

# SYSTEM ADMINISTRATOR - CONTROL PANEL SETTINGS

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# Control Panel Overview

# About the HOC Control Panel

The HandsOn Connect 'Control Panel' tab is a tab that can be found in Salesforce Classic. In lightning - you can access it by going to the App Chooser, and selecting it in the list of "All Items".

The majority of the settings visible in the Control Panel are left over from HOC 2.0 functionality and no longer used by HandsOn Connect 3.0. These will eventually be cleaned up and removed but for the most part you can ignore these settings.

There are however a few settings in the Control Panel which are still used to configure things in HandsOn Connect 3.0. The control panel menu items and fields that are still relevant to HOC 3.0 are listed in this manual. You should ignore all other control panel settings other than the ones mentioned in this manual.

# Control Panel - Site Configuration

# Check-In Sheet Fields

Each occurrence in HandsOn Connect has a button labeled Print Check-In Sheet. The columns in the sheet can be customized in this section of the control panel.

In Salesforce, the check-in sheets that are printed from the connections grid in the occurrence record can be slightly customized as described in this article.


Note however that the check-in sheets that partners can access in the sharing portal, are not currently customizable and not affected by these settings.

## Check-In sheets are printed via the Occurrence Record

[Connections \[1\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#)

Occurrence Detail

[Edit](#)
[Delete](#)
[Clone](#)
[Sharing](#)
[Print Check-In Sheet](#)
[Run Answer Report](#)



**Arts & Crafts with Kids**  
 Organization Served: Troutco  
**December 3, 2012 09:00AM - 11:00AM**  
**Location:** 3649 Mission Inn Ave Riverside CA 92506  
**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
Lenny Leader		(210) 111-1111	troutco+training_leader@gmail.com	1234 Leader Lane Riverside CA 92506	Yes	

By default these columns show up on the sheet, but you can supress certain columns of information if you want to protect certain privacies. (i.e. address).

You can also add one custom column for volunteers to write something in on the sheet.

**Turn columns on and off by checking boxes in the Check-In Sheet Fields section of the control panel.**

**Check-in Sheet Fields** Save

Select All ☐

Team Name ☒

Phone ☒

Email ☒

Address ☐

Over 18? ☒

Extra Column ☐ Title:

Save

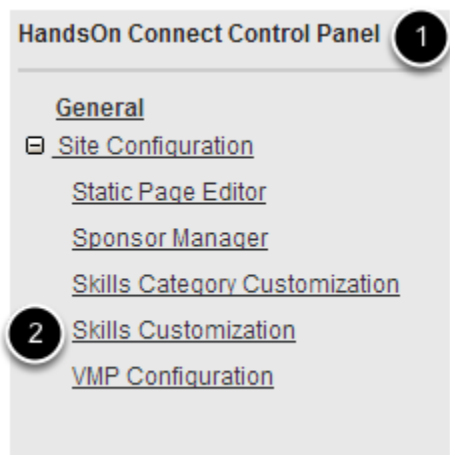
# Control Panel: Customizing Skill Categories and Skills



# Creating Custom Skills

While you cannot edit or delete the default skills and skill categories that come with the system, HandsOn Connect allows you to **add** new skills to the skill profiles used by volunteers and volunteer opportunities,

## Skills



Go to **Control Panel / Skills Customization** to create a new skill

A screenshot of the 'Skill Customization' form. The form has a title bar 'Skill Customization' and a section header 'Create Skills'. Below this, there is a text input field for 'Skill Name' with the value 'Animal Socialization' (marked with a circled '3') and a 'Save' button. To the right, there is a dropdown menu for 'Categories' with the value 'Animal Services' (marked with a circled '4') and another 'Save' button (marked with a circled '5').

3. Put in the name of the new skill
4. Select a category from the picklist (this list will include any custom categories you create as well)
5. Click Save.

## The new skill will show up in the Custom Skills section

The screenshot shows two sections of the interface. The top section, titled 'Create Skills', contains a 'Skill Name' text input field, a 'Categories' dropdown menu set to 'Animal Services', and two 'Save' buttons. The bottom section, titled 'Custom Skills', shows a list of skills under the 'Animal Services' category. One skill, 'Animal Socialization', is listed with 'update' and 'delete' action links next to it.

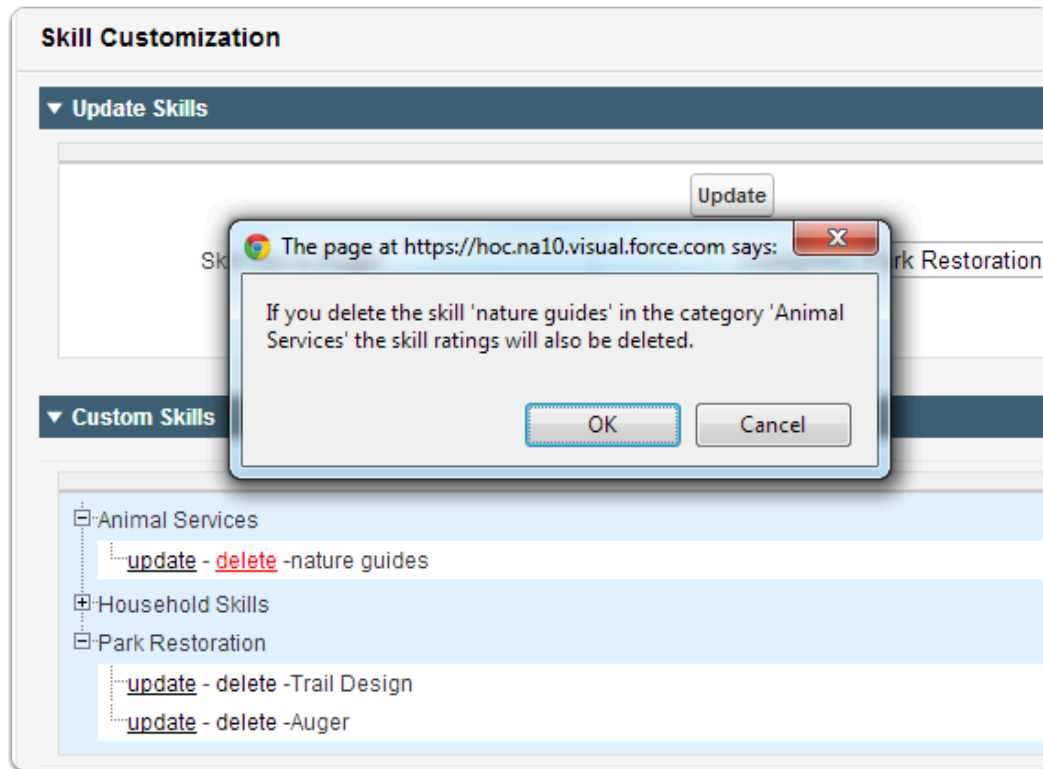
You can click on 'update' to change the name of the skill - or delete to delete the custom skill

## When you click on update, you can edit the skill name or the category the skill has been placed in.

The screenshot shows the 'Skill Customization' page. The 'Update Skills' section is highlighted with a red circle. It contains a 'Skill Name' text input field with 'Animal Socialization' entered, a 'Categories' dropdown menu set to 'Animal Services', and two 'Update' buttons. Below this, the 'Custom Skills' section shows a list of skills under the 'Animal Services' category.

The ability to edit appears in the 'update skills' section of the page.

## If you request to delete a skill you will get a warning



Note: If you delete a skill, all skill ratings (for volunteers and volunteer opportunities) associated with that skill will also be permanently deleted. There is no undo for this.

# Creating Custom Skill Categories

HandsOn Connect allows you to add new skills to the skill profiles used by volunteers and volunteer opportunities.

All skills need to be added to a Skill Category. You can create new Skill Categories to 'group' new custom skills in if a new skill does not fit into any of the existing skill categories in the system.

## Creating a Custom Skill Category

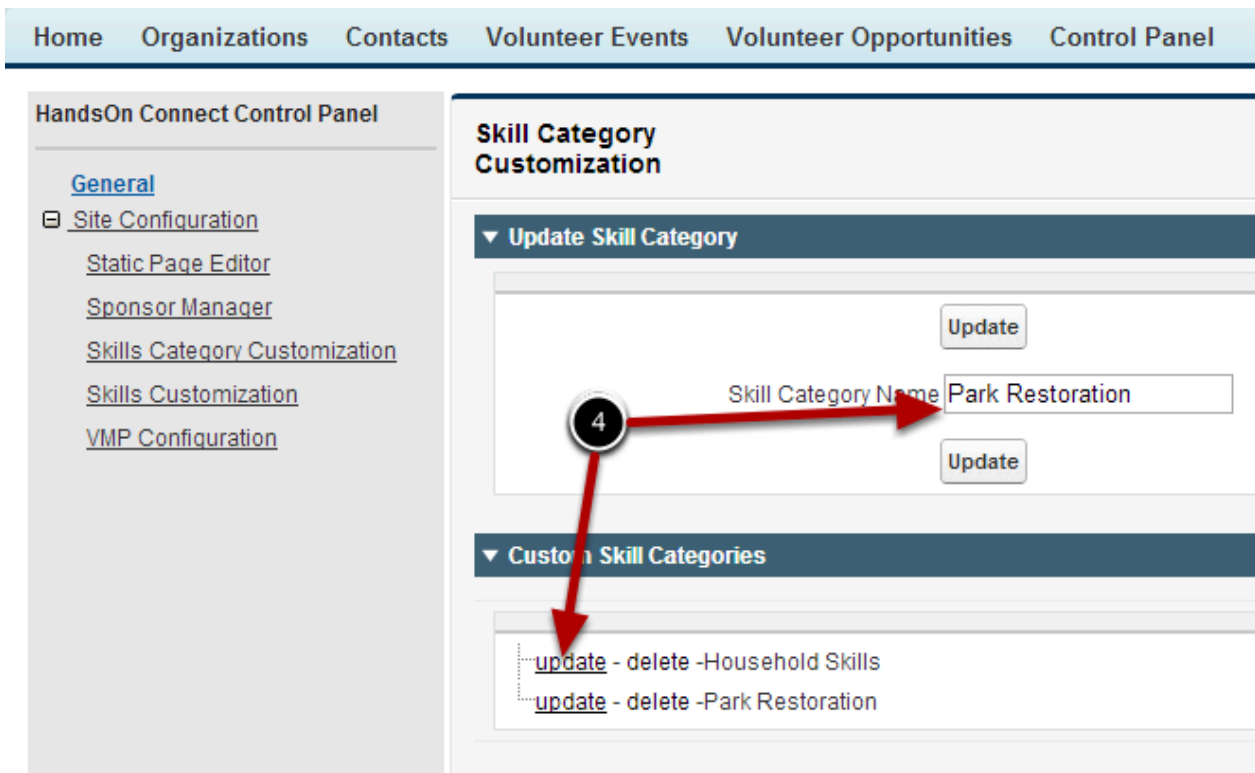
The screenshot displays the HandsOn Connect Control Panel. The top navigation bar includes links for Home, Organizations, Contacts, Volunteer Events, Volunteer Opportunities, and Control Panel. The sidebar on the left, titled 'HandsOn Connect Control Panel', lists several options: General, Site Configuration, Static Page Editor, Sponsor Manager, Skills Category Customization (highlighted with a '2'), Skills Customization, and VMP Configuration. The main content area is titled 'Skill Category Customization' (marked with a '1') and contains three sections: 'Update Skill Category' with a text input field for 'Skill Category Name' (marked with a '3') and an 'Update' button; 'Custom Skill Categories' showing a list of existing categories with 'update' and 'delete' links; and 'Default Skill Categories'.

Skill Categories are headings under which the existing and custom skills are grouped. The Skill Category serves as the label of the expandable sections in the skill profile and as the search criteria when filtering by "Use these Skills."

To add custom skill categories follow these steps:

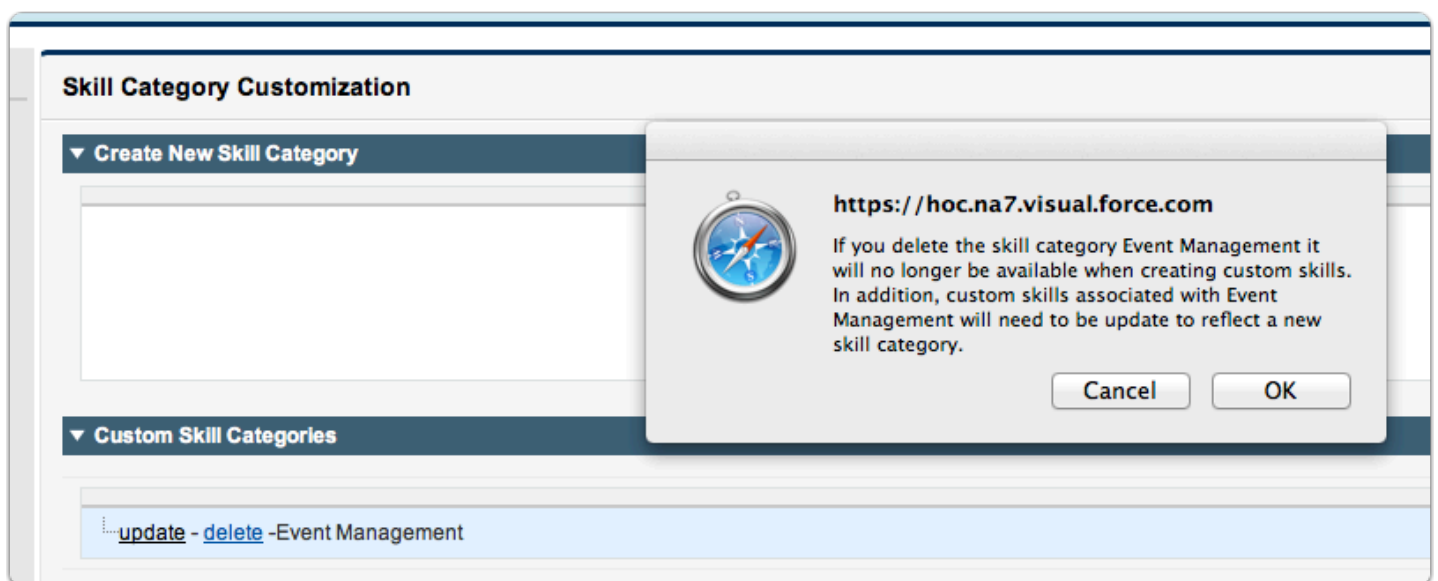
- 1) Go to the Control Panel tab
- 2) Select "Skills Category Customization"
- 3) Enter a value in the "Skill Category Name" field and click "Save" to create a new skill category.

## Editing an existing skill category name



4) You can also click "Update" next to any custom skill category to edit the name. When you click update, it will populate the selected value in the Skill Category Name field for you to update. Click "Update" after making the changes.

## You will get a warning if you use to delete a skill category



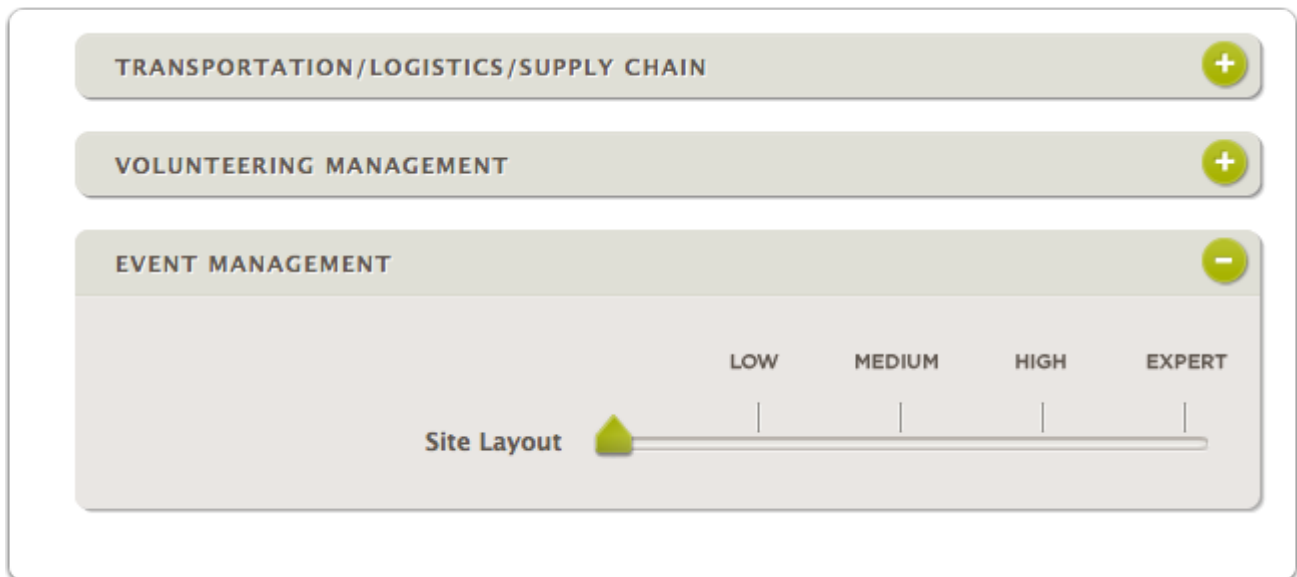
You may also select to Delete custom skill categories by clicking on Delete next to the name. Prior to or immediately after deleting the custom skill category, you will need to update any custom skills associated with the skill category deleted to prevent errors and duplications on your site.

NOTE: Despite what the warning message says -- the skills associated with the category will be deleted! So if you wish to preserve the skills, edit the skills first and move them to a new category (or they will be lost)

Click "OK" to confirm the deletion.

**Success:**  
The skill category "Event Management" was successfully delete.

## Custom Skill Categories will appear alphabetically on the volunteer profile **AFTER** the standard skill categories



The screenshot displays a list of custom skill categories in a light gray box. The categories are:

- TRANSPORTATION/LOGISTICS/SUPPLY CHAIN (with a green '+' icon)
- VOLUNTEERING MANAGEMENT (with a green '+' icon)
- EVENT MANAGEMENT (with a green '-' icon)


The 'EVENT MANAGEMENT' category is expanded, revealing a skill level slider for 'Site Layout'. The slider has four markers labeled LOW, MEDIUM, HIGH, and EXPERT. A green triangle marker is positioned at the 'LOW' level.

# Accessing Skill Documentation and Certifications

The Contact Record of each volunteer has a 'related list' called Skill Ratings

Skill Ratings			
		<a href="#">New Skill Rating</a>	<a href="#">Skill Ratings Help ?</a>
Action	Skill Rating ID	Skill	Rating
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SR-000290</a>	<a href="#">Account Management</a>	Low
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SR-000063</a>	<a href="#">Accounting</a>	Medium
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SR-000407</a>	<a href="#">AmeriCorps – VISTA Experience</a>	High
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SR-001666</a>	<a href="#">Animal Friendliness</a>	Medium
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SR-000065</a>	<a href="#">Animal Shelter</a>	Medium
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SR-001654</a>	<a href="#">Annual Budget</a>	Low
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SR-000005</a>	<a href="#">Board Effectiveness Assessment</a>	Low
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SR-001661</a>	<a href="#">Board Member Experience</a>	Medium
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SR-001624</a>	<a href="#">Brand Strategy</a>	Low
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SR-001642</a>	<a href="#">Business Legal</a>	Low
<a href="#">Show 10 more »</a>   <a href="#">Go to list (41) »</a>			

In this case, I'm going to "go to list" and view all 41 skill ratings this volunteer has - and look at the one called licensed RN. I click on the Skill Rating ID to get to the skill rating record:



Skill Ratings

Valerie Volunteer

Contact: Valerie Volunteer

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

Action	Skill Rating ID	Skill ↑	Rating
<a href="#">Edit</a>   <a href="#">Delete</a>	<div>SR-001665</div>	<a href="#">Licensed RN</a>	Expert/Certified

## The Skill Rating record has a related list where any "skill rating documentations" objects are displayed:

The screenshot displays the Salesforce interface for a Skill Rating record (SR-001665). The record is owned by Valerie Volunteer. The 'Skill Rating Documentations' related list is visible at the bottom, showing a single entry for 'Licensed RN' from 'Mercy Hospital' received on 4/1/2010. The attachment URL is highlighted in a red box.

**Skill Rating Detail** [Edit] [Delete]

**Information**

Owner	Valerie Volunteer [Change]	Contact	Valerie Volunteer
Skill Rating ID	SR-001665	Volunteer Opportunity	
Skill	Licensed RN	Rating	Expert/Certified

**System Information**

Created By: Valerie Volunteer, 2/12/2013 2:14 PM | Last Modified By: Valerie Volunteer, 4/16/2013 3:01 PM

[Edit] [Delete]

**Skill Rating Documentations** [New Skill Rating Documentation] [Skill Rating Documentations Help]

Action	Skill Rating Documentation Name	Organization Name	Date Received	attachmentUrl
[Edit] [Del]	Licensed RN	Mercy Hospital	4/1/2010	https://na7.salesforce.com/servlet/servlet.ImageServer?oid=00DA00000000aAsxMAE&id=015A0000002gpVDIAY

Copy the attachment Url and then paste it into a new browser tab. That URL will open or download the attachment that was uploaded in association with the Skill Rating Documentation in the list. In this case, I'll see the Licensed RN's certification that was uploaded.

## Note: Skill Rating Documentations are, by default, only accessible to system administrators.

If you wish to make it available to staff in Salesforce as well, update the Staff profile to give read only access to the "Skill Rating Documentation" object.



# Create Reports that make it easy to find ALL skill ratings and documentation that you have access to:

Custom Report Type  
**HOCD Skill Ratings and Documentation**  
[Back to List: Custom Report Types](#)

Below is the information for this custom report type. You can click the buttons on this page to preview or update information for the custom report type.

Custom Report Type Definition		Report Type Category	Other Reports
Report Type Label	HOCD Skill Ratings and Documentation	Deployment Status	Deployed
Report Type Name	Skill_Ratings_and_Documentation		
Description	Allows you to look up all documentation attached to skills.		
Created By	Larry Decker, 4/5/2013 2:17 PM	Modified By	Larry Decker, 4/5/2013 2:22 PM

**Object Relationships**

[Edit](#)

**Skill Ratings (A)**  
 with or without related records from **Skill Rating Documentations (B)**

**Fields Available for Reports**  
[Edit Layout](#) [Preview Layout](#)

First, you'll need to create a new custom report type by going to setup / Create Report Types and clicking on New Custom Report Type.

Primary Object = Skill Ratings

Secondary object - with or without records from Skill Rating Documentations.

Click on Edit Layout, and then use "add fields related via lookup" from the skill ratings object, to add all the fields from the contact record. (Make sure that you new custom field "View Documentation" is included in the available fields in the Skill Rating Documentations object for this report type.)

**Add Fields via Lookup**

**Add Fields Related to Skill Ratings Via Lookup**

Newly added fields will appear inside layout section labeled "Skill Ratings".

Select to add fields, or click a link to more fields:

**Path:** Skill Ratings » Contact

- ☒ 2013 Waiver on File
- ☒ Accepts Invitations
- ☒ Account Name [view related fields...](#)
- ☒ Age
- ☒ Allow Customer Portal Self-Registration
- ☒ Alternate Email
- ☒ Anniversary Date
- ☒ Assistant
- ☒ Asst. Phone
- ☒ Availability
- ☒ Background Check Completed
- ☒ Birthdate
- ☒ Calculated Birthdate
- ☒ Communication Preferences

[Select All](#) | [Clear All](#)

[OK](#) [Cancel](#)

## Create a Report that lists ALL the skills your volunteers have submitted in skill profiles.

Report Type: HOCD Skill Ratings and Documentation  
HOCD All Volunteer Skills

Save As Close Report Properties Add Report Type Run Report

Filters Add  
Show: All skill ratings

Filter: Contact: Skill Profile Completed equals True

Rating ID	Skill Name	Rating	Skill Rating Documentation Name	attachmentURL	View Documentation
Contact: Full Name: Abby Ortolini (2 Records)					
01998	Disaster Call Center / Hotline	High	Master	https://na7.salesforce.com/servlet/servlet.ImageServer?oid=00DA000000aAsxMAE&id=015A0000002hVIAA	http://demo.handsconnect.org/015A0000002hVIAA
01999	Disaster Call Center / Hotline	High	2-1-1 Hotline Operator	https://na7.salesforce.com/servlet/servlet.ImageServer?oid=00DA000000aAsxMAE&id=015A0000002hVIAA	http://demo.handsconnect.org/015A0000002hVIAA
Contact: Full Name: Always Allison (3 Records)					
01251	Volunteering Project Management	Medium			

Use the filters and fields as noted in the above illustration. Group by Contact Full Name.

## You Can also create a report that only lists those skills that have Skill Rating Documentation Objects

HOCD Skill Certifications and Training

Report Generation Status: Complete

Report Options:

Summarize information by: Contact: Full Name Show: All skill ratings

Time Frame: Date Field: Created Date Range: Custom From: To:

Run Report Hide Details Customize Save Save As Delete Printable View Export Details

Filtered By: Edit  
Contact: Skill Profile Completed equals True Clear  
AND Skill Ratings with Skill Rating Documentations Clear

Skill Rating ID	Skill Name	Rating	Skill Rating Documentation Name	attachmentURL	View Documentation
Contact: Full Name: Abby Ortolini (3 records)					
SR-001568	Disaster Call Center / Hotline	High	Master	https://na7.salesforce.com/servlet/servlet.ImageServer?oid=00DA000000aAsxMAE&id=015A0000002hVIAA	http://demo.handsconnect.org/015A0000002hVIAA
SR-001568	Disaster Call Center / Hotline	High	2-1-1 Hotline Operator	https://na7.salesforce.com/servlet/servlet.ImageServer?oid=00DA000000aAsxMAE&id=015A0000002hVIAA	http://demo.handsconnect.org/015A0000002hVIAA
SR-001567	Veterinarian Services	Medium	test		http://demo.handsconnect.org/
Contact: Full Name: Valerie Volunteer (6 records)					
SR-000290	Account Management	Low	Workflow Training	https://na7.salesforce.com/servlet/servlet.ImageServer?oid=00DA000000aAsxMAE&id=015A0000002hVIAA	http://demo.handsconnect.org/015A0000002hVIAA
SR-001685	Licensed RN	High	RN License	https://na7.salesforce.com/servlet/servlet.ImageServer?oid=00DA000000aAsxMAE&id=015A0000002hVIAA	http://demo.handsconnect.org/015A0000002hVIAA
SR-001690	Site Layout	Low	Course of study with lent company	https://na7.salesforce.com/servlet/servlet.ImageServer?oid=00DA000000aAsxMAE&id=015A0000002hVIAA	http://demo.handsconnect.org/015A0000002hVIAA
SR-001601	Board Member Experience	Medium	Board Member	https://na7.salesforce.com/servlet/servlet.ImageServer?oid=00DA000000aAsxMAE&id=015A0000002hVIAA	http://demo.handsconnect.org/015A0000002hVIAA
SR-000305	Animal Shelter	Medium	Vet License	https://na7.salesforce.com/servlet/servlet.ImageServer?oid=00DA000000aAsxMAE&id=015A0000002hVIAA	http://demo.handsconnect.org/015A0000002hVIAA
SR-001536	E-mailing Exp.	Medium	Constant Contact Course	https://na7.salesforce.com/servlet/servlet.ImageServer?oid=00DA000000aAsxMAE&id=015A0000002hVIAA	http://demo.handsconnect.org/015A0000002hVIAA
Grand Totals (9 records)					

Do a Save As to create a report with a new name - and add the cross filter "Skill Ratings WITH Skill Rating Documentations". This will exclude skill ratings that don't have a related documentation object.

These reports will give you an overview of all the skill documentation that is available. (instead of having to go to individual contact records to drill down to each skill rating and see whether it has a related skill rating documentation object!

# **Control Panel: Workflows & Email Alerts**

# Disabling triggers for emails

Most of the emails sent out by HandsOn Connect are managed by workflows and email alerts. [Instructions for disabling workflows can be found here](#). Some emails however, are sent via 'triggers' which normally cannot be deactivated by the user. This control panel gives you administrative control to turn off certain emails if desired. Note: You cannot selectively turn off these triggered emails -- if you turn them off - then no emails of that type will be sent out to opportunity coordinators.

## Control Email Notifications for individual Occurrences



HandsOn Connect Managed Triggers	
<b>Control Email Notifications for Individual Occurrences</b>	
Notification of Volunteer Sign up	<input checked="" type="checkbox"/>
Notification of Volunteer Waitlist	<input checked="" type="checkbox"/>
Notification of Volunteer Removed	<input checked="" type="checkbox"/>

These three emails are sent to Opportunity Coordinators notifying them whenever a volunteer signs up, is removed, or has been added to the waitlist. By default these are all on. If however you do not wish these notifications sent out to opportunity coordinators uncheck the appropriate boxes to disable these triggers.

Note: With these turned off - Opportunity Coordinators will have to log-in to their account to see who is signed up, and how many slots have been filled.

## Control Email Notification for Grouped Occurrences



Control Email Notification for Grouped Occurrences	
Notification of Volunteer Sign up (Grouped)	<input checked="" type="checkbox"/>
Notification of Volunteer Waitlist (Grouped)	<input checked="" type="checkbox"/>
Opportunity Sign-up Confirmation - Affiliate Managed (Grouped)	<input checked="" type="checkbox"/>
Opportunity Sign-up Confirmation - Partner calendar email only (Grouped)	<input checked="" type="checkbox"/>
Notification of Volunteer Removed (Grouped)	<input checked="" type="checkbox"/>
Volunteer Interest Notification (Grouped)	<input checked="" type="checkbox"/>
Opportunity Sign-up Confirmation - Affiliate Managed - Date and Time Specific - Express Interests (Grouped)	<input checked="" type="checkbox"/>
Opportunity Sign-up Confirmation - Partner calendar full sign-up (Grouped)	<input checked="" type="checkbox"/>

If you have activated the advance functionality for grouped occurrences -- these triggers can be turned off to suppress the variety different email notifications sent out when volunteers sign up for group occurrences.

For more information on working with grouped occurrences -- [see the details in the advanced system administrator guide.](#)

## Control Email Notification for Individually Scheduled Opportunities

You can choose to disable emails sent to volunteers and/or to opportunity coordinators related to Individually Scheduled Opportunities. Help tips for each email tell you who is the recipient of each of the emails and when they are sent when enabled.

The screenshot shows the 'HandsOn Connect Control Panel' with a sidebar menu on the left. The 'Workflows & Email Alerts' option is selected and highlighted with a red circle. The main content area is titled 'HandsOn Connect Managed Triggers' and contains several sections for configuring email notifications. A red box highlights the 'Control Email Notification for Individually Scheduled - Express Interest with Schedule' section, which includes the following triggers:

Trigger	Enabled	Help
Opportunity Sign-Up Acknowledgement for Individually Scheduled	<input checked="" type="checkbox"/>	?
Volunteer Interest Notification for Individually Scheduled	<input checked="" type="checkbox"/>	?
Volunteer Status has been confirmed for Individually Scheduled	<input checked="" type="checkbox"/>	?

Below this section is another section titled 'Control Email Notification for Individually Scheduled - Express Interest Only', which includes the following triggers:

Trigger	Enabled	Help
Opportunity Sign-up Acknowledgement for Express Interest Only	<input checked="" type="checkbox"/>	?
Volunteer Interest Notification for Express Interest Only	<input checked="" type="checkbox"/>	?
Volunteer Status has been confirmed for Express Interest Only	<input checked="" type="checkbox"/>	?

The 'Save' button is located at the bottom right of the main content area.

# Control Panel - Volunteer Registration Configuration

# Adding Custom Registration Questions to the Volunteer Registration Form

Additional Registration Questions can be added to the Volunteer Registration Form.

This functionality allows you to capture additional information about volunteers when they first create their account. The answers to these registration questions will be associated with their contact record as a related list:

❗ In HOC 3.0 there is an Advanced Registration System add-on available, that greatly strengthens the ability to ask custom registration questions. It is far more powerful, and unlike the functionality described here, can populate answers to these questions directly on the contact record (rather than in a related object).

The functionality for asking custom 'volunteer registration questions' is still available and therefore this documentation is still relevant, but for the most part, you'll be better served by using the [Advanced Registration System](#) add-on instead.

For those using the original system: here's how Volunteer Registration Questions can be added.



## On the Volunteer Sign up Page the final, rolled-up section is called Volunteer Registration Questions

The screenshot shows a section titled "VOLUNTEER REGISTRATION QUESTIONS" with a green minus icon in the top right corner. Above it is a section titled "DEMOGRAPHIC AND VOLUNTEER OPTIONS" with a green plus icon. The "VOLUNTEER REGISTRATION QUESTIONS" section contains two questions:

\*1- What T- Shirt Size do you wear?

Below this question is a dropdown menu with the text "SELECT" and a downward arrow.

2- Where have you volunteered previously?

Below this question are four checkboxes:

- ☐ School
- ☐ Church or Synagogue
- ☐ Community
- ☐ Local Non-Profits

These questions, if present, add a final roll-down section to the registration form. Questions can be of several types including picklists, multi-picklists, radio buttons, checkboxes, date, number or text field. You can rename this section from "Volunteer Registration Questions" if you wish.

## To create a Custom Registration Question:

The screenshot shows the "Volunteer Registration Questions" configuration page. At the top, there is a teal header with the text "Volunteer Registration Questions". Below the header, there is a "Section Name:" label followed by a text input field containing "Volunteer Registration Questions". To the right of the input field is a button labeled "Create Vol Registration Questions". Below the input field and button is a table with the following columns: Question ID, Question, Type, Active, Required, and Order.

Question ID	Question	Type	Active	Required	Order
RQ-000054	Please check all that apply	Checkbox	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0
RQ-000041	If you are an employee of Exelis, please indicate your region as appropriate:	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1
RQ-000042	Are you a Veteran or a family member of a veteran?	Picklist	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0
RQ-000023	How many years have you served with Exelis?	Multi-picklist	<input type="checkbox"/>	<input type="checkbox"/>	22
RQ-000026	Would you want to serve as a Volunteer or Team Leader?	Radio Button	<input type="checkbox"/>	<input checked="" type="checkbox"/>	11
RQ-000053	Exelis Affiliation:	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2
RQ-000056	Are you associated with the local school district?	Checkbox	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

In the control Panel tab, click on "Vol Registration and Configuration" and in the lower section of the configuration page, click on the button "Create Vol Registration Questions" This will open the Registration Questions object:

# The Registration Question object.

Save Cancel

Create a new registration question ■ = Required Information

1 Available for: ☒ --None--  
☐ Organization  
☐ Contact

2 Type

3 Question:

4 Options: (One option per line)

5 Order:

6 Required: ☐

7 Active: ☒

1. Available For: Set whether this is a question for volunteer registration (contact) or organization registration. For the volunteer registration page, you should select contact. (NOTE You can also use the form to create custom registration questions for the Organization registration page!

2. Question Type: See the post on [custom registration questions for volunteer opportunities](#) for information on the options here.

3. Question Text.

4. This will appear for picklists, checkboxes and radio buttons. List the answers that can be selected, one option per line.

5. The order you want the question to appear. (We recommend using 10, 20, 30 rather than 1, 2, 3. This makes it easier to change the order or add additional questions 'between' existing questions at a later time.

6. Makes a question required

7. Uncheck this box if you wish the question to no longer appear as part of volunteer registration.

Once saved - registration questions will appear as part of registration on your site.

## Editing Existing Questions

Question ID	Question	Type	Active	Required	Order
RQ-000054	Please check all that apply	Checkbox	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0
RQ-000041	If you are an employee of Exelis, please indicate your region as appropriate:	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1
RQ-000042	Are you a Veteran or a family member of a veteran?	Picklist	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0
RQ-000023	How many years have you served with Exelis?	Multi-picklist	<input type="checkbox"/>	<input type="checkbox"/>	22
RQ-000026	Would you want to serve as a Volunteer or Team Leader?	Radio Button	<input type="checkbox"/>	<input checked="" type="checkbox"/>	11
RQ-000053	Exelis Affiliation:	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2

To edit an existing question, click on the Question ID.

## Best practices:

- Avoid too many registration questions as it slows down the registration process and can be annoying to volunteers.
- You can not change the 'type' of question after the question has been created. Simply make the old question inactive, and create a new one to take its place.
- You can edit the text of questions or picklist values at any time (though it will create some inconsistency in the related answers since some people will have answered the same 'question' object, even though the text of the question (or the options for answers) have changed. You may find it better to 'retire' a question (by unchecking the active box) and creating a new question to take its place for future registrations.
- Note: Never Clone questions. Cloned questions will not work and will cause problems on the registration page.

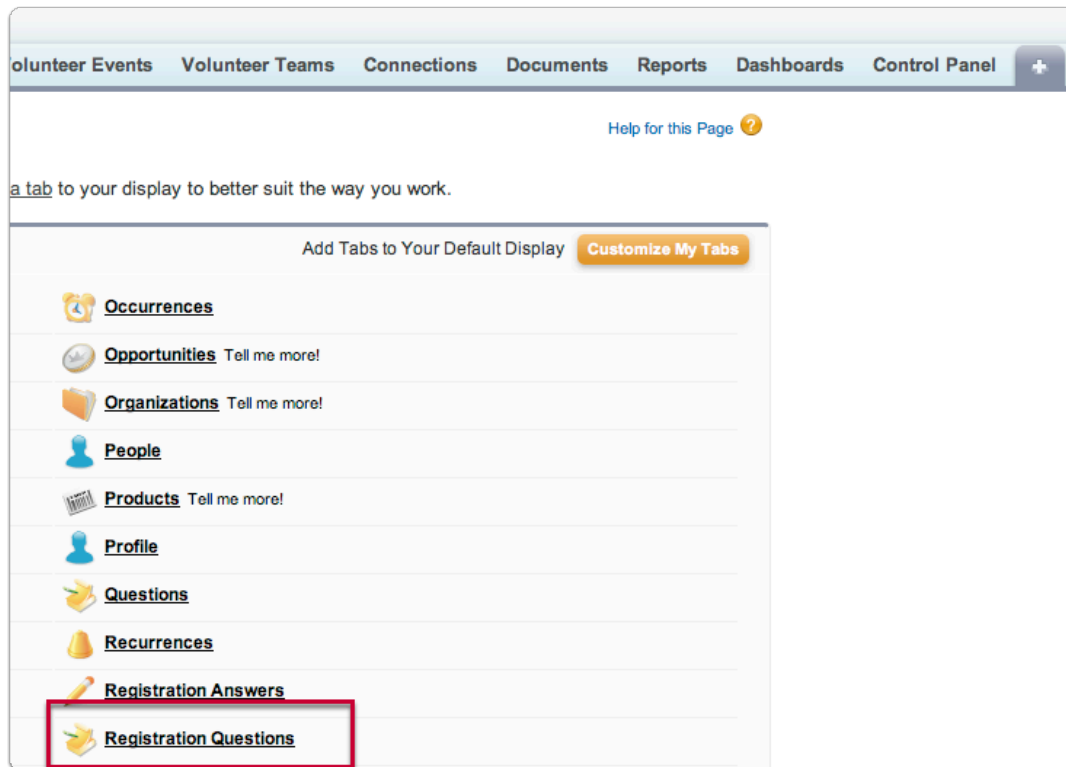
## The Answers to these "Volunteer Registration Questions" can be seen on the related list "Registration Answers" on the Contact Record

Registration Answers		New Registration Answer		Registration Answers Help ?
Action	Registration Answer ID	Question	Answer	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">RA-000617</a>	<a href="#">RQ-000001</a>	I am a first time volunteer and happy to be using your great website.	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">RA-000618</a>	<a href="#">RQ-000002</a>	I would love to volunteer to give aid during any local or state-wide disasters.	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">RA-000619</a>	<a href="#">RQ-000004</a>	I'm more of a follower than a leader - so I wouldn't be interested in leader training.	

Answers to registration questions can also be gotten by running the system reports:

- Registration Answers (Contacts)
- Registration Answers (Organizations)

To edit or access registration questions for organizations, click on the + sign in the tabs, and select the object 'Registration Questions'



This will give you access to ALL your registration questions, including organization registration questions:

Registration Questions Home [Help for this Page](#)

View: All [Go!](#) [Edit](#) [Create New View](#)

**Recent Registration Questions** [New](#) [Recently Viewed](#)

Registration Question ID	Available for	Type	Question	Order	Required	Active
RQ-000053	Contact	Picklist	Exelis Affiliation:	2	✓	✓
RQ-000041	Contact	Picklist	If you are an employee of Exelis, please indicate your region as appropriate:	1	✓	✓
RQ-000054	Contact	Checkbox	Please check all that apply	0	✓	✓
RQ-000055	Organization	Checkbox	CheckQuestion	9	✓	✓
RQ-000042	Contact	Picklist	Are you a Veteran or a family member of a veteran?	0	✓	<input type="checkbox"/>
RQ-000038	Organization	Radio Button	What social network sites does your organization use	4	<input type="checkbox"/>	<input type="checkbox"/>
RQ-000028	Organization	Checkbox	Are you interested in working with a Volunteer Leader to lead your opportunities?	22	✓	✓
RQ-000029	Organization	Date	When does your fiscal year end?	34	<input type="checkbox"/>	✓
RQ-000036	Organization	Picklist	What is your organization's budget?	2	<input type="checkbox"/>	✓
RQ-000025	Organization	Picklist	what is your second favorite color?	3	<input type="checkbox"/>	✓
RQ-000021	Organization	Checkbox	What tshirt size do you wear?	3	✓	✓
RQ-000040	Organization	Text Box	What types of supplies would you need from a Tool Bank to complete a project?	65	✓	✓
RQ-000034	Organization	Number	How many employees do you have?	15	✓	✓
RQ-000031	Organization	Multi-picklist	In gerenal, what days of the week do you utilize volunteers?	1	✓	✓

Show 10 items