How to control what each group can see

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HelpOne has many areas: Volunteers, Events, Finances, People & HR, Policies, and more. You don't have to use them all on day one.

Control what people see

What each person can open is set by their group in Settings > Access. Give each group only the areas it needs.

1. In the sidebar, go to Settings > Access.
2. Open the group you want to change.
3. Choose what that group can open.

Keep your Dashboard simple

On My work > Dashboard, click Edit layout to arrange the cards you see.

Start small

Set up HelpOne (in the sidebar under My work) has a short checklist. Do those steps first, then add more areas when your team is ready. Your records stay connected as you go.

