

If you need people.

Have your people
call our people.



We rely on OneOC and the volunteers they connect us with to help get food to Orange County's hungry.
- Mark Lowry, CAPOC's O.C. Food Bank

Connecting nonprofits with volunteers is what we've done for over 50 years.

We connect young and old, diverse cultures and religions, and people of all economic levels to build a stronger, more vibrant Orange County. Every day, thousands of Orange County lives are touched by the way we unite the power of volunteers, philanthropic dollars and charitable causes.

Posting a Volunteer Project on www.OneOC.org

As a partner organization of OneOC, you have the ability to post a volunteer project on our website.

Using our technology, you can do the following:

- Create and publish volunteer opportunities
- Update basic information involving your organization
- Edit existing volunteer opportunities
- Monitor sign ups and review prospective volunteers
- Confirm volunteer participation for "express interest" opportunities
- Schedule volunteers for ongoing volunteer opportunities
- Communicate with volunteers via email

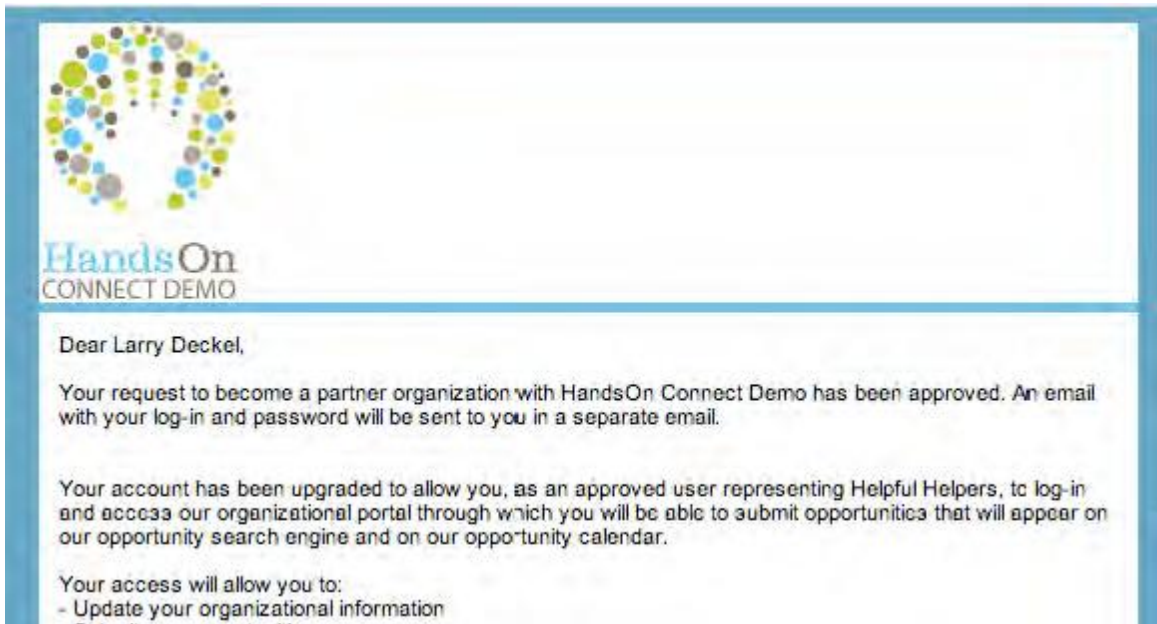
This guide introduces you to the basics of posting a volunteer project, supplementing the information you received from the training video.

Let's get started!

Table of Contents

Part 1

The Home Tab and Userface.....	5
Using the Volunteer Opportunity Wizard in the Partner Portal	7
Understanding the Volunteer Opportunity Overview Dashboard (Partner Portal)	17
Submitting your Volunteer Opportunity for Approval	20

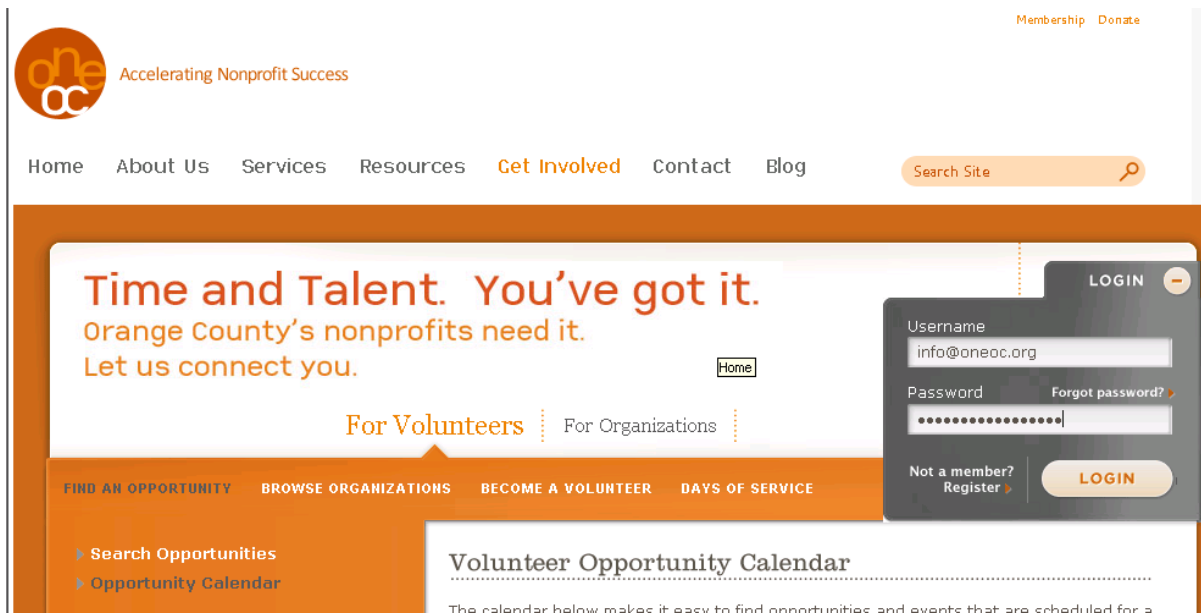


This first email specifies you have been approved and granted access to the portal. You will receive a follow-up email with your username and password.



The password is temporary, and you will be prompted to reset it.

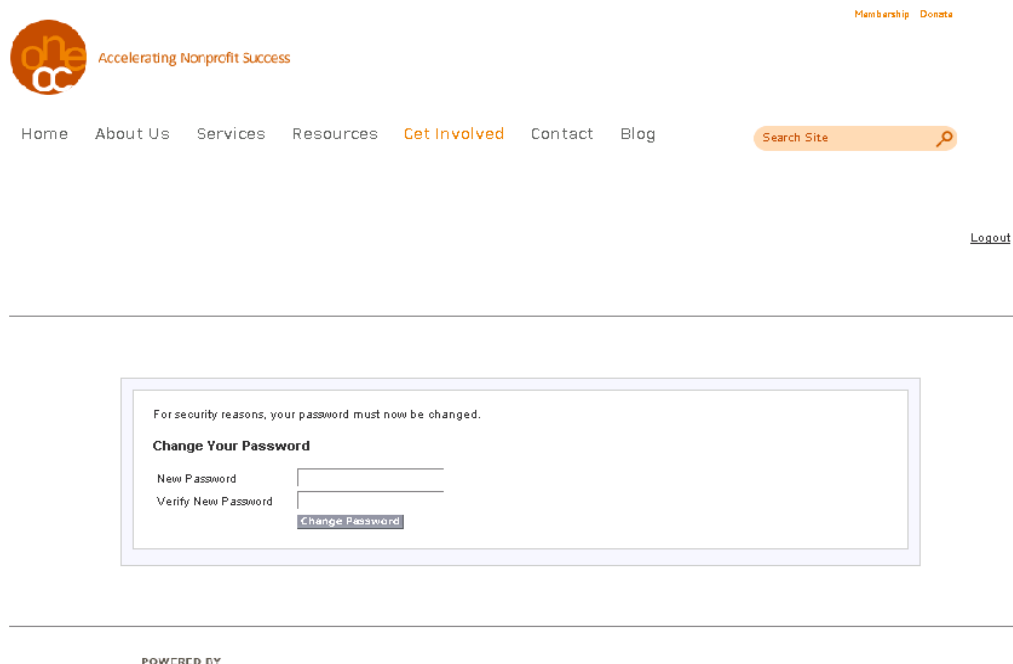
To log on go to the site go to www.OneOC.org and click on "Get Involved" and then "Volunteer Opportunities". Click on the **Login** in the upper right corner, and enter your username and temporary password.



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

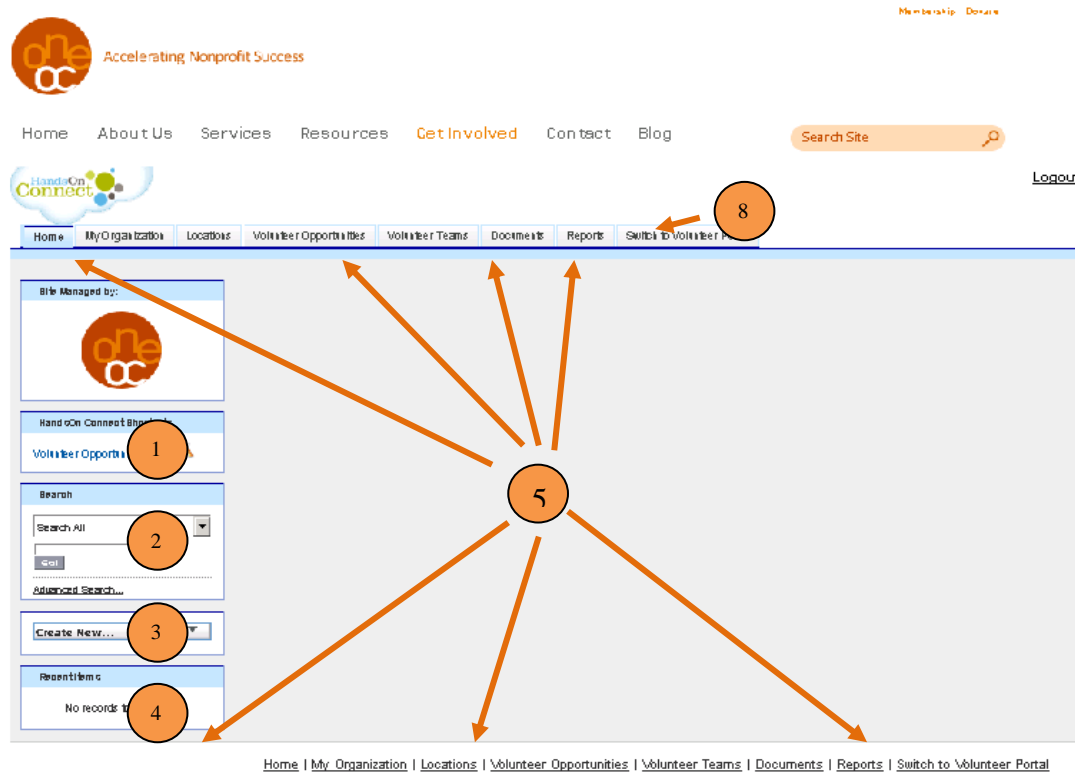
You will need to set your permanent password.

If you forget your password, click "**Forgot Password?**"The system will prompt you to enter your username to send you your password you created.



The Home Tab and User Interface

Here's a brief overview of the portal home page with the different elements:



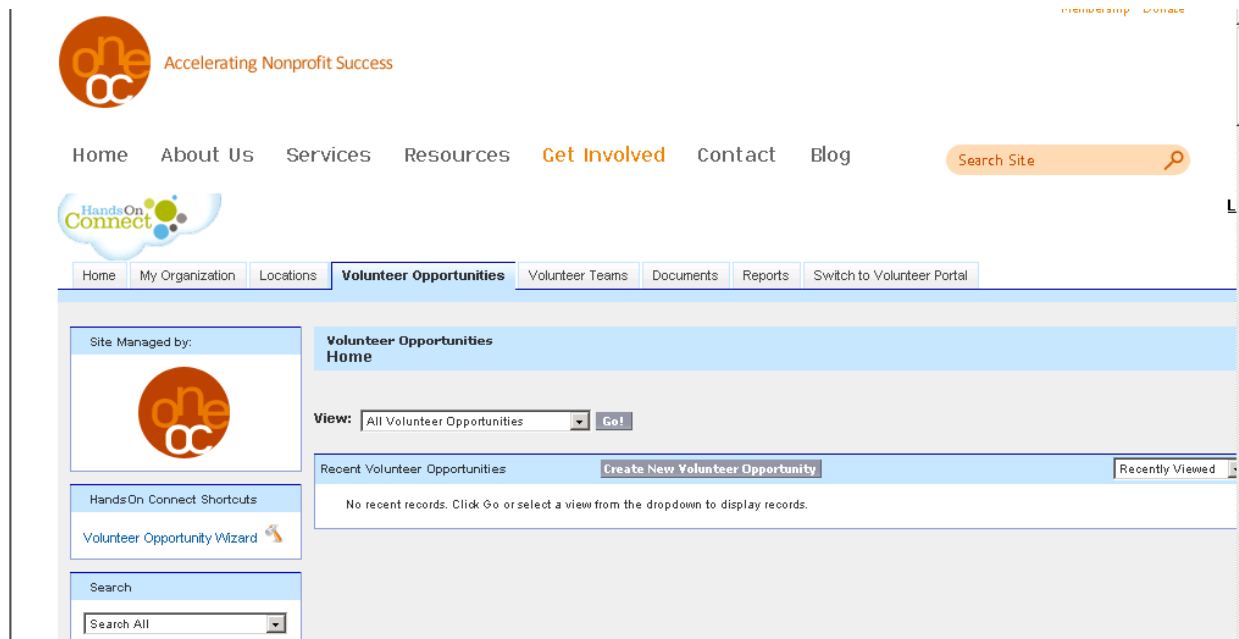
Left Sidebar

1. Volunteer Opportunity Wizard: Click on the link to start the process of posting opportunities.
2. Search: Search for any records your organization has created, and for volunteers who have signed up or expressed interest in the volunteer opportunities.
3. Create New: A shortcut to create a new record of any type.
4. Recent Items: List of the last 10 records that have been viewed or edited. Clicking on a recent item will bring up the record.
5. Tabs and Hyperlinks:
 - a. Home – the page you're on now.
 - b. My Organization – your Company's profile.
 - c. Locations – the names and addresses of one or more places where volunteer opportunities will take place.
 - d. Volunteer opportunities – All the records of the volunteer opportunities you have created. You would create a "New Volunteer Opportunity" on this page, but don't! **(Use the Volunteer Opportunity Wizard instead. It's far, far, easier.)** In this section you can edit your volunteer opportunities, submit them for approval to be posted on the public

-
- site, create new occurrences of date & time specific volunteer opportunities, search for skilled volunteers, and more. This is also where you will be approving volunteers for express interest opportunities, scheduling them for 'ongoing' opportunities, and reporting their attendance and service hours.
- e. Connections – A connection is a record of the relationship of a contact (the volunteer), the occurrence of the opportunity they are connected to, and the status of that connection.
 - f. Documents – This is where you will find documents and other resources that have been made available to you by the managing organization.
 - g. Reports – This is where you will find reports that you can run to get information about all your data in HandsOn Connect. These reports can be viewed on the website, or exported to excel or .csv files.
 - i. Note: The tabs available to you may appear in a different order, and may include fewer or greater tabs than what is featured here.
6. Switch to Volunteer Portal – Clicking here will take you back to the public website. You can search for your volunteer opportunities, and view other site content. To update your personal information, click on “Switch to Volunteer Portal” and then navigate to the My Account tab on the public site. Then, click on the Personal Information link. You can also change your passwords here!

Using the Volunteer Opportunity Wizard in the Partner Portal

The **best and easiest way** to create a new volunteer opportunity is to use the **Volunteer Opportunity Wizard link**, which is on the left sidebar of your portal.



There are 4 steps to creating a volunteer opportunity.

- Step 1- Complete the questions on the Volunteer Opportunity Wizard
- Step 2- Write a job description to incise volunteers
- Step 3- Edit any reoccurrence or occurrence record
- Step 4- Hit submit

Step 1

Clicking on the hyperlink for “Volunteer Opportunity Wizard” will launch the wizard in a pop-up window. Let’s walk you through using the wizard!

Give your Opportunity a descriptive name and select its primary impact area. Note: Pick a Volunteer Opportunity Name that is simply but descriptive enough to help solicited your volunteer opportunity.

Volunteer Opportunity Wizard

Please complete the following and we'll guide you through the process of creating a Volunteer Opportunity.

1 Volunteer Opportunity Name

2 Primary Impact Area

Opportunity Coordinator

Location [Create Location](#)

Type

The impact area will be used in searches on the site.

Use the Magnifying Glass to find the Opportunity Coordinator and click on the hyperlink next to their name to populate the field.


The Opportunity Coordinator is the person who will be in charge of managing volunteers for this project. The coordinator will receive emails mentioning volunteer signups and removals, and the coordinator will be listed on the public site as the contact for this opportunity.

Volunteer Opportunity Wizard

Please complete the following and we'll guide you through the process of creating a Volunteer Opportunity.

Volunteer Opportunity Name

Primary Impact Area

Opportunity Coordinator 

Location [Create Location](#)

Type

Search ~ HandsOn Connect

Lookup

Search

You can use "*" as a wildcard next to other characters to improve your search results.

Recently Viewed Contacts

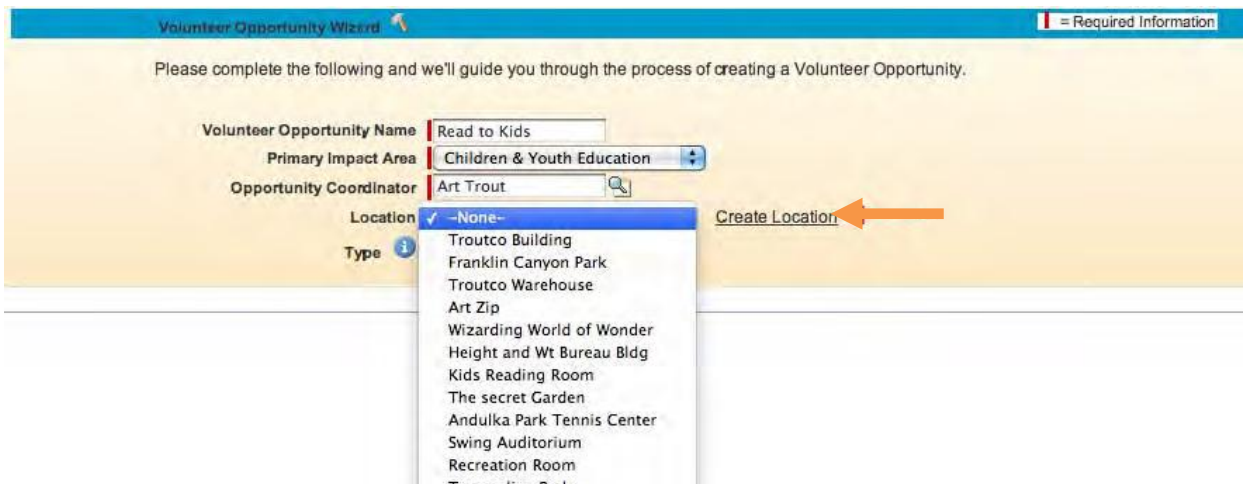
Name	Organization Name	Organization Site	Profile Name
Actemus Troutie	Troutco		Volunteer Leader
Art Trout	Troutco		Partner Staff
Barry Trout	Troutco		
Bobby McGhee	Troutco		Volunteer
Bobby Trout	Troutco		Volunteer Leader
Pete Partner	Troutco		Volunteer
Portal Pete	Troutco		Partner Staff
Robert Trout	Troutco		Partner Staff
Tad Pohl	Troutco		Volunteer

Clicking on the magnifying glass icon will allow you to “look up” anyone on your staff and select them to be the Opportunity Coordinator for this volunteer opportunity.

By default, the contacts you have most recently accessed in the system will appear in a list. You can look up other names in your data, by typing the name in the search box and clicking on the GO button.

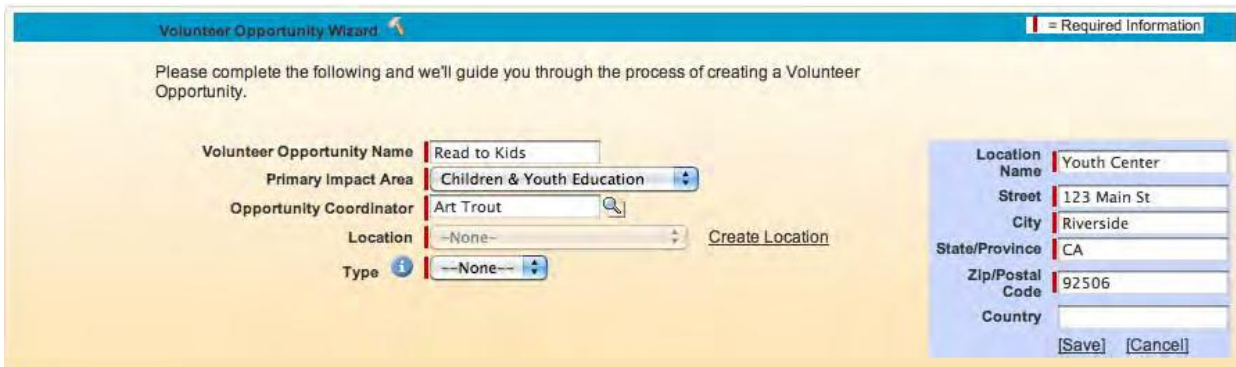
The Opportunity Coordinator is the person who will be in charge of managing volunteers for this project. The coordinator will receive emails mentioning volunteer signups and removals, and the coordinator will be listed on the public site as the contact for this opportunity.

Select the Location for the Volunteer Opportunity.



A dropdown menu with all locations you have used for other volunteer opportunities will be visible here. Select the location that is correct for this opportunity. If the location is not already on the list, you can create a new location record by clicking on "Create Location."

If you create a new location, a popup will appear on the right.



Fill in all required fields.

The "location Name" is the reference name for the location that will appear in your location dropdown menu in the future. It will also be what is visible to volunteers when they review your project information. Click on SAVE to save the location. Doing so automatically selects and adds the location to the dropdown menu list.

Is your Opportunity a **project** or an **activity**?

The screenshot shows the 'Volunteer Opportunity Wizard' interface. The form fields are: Volunteer Opportunity Name (Read to Kids), Primary Impact Area (Children & Youth Education), Opportunity Coordinator (Art Trout), Location (Youth Center), and Type (Project). The 'Type' dropdown menu is open, showing options: --None-- (selected), Project, and Activity. A 'Create Location' link is visible next to the Location field.

Project - A volunteer opportunity where volunteers perform service for your organization. You will be able to verify their service and credit them with service hours. Note: If you setup as activity you will not be able to track hours. It must be setup as project to manage volunteer hours.

Activity - Any other type of activity that you might want volunteers to sign-up for, which doesn't result in direct service. If you choose activity you will be asked to define what type of activity it is:

- Recognition -- A public ceremony where volunteers are recognized and celebrated
- Training -- any class or instruction you provide as an organization (i.e. First Aid Class, CPR, Working with Children, etc)
- Social -- any party or social event you have for your volunteers
- Other -- anything else that isn't a volunteer service opportunity.

The screenshot shows the 'Volunteer Opportunity Wizard' interface. The form fields are: Volunteer Opportunity Name (Read To Kids), Primary Impact Area (Children & Youth Education), Opportunity Coordinator (Art Trout), Location (Youth Center), Type (Activity), Activity Type (Training), Training Type (Academy), Minimum Age (w/ adult) (Social), and Schedule Type (Other). The 'Activity Type' dropdown menu is open, showing options: --None-- (selected), Recognition, Training (selected), Academy, Social, and Other. A 'Create Location' link is visible next to the Location field.

If you select training, you will be asked to specify what type of training it is.

- Volunteer Leadership -- teaches how to lead others in service
- Volunteer Management -- teaches organizations and individuals on how to manage volunteers or events
- Organizational Development - classes to help other organizations succeed
- Other

Minimum Age

Volunteer Opportunity Wizard = Required Information

Please complete the following and we'll guide you through the process of creating a Volunteer Opportunity.

Volunteer Opportunity Name: Test

Primary Impact Area: Children & Youth Education

Opportunity Coordinator: Alan Romero

Location: 1901 E. 4th Street, Suite 100 [Create Location](#)

Type: Project

Minimum Age: 16

Minimum Age (w/ adult): 8

Schedule Type: --None--

- Minimum Age -- what is the youngest age where a volunteer could attend on their own (If under 18, you can ask the volunteer to bring a completed parental consent form, but the parent doesn't need to accompany him or her).
- Minimum Age (W/ adult) -- to encourage family volunteering, we'd like you to set the youngest age where a minor could attend this volunteer opportunity while accompanied by an adult, parent or guardian.

Schedule Type

There are two kinds, with very different characteristics: date and time specific and to be scheduled.

Volunteer Opportunity Wizard = Required Information

Please complete the following and we'll guide you through the process of creating a Volunteer Opportunity.

Volunteer Opportunity Name: Read To Kids

Primary Impact Area: Children & Youth Education

Opportunity Coordinator: Art Trout

Location: Youth Center [Create Location](#)

Type: Project

Minimum Age: 16

Minimum Age (w/ adult): 8

Schedule Type: **✓ --None--**
Date & Time Specific
To Be Scheduled

Date and Time Specific: This is intended as an opportunity where you need a certain number of volunteers to attend and volunteer together. It takes place on a specific day with everyone starting at the same time and ending at a defined time. This could happen just one time, or on a recurring basis (weekly, monthly, etc). You define how MANY volunteers can sign up for this opportunity, and they will see exactly what times are available.

To Be Scheduled: Some organizations need volunteers on an ongoing basis. Examples might be "Office help needed" or "Mentors or Tutors needed". You might welcome volunteers at defined times of the day, (i.e. Mondays - Fridays anytime from noon - 5 pm)... but exactly when the volunteer will attend, and for how long, is flexible and something you will arrange directly with the volunteer. If you need volunteers every day, this is the preferred schedule type (as opposed to creating many, many date and time specific opportunities).

Registration Type

The screenshot shows the 'Volunteer Opportunity Wizard' interface. It includes a header with a lightning bolt icon and a legend for required information. The main content area contains the following fields:

- Volunteer Opportunity Name: Read To Kids
- Primary Impact Area: Children & Youth Education
- Opportunity Coordinator: Art Trout
- Location: Youth Center (with a 'Create Location' link)
- Type: Project
- Minimum Age: 16
- Minimum Age (w/ adult): 8
- Schedule Type: Date & Time Specific
- Registration Type: --None-- (with a dropdown menu showing 'Sign Up' and 'Express Interest')

There are two registration types to choose from:

Sign Up: ideal for date & time specific opportunities. You specify how many volunteers you need, and volunteers can simply sign-up and commit to attend on that date and time. The volunteer is automatically confirmed and receives a notification email stating that they are scheduled to attend. When all slots are gone, sign-up is cut off (though people have the option of being added to a wait list, which automatically alerts prospective volunteers whenever someone cancels and space becomes available).

Express Interest: choose this registration type if you want to review volunteers before confirming them for the opportunity. They will not be able to automatically sign-up, but will just express interest. The opportunity coordinator will receive an email notification whenever a volunteer expresses interest, and will have to log-in and either CONFIRM or DECLINE the volunteer. All "To Be Scheduled" opportunities are automatically set to "express interest," since you will have to contact the volunteer to arrange a specific date and time for them to volunteer with you.

Set a minimum and maximum number of volunteers for the opportunity

Volunteer Opportunity Wizard = Required Information

Please complete the following and we'll guide you through the process of creating a Volunteer Opportunity.

Volunteer Opportunity Name	<input type="text" value="Test"/>
Primary Impact Area	<input type="text" value="Children & Youth Education"/>
Opportunity Coordinator	<input type="text" value="Alan Romero"/>
Location	<input type="text" value="1901 E. 4th Street, Suite 100"/> Create Location
Type	<input type="text" value="Project"/>
Minimum Age	<input type="text" value="16"/>
Minimum Age (w/ adult)	<input type="text" value="8"/>
Schedule Type	<input type="text" value="Date & Time Specific"/>
Registration Type	<input type="text" value="Sign Up"/>
Minimum Attendance	<input type="text" value="1"/>
Maximum Attendance	<input type="text" value="15"/>
Does this occur on a regular schedule?	<input type="text" value="-None-"/>

The maximum attendance determines how many people can sign-up or express interest before the opportunity is closed to sign-ups. This ensures you never get too many volunteers signed up. If someone later cancels and removes themselves, anyone on the waiting list will be automatically notified and able to sign-up to fill the open space.

Does this occur on a regular schedule?

Volunteer Opportunity Wizard = Required Information

Please complete the following and we'll guide you through the process of creating a Volunteer Opportunity.

Volunteer Opportunity Name	<input type="text" value="Read To Kids"/>
Primary Impact Area	<input type="text" value="Children & Youth Education"/>
Opportunity Coordinator	<input type="text" value="Art Trout"/>
Location	<input type="text" value="Youth Center"/> Create Location
Type	<input type="text" value="Project"/>
Minimum Age	<input type="text" value="16"/>
Minimum Age (w/ adult)	<input type="text" value="8"/>
Schedule Type	<input type="text" value="Date & Time Specific"/>
Registration Type	<input type="text" value="Sign Up"/>
Minimum Attendance	<input type="text" value="1"/>
Maximum Attendance	<input type="text" value="15"/>
Does this occur on a regular schedule?	<input checked="" type="text" value="-None-"/> Yes No

If you are just creating one occurrence (for now) of this volunteer opportunity, answer NO to this question. You will then be prompted to set the date and time the opportunity will take place.

If you want to schedule multiple occurrences (i.e. a regular schedule, where you wish to have sign-ups every week for the next three months), then answer YES. If you answer yes, you will be prompted to

enter a Start Date and End Date for the opportunity itself (how long will you be listing it on the site), and prompted to create a recurrence before publishing the opportunity.

Specify the start date and time, and the end date and time, for a single occurrence.

Volunteer Opportunity Wizard ! = Required Information

Please complete the following and we'll guide you through the process of creating a Volunteer Opportunity.

Volunteer Opportunity Name

Primary Impact Area

Opportunity Coordinator

Location [Create Location](#)

Type

Minimum Age

Minimum Age (w/ adult)

Schedule Type

Registration Type

Minimum Attendance

Maximum Attendance

Does this occur on a regular schedule?

Start Date [7/18/2012]

End Date [7/18/2012]

After creating this opportunity, you will need to add the Opportunity Description before it can be published.

[Create Volunteer Opportunity](#)

You will be reminded to add an opportunity description before publishing the opportunity as part of step 2.

Click on the “Create Volunteer Opportunity” button to complete Step 1.

If you have signed it to “regular schedule” to YES, you will be prompted to just specify the start and end date, in addition to reminding you to create a recurrence.

Volunteer Opportunity Wizard = Required Information

Please complete the following and we'll guide you through the process of creating a Volunteer Opportunity.

Volunteer Opportunity Name
Primary Impact Area
Opportunity Coordinator
Location [Create Location](#)
Type
Minimum Age
Minimum Age (w/ adult)
Schedule Type
Registration Type
Minimum Attendance
Maximum Attendance
Does this occur on a regular schedule?
After creating this opportunity, you should click on the link to create new recurrence
Start Date [
End Date [
After creating this opportunity, you will need to add the Opportunity Description before it can be published.
[Create Volunteer Opportunity](#)

You will be reminded to add an opportunity description before publishing the opportunity, but you have now completed everything required by the wizard! Click on the "Create Volunteer Opportunity" button to complete the initial set-up of your opportunity.

If you selected "To Be Scheduled" as the Schedule type, you will have slightly different questions to answer.

Volunteer Opportunity Name
Primary Impact Area
Opportunity Coordinator
Location [Create Location](#)
Type
Minimum Age
Minimum Age (w/ adult)
Schedule Type
Start Date [
End Date [
Days and Times Needed

After creating this opportunity, you will need to add the Opportunity Description before it can be published.
[Create Volunteer Opportunity](#)

For To Be Scheduled opportunities, you will specify a start and end date. This is the period of time during which you want the opportunity to be listed and searchable on the site, and available for volunteers.

Specify the days and times you need volunteers (Hold down the Control key or Shift key to select multiple days and times from the list). If you want to give more detailed info on "hours," you will be able to specify that in the opportunity description you will create next.

Step 2

Click on the "Volunteer Opportunity" tab to see the record.

The screenshot shows the 'Volunteer Opportunity Overview' page. The main content area is titled 'Volunteer Opportunity Overview' and includes a checklist of completion status for various fields:

- Opportunity Created
- Occurrence Created
- Recurrence Created
- Opportunity Description
- Opportunity Characteristics (Optional - Improves Search and Metrics)
- Opportunity Published (Status: Pending)
- Verifications Complete

Below the checklist, there are sections for 'Information', 'Opportunity Type', 'Special Event Information', 'Time/Date Information', and 'Organization Information'.

Section	Field	Value
Information	Owner	Alan Romero
	Volunteer Opportunity Name	Test
Opportunity Type	Type	Project
	Schedule Type	Date & Time Specific
Special Event Information	Volunteer Event	
	Volunteer Event URL	
Time/Date Information	Start Date	7/24/2012
	End Date	7/24/2012
Organization Information	Managed By	Partner
	Organization Served Name	Early NOLA Profit
	Organization Served URL	http://www.oneocforce.com/HOC_Organization_Profil...

Before you can submit the opportunity for publication, you will need to add an **Opportunity Description**.

Step 3

- If you chose "Recurring schedule" in the wizard, you will need to create a recurrence so that you have at least one occurrence date and time for the opportunity.
- Note: Projects setup as on going DO not need to have the occurrence record updated.

Step 4

- **Submit the opportunity for approval**, if you do not hit submit your opportunity can not get approved.

Understanding the Volunteer Opportunity Overview Dashboard (Partner Portal)

The Volunteer Opportunity Overview gives you a “dashboard” view of the status of the Opportunity and whether it has been published.

Volunteer Opportunity Overview Dashboard



- 1. Opportunity Created** - the basic characteristics of the opportunity have been successfully defined (The checkmark to the left of each of the 8 items indicates whether it has been completed and accepted)
- 2. Occurrence Created** - the opportunity has at least one occurrence defined. (Occurrences are what show up for sign-up on the public site. An opportunity without at least one occurrence *will not* appear on the public site).
- 3. Recurrence Created** - whether there is a recurring pattern of occurrences that has been created in association with this opportunity.
- 4. Total Active Occurrences** - the total number of occurrences that are in Active Status.
- 5. Opportunity Description** - whether the opportunity description has been created and accepted.
- 6. Opportunity Characteristics** -can improve efforts to track national and local metrics.
- 7. Opportunity Published** – Projects are “pending” until OneOC approves it. Your project can not be reviewed for approval until you submit. To submit, click the link to **submit the opportunity for approval**.
- 8. Verifications Complete / Total Verifications** tells you whether there are any outstanding verification due, specifically for past occurrences. It is good business practice for you to always verify volunteer attendance and service hours. Strive to have your total verifications due count always at zero!

Opportunity Description (Partner Portal)

A volunteer opportunity cannot be published until it has a description. Because the description is a rich-text object, populating it is a separate step from using the Volunteer Opportunity Wizard. The Volunteer Opportunity Overview reminds us that we have not yet authored a description.



Volunteer Opportunity Overview

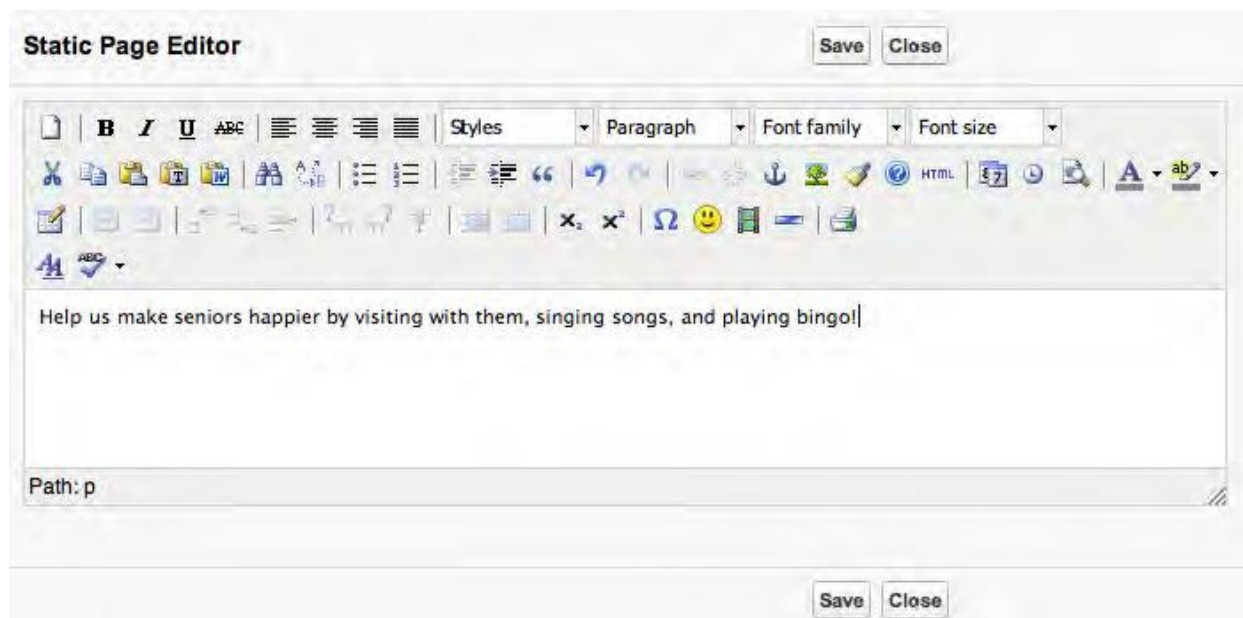
Here's your at-a-glance view of this Volunteer Opportunity:

- Opportunity Created
- Occurrence Created [Create New Occurrence](#)
- Recurrence Created [Create New Recurrence](#)
- Opportunity Description [Add/Change Description](#)
- Opportunity Characteristics (Optional – Improves Search and Metrics)
- Opportunity Published (Status: Pending) [Submit for Approval](#)
- Verifications Complete

Total Active Occurrences: 0 Total Verifications Due: 0

If there is no check mark next to Opportunity Description, then you have not yet created a description for the opportunity. Click on the Add/Change Description hyperlink to submit a description for your project.

Click on the link to open the WYSIWYG editor and enter the opportunity description



Static Page Editor

Save Close

Help us make seniors happier by visiting with them, singing songs, and playing bingo!

Path: p

Save Close

The editor will appear in a separate tab or window. You can use plain text if you wish, or use the **features of the WYSIWYG editor** to create a more compelling description, which could include links, images, and possibly documents to download.

When you have finished adding your text, click on SAVE. To close the window and remove it from your screen, click on CLOSE after Saving.

You will receive an alert message asking you to refresh the browser window. In order for the Opportunity Description to be added you **MUST** refresh your page in your browser.




Here is an example of a richer volunteer opportunity created using the Static Page Editor:

Static Page Editor Save Close

NOTE: This volunteer opportunity is for **women** only. The world is scary when you don't have a permanent place to call home. Ease the uncertainty of the youngsters at the Mother-Child Residence by engaging them in arts and crafts activities while their moms attend a social service class that evening. These kids (aged 5-12) adore the company of our warm and friendly volunteers. The arrival of Handson Demo volunteers fills the halls with happy shouts and hugs!

The Good Shepherd Mother-Child Residence provides programs that address the complex needs of homeless women with children in Southern California and Orange County.

16 and 17 year olds can attend this project without parent by arriving with a [parental waiver form](#). Volunteers who are 14 or 15 must be accompanied by a parent.



You do not have to make your descriptions fancy. Plain text will do and may be easiest for most users. But you do have the option of doing some basic html markup.

Please note, OneOC does not review your posting for spelling errors or grammar mistakes.

Submitting your Volunteer Opportunity for Approval

Once you created the opportunity, gave it a description, and made sure it has at least one occurrence scheduled, you are ready to submit it to OneOC for approval.

The screenshot shows the 'Volunteer Opportunity Overview' page. At the top, there are tabs for 'Edit', 'Clone', and 'Skilled Volunteer Search'. Below that, there's a 'HandsOn Connect Shortcuts' bar. The main content area is titled 'Volunteer Opportunity Overview' and contains a checklist of items:

- Opportunity Created
- Occurrence Created [Create New Occurrence](#)
- Recurrence Created [Create New Recurrence](#)
- Opportunity Description [Add/Change Description](#)
- Opportunity Characteristics (Optional – Improves Search and Metrics)
- Opportunity Published (Status: Pending) [Submit for Approval](#)
- Verifications Complete

At the bottom of the overview, it shows 'Total Active Occurrences: 0' and 'Total Verifications Due: 0'. A red arrow points to the 'Submit for Approval' link.

Click on the **Submit for Approval** link in order for OneOC to review your opportunity and approve it for publication.

After submitting for approval:

The screenshot shows the 'Volunteer Opportunity Overview' page after submission. The status of the opportunity has changed to 'Awaiting Approval'. The 'Opportunity Published' item in the checklist is now checked and highlighted with a red box. Below the overview, there's a section for 'Information' with the following details:

Owner	Alan Romero [Change]
Volunteer Opportunity Name	Test
Status	● Awaiting Approval
Posting Status	We have been notified and will be reviewing your record for posting shortly

When you click on “Submit for Approval,” the status will be updated. The "Posting Status" field on the page will indicate that OneOC has been notified and is reviewing the opportunity. Upon approval, you will receive an email letting you know it's been published. The posting status on the Volunteer Opportunity Record will be updated accordingly.

Please Manual Part 2 for these sections:

- Creating an Occurrence (Partner Portal)
- Creating an Recurrence (Partner Portal)
- Occurrence Record Saved View (Partner Portal)
- Connection Grid Overview