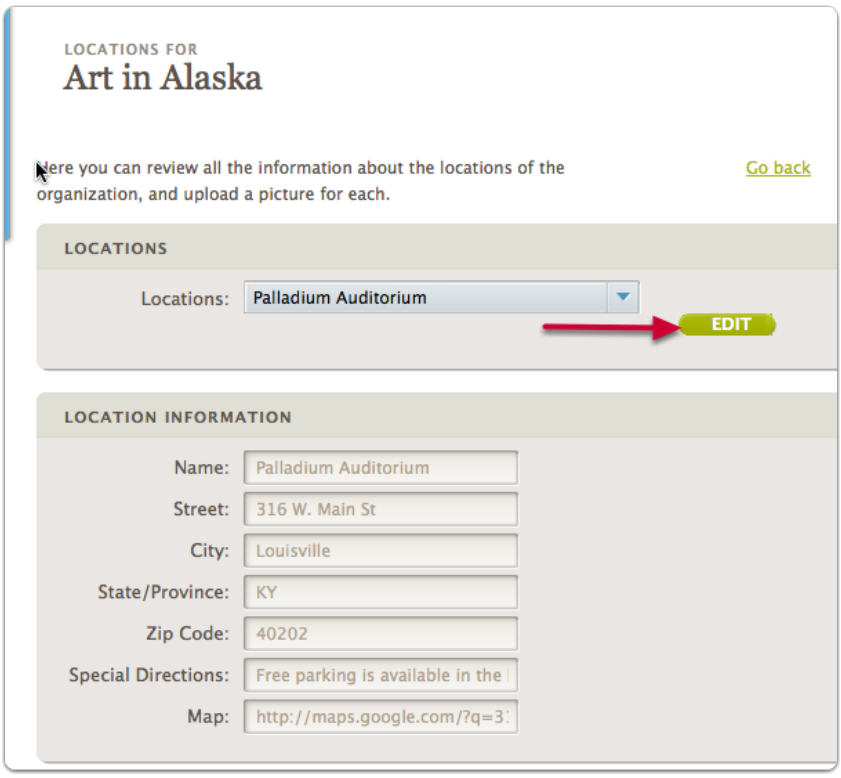
2) Opportunities / Opportunity Locations navigation will take you to a locations picklist:



This will take you directly to the locations page, where you can choose which location to edit.

Select the location you wish to edit and then hit the edit button.

You'll initially view the current info, and can click the info button to change and update the location information.



This opens the fields for editing and you can update info as needed.

Note: The Map info was created for you automatically - but if you wish to use a different google map link, you could choose to replace this info with a more specific google map link.

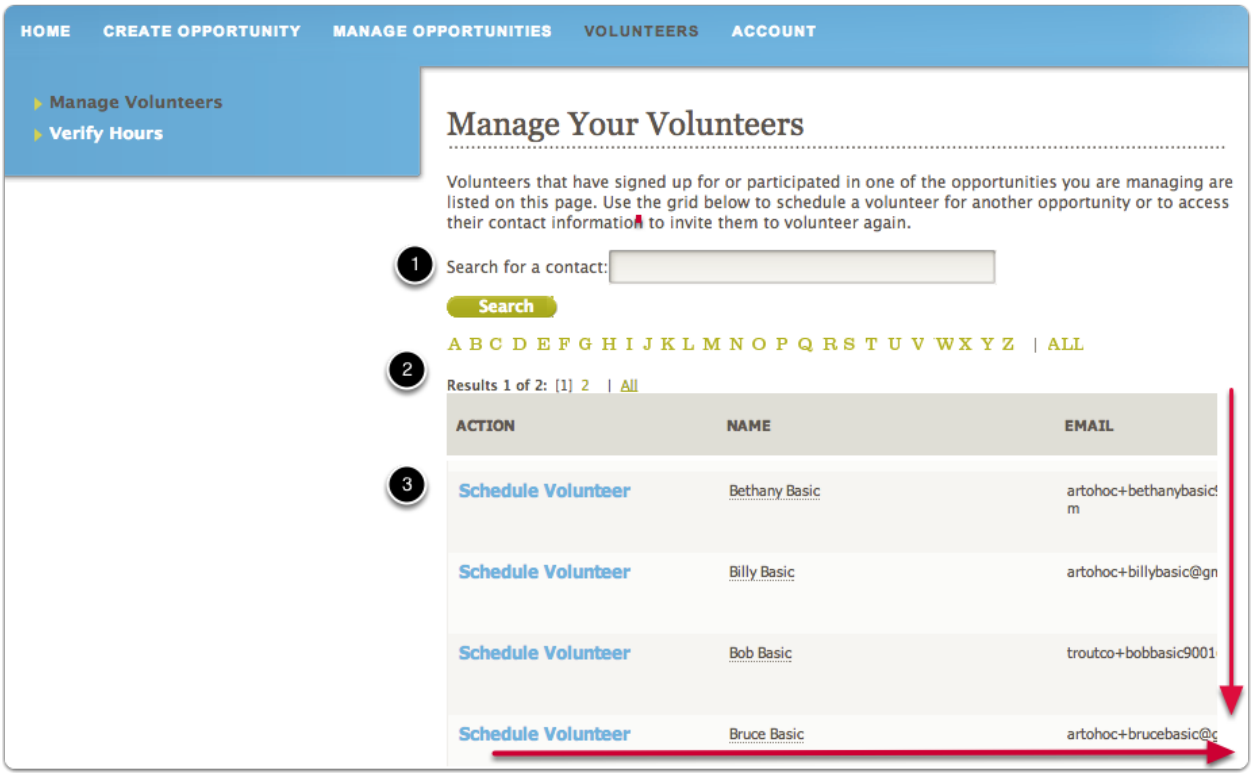
Click SAVE to save your edits.

Volunteers

Manage Your Volunteers Individually / Volunteer Detail Records

The Volunteers Navigation item in the basic portal allows you to view and act on individual volunteers.

Volunteers / Manage Volunteers takes you to the Manage Your Volunteers Page



Here you can see all the volunteers and contacts associated with your organization and see a summary of their information.

1. If you know the name of the volunteer, you can search for them here. If you put in just the first or last name it will return all valid matches.

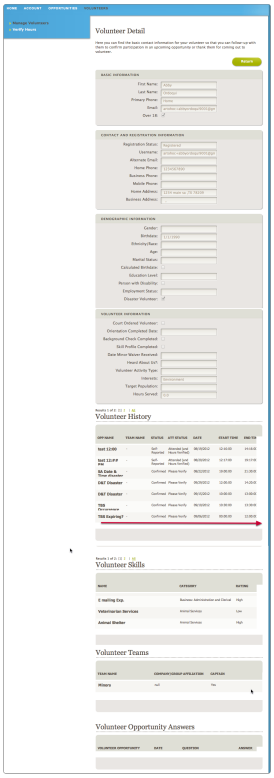
2. Or you can search for volunteers by scrolling through the list, or alphabetically narrow the list by clicking on a letter which will give you all volunteers with that letter as the start of the first name.

3. The list below tells you basic info about each volunteer, and can be scrolled to the right to reveal additional columns:

- Primary Phone #
- Whether or not they are over 18
- Hours served (the total of their verified hours)

The Action link: "Schedule Volunteer"can be used to directly schedule or connect a volunteer to any volunteer opportunity and occurrence.

Clicking on a volunteer's name will open the Volunteer Detail Page



This gives you all the information that volunteers have submitted about themselves, as well as their volunteer history.

The volunteer History grid can be scrolled to the right to reveal additional columns:

- Hours (the total number of verified hours for that occurrence)
- Feedback (the star rating given by the volunteer)
- Decline Reason
- Action: "Go To Occurrence" -- which would take you directly to the occurrence detail page for that occurrence, so you could update attendance, hours served, etc.

Contact records are read only and cannot be edited. (Only the volunteer can edit their personal record)

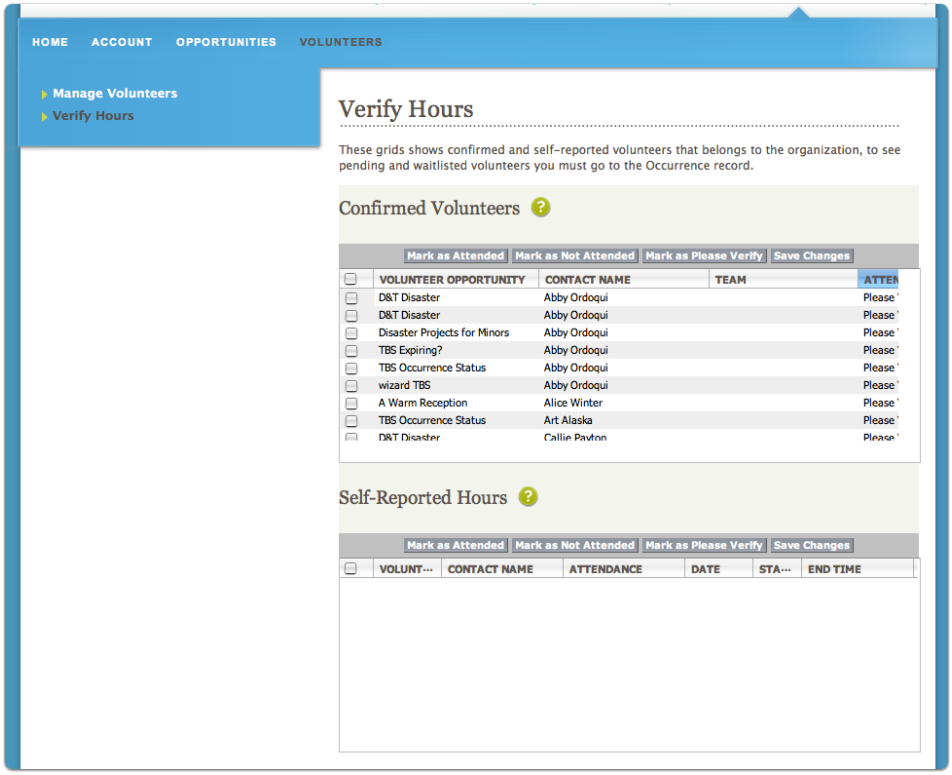
Verifying Hours for Volunteers

Volunteers count on you to verify their service, and to make it easy for you to see any outstanding verifications, there is a grid where you can see any verifications due in Volunteers / Verify Hours.

This grid lists any contact, for any opportunity, that is in confirmed status and the occurrence date (or scheduled connection) is in the past. At that point, you should be verifying the volunteer's service.

Whenever you log into the portal - you should check here to see if you have any verifications due. (The system will send you reminders when specific occurrences are over and you should return to verify service -- but if you don't want to look up each occurrence record, this page gathers all due verifications in one place!)

Verify Hours Page



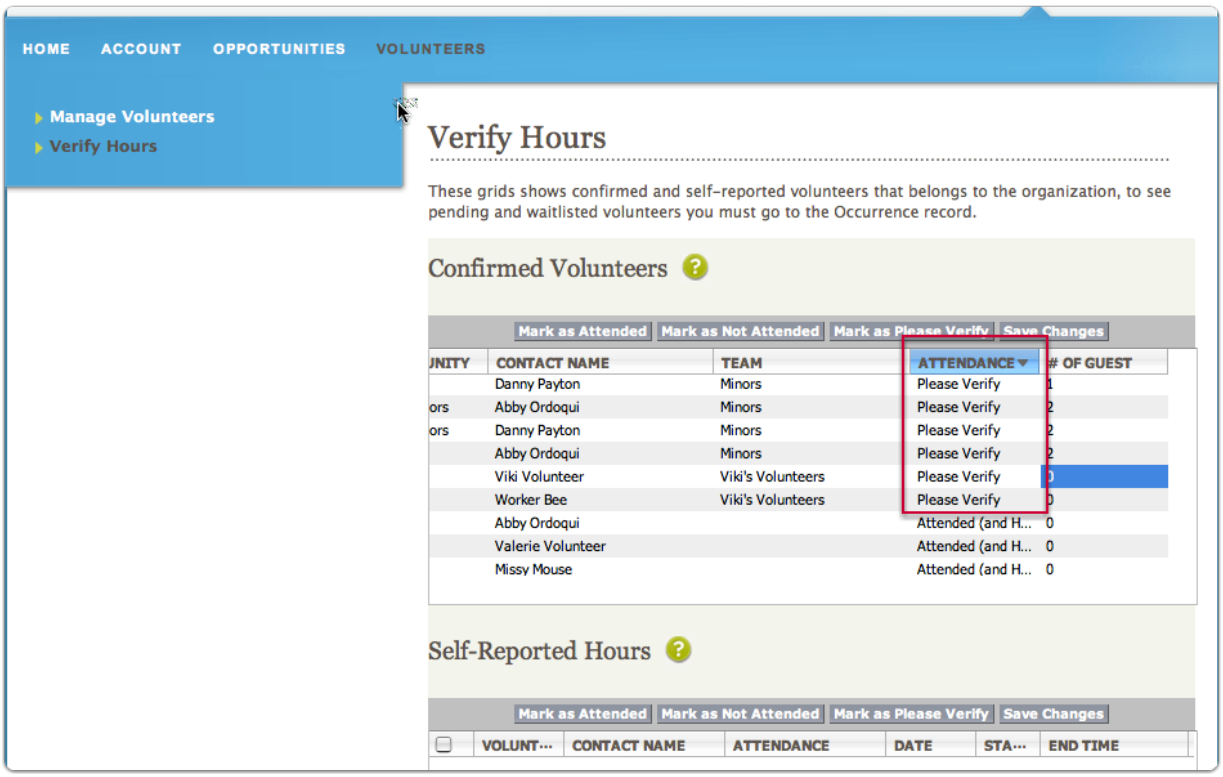
This grid of confirmed volunteers, for occurrences in the past, can be sorted by clicking on the column headers for your convenience.

The top grid is confirmed volunteers for your posted opportunities, the bottom grid will show any unconfirmed self-reported connections.

You can scroll the grid to the right to reveal additional columns:

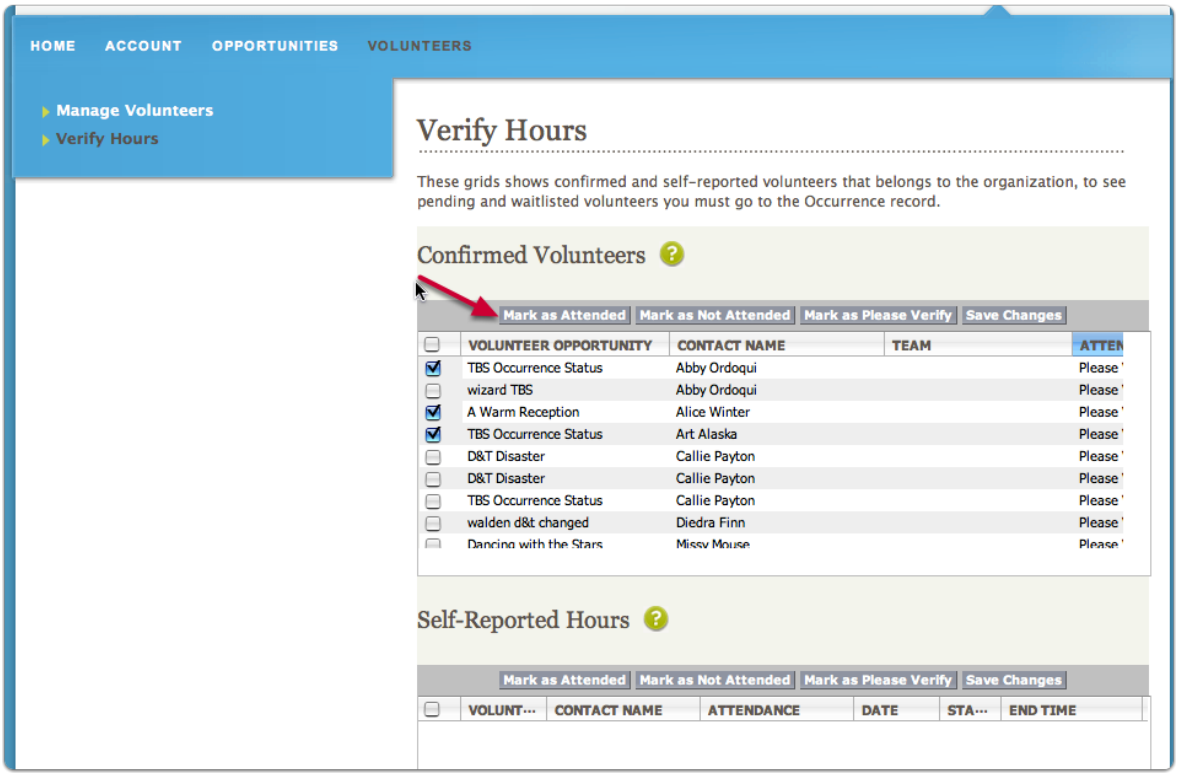
- Attendance Status
- # of guests
- Date
- Start Time
- End Time
- Hours (currently set to zero, unless the volunteer has self-reported hours on their own via the public site and is just waiting for you to verify them)
- Guest Hours
- Feedback (you can see how many stars they've rated their volunteer experience.
- Action: View / Edit (Clicking here will take you to the occurrence detail page for that opportunity if you want to update information via the connections grid.

To find the verifications that are due and have still not taken place, sort on the attendance column to bring the ones in 'please verify status' to the top.



The ones in please verify status are the ones you want to take action on. Now scroll to the left to get back to the action checkboxes.

Place checkboxes in the radio buttons to the left of the rows where you wish to take action.



Known Issue: When you first arrive on the page -- the checkboxes have a '-" sign in them. Click the top left check button to clear all the occurrences. Click again to check ALL the rows. Or just individually check the rows you want to mark as attended, not attended, or return to please verify status.

To mark as attended -- put checkbox to the left and click the Mark as Attended button.

To mark as not attended -- put checkbox to the left and click the Mark as Not Attended button.=

You should make sure that no columns are left in the status of "Please verify". When that's done - your attendance verifications are 100% complete!

All confirmed volunteers should be in attendance status of either Attended or Not Attended!

Connections for Self-Reported Hours with your organization will appear in the 2nd grid -- and you should verify their self-reported attendance in the same way!