HandsOn Connect

Partner Training Manual

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Logging into HandsOn Connect

Log into the HandsOn Connect system by visiting http://volunteer.lenaweecf.org and clicking the **Login** button on the top right hand side of the website.

Username: Your username will always be your email address.

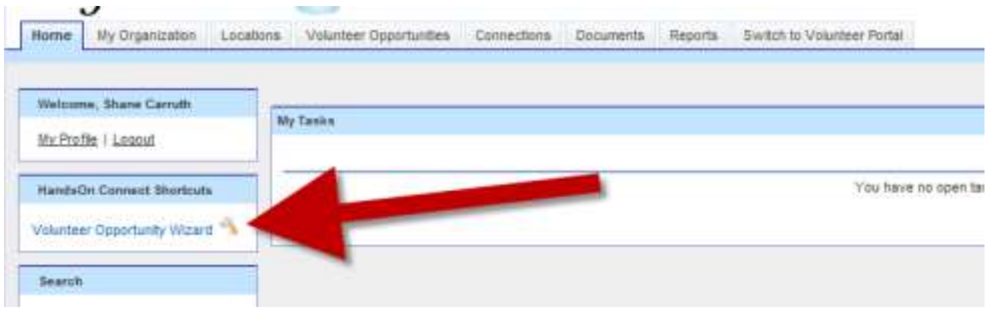
Password: We are unable to look up what your password is, so if you don't remember simply click the link that says **Forgot Password?**

Please don't share your username and password with other people at your organization. If someone else at your organization needs access to the system, we can grant them access as well.

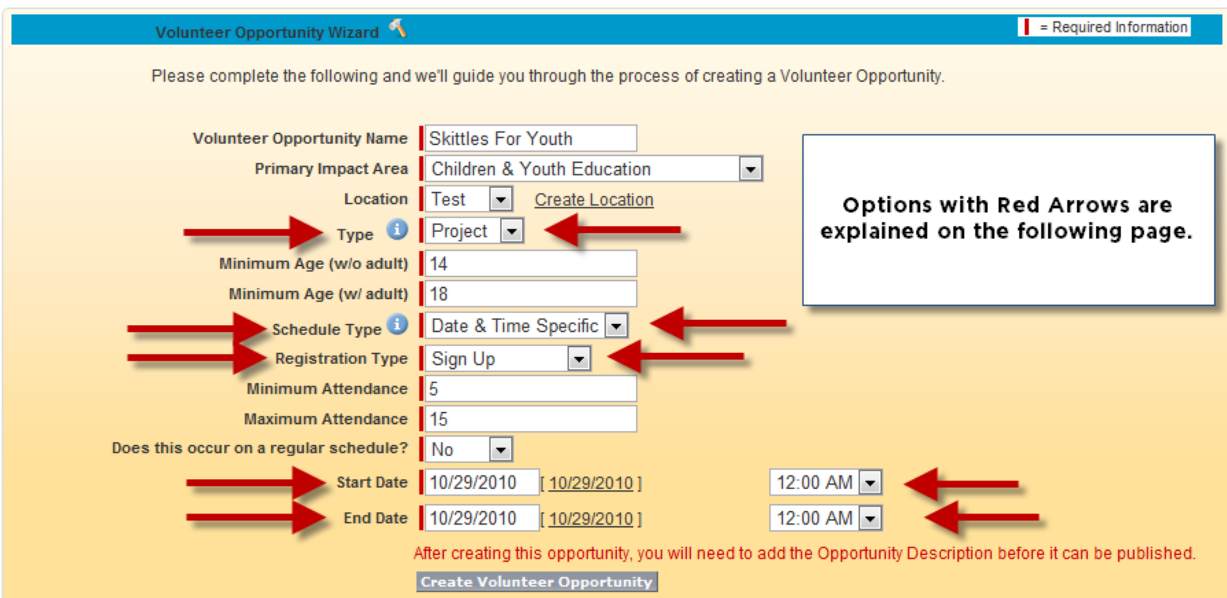
If you're unsure who has access to your account, or want to add users, email ptrentman@ubat.com for more information.

Creating a new Volunteer Opportunity

Using the Volunteer Opportunity Wizard



Creating a new Volunteer Opportunity is very easy with the Volunteer Opportunity Wizard. After logging into your account simply click the Volunteer Opportunity Wizard link on the left hand side of the screen.



As you fill in the fields of the form, it will automatically generate the next question based on the type of Volunteer Opportunity you are creating.

Enter a Volunteer Opportunity Name.

Select the Primary Impact Area that is as relevant as possible. There may not be an exact match.

Select a Location. If this is a new location, select Create Location and enter that information first.

There are two options for **Type**;

- A **PROJECT** is any volunteer opportunity that a volunteer can sign up for or express interest in.
- An **ACTIVITY** is used for events such as trainings or workshops. We recommend using Project for everything.

There are two options for **Schedule Type**;

- **DATE & TIME SPECIFIC** projects show up on the Project Calendar.
- **TO BE SCHEDULED** projects show up in the Volunteer Opportunity Database.

If this is a **Date & Time Specific** Volunteer Opportunity you will also have to select one of two options for **Registration Type**;

- **SIGN UP** opportunities allow the volunteer to fully register for the project through our site.
- **EXPRESS INTEREST** opportunities allow the volunteer to express interest through our site. You will receive an email with their contact information and it is up to you to follow up with this volunteer. This can be useful if you are screening applicants or need to set up a volunteer schedule with this individual.

If this is a **To Be Scheduled project**, you will need to pick a **Start Date** and **End Date**. This is not asking when the project itself will start and end, it is asking you what the recruiting dates are for this project. The Start Date refers to the date you want to start recruiting for the project, and the End Date is the date the Volunteer Opportunity is no longer visible to potential volunteers.

After you have finished the entire form, you can click **Create Volunteer Opportunity**.

You will now see the Volunteer Opportunity Detail Page, and at the top of this page will be a tan box that shows all the steps that you have completed and which steps still need to be finished. Start by adding an **Opportunity Description** by clicking **Add/Change Description**.

This will open the editor for your Project Description. You can add text, links, pictures and logos. You can also change the color of text or make certain words bold in order to draw more attention to application deadlines or special requirements. Once completed, click Save, then Close.

After this window closes, you may notice that Opportunity Description is not checked yet; you can refresh your browser window and it will now show as checked.

If this project occurs more than once, you can create additional occurrences by clicking the link Create New Recurrence. Otherwise the volunteer opportunity just won't show that as checked, which is fine.

When you have finished creating the volunteer project you will have to Submit for Approval. Up until this point, no one from VOLUNTEER Lenawee! has any indication that you have actually done anything. You **must** submit your project for approval in order for it to appear on the website.

The Opportunity Published will also not show as checked at first. It will show the Status of the project as Pending, which just means that it's been submitted to VOLUNTEER Lenawee! for approval. Once approved by us, the item will be checked and the Status will change to Active.

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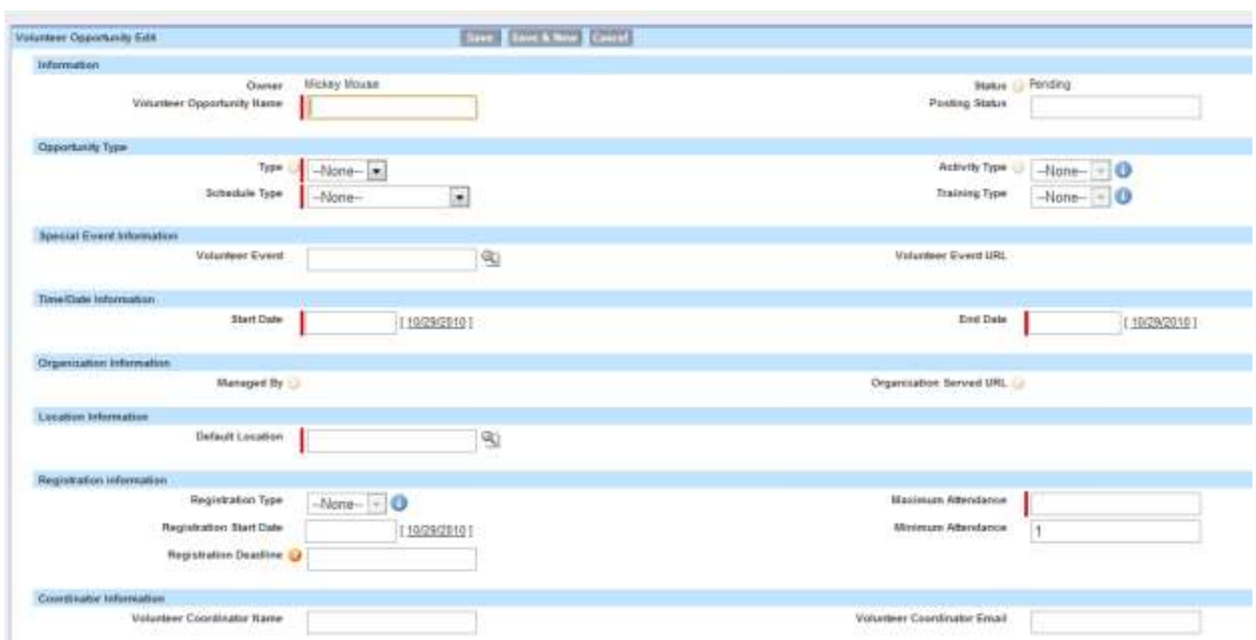
Using the Volunteer Opportunity Tab - Optional

This is an alternative to using the Volunteer Opportunity Wizard. By using the Volunteer Opportunity Tab you have to enter all the project details directly into the correct field yourself. **It is not recommended to use the Volunteer Opportunity Tab. The information below is provided just to show you how to use it if you choose to do so. We recommend using the Volunteer Opportunity Wizard.**

Click on the **Volunteer Opportunities** tab and then the **Create New Volunteer Opportunity** button.



Fill in the fields that have the Red Bar in front of them. Then click **SAVE** at the bottom. The remaining steps are the same as outlined above after you've run the Volunteer Opportunity Wizard.

You will now see the Volunteer Opportunity Detail Page, and at the top of this page will be a tan box that shows all the steps that you have completed and which steps still need to be finished. Start by adding an Opportunity Description by clicking Add/Change Description.

This will open the editor for your Project Description. You can add text, links, pictures and logos. You can also change the color of text or make certain words bold in order to draw more attention to application deadlines or special requirements. Once completed, click Save, then Close.

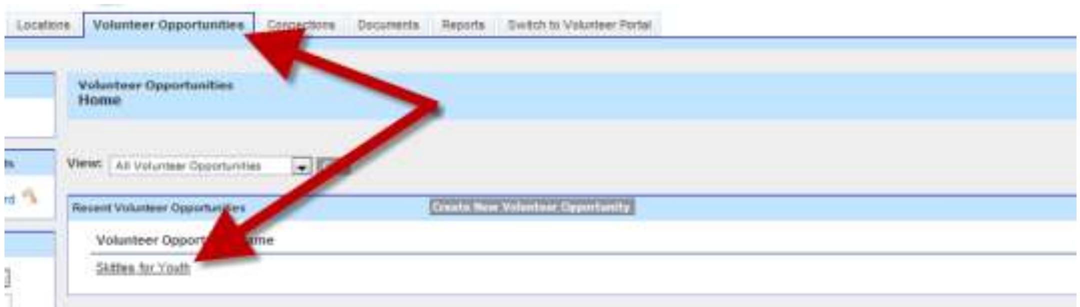
After this window closes, you may notice that Opportunity Description is not check off yet, you can refresh your browser window and it will now show as checked.

If this project occurs more than once, you can create additional occurrences by clicking the link Create New Recurrence. Otherwise the volunteer opportunity just won't show that as checked, which is fine.

When you have finished creating the volunteer project you will have to Submit for Approval. Up until this point, no one from VOLUNTEER Lenawee! has any indication that you have actually done anything. You **must** submit your project for approval in order for it to appear on the website.

The Opportunity Published will also not show as checked at first. It will show the Status of the project as Pending, which just means that it's been submitted to VOLUNTEER Lenawee! for approval. Once approved by us, the item will be checked and the Status will change to Active.

Editing a Volunteer Opportunity

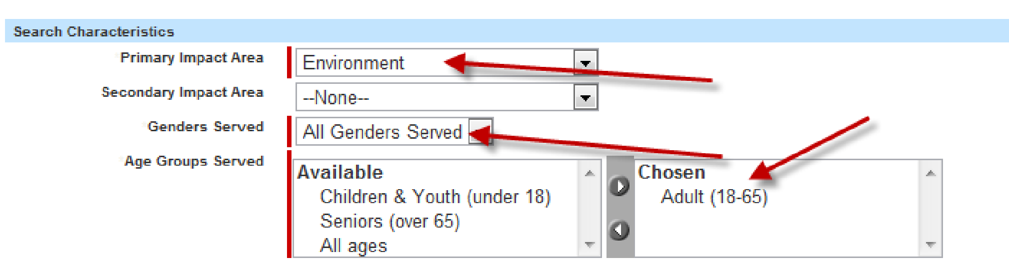


Click on the Volunteer Opportunities tab and then the name of the Volunteer Opportunity you want to edit.

You can now edit any of the information that you entered when the project was created. You can do this two ways. You can click Edit at the top of the page, make the changes and then click Save or just change it directly on this page and click Save.

If you need to edit the project description, click the Change Description link under the yellow box. Make your changes, then click Save and then Close.

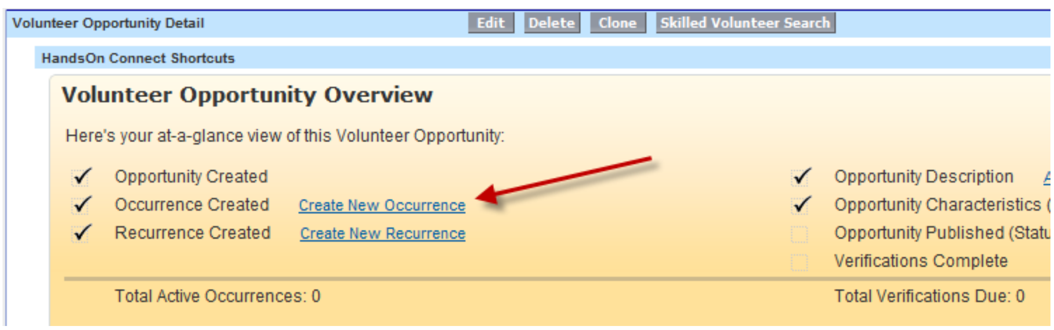
If you do need to edit the project, you will now be forced to select a Primary Impact Area, Genders Served, & Age Groups Served before you can save your edits.



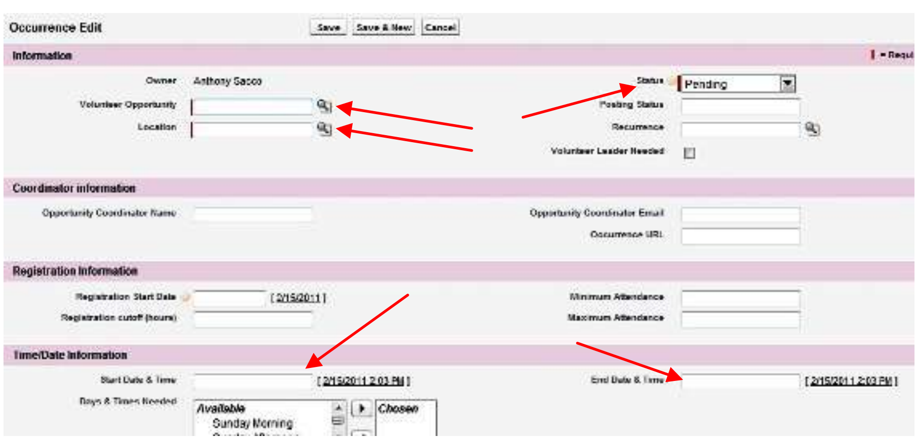
Adding Project Occurrences

If the project is **Date & Time Specific** and you need to add additional dates click on the **Volunteer Opportunities** tab and then the name of the Volunteer Opportunity you want to add occurrences to.

In the yellow box, click the **Create New Occurrence** link.



You will now need to select the **Volunteer Opportunity**, the **Location**, set **the Status to Active**, set the **Start Date & Time** and the **End Date & Time** then click **save**.



Removing Volunteer Opportunities

If you need to remove a Volunteer Opportunity from the Searchable Database or Project Calendar, click on **Volunteer Opportunities** and click on the name of the Volunteer Opportunity you need to remove.

Removing To Be Scheduled Volunteer Opportunities

If the project is a **To Be Scheduled** type of project, removing a Volunteer Opportunity from the Searchable Database is as simple as editing the **End Date** to a date in the past. Deleting the entire Volunteer Opportunity is not necessary, as you can just change the end date to yesterday and it will no longer be visible to potential volunteers. However, it will still be visible to you in the Administrative side of HandsOn Connect. What's useful about this is that it allows you to change that end date to some date in the future, if you need to relist this project in the future.

Removing Date and Time Specific Volunteer Opportunities

If the project is a **Date and Time Specific** type of project, scroll down to the Occurrences section of the page and click on the Occurrence ID that you want to delete.

Please **DO NOT** delete the entire Volunteer Opportunity when you are just trying to delete one Specific Date Occurrence. If you delete the entire Volunteer Opportunity, it will delete all Occurrences associated with this Volunteer Opportunity.

Also, **DO NOT** just click **DEL** next to the Occurrence ID. You should click the Occurrence ID and then scroll down to Connections section to make sure that there are no volunteers already signed up for the Occurrence before you delete it.

After you've clicked on the Occurrence ID, and verified that there are no volunteers signed up for that occurrence (Connections). Scroll up to the top of the page for that Occurrence, not the whole project, and click "Delete". This will remove that occurrence from the project listing, while keeping the initial project intact, which lets you relist the project again in the future by simply adding a new occurrence.

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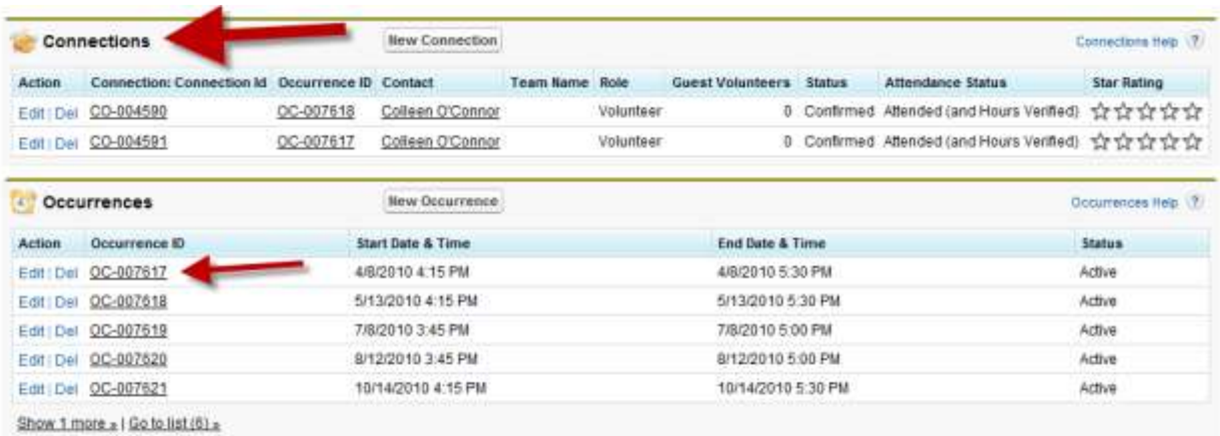
Using Connections to track registration

Anytime a volunteer registered for one of your Full Sign Up opportunities or requests to be contacted for one of your Express Interest Projects this is called a CONNECTION in HandsOn Connect.

If you want to look up a certain project's connections first Search for that project and click its name. This will take you to the Volunteer Opportunity Detail page that you would see after creating or editing a project.



You have two ways to view past Connections.

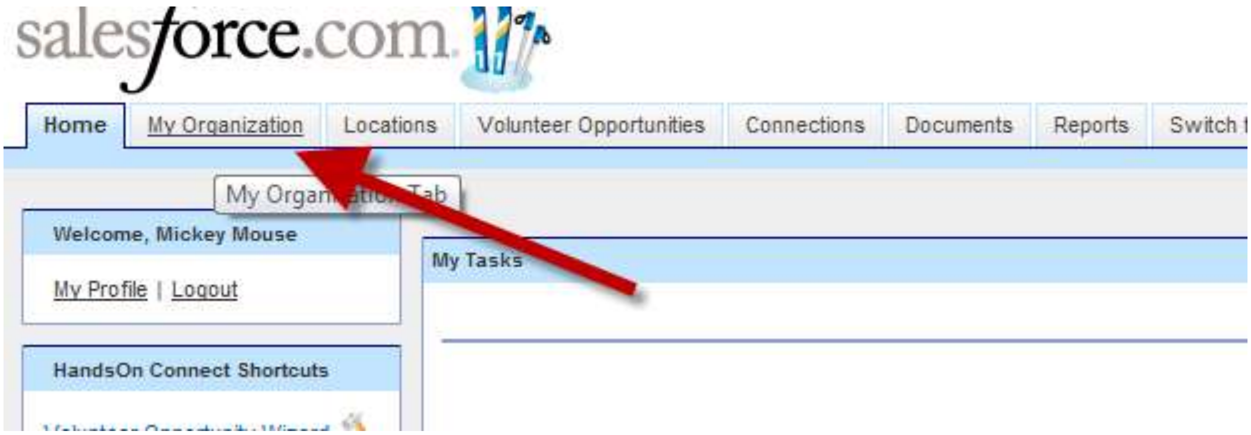
You can scroll down to the Connections segment of the Volunteer Opportunity Detail page and view all connections for this opportunity, regardless of what specific occurrence they were connected to.

However, if the project has more than one occurrence (or event date), as pictured above, and you only want to see the connections for a specific occurrence, click on that occurrence's Occurrence ID.

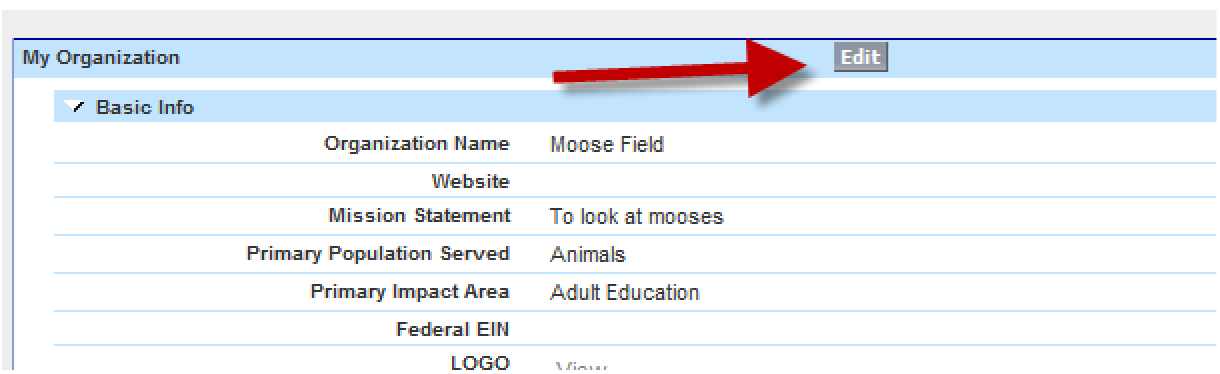
You are now at the Occurrence Detail page, and you can scroll down on this page to the Connections segment to see who was connected with this specific occurrence.

Updating Your Organization's Information

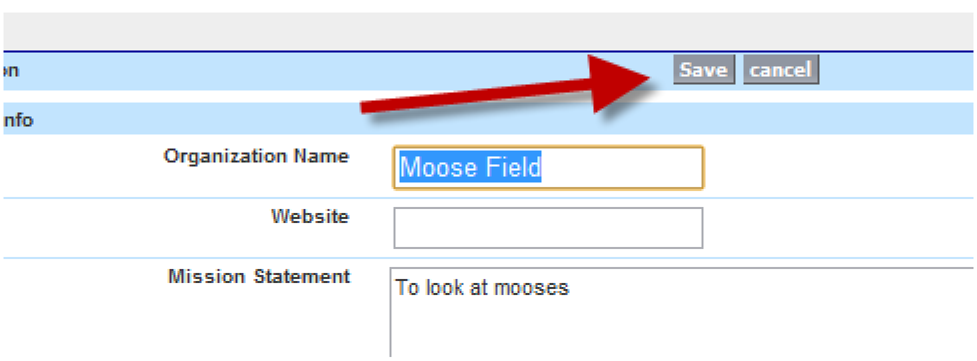
To update organization information such as phone numbers or addresses, click on the **My Organization** tab.



Click **Edit**.



Make the necessary changes, and then click **Save**.



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