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

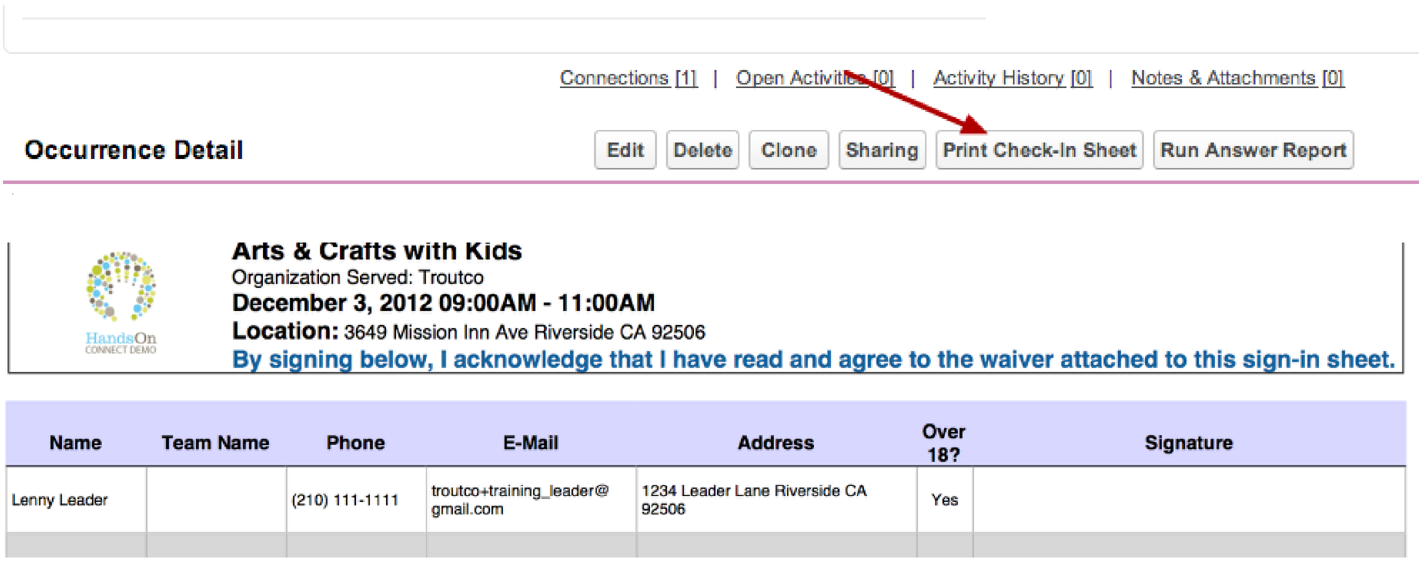
Check-In Sheet Fields

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.

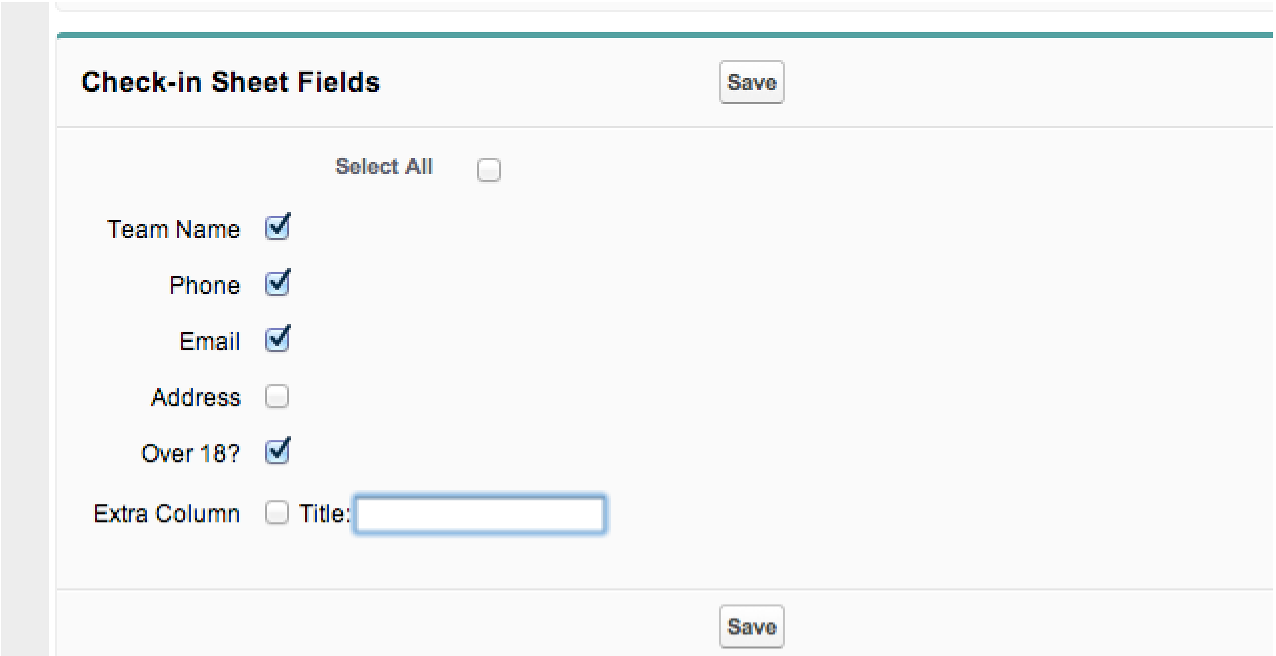
Check-In sheets are printed via the Occurrence Record



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.

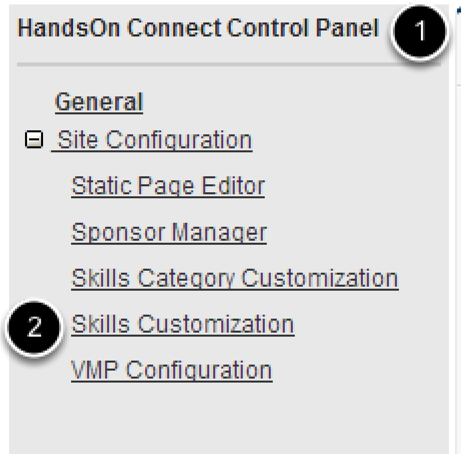


Control Panel: Customizing Skill Categories and Skills

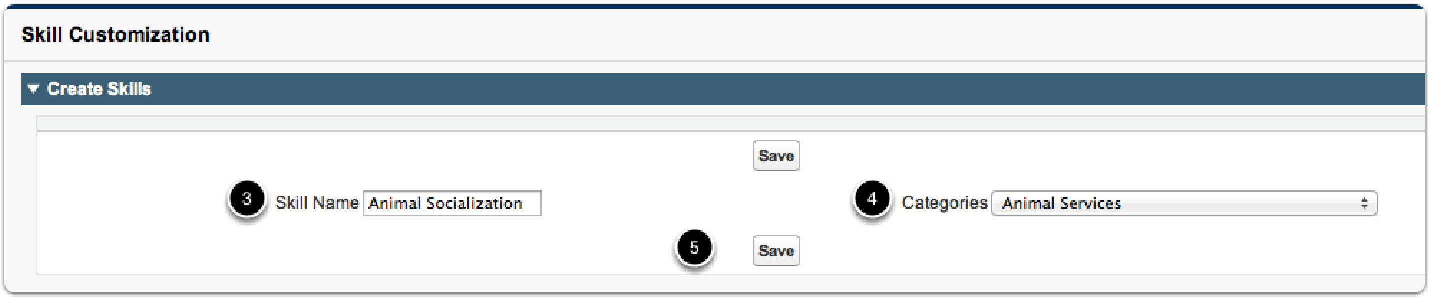
Creating Custom Skills

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

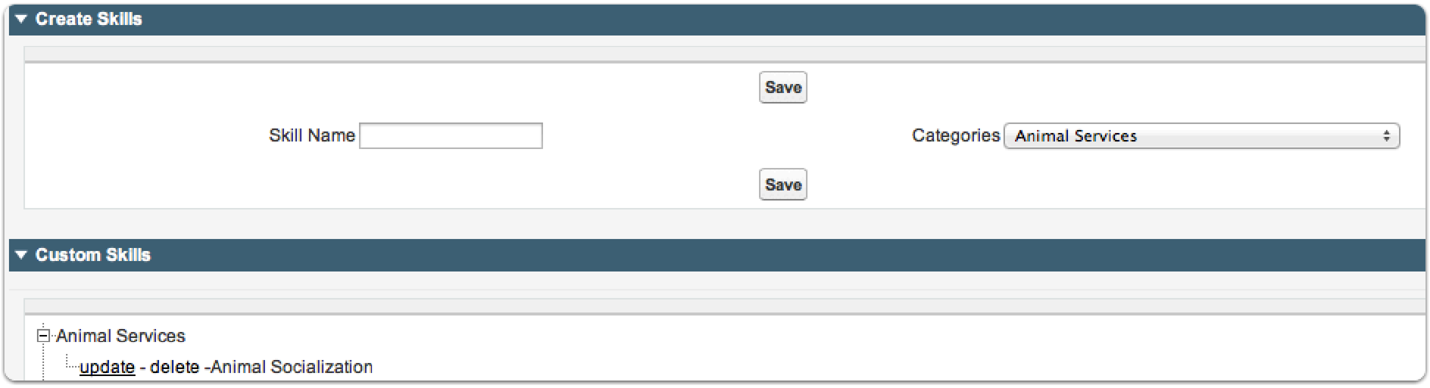


3. Put in the name of the new skill

4. Select a category from the picklist (this list will include any custom categories you create as well)

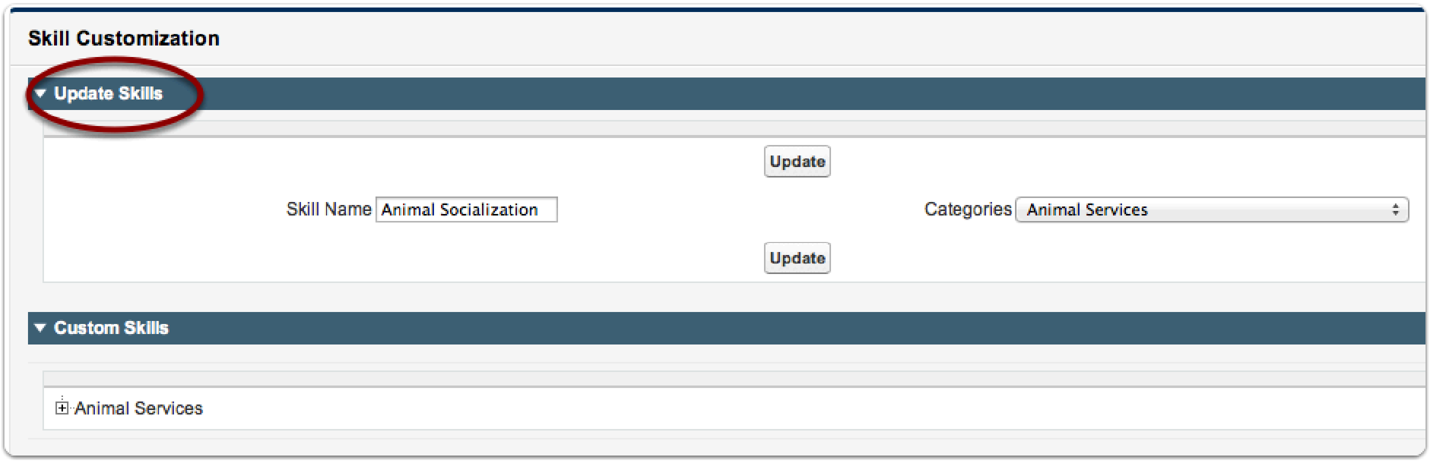
5. Click Save.

The new skill will show up in the Custom Skills section



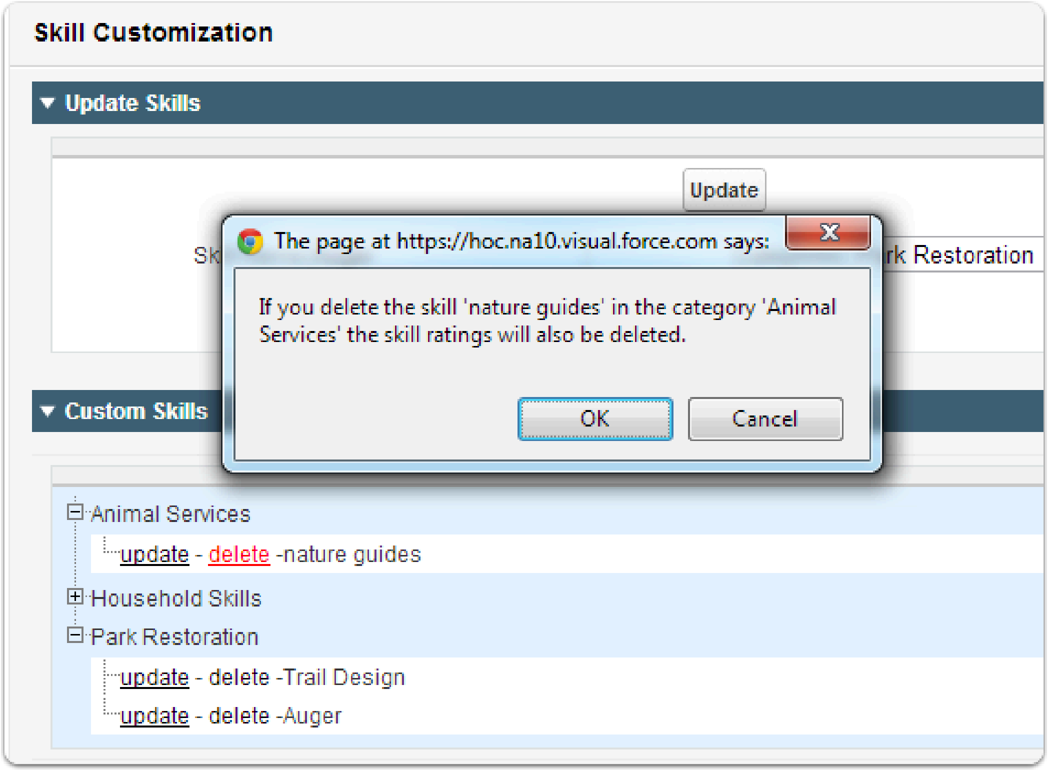
You can click on 'update' to change the name of the skill - or delete to delete the custom skill

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



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

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



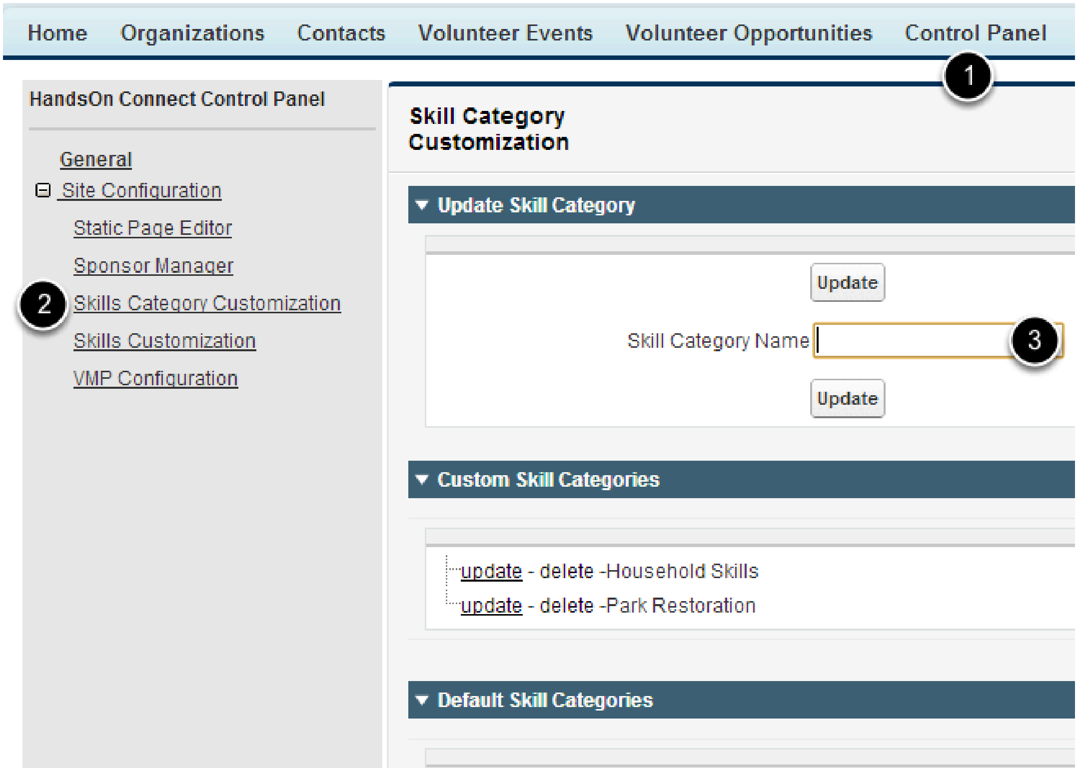
Note: If you delete a skill, all skill ratings (for volunteers and volunteer opportunities) associated with that skill will also be permanently deleted. There is no undo for this.

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



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."

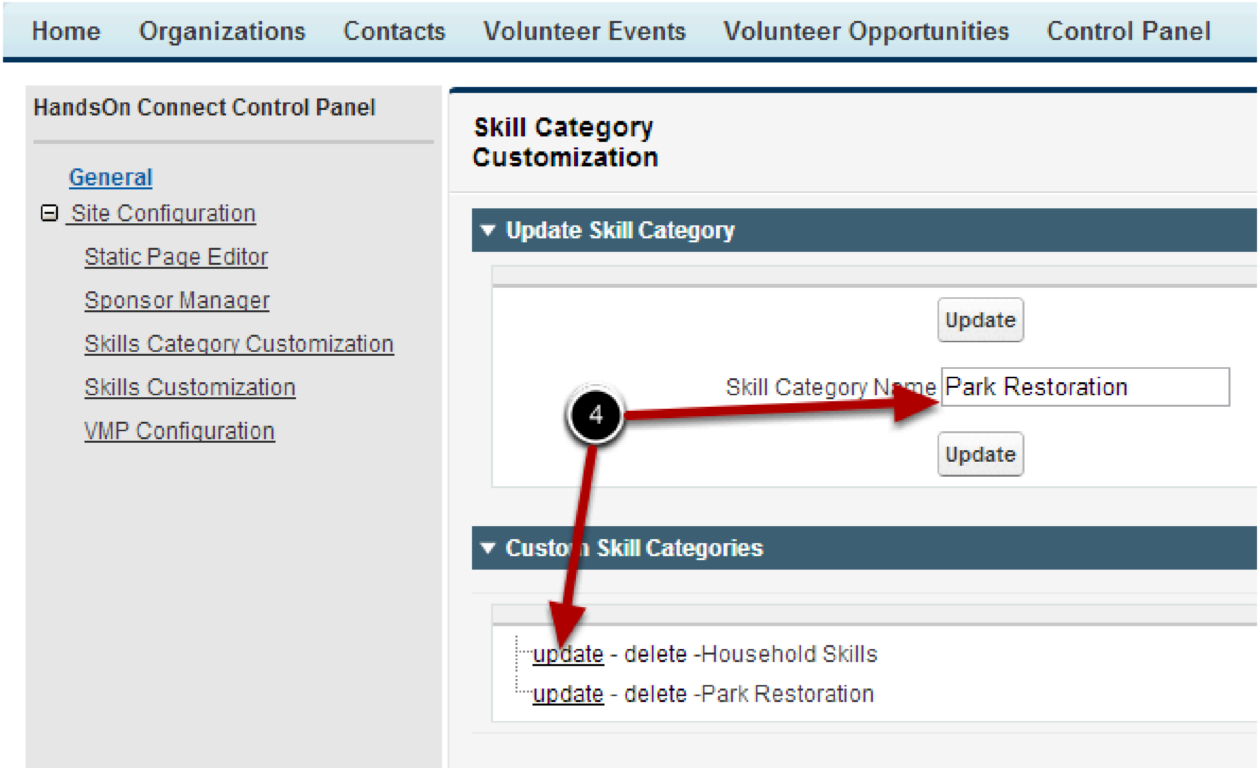
To add custom skill categories follow these steps:

1) Go to the Control Panel tab

2) Select "Skills Category Customization"

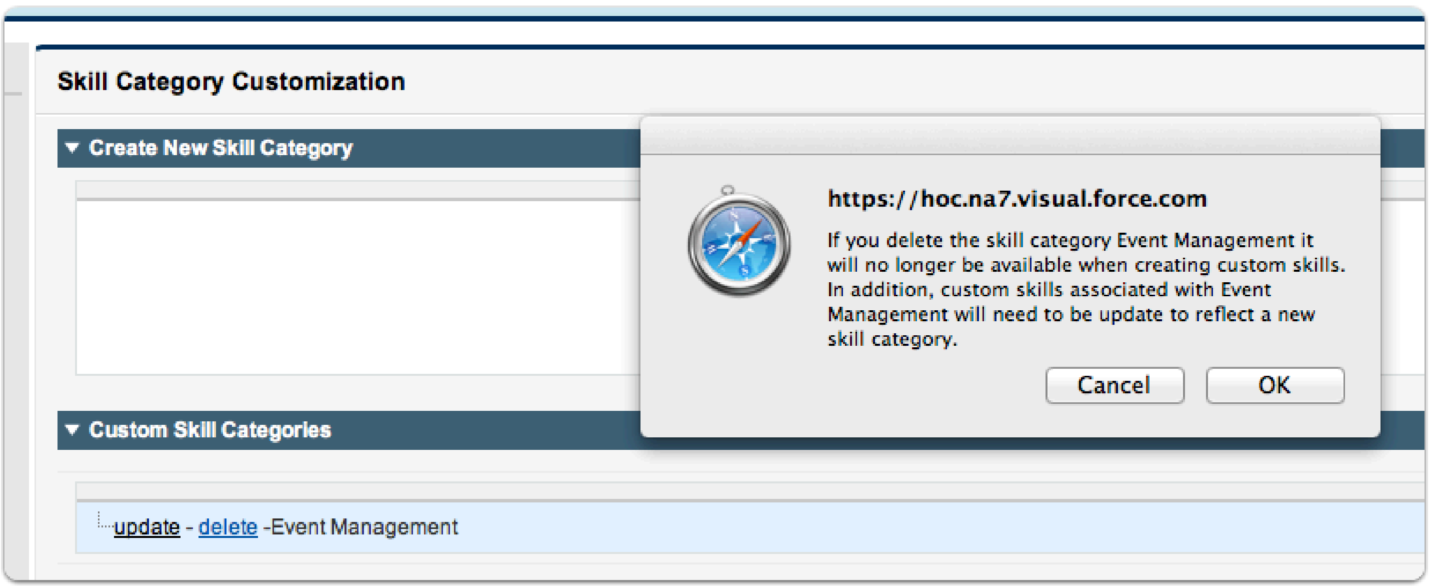
3) Enter a value in the "Skill Category Name" field and click "Save" to create a new skill category.

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.

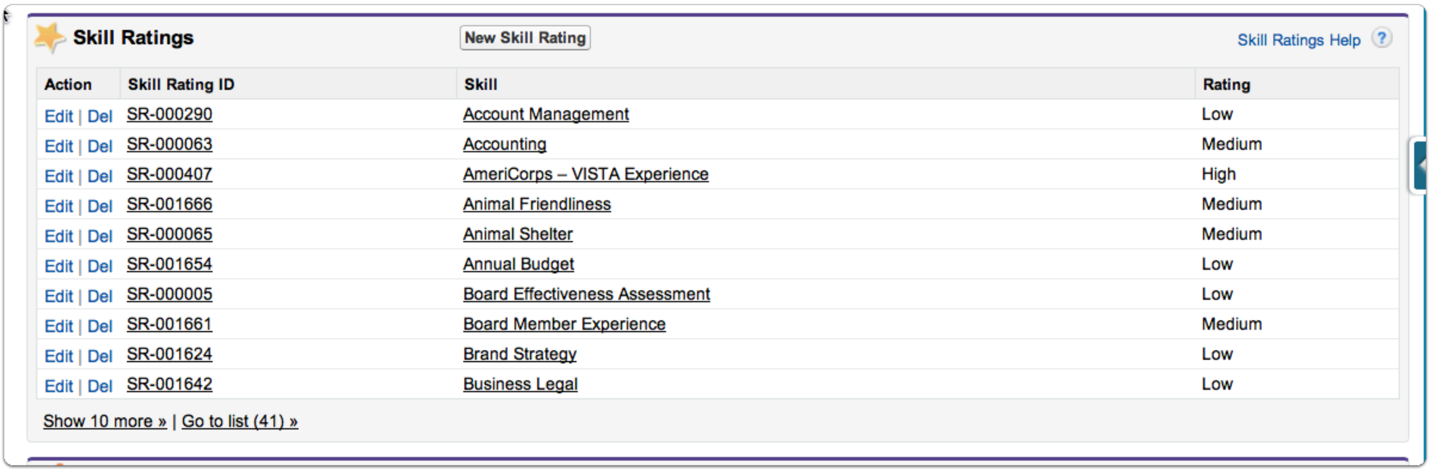
NOTE: Despite what the warning message says -- the skills associated with the category will be deleted! So if you wish to preserve the skills, edit the skills first and move them to a new category (or they will be lost)

Click "OK" to confirm the deletion.

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

Accessing Skill Documentation and Certifications

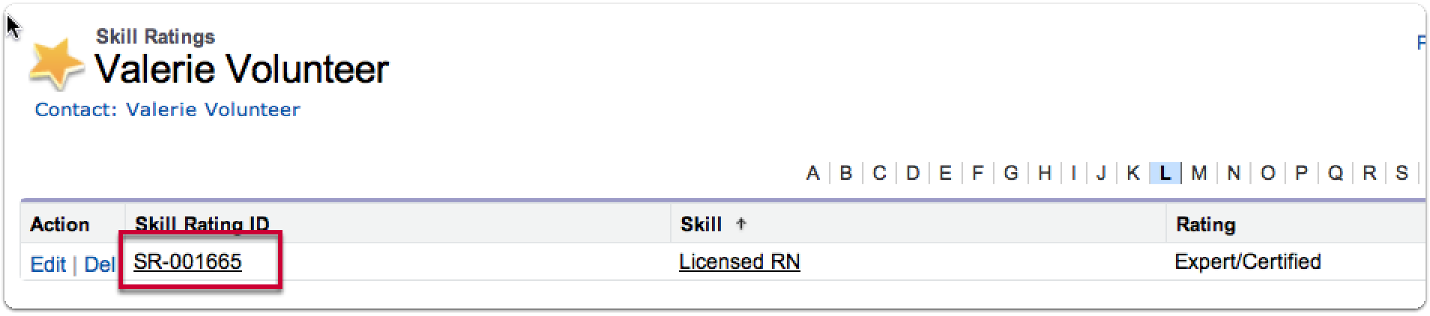
The Contact Record of each volunteer has a 'related list' called Skill Ratings


Skill Ratings | New Skill Rating | Skill Ratings Help

Action	Skill Rating ID	Skill	Rating
Edit | Del	SR-000290	Account Management	Low
Edit | Del	SR-000063	Accounting	Medium
Edit | Del	SR-000407	AmeriCorps – VISTA Experience	High
Edit | Del	SR-001666	Animal Friendliness	Medium
Edit | Del	SR-000065	Animal Shelter	Medium
Edit | Del	SR-001654	Annual Budget	Low
Edit | Del	SR-000005	Board Effectiveness Assessment	Low
Edit | Del	SR-001661	Board Member Experience	Medium
Edit | Del	SR-001624	Brand Strategy	Low
Edit | Del	SR-001642	Business Legal	Low

Show 10 more » | Go to list (41) »

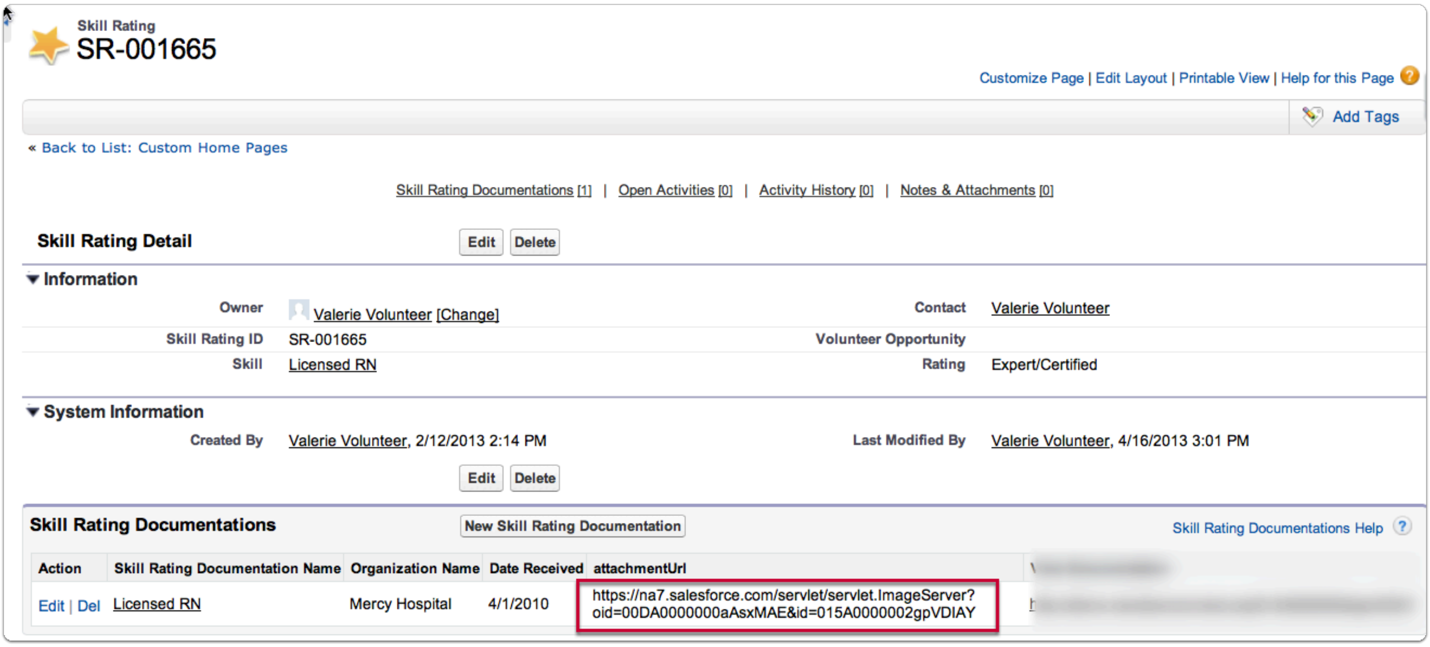
In this case, I'm going to "go to list" and view all 41 skill ratings this volunteer has - and look at the one called licensed RN. I click on the Skill Rating ID to get to the skill rating record:


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
Edit | Del	SR-001665	Licensed RN	Expert/Certified

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

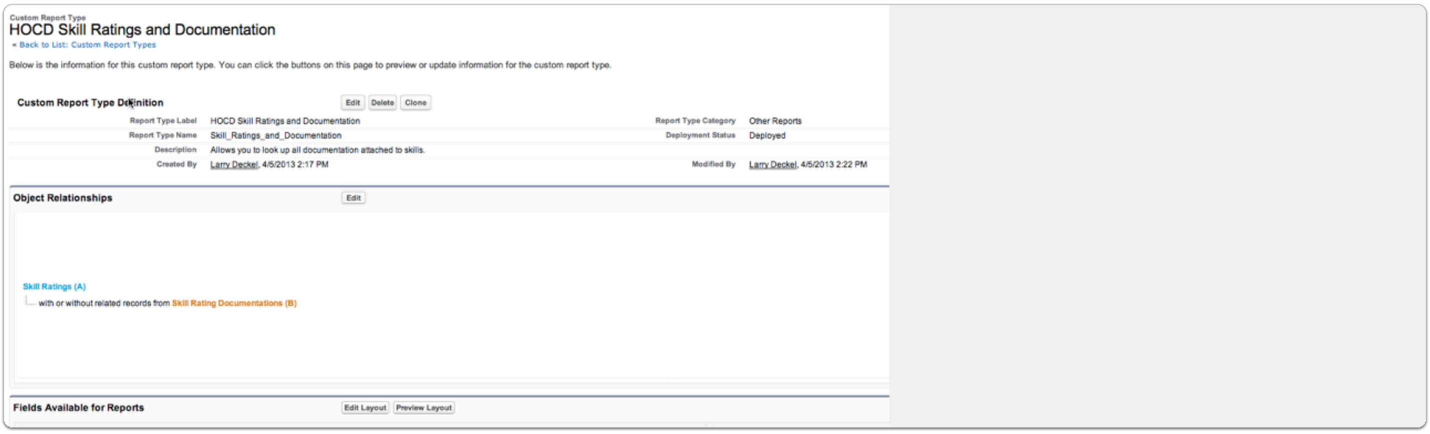


Copy the attachment Url and then paste it into a new browser tab. That URL will open or download the attachment that was uploaded in association with the Skill Rating Documentation in the list. In this case, I'll see the Licensed RN's certification that was uploaded.

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.

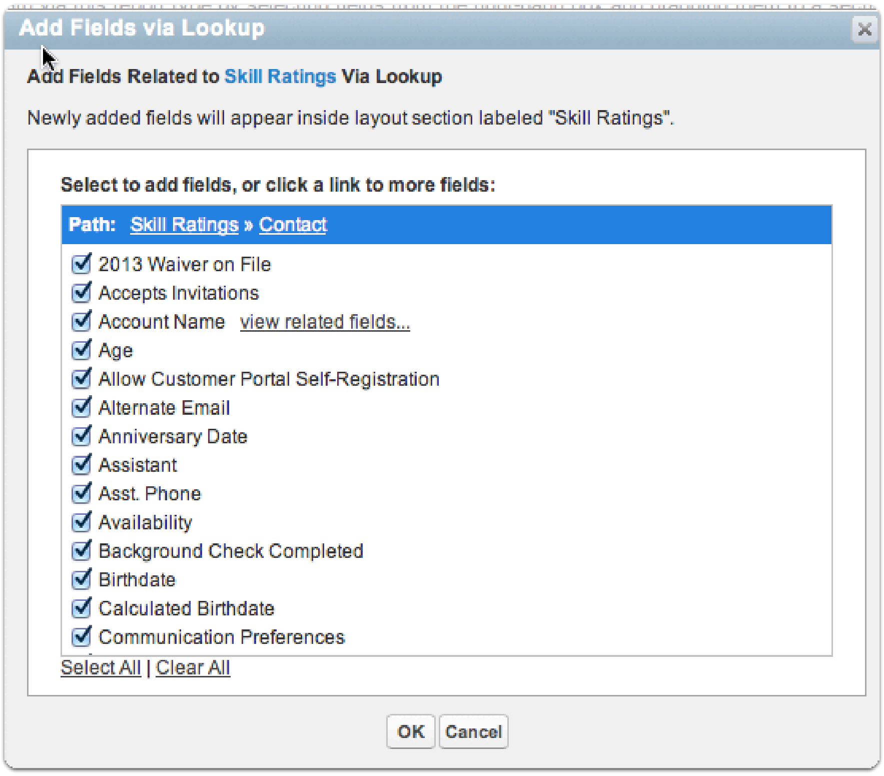
Create Reports that make it easy to find ALL skill ratings and documentation that you have access to:



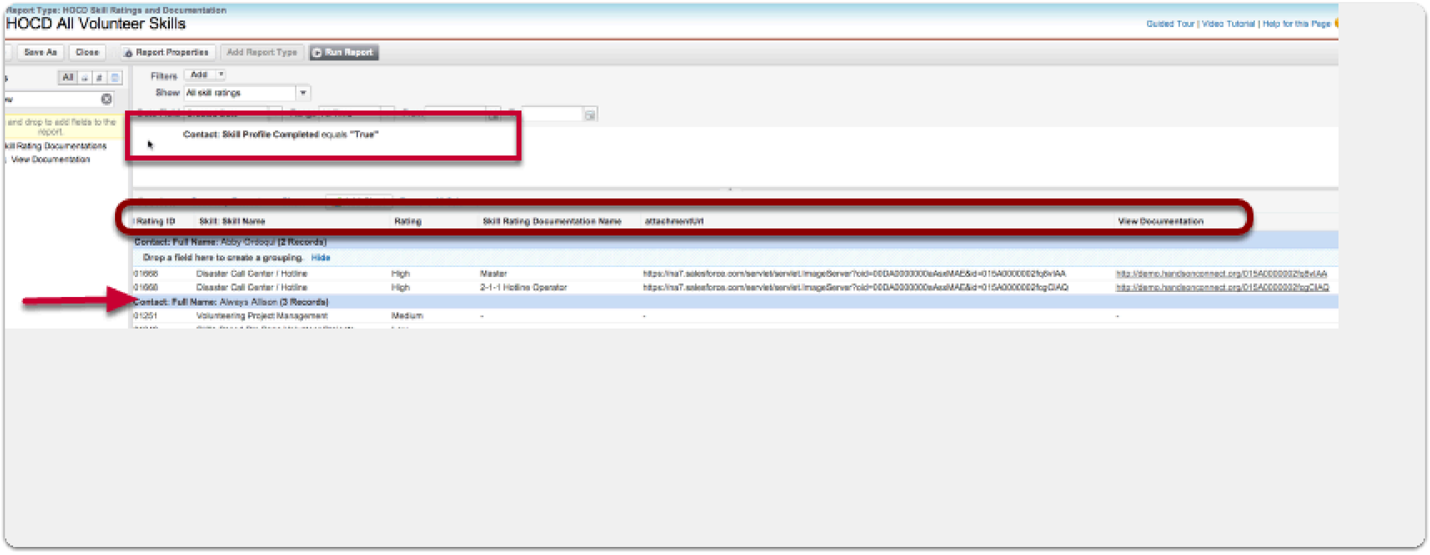
First, you'll need to create a new custom report type by going to setup / Create Report Types and clicking on New Custom Report Type.

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.)

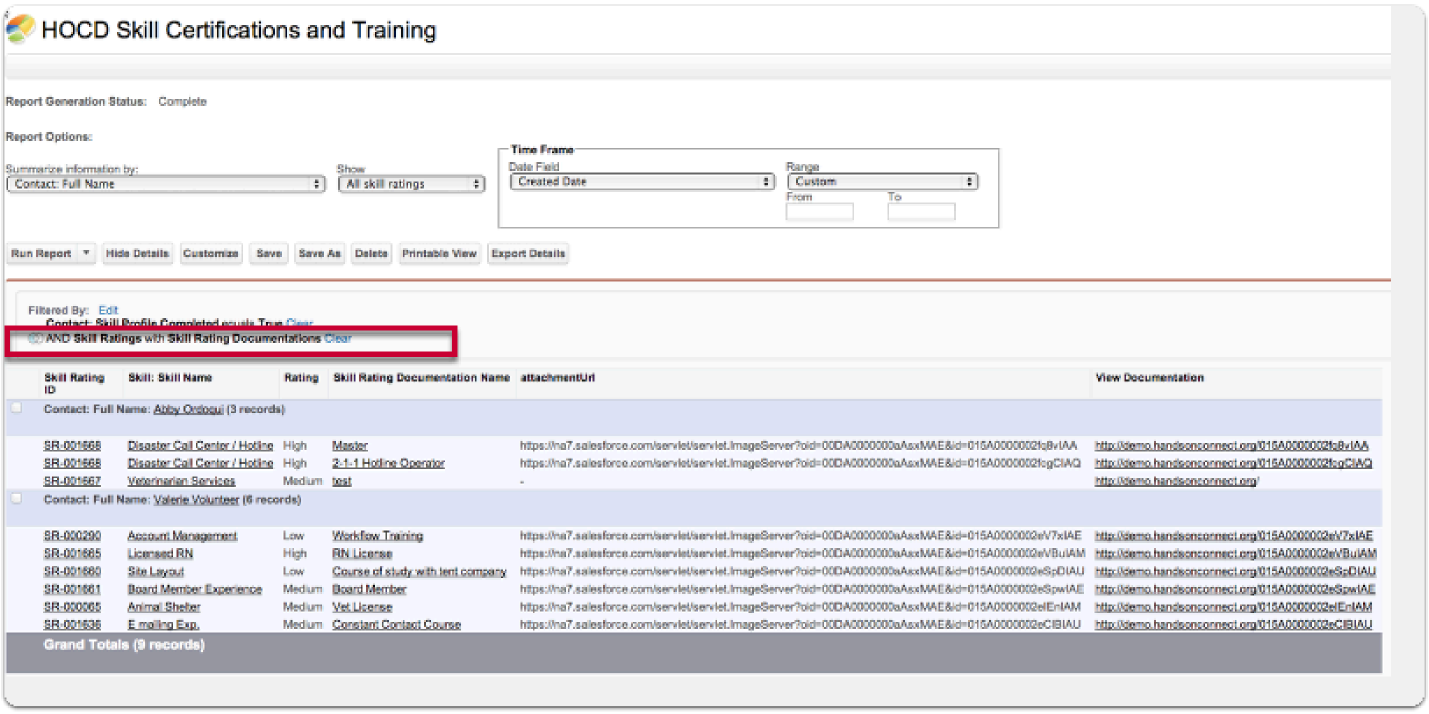


Create a Report that lists ALL the skills your volunteers have submitted in skill profiles.



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



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.

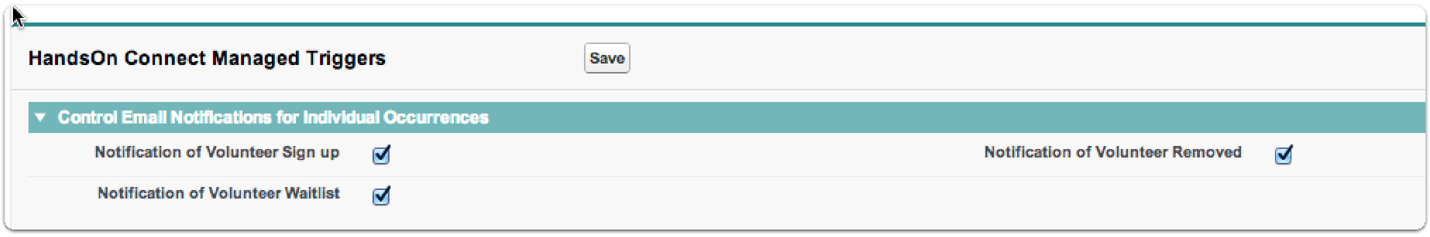
These reports will give you an overview of all the skill documentation that is available. (instead of having to go to individual contact records to drill down to each skill rating and see whether it has a related skill rating documentation object!

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



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.

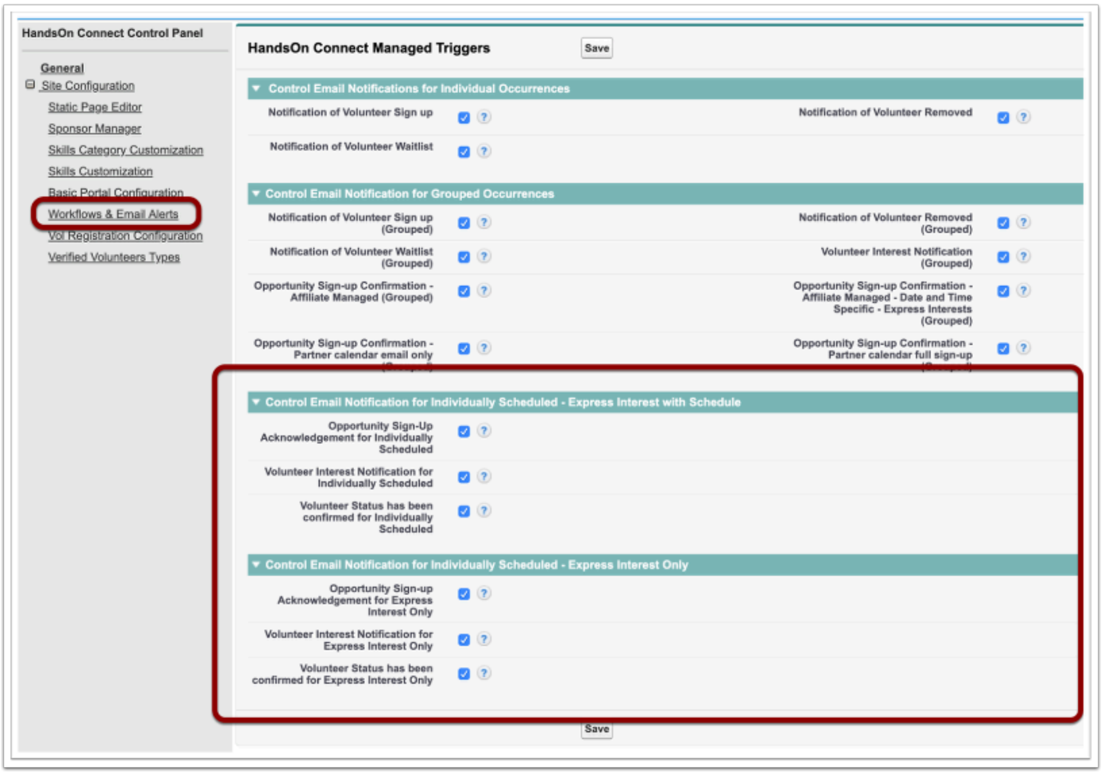
Control Email Notification for Grouped Occurrences

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.



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.

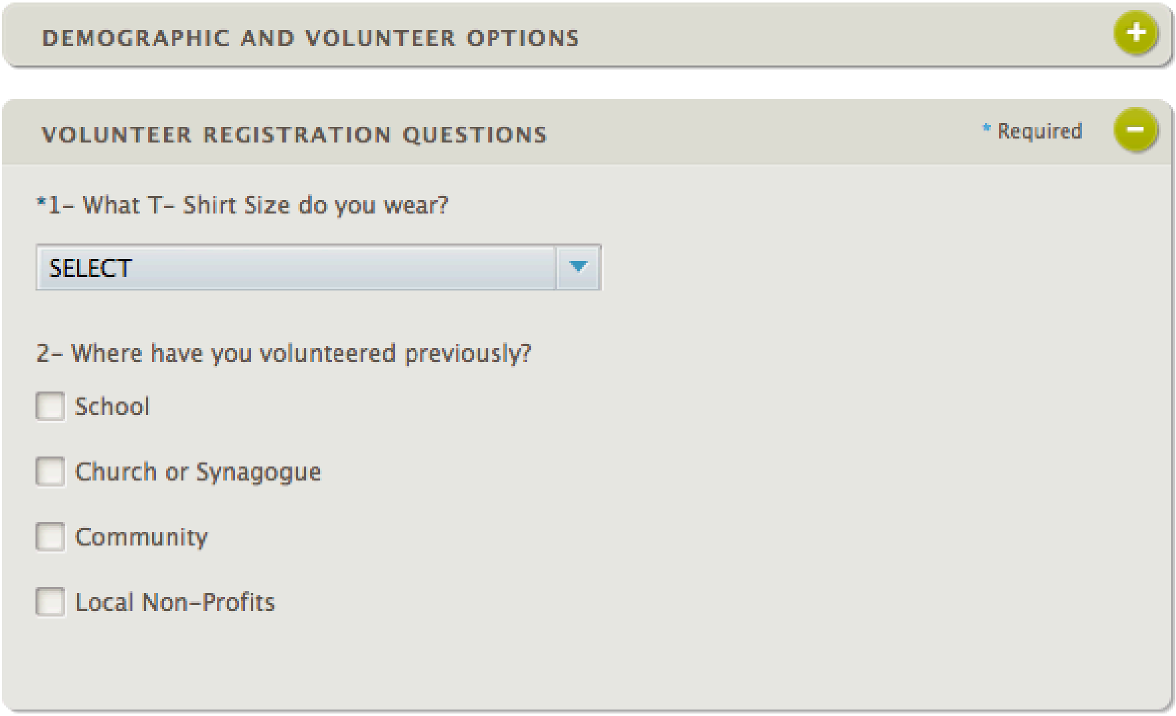
This functionality allows you to capture additional information about volunteers when they first create their account. The answers to these registration questions will be associated with their contact record as a related list:

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 relewvant, but for the most part, you'll be better served by using the Advanced Registration System add-on instead.

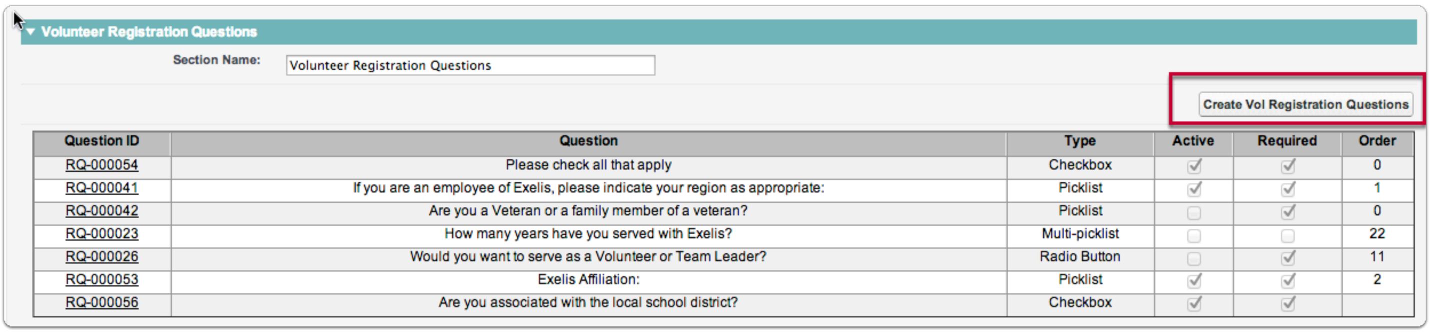
For those using the original system: here's how Volunteer Registration Questions can be added.

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



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:



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

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.

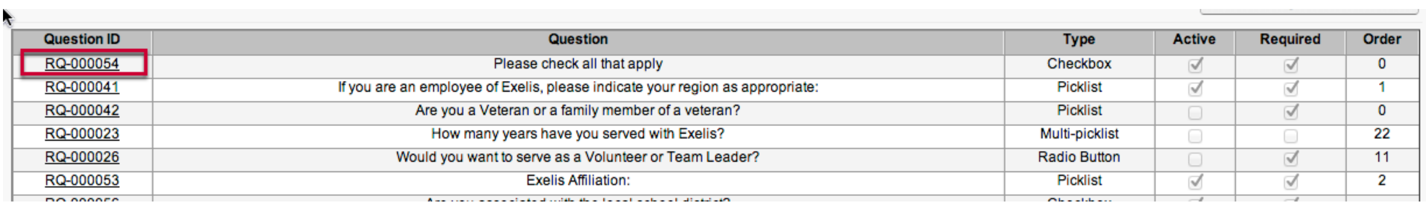
5. The order you want the question to appear. (We recommend using 10, 20, 30 rather than 1, 2, 3. This makes it easier to change the order or add additional questions 'between' existing questions at a later time.

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	✓	✓	0
RQ-000041	If you are an employee of Exelis, please indicate your region as appropriate:	Picklist	✓	✓	1
RQ-000042	Are you a Veteran or a family member of a veteran?	Picklist		✓	0
RQ-000023	How many years have you served with Exelis?	Multi-picklist			22
RQ-000026	Would you want to serve as a Volunteer or Team Leader?	Radio Button		✓	11
RQ-000053	Exelis Affiliation:	Picklist	✓	✓	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

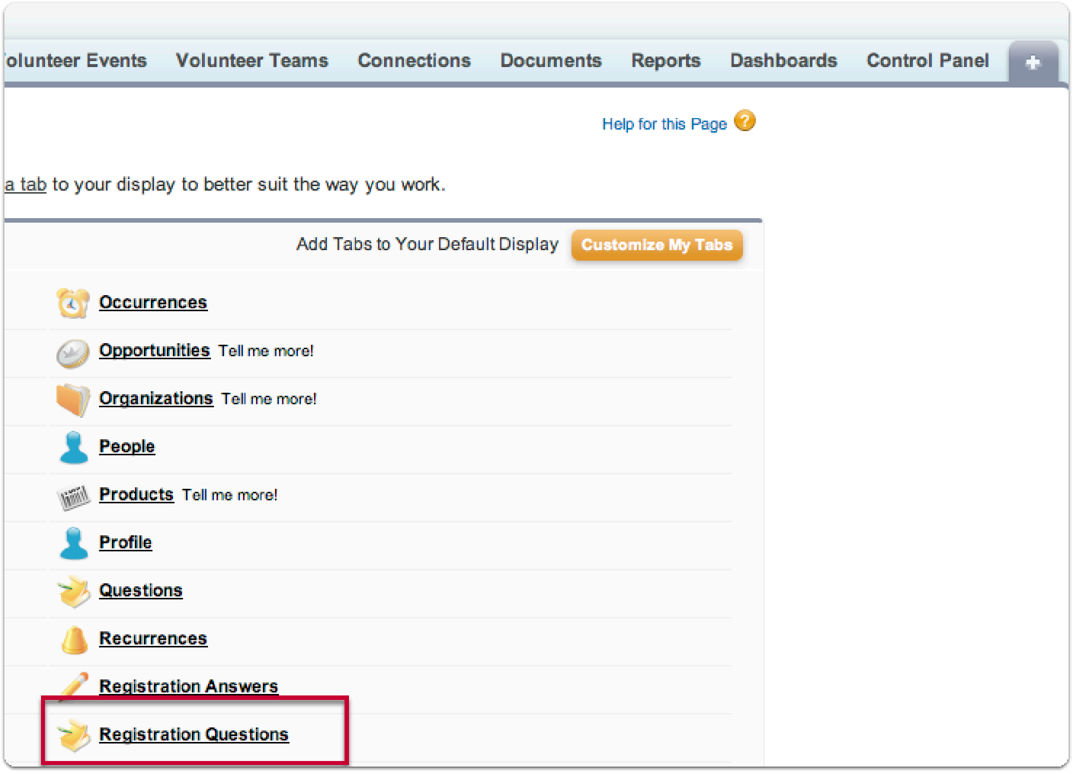
Registration Answers New Registration Answer Registration Answers Help ?

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

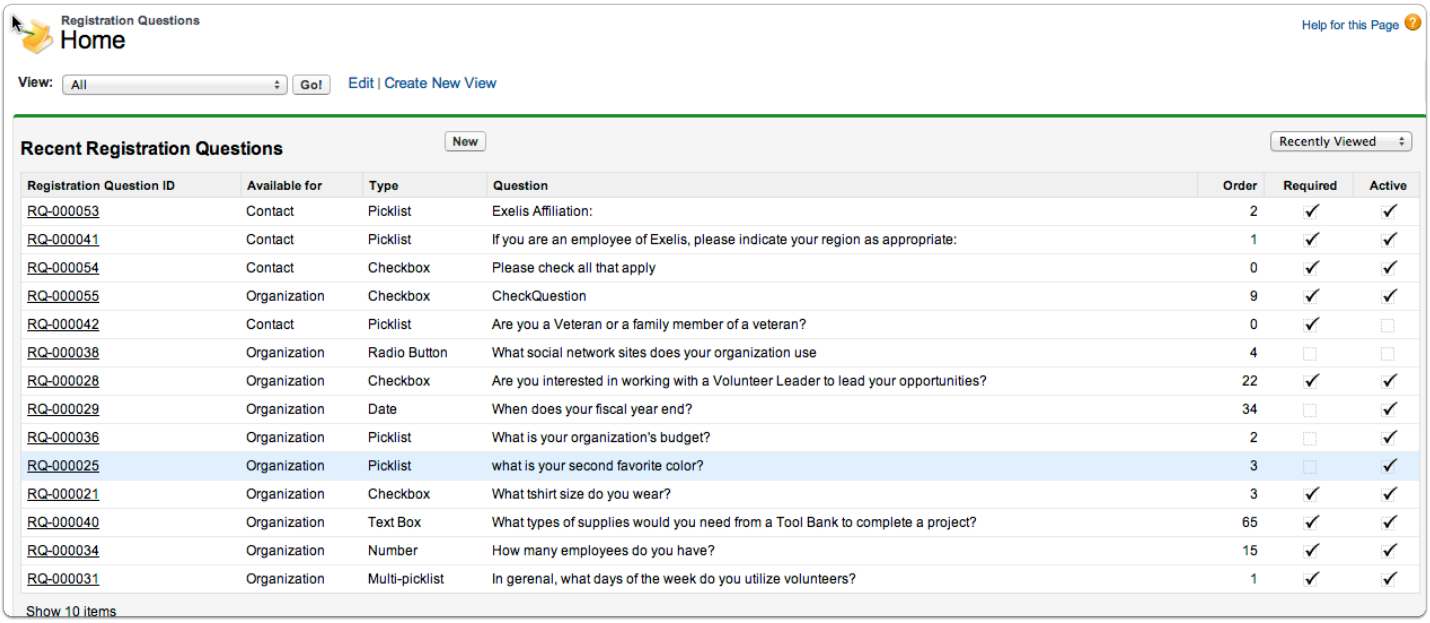
Answers to registration questions can also be gotten by running the system reports:

- 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	✓	
RQ-000038	Organization	Radio Button	What social network sites does your organization use	4		
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		✓
RQ-000036	Organization	Picklist	What is your organization's budget?	2		✓
RQ-000025	Organization	Picklist	what is your second favorite color?	3		✓
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