HandsOn Connect Standard "Starter" reports

HandsOn Connect has a number of reports included.

For most HandsOn Connect customers the reports are found in the following folders:

- **HOC Basic Reports**
- **HOC Custom Button Reports**
- **HOC Managerial Reports**
- **HOC Monthly Reports**
- **HOC Sharing Portal Reports ***
- **HOC Support**

* The Folder "HOC Sharing Portal Reports was added in late December, 2018. It contains six reports that serve as starter reports for partners in the sharing portal and replaces an older folder called "Partner Reports". If you were a customer before January, 2019 and wish to have the sharing portal reports and its folder added to your instance of HandsOn Connect - please open a support ticket and we will add these reports to your instance.

Customers who had an existing instance of Salesforce when they added HandsOn Connect - have the same reports as listed below - but they will be organized in different folders. Additional folders that hold some of these reports may include:

- HOC 2.12 Release
- HandsOn Connect Reports
- HOC Entity Reports
- HOC Graphics and Statistics
- HOC Import Templates
- HOC Referrals and Service Hours
- HOC Reports (self Report)
- HOC Summary
- HOC Team Reports

Just search for the reports mentioned below by name, and you should find them in your instance. You can move the reports into the folder organization schema listed below if desired.

HOC Basic Reports

# of Connections per vol (Calendar Yr)- Shows the number of connections grouped by Contact based on the start date of the connection occurring this Calendar Year.

Connections Overview (Current Year) - Shows all connections grouped by VO Type, Volunteer Opportunity and Occurrnence for the current Calendar Year and provides basic information such as opportunity coordinator, status, attendance numbers, and hours served.

Connections Verifications Due - Shows the connections that are confirmed and have 'please verify' for the attendance status)

Contact's Skills and Interests - Shows contacts that have identified a skill set and what impact areas they are interested in along with whether or not they accept invitations and contact information. (formerly known as *Individual Reports (interests & Skills)*

Contacts - Shows hours served, contact information and other demographic information for all contacts in the system grouped by the Account Name.

Feedback Reports (Projects) - Shows the occurrence and connection information filtered for those that have provided a feedback rating.

Grand Summary (Current Year) - Shows the Number of Volunteer Opps, Occurrences, Connections, hours Served, and Guest Hours Served grouped by Schedule Type and Project Type for all projects and activities. Filtered by Occurrence= Active, Attendance Status NOT EQUAL to Decline, Canceled, or Not Attended.

HOC Skills - Shows all the skills in HandsOn Connect grouped by category.

Number of Accounts Created by Month - Shows the number of accounts created each month

Number of Contacts created by month - Shows number of contacts created by month

Occurrence Overview Report - Shows all occurrences grouped by volunteer opportunity. Information displayed includes opportunity coordinator information, attendance numbers, hours served.

Organizations Report - Shows Status, Impact Area, Type, Primary Contact, Addresses, and other related information for all the organizations in your system and grouped by type.

Orgs with Opportunities Avail in Search - Shows the number of organizations with Active Volunteer Opportunities with Active, Upcoming occurrences and the total of each.

Total Active Future Project Occurrences - Shows the number of ACTIVE upcoming Date & Time specific occurrences and To Be Scheduled occurrrences that are still open.

Unverified Self-Reported Hours - Lists all Connections where hours have been self-reported by volunteers, but not yet verified.

Volunteer Demographics 1 - Shows demographics for Gender, Ethnicity/Race, and Person with Disability. Great for Dashboard chart for demographics.

Volunteer Demographics 2 - Shows demographics for Education Level, Marital Status, and Employment Status. Great for Dashboard chart for demographics.

Volunteer Leaders Still Needed - Shows the upcoming occurrences, grouped by Volunteer Opportunity, that are in need of a volunteer leader, along with the Volunteer Opportunity name, location, and start date.

Volunteer Opportunity Matrix- Current Yr - Shows the Number of Volunteer Opps, Occurrences, Connections, Hours Served, and Guest Hours Served grouped by Schedule Type and Project Type for all projects and activities. Filtered by Occ= Active; Attendance Not Equal to Decline, Canceled, Not Attended.

Volunteer Opportunity- Summary Report - Shows the Managing Organization, Total Occurrences, Total Connections, Total Attended, and Total hours served for each volunteer opportunity in the system

Volunteer Orientation & Connection - Shows the Volunteers that have completed orientation and if they have any connections

Volunteer Team Captains - Shows the contact information for Volunteer Team Captains and basic information on the # of members, Team Hours Served

Volunteer Team Overview - Shows the number of hours served, number of members, associated organization and visibility by Volunteer Team

HOC Custom Button reports

Questions & Answers. - Do Not Edit the filters for this report since it is used for the "Run Answers Report" link found in the Occurrence record. It shows the answers to the custom questions for the related occurrence. Do not rename this report or the button will not work.

View Service Hours (Org Record) - Do Not Edit the filters for this report since it is used for the "View Service Hours" link found in the Organization record. It shows the number of volunteer hours served by schedule type for ALL volunteer opportunities for that organization record. Do not rename this report or the button will not work. (Note: This button may only exist in legacy HandsOn Connect organization page layouts)

HOC Managerial Reports

These reports give you an overview of information about your use of Salesforce - and provide tools for importing data.

Active Users- Lists all the active users, regardless of profile, in your system

Adjustments made to Reports- shows who has modified a report within the last 30 days

Approval Needed - Partners (Past Due) - Shows the Connections that volunteers have made to your opportunities that are Pending Approval and Past Due,

Contact Import Template- Use this report to create a template for importing contacts

Contacts and Employers- Shows the Contacts and their related Employer and Organization. Can be used to determine which contacts could be related to their employers instead of the "Individual" organization.

Custom Reports by User- Shows who is creating custom reports in your system.

Document Library- Shows all the documents in your system grouped by folder

Inactive Users? - Shows the users that haven't logged into the system within the past 90 days. Date range can be customized.

Login Leaderboard- Shows the number of log-ins by Active Users within the last 7 days. Can be used to create a Login Leaderboard dashboard

Number of Documents Added by Month- Shows the number of documents added each month to the system.

Number of Open Tasks grouped by Assignee- Shows the number of open tasks assigned to internal users

Number of Tasks and Calendar Activities- Shows the number of tasks and calendar activities grouped by month

Opt in for Communciations - Shows the contacts that have opted in for your organization's communications and provides phone, email, and postal information.

Org and Contacts Import Template- Use this report to export and create a template that can be used for importing Organizations and Contacts.

Organization Import Template- Use this report to create a template for importing organizations.

Parent and Related Organizations - Shows the organizations that are related to a Parent Organizations and the related Primary Contact, Opportunity Coordinator, and Phone number

Self-Reported Orgs unmatched in database - List of all organizations self-reported by volunteers where an active organization was not found. Use to see if you have a 'close match' &

want to update the Existing Organization field or contact new organizations to recruit as active partners.

Team Member Import Template - Use this report to get the basic template for importing Team Members. You will need to modify the filter to the organization name you wish to use and then add additional columns (Team ID, Team Member Status, and Captain) to the template after exporting.

Users Logged in (Last 7 Days) - Shows the users that have logged into your system within the past 7 days.

Here are links to using the import templates for batch adding data to Salesforce

Importing Organizations and Contacts in Salesforce

Batch adding Team Members

HOC Monthly Reports

Active Occurrences (This Month)- Shows the occurrences that are active for the current month grouped by schedule type

Contacts Created Last Month- Reports on the contacts that were created during the previous month.

Date & Time Project Occ (Last Month)- Shows the number of confirmed, attended, not attended, unreported, and hours served for all the Date & Time project occurrences during the previous month

Express Interest Project - Last Month- Shows the number of connections created for Express Interest projects last month. Grouped by Schedule Type and Occurrence.

New Agency Partners- Shows the Nonprofit Organizations that were created during the previous month, their status, and primary contact.

Total Hours Confirmed (Last Month)- Shows the number of hours for connections with an end date equal to last month and attendance status equal to Attended (and Hours Verified). Report is grouped by Schedule Type

HOC Sharing Portal Reports

These reports are in a folder that you can make available in the CMS to the sharing portal. These are starter reports for your partner organizations. Add more based on information you wish to share with your partner organizations.

Occurrences visible on public site - Shows the upcoming occurrences of volunteer opportunities that are visible on the public site for volunteers to sign up or express interest.

Upcoming Connections - Shows connections coming up today and in the future, grouped by pending and confirmed.

Volunteer Engagement Report- Shows all volunteer connections grouped by contact as well as summary of hours served and number of connections by contact.

Volunteer Opportunity Overview - Shows statistics for all volunteer opportunities past and present.

Volunteers and Connections - Searchable - Use the search box and/or the sorting and filtering capabilities in the report header to find info on your volunteers and their connections to your opportunities.

Volunteer Awaiting Confirmation - Shows volunteers with upcoming connections in Pending Approval Status. These volunteers should be confirmed or declined to participate in your Volunteer Opportunity

HOC Support

These reports are used by the support team for onboarding your instance and troubleshooting your data issues. Please leave these where they are - but you can run them yourself, and/or make variations that you store in folders you create.

Missing Information- Occ - Shows if any Occurrences are missing the required fields. (Run this report to see if any of your occurrences have become corrupted due to missing required information. (This corruption is generally the result of deleting parent records (Volunteer Opportunity, Locations, etc) that are required for occurrences.

Missing Information- VO - Shows if any Volunteer Opportunities are missing the required information. (Run this report to see if any of your volunteer opportunities are corrupted because they are missing required information).

Object Change Report (Search Update) - This report tells you if a request to update search was sent to the search server when you edited a volunteer opportunity or occurrence.

Report on all HOC Reports - Shows all Unmanaged Report Folders and their reports associated with HOC. (Edit this report to include folders you may be using for reports - and it'll give you a list of all reports that are of value to you!)