Release Notes

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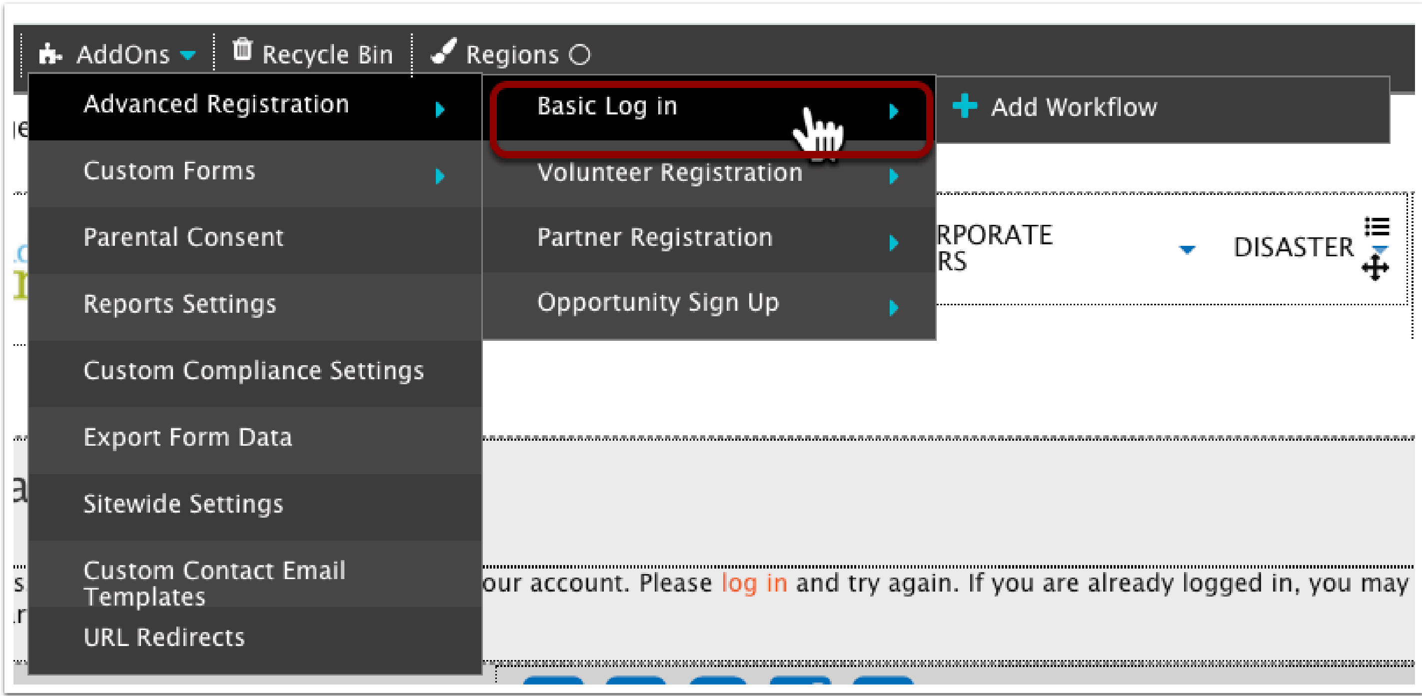
Release Notes 2020

HOC 3.0.10.8 (July 2)

This release features two significant improvements to the Advanced Registration System and Forms. There are also some user interface improvements in the CMS and in the check-in kiosk.

New type of ARS available - Basic Login: HOC3-11531

CMS users who have the HOC add-on Advanced Registration System (ARS) will see a new type of ARS joining the exissting Volunteer Registration, Partner Registration and Opportunity Sign-Up ARS.   It's called Basic Login. It allows you to run a workflow and present information, forms, and other info at the time a Volunteer or Partner logs into via the public site*



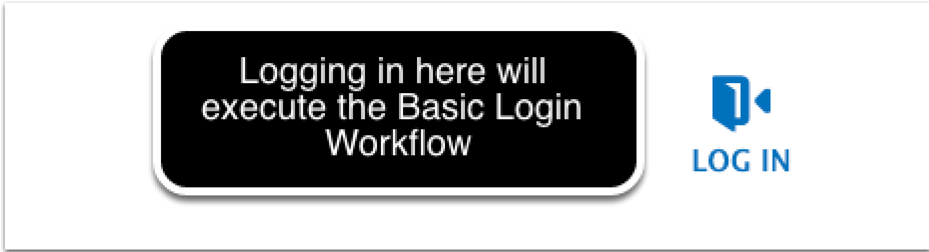
What might you use the Basic Login Workflow for?

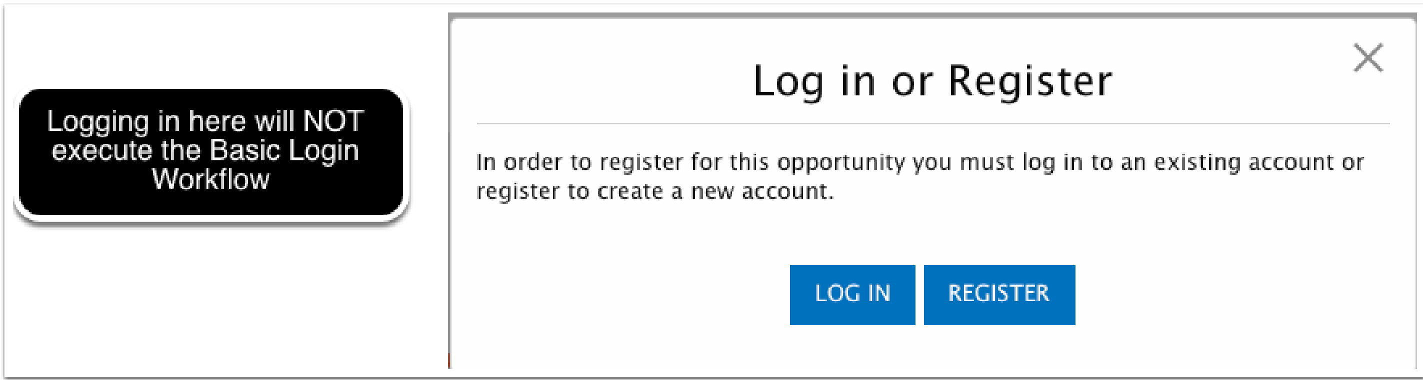
You can use branch logic to evaluate whether or not a person logging in has or has not submitted certain information (a checkbox for a new waiver, a new field you're now requiring as part of registration but might not be populated for existing contacts, etc ... and then require them to update their contact information before proceeding.

If you wish to redirect a login so that it doesn't go to the account overview page -- you can do this using a form with page redirection as a basic login workflow.

* The basic login workflow run whenever someone logs in via the Log In widget on the upper right of each page. At this time it does not execute the workflow if you login via the pop-up that appears when you sign up or express interest in a volunteer opportunity.   In a future release the basic login workflow may be extended to execute during opportunity signup login.

So be aware, that using the basic login workflow does not guarantee that every person logging in will be presented with this workflow. But it WILL run for anyone logging in via the traditional log-in widget in the upper right.





Improvements to File Uploads in Forms: HOC3-11386

The option to include a File Upload 'field' in a form has been greatly enhanced in this release. The following is now possible:

- On the public site, users can upload multiple files at one time either by browsing or dragging and dropping
- Uploaded files can be associated with Salesforce Libraries and/or Specific records in Salesforce. This means, for example, you can have a contact upload files and have them associated to their contact record for easy access.
- You can optionally create a form that gives a logged in user access to all the files they've uploaded so they can delete and replace an existing file if desired.

[To read about all the new features available with File uploads in forms, see this article]

Improvement to ARS - prevent accidental deletion: HOC3-10362

The ability to delete an ARS workflow was added a while back, but once you hit delete, POOF, the workflow was gone :-(If you accidentally pushed the button, your work was lost. To prevent this from happening, you will now be asked to confirm the deletion, to be sure you mean to do so. Also, deleted workflows will now be available in the recycle bin, so it will be possible to restore them.

Improvements to Check-in Kiosk - QR Codes: HOC3-11895

1) QR codes now support both check-in and check-out if used twice.

2) PDF downloads of the access pass now include the QR code as expected.

3) The display of a QR code on a mobile device is now larger and easier to view and scan.

4) An identified typo on the success page was corrected.

Bug Fix: Opportunity Characteristics Filter in search result block: HOC3-11964

The results in a /search results block were not always accurate when using the field opportunity characteristics as a filter. This has been corrected.

HOC 3.0.10.6 and 3.0.10.7 (June 4 and June 18)

The 3.0.10.6 release was primarily internal work to set the stage for future enhancements. There were also some user interface improvements to forms. Improvements have also been made to the display of the calendar in Mobile. In 10.6 and and in the 10.7 release, fixes have been made to the scanning capabilities of the check-in Kiosk (for those using QR codes with the kiosk). The 10.7 release also has internal improvements to the CMS. Here are a few visible improvements and new features in these releases, including a major new Feature: Virtual Locations for Virtual Opportunities/Occurrences.

(Beta) Virtual Locations for creating Virtual Opportunities and Occurrences (HOC3-11842)

Since the arrival of COVID-19, there has been an increased demand for listing Virtual Volunteer Opportunities in HandsOn Connect. During the last 3 months, we've suggested a number of ways to leverage HOC to create Virtual Volunteer Opportunities, but they've all had drawbacks and were less than ideal. They weren't automatically searchable, and creating 'virtual' addresses with zip code 00000 caused maps to nowhere to appear, and the listings of 'where' virtual opportunities took place, (such as Virtual, Virtual, 00000) in search results were less than ideal.

With this release we are introducing a beta of fully integrated Virtual Locations (for Volunteer Opportunities and Occurrences) into HandsOn Connect.

This new way of creating Virtual Locations allows the following:

1. The ability to search and/or filter for Virtual Opportunities in all our search and feature related blocks on your public site.
2. The ability for partners to specify opportunities or individual occurrences as virtual, by having them take place at a "Virtual Location"
3. The ability to create virtual locations and use the special directions field to specify instructions for how to join or participate in a virtual opportunity.

For full details on how Virtual Locations / Opportunities will work, please see these articles:

- Virtual Opportunities on the Public Site
- Creating Virtual Locations for Virtual Opportunities/Occurrences in HOC Salesforce
- Virtual Locations for Virtual Opportunities in the Sharing Portal
- Sharing Virtual Opportunity Special Directions with Volunteers

Participating in this Beta requires us to upgrade your instance of SF and your public site. If you wish to start using this new feature, please open a support ticket and request 'Upgrade us to Virtual Opportunities". By default we will activate this in both Salesforce (Volunteer Opportunity Wizard) and for your partners and volunteer leaders in the Sharing Portal.

If you only want this in SF (admin access), and NOT in the sharing portal - please state that in your request to activate Virtual Opportunities. Thanks!

Also: Please read and indicate whether you want the feature mentioned in Option 2 here activated as well.

After the feature has been activated for you, and you've created one or more VIrtual Locations to use for your Virtual Opportunities, turn on the search filter for 'location type' on your search, calendar and/or search results pages as instructed in Virtual Opportunities on the Public Site.

When you start using this new feature we recommend:

1) Communicating to your partners using the sharing portal the new "Location Type" field, and its use.

2) Announce to your Volunteers how they can use the new search filters on your /search, /calendar or /search results block to search for Opportunities that are Virtual. This could be done via newsletter, or an announcement on the home page.

Check-In Kiosk Improvements. (HOC3-10727, 11790,

1. The libraries used to allow QR scanning with the check-in Kiosk have been updated so that scanning works on desktop/laptop browsers. For those using QR scanning here are the devices / browsers that are supported now:

- **Mac Desktop** - Current versions of Chrome or Firefox. (note: Not compatible with Safari)
- **Windows Desktop** - Current versions of Chrome, Firefox, Opera and Edge. (Not compatible with Internet Explorer)
- **Android Mobile Devices**
- **IOS Mobile Devices** -- must use IOS AppHandsOn Connect Admin Kioskto scan volunteers for check-in. IOS will not support use of browsers for QR check-in.

2. A "start new check-in" button has been added to the kiosk failure screen with the message "Sorry, you are not registered..." making it easy to return to the check-in page rather than waiting for the kiosk to self-refresh.

3. Improvements have been made to the Visual Prompts and error messages that appear when using the kiosk.

- Error Messages are displayed in a standardized format (in which the user must click to dismiss the error message, allowing sufficient time for the message to be read).
- Cancel buttons are available at several points allowing the user to cancel out of checking in if necessary.
- Some headings have been bolded to make them more prominent.

Self-Reporting Improvement (HOC3-11760)

In some cases, depending on the time zone an organization is in, errors might result if you self-reported a connection that had taken place earlier the same day. Now, self-reporting will work if you report a connection right after it has taken place.

Default Dates now appear when exporting form data in CMS (HOC3-11939)

Previously, when exporting data from forms in the CMS, the FROM and TO fields that define a date range were blank. Now, by default exports will be set, **From** = Today - 3 months and **To** = Today.

Bug Fix: Forms not saving data to export file (HOC3-11960)

It was discovered that in cases where a form was mapping SOME fields to Salesforce, but not mapping others, that the export file available in the CMS, was not capturing the unmapped fields. This has been corrected.

Bug Fix to ARS: Not all data being captured in some ARS circumstances (HOC3-11913)

It was discovered that some more complex uses of the ARS (multiple pages with multiple forms) occasionally caused data to not synch with Salesforce. This has been corrected.

Bug Fix: Emails sent when granting partner access for organizations using Flex Model (HOC3-11870)

For those clients using the HOC flex model, where contacts for partners are not associated with their organization as their direct account relationship, there was a minor issue with the email sent when granting partner staff access. It populated the merge fields of the email with their household account, rather than the account you had just granted them HOC access to via Related Accounts.   The emails will now specify the correct account they have been granted access to.

Bug Fix: Corporate page search for private opportunities (HOC3-11826)

Now that Invitation Codes can be used to create private opportunities at the Occurrence Level (instead of for an entire Volunteer Opportunity), we've adjusted the search mechanism used on business pages so that it will only bring individual private occurrences. Previously, it was found that this special search page was returning all occurrences of a volunteer opportunity, even if only some of its occurrences required an invitation code. This has been fixed. Corporate page results, after entering an invitation code, only brings private occurrences, opportunities, and/or Volunteer Events.

HOC 3.0.10.4 and 3.0.10.5 (May 14 and May 21)

HOC 3.0.10.4 release was entirely internal improvements. The 3.0.10.5 release had additional internal work and a couple of bug fixes. Here's what you might notice.

Bug Fix: Mapping of Encrypted fields in forms to Encrypted fields in Salesforce (HOC3-11547)

Mapping an encrypted field in a form to a corresponding encrypted field in Salesforce was not 'sticking'. The mapping disappeared when you saved the form. This has been corrected.

Bug Fix: Problems adding new locations to new occurrences (HOC3-11753 and 11757)

When adding a new occurrence to an existing opportunity, and defining a new location for that occurrence, the location creation screen was requiring the user to submit a latitude and longitude for that location. This has been fixed.

HOC 3.0.10.2 and 3.0.10.3 (April 24 and May 7)

These two releases are primarily minor bug fixes and improvements to existing functionality. There are not a lot of user-facing changes that you'll notice. The work in these releases include incremental work on features that may appear in the future including improved donation forms, and a few surprises coming in the next month (more on that later!). Here's two small bug fixes in these releases:

Bug Fix: Not all grouped occurrences are visible when 'do not display full occurrences" is configured. (HOC3-11527)

Because grouped occurrences can be configured for signing up for all occurrences in a group - an exception has been added so that all occurrences in a group are visible (even if full). In this scenario, if one occurrence has available space, then a user can sign up for that occurrence, and is still signed up for all the remainder of the occurrences in the group (which will, in fact, exceed the maximum attendance).

Note: If you wish to have a volunteer only sign up for one occurrence in a group (because the others are full), you should ungroup that occurrence from the group, making it a non-grouped occurrence. Otherwise, grouped occurrence signup behavior will be enforced.

Bug Fix: Problems signing up for recurring self-reported connections (HOC3-11492)

A bug was found, and corrected, that prevented the signing up for a recurring series of self-reported connections, even when there was no conflict.

Note: a user cannot self-report a connection that overlaps a connection of another opportunity they are connected to on the same date, now that HOC prevents a user from creating overlapping connections of two different Volunteer Opportunities.

HOC 3.0.10.1 (April 9, 2020)

This release is chock-full of new goodies for advanced users who want more control over their public site and more control over signups/express interest for occurrences. Here's the highlights!

CMS: Friendly URLs (URL Redirect) (HOC3-11271)

Here's a much requested feature: The ability to create a friendly URL that will redirect to a longer, more complicated URL.

Here's the sort of things you might use this for:

1) You have a document saved in Salesforce Files, and the document URL for public access is this charming URL: https://hoc9015.my.salesforce.com/sfc/p/1N000001BS6x/a/3m000000Vr5i/A3OOjTEWowfqMphZxjMw7Imy55szFUI1ie6mcWfF_W0

For marketing purposes: you might want this URL to be simply Https://demo.handsonconnect.org/knitting

2). You want to give a friendly URL in your newsletter that goes to a specific volunteer opportunity. Instead of https://ps9015.handsonconnect.org/opportunity/a0C3m00000gVb19EAC

you could now create a URL https://ps9015.handsonconnect.org/arts. that will go directly to that opportunity page.

Click here for an article showing you how to create friendly URLs (which we call URL redirects) in the CMS.

New Feature: Turn off Individual Signup (HOC3-10722)

It's always been possible to 'turn off teams' and make opportunity sign-up for individuals only. Now, its possible to 'turn off Individual Signup" as well, so that you could theoretically make an opportunity sign-up available only to Teams (and not to individuals).

Additionally, if you turn off both signup for teams and signup for individuals, you can now publish an opportunity that no one can sign up for! This makes it possible to post an opportunity that's strictly informational, with no sign-up option at all.

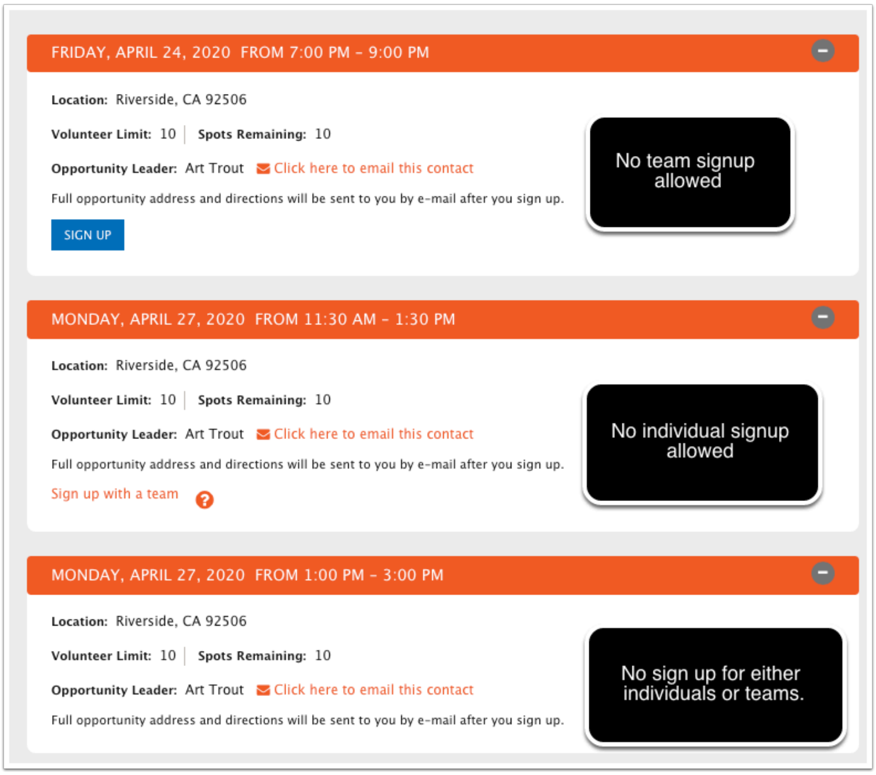
Turning off signup altogether may be confusing for users - as the occurrence will still appear, but with neither a signup or signup with teams link. If turning off all signups - it is recommended you make it clear in the opportunity description (or occurrence name/description) that it is not available for signup!

Using this new feature requires an administrative speedup.

1) You need to grant access to all HOC using profiles to Read and Edit the field "Turn off Individual Signup" This field is available for use in the Occurrence Object, Volunteer Opportunity Object, and Volunteer Event Object. Enable permissions for those profiles you wish to have access to this feature.

2) Add the new field to the page layout(s) you are using for Occurrences, and/or Volunteer Opportunity and/or Volunteer Event.

[See this article for information on how to do this:](#)

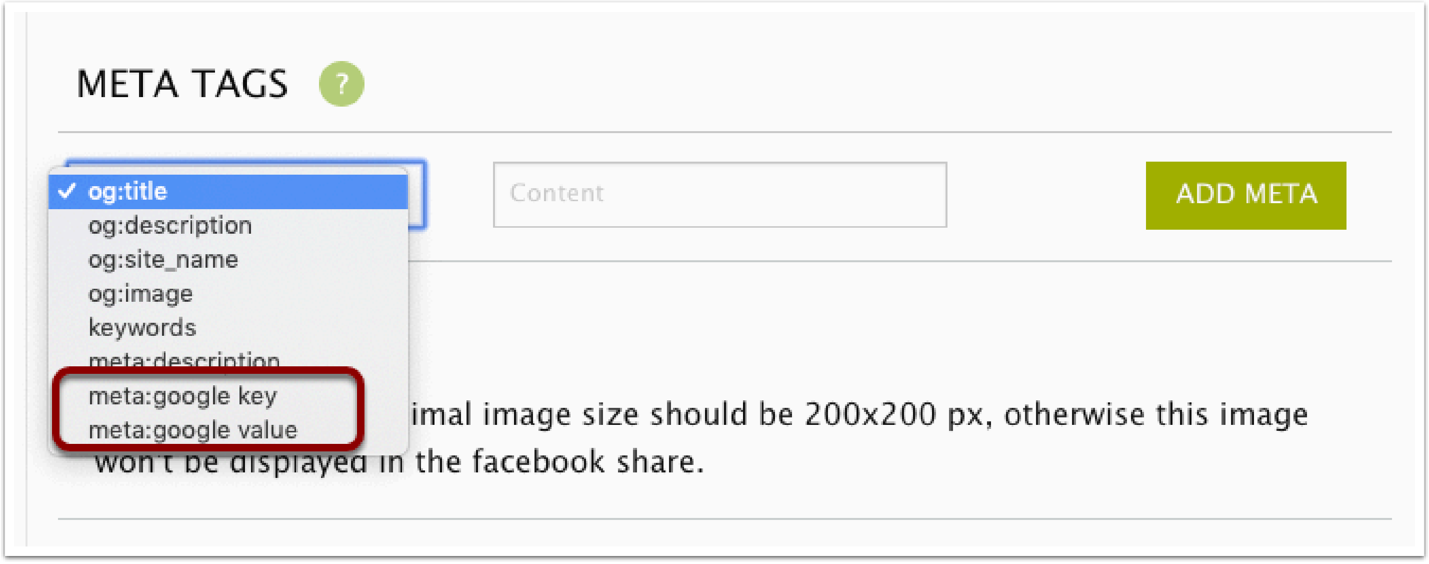


(Advanced) Ability to add Google Site Verification MetaTags (HOC3-11146)

For users who wish to add google site verification tags to their site, its now possible to do so.

In the CMS, go to AddOns - and select **Site Wide Settings.**

Here, along with previously available meta tags - you'll also be able to add a meta tag for a Google Key and a meta tag for the Google Value . Once added, these tags will appear as google expects to find them, in the header of your pages. You can add more than one custom meta tag as needed for your site.



HOC 3.0.9.4. Release (March 26, 2020)

This release features continued improvements to ADA compliance for websites, improvements to the performance of forms, and additional 'under the hood' improvements to HandsOn Connect's public site and sharing portal. Here's two small but welcome fixes / improvements you'll notice in this release.

Bug Fix: Some reports won't run in sharing portal for Volunteer Leaders (HOC3-11153)

A few months ago we made it possible to share certain types of reports with Volunteer Leaders in the sharing portal. A recently discovered bug indicated that some reports shared with Volunteer Leaders could not be run. This bug has been fixed.

As always, follow these guidelines when creating reports to share with either partners or volunteer leaders in the sharing portal.

Improvements to Team Sign up / Express Interest (HOC3-11093)

When a team captain signs up or expresses interest with a team, there are circumstances where not all team members will be signed up, because some team members did not meet certain requirements for that opportunity. The Success Page will now articulate, for each team member that wasn't connected, the reason the connection was not made. Additionally an alert that all team members were not signed up will be posted at the top of the Success Page:

Success!

Not all your team members were signed up for this opportunity. See bellow for more details

A notification of your team's interest in the opportunity has been sent to the appropriate volunteer leader / coordinator. They should be contacting you soon to confirm your team's participation and provide additional information about this opportunity including the address, driving directions, and any other necessary instructions.

Opportunity Details: Food bank activity with Skill ....

You have expressed interest in this opportunity for the following team members:
- Rafaelllll Britooooo

Members who were not expressed interest to this opportunity did not meet one or more of the restrictions on expressed interest for this opportunity:
- Adriana Rincon (Volunteer already signed up for this opportunity)
- Gissel 1 (Volunteer already signed up for this opportunity)
- tets tets (Does not meet maximum age (70) requirements)
- Adriana Brito (Volunteer already signed up for this opportunity)
- Karina Flores (Does not meet age requirements)
- Adriana 2 (Volunteer already signed up for this opportunity)
- Dainer Brito (Does not meet age requirements)
- Teams name (Volunteer already signed up for this opportunity)

Sign Up for another opportunity

New Feature - Prevent volunteer from signing up for overlapping volunteer opportunities (HOC3-10672)

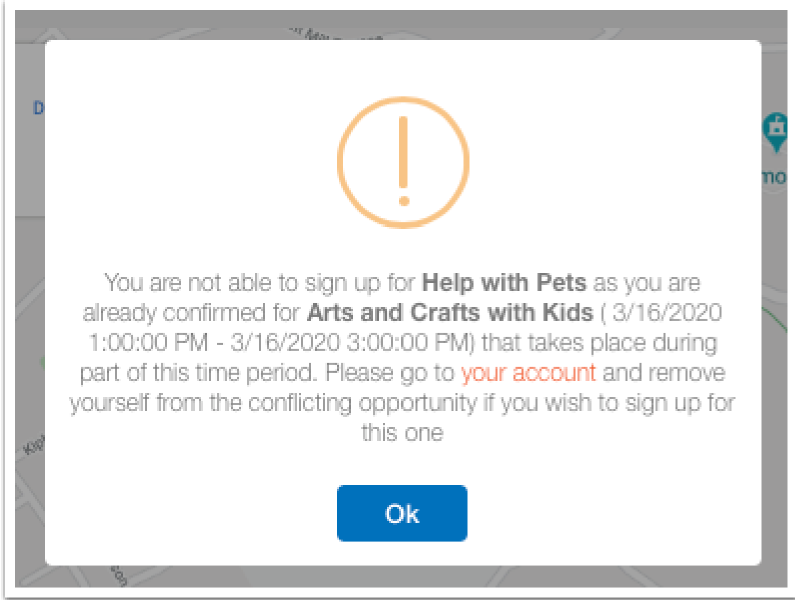
A long standing feature request for HandsOn Connect has been the ability for the system to prevent volunteers from signing up for two different opportunities that take place at the same time or overlap.

Mostly, volunteers keep track of their commitments and don't do this - but occasionally someone signs up to be at two different opportunities at the same time. Now, by default, HandsOn Connect will warn volunteers when they have a conflicting connection, and prevent them from signing up for a different volunteer opportunity that takes place during the same time period.

This feature will be activated for all HOC customers on April 2nd, 2020. If for any reason your business needs are such that you DO want volunteers do be able to continue to sign up for two different opportunities that overlap, please let us know at support@handsonconnect.org and we can deactivate this feature for you.

How conflicts between overlapping opportunities will now be handled

In this example, Valerie Volunteer has signed up for the opportunity "Arts and Crafts with Kids" for March 16 from 1 - 3 pm. Then, perhaps on another day, she comes back and wants to sign up for "Help with Pets" which takes place March 16 from 2- 4 pm. When she clicks on 'sign up' she gets the following message:



Now Valerie, is aware she has a conflict, and doesn't accidentally sign up for Help with Pets. If she'd prefer to however, to sign up for Help with Pets, she can click on the 'your account' link, remove herself from Arts and Crafts with Kids, and then return to Help with Pets and successfully sign up once the conflict is removed.

What about overlapping shifts of the same volunteer opportunity?

It's a fairly common practice for volunteer opportunities with multiple shifts on the same day to intentionally have a small overlap between one shift and the next.

For example: Event Registration shift 1 is March 15, 9:00 am - 12:00 pm, Registration shift 2 is March 15 11:30 am - 1:30 pm. Registration Shift 3 is March 15, 1:00 pm - 3:00 pm.

The reason for overlapping these shifts is to ensure that the registration table is never without volunteers, and so that the shift 1 volunteers can cross-train the shift 2 volunteers.

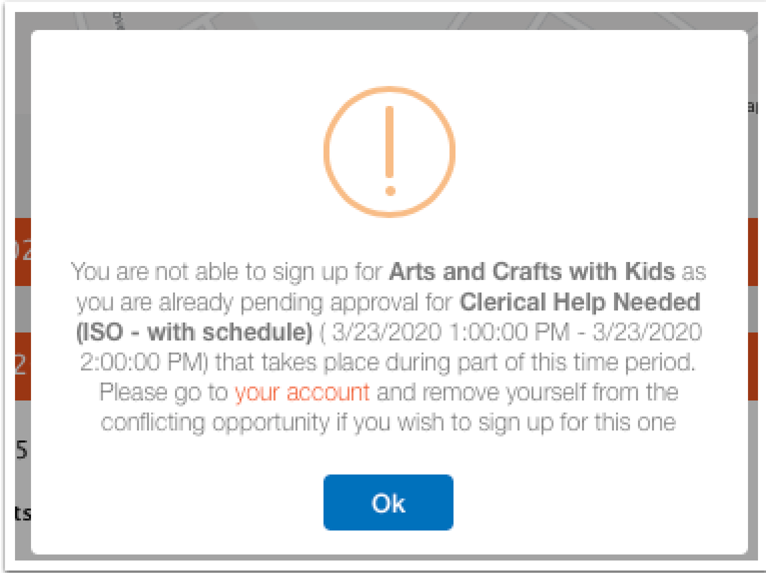
So, does this mean that a volunteer can't sign up for overlapping shifts of the **same** volunteer opportunity? No! A volunteer who wishes to work all three shifts (occurrences) of the same volunteer opportunity, will not be prevented from signing up for overlapping shifts. That way Valerie can sign up for all three shifts of the same volunteer opportunity, even when they are scheduled with overlaps. Now Valerie is able to work registration from 9:00 am - 3:00 pm.

Simply put: You are not permitted to sign up for **different volunteer opportunities** that overlap, but the system does allow a volunteer to sign up for overlapping shifts (if they exist) for the **same volunteer opportunity,** if the opportunity coordinator has chosen to have overlapping occurrences the same day!

What about individually scheduled opportunities?

The overlapping warning will be displayed if you have conflicting connections for ISO opportunities as well.   For example, Valerie Volunteer has expressed interest in "Clerical Help (ISO - with schedule)" for March 23 from 1:00 - 3:00. The connection is still in pending approval status, but she's indicated she'd like to volunteer at that time.

She now realizes she'd like to volunteer for Arts and Crafts with Kids from 1:00 - 3:00 on March 23rd.   She is alerted that she has an existing connection in pending approval status, for Clerical Help (ISO - with Schedule), and can't sign up for Arts and Crafts with Kids unless she removes her expression of intent to volunteer for Clerical Help first.

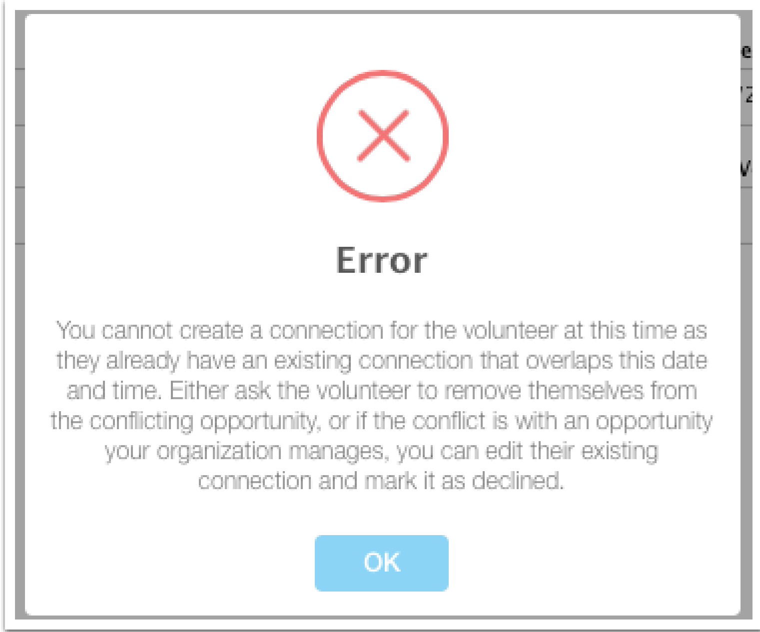


How does this affect administratively creating connections in the sharing portal?

Sharing Portal users are able to administratively create connections on behalf of volunteers. However, because they do not have access to information about connections made by volunteers who are volunteering with other organizations, they had been able to accidentally administratively schedule a connection for a volunteer that conflicts with a commitment they've made with another organization.

With this feature, partners will be alerted when a conflict exists, so that they don't accidentally double-schedule a volunteer.

In this example, Troutco goes to administratively schedule Valerie for Arts and Crafts with Kids, unaware that she has already signed up for Clerical Help Needed (ISO - with schedule) with another partner organization. They receive this alert preventing them from creating the overlapping connection:



If the conflict is with an opportunity the partner is managing - they can administratively remove valerie from the conflicting opportunity if they choose to.   However, if the conflict is with another organization's opportunity, then they will have to email Valerie and ask her to remove herself from the conflicting opportunity.

What happens in Salesforce?

In Salesforce, users have access to view and manage all of Valerie's connections. So, if they choose to administratively create a connection for Valerie, they can look at her upcoming connections and see if a conflict exists. As a Salesforce user, they have the ability to create overlapping connections if they choose to do so. So in Salesforce, a user is not prevented from creating an overlapping connection if they decide to do so.

If a volunteer or a partner wants (for whatever reason) to allow a volunteer to sign up to be at two different opportunities that overlap -- a Salesforce user can create an overlapping connection on behalf of a volunteer or a partner. Generally this isn't a good idea, but there may be circumstances in which you do want to allow a volunteer to be signed up for overlapping volunteer opportunities.

What if we prefer to allow signing up for overlapping occurrences?

This much requested feature will be be activated for all HOC customers on April 2nd. However, if your business practices are such where you DO want to allow volunteers to create connections for one or more volunteer opportunities that overlap time wise, then open a support ticket and we can disable this feature for your organization.

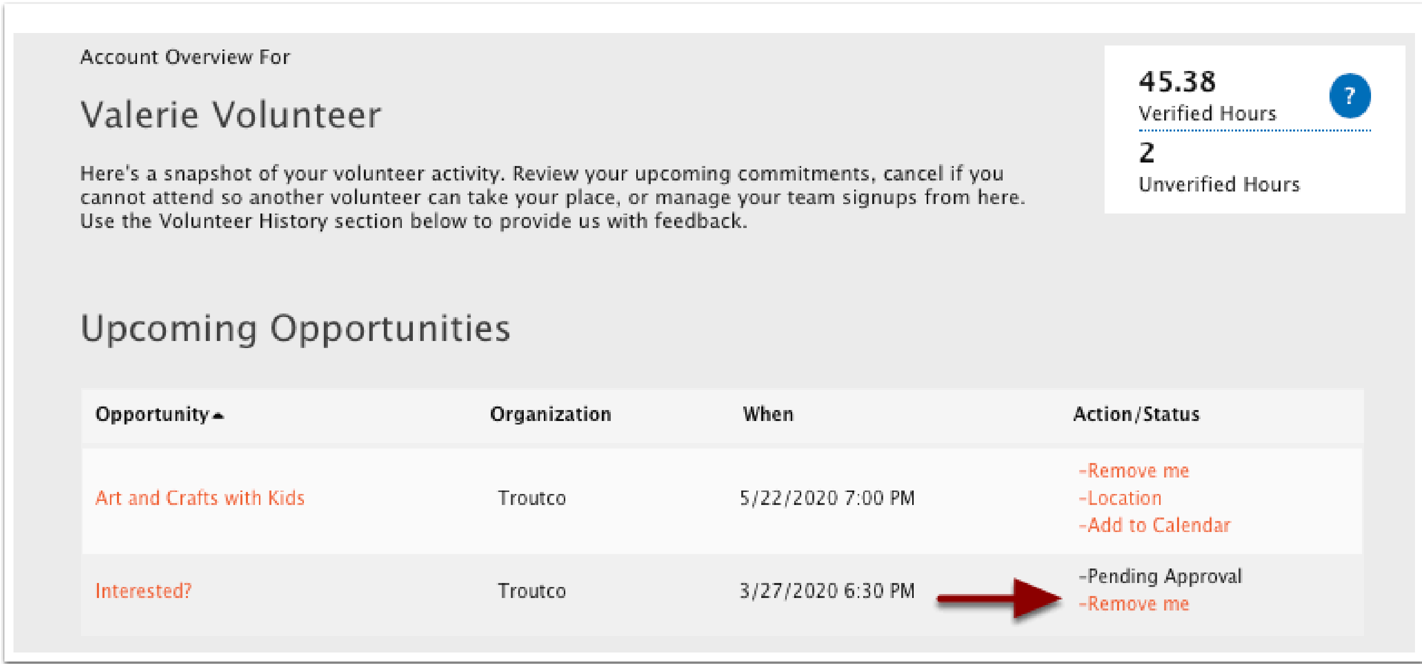
HOC 3.0.9.3. Release (March 13, 2020)

This week's release includes internal improvements and a new, much requested improvement to the public site - allowing volunteers to remove themselves from express interest opportunities.

Volunteers now able to remove themselves (cancel) from Express Interest Opportunities (HOC3-11022)

On the public site, on the account overview page, volunteers have always been able to cancel from any confirmed connection. by clicking on the 'remove me' link. However, if they had expressed interest and the connection was still in pending status, they had no way to indicate they were no longer interested and remove themselves.

With this release, volunteers will be able to remove themselves from any connection they've made, whether its been confirmed or is still in pending status. This allows better communication between volunteers and opportunity coordinators when a volunteer's availability or interest changes.



Bug fix: Feedback link doesn't always work in account overview (HOC3-10925)

In some cases, the feedback link in volunteer overview may not have opened the feedback pop-up. The circumstances under which this might happen have been identified and corrected.

HOC 3.0.9.2.X Release (Feb 27, 2020)

This release has been focused on internal improvements, and addressed a few bugs that occurred in certain rare conditions. Most of you haven't encountered the mini-bugs that were fixed :-). There have also been improvements in the performance of forms and listview blocks. Here's a couple of things worth mentioning in this release.

Sharing Portal: Ability to remove defaults for Minimum Age and Minimum Age with Adults when creating Volunteer Opportunities (HOC3-9439)

In your sharing portal, when your site was configured we asked you what you wanted the default value to be for minimum age and minimum age with adult (if visible) when partners are creating volunteer opportunities. Of course, partners could overwrite those defaults whenever they desired. Some customers have asked if the defaults could be removed, because their partners do not update the values and instead use the defaults without realizing them.

It's now possible, by making a request to support, for us to have NO default age set for these fields. In that case, partners must fill in the age manually, as no default will be shown. If you wish to have the default updated or removed entirely for one or both of these fields, please open a support ticket.

Flex Model Fix: Use default contact record type when creating team contacts (HOC3-10770)

For users who have HOC set up in Flex model and are using custom contact record types as defaults, the contact record type you've set as a default for newly registered volunteers will now also be applied as the record type when a team captain creates team members on the public site.

HOC 3.0.9.1 Release (Feb 13, 2020)

Happy Valentine's Day. This release has a number of internal improvements, and features some minor bug fixes and some improvements to forms. Here's the highlights.

Improvement to Forms (HOC3-7801)

1. When using a picklist where auto suggest is turned on, the help text was overlapped by the field itself and this made the help text difficult to read. This has been corrected.

2. (For advanced users only)

In the advanced section of forms, there are now options to set required URL parameters and a message to display (instead of the form) if the form is submitted without those required parameters. Here's the use case:

When a form has "Update Record" turned on you can use the same form to edit a record or create a new record. If the URL parameter "recid" exists, then the form assumes you are editing a record, if it does not, then it assumes you are creating a record. In some cases, you want to only allow edits, hence, you want to be able to say if the recid URL parameter does not exist, then do not display the form and instead show a custom message.

A very common use case is when you use a URL parameter(s) to pass a value to a hidden field(s). In some cases, that field cannot be empty because the value is required to edit or create the record.

Bug Fix: Wrong organization name sent in password reset emails (HOC3-10568)

In some cases, the wrong organization name (or a variation on the organization name) was populated in emails sent by .net, such as the password reset email. This has been corrected.

Release Notes January/February 2020

A few new features/improvements and minor bug fixes have been included to the HOC Managed package in Salesforce. Here's what's notable:

Check-In Kiosk Time Clock Improvement. New field "Kiosk Hours Served" (HOCAVV-1265) (Administrator Speedup needed if you wish to use it.)

In a previous release two new fields were added to the connection object for Check-In Kiosk users that allowed you to know the exact time someone checked in via the kiosk, and, if they checked out, the exact time they checked out. (These fields are called "Check-In" and "Check-Out"

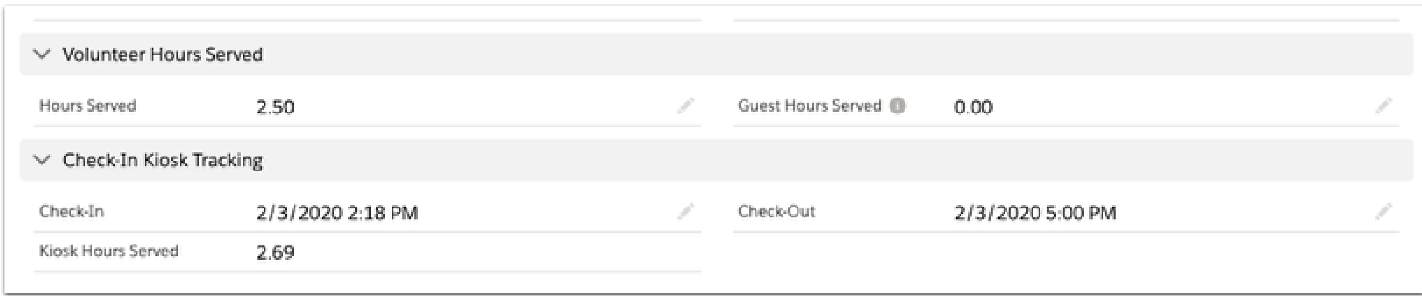
We've now added another new field "Kiosk Hours Served". (Kiosk_Hours_Served_c which is a formula field that will calculate the hours served based on the difference between the time they've checked in via the kiosk, and the time they check out. (If they don't check-out, the connection end time is used instead).

If you wish to credit the volunteer with their actual hours as determined by the time clock (as opposed to the hours calculated based on the connection start time and end time, you can use the field "Kiosk Hours Served" in your reports as it reflects their total time from arrival to check-out for each connection.

To add these fields to the connection layout do the following:

1) Update System Administrator and any other profiles to have read access to the fields "Check-In" , "Check-Out" and "Kiosk Hours Served".   (This isn't necessary if your system admin users already have the permission set "HOC System Administrator" assigned to them.

2) Add these three new fields to your connection page layout. (Here's a suggested placement:)



For reporting purposes, update any custom reports you've created for connections and add these new fields to the report type, so that you can add "Kiosk Hours Served" to your reports.

Prevent automated emails from being sent for Volunteer Opportunities in Admin Status (HOCAVV-1278)

Certain automated emails sent to connections via apex triggers (instead of workflows) were sending emails to volunteers even if the Opportunity or Occurrence was in status "Admin". This has been fixed.

For Connections to Volunteer Opportunities or Occurrences that are in admin status, the expected (and now fixed) behavior, is that no email notifications are sent to the connected volunteer.

HOC 3.0.9.0 Releases (Jan 30, 2020)

This release contains a number of under the hood improvements to HOC and groundwork for future functionality. It also contains additional improvements to accessibility for users using assisted reading devices. Below are the most visible improvements in this release, including a major new feature for the Check-in Kiosk.

Check-In Kiosk (beta) - Ability to get additional information during check-in or check-out (HOC3-10325)

For users of the check-in kiosk, its now possible to add a form that appears during checking in or checking out (or both), to get additional information from the volunteer which can be updated in either the connection record or the contact record.

See this article for details on how to create a kiosk form and how to request having your form added to your check-in kiosk.

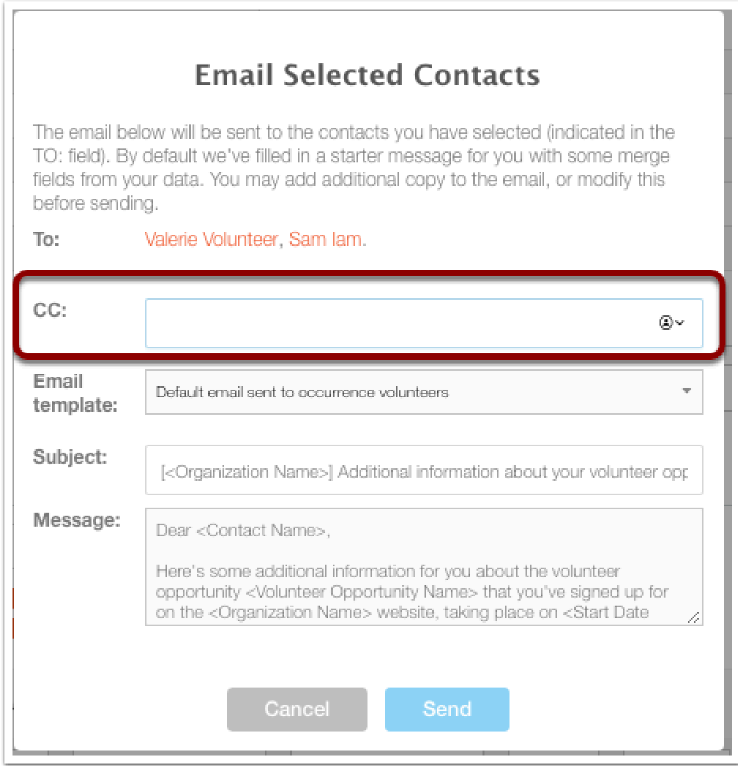
Exported Data from forms does not appear in expected order (HOC3-5463)

When creating a form, and not mapping the form data to salesforce - users can get the form data by exporting a report from the CMS.   The exported data in the .csv file however appears in the order the fields were created in the form, and not in the order they actually are presented in the form.

This has been corrected, and the .csv file will now present the exported data in the order the questions are presented in the form itself.

Ability to add cc to emails sent from sharing portal (HOC3-9831)

Here's a much requested new feature for the sharing portal. When sending emails to selected connections in the sharing portal, it's now possible to add a cc email address. This makes it possibly for an Opportunity Coordinator to get a copy of the email being sent out to volunteers.



You can add more than one cc by adding a comma "," between email addresses.

Also possible now is for a 'global cc email' to be sent so that every email sent via the sharing portal can be cc'd to a single address. This may be useful if you want your system administrator or program manager (for example), to automatically be cc'd on all emails sent from the sharing portal.

To request a global cc email address to be added to your sharing portal configuration, please open a support ticket and make the request.

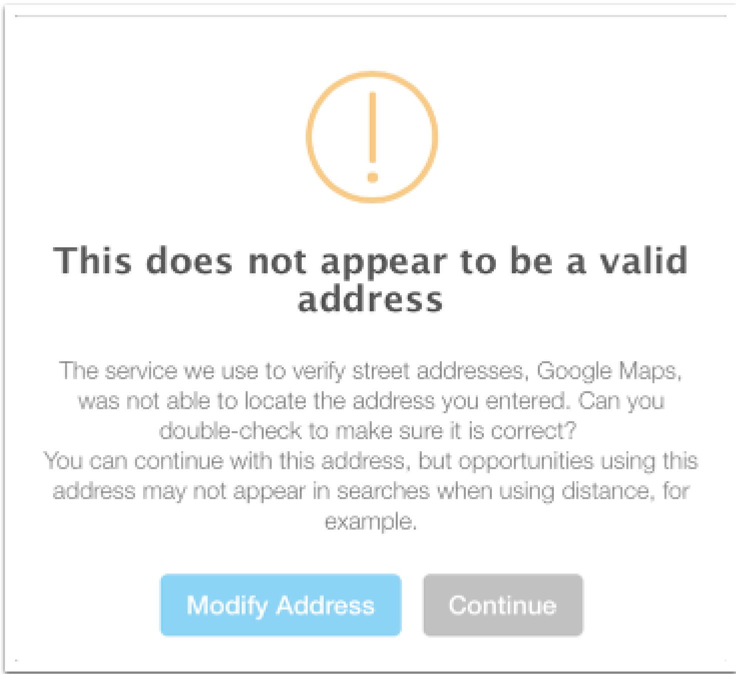
HOC 3.0.8.20 Release (Jan 16, 2020)

This release features a number of internal improvements, squelches some rarely occurring bugs, and lays groundwork for future functionality.Improvements were also made to meet the Web Content Accessibility Guidelines (WCAG), so that HOC public sites are more accessible to people with disabilities.

This release also features a significant improvement to creating locations via the sharing portal.   Here are the highlights of this release.

Address Verification for locations in Sharing Portal (HOC3-120483)

When creating or editing a location in the sharing portal, the entered address will be checked against the Google Maps database to ensure that the address is a valid one. A variety of messages will appear if either the address doesn't exist in Google or there are alternate suggestions for a more accurate address.

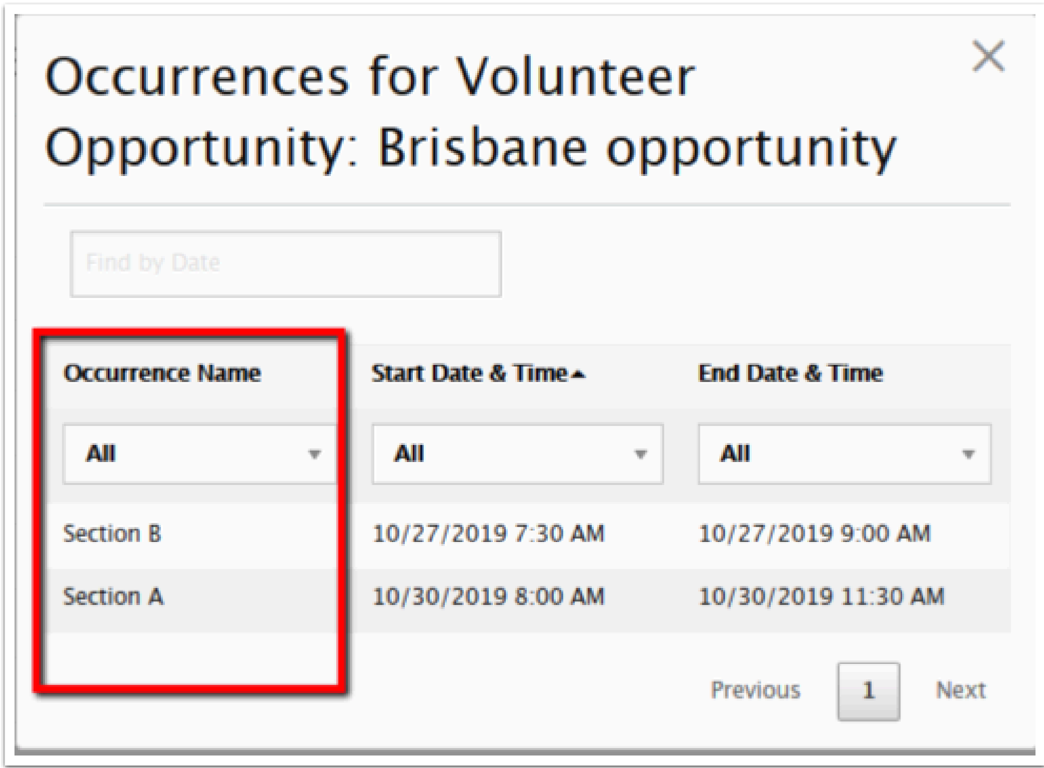


Kiosk Bug Fix: Registration Type maintained (HOC3-10464)

A somewhat rare bug was found wherein if you created an opportunity with registration type = express interest, and created multiple occurrences individually (not recurrences), that when submitted, the registration type would rever to sign up.. This has been fixed.

Sharing Portal: Display Occurrence Names when adding connections (HOC3-10481)

For sites with sharing portals that have the optional 'occurrence name" feature turned on, creating connections administratively will be easier, as when adding occurrence info to a connection, in addition to the start time and end time of connections, the occurrence name will be visible as well.



Kiosk: Disable Late Checkin functionality not working as expected (HOC3-10530)

A bug was found that affected the performance of check-in kiosks that were activated with the disable late check-in functionality enabled. This feature, when used, now will disable late check-ins by the number of minutes indicated in the activation module..

Release Notes 2019

HOC 3.0.8.19 Release, (Dec 30, 2019)

As we wrap up the decade we have one final release with a few year-end treats for you!

A friendly greeting appears when you are logged in (HOC3-2231)

When a user logs into the public site, they now see they are logged in by way of a friendly 'hello' with their name :-)

Check-in Kiosk Activation Screen Customization (HOC3-10266)

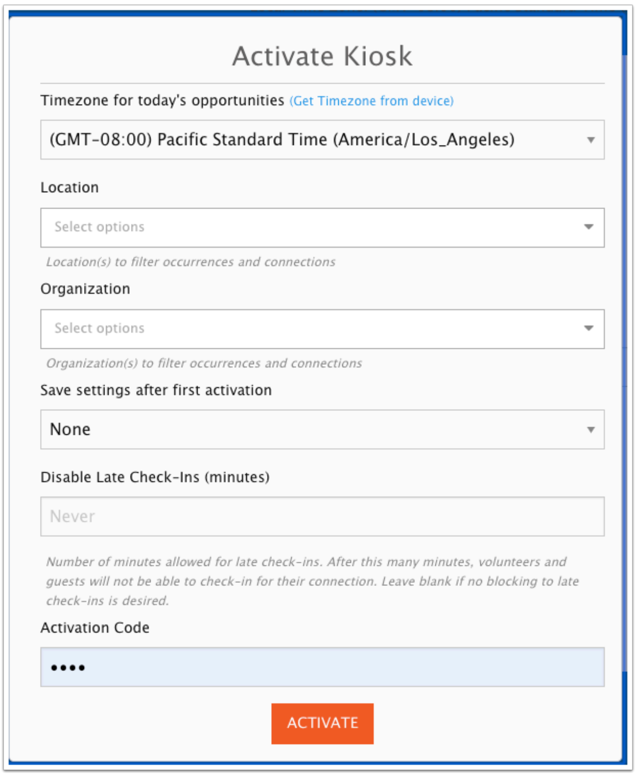
A number of options are presented in the activate Kiosk screen, which gives a user a number of choices to filter by location, organization, and to decide whether to Save Settings after activating the kiosk, and whether to disable late check-ins.

Some users have found that offering all these 'options' can be confusing for their partners who are activating the kiosk. In some cases, the options available are ones that your organization may never choose to use (such as the recent "Disable late check-ins".

It is now possible, by request to the support team, to request that any of the following options be disabled from the activate kiosk screen for your organization.

- Location
- Organization
- Save Settings after first activation
- Disable Late Check-Ins (minutes)

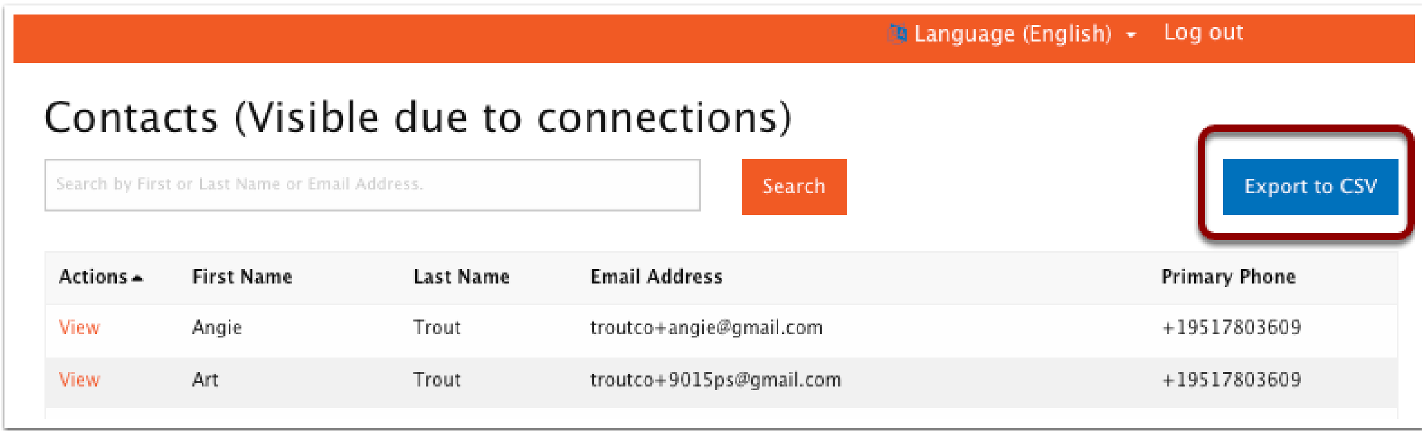
Just open a support ticket and make the subject "Kiosk update", and indicate which activation options you want disabled from your kiosk!



Sharing Portal: Ability to export Contact List to .csv (HOC3-10275)

Sharing portal users now have an easy way to download contact information (without having to resort to a report).

On the Contacts (Visible due to Connections) page, there is now an 'export to CSV" button that will allow you to download the contact list with their email address and primary phone.



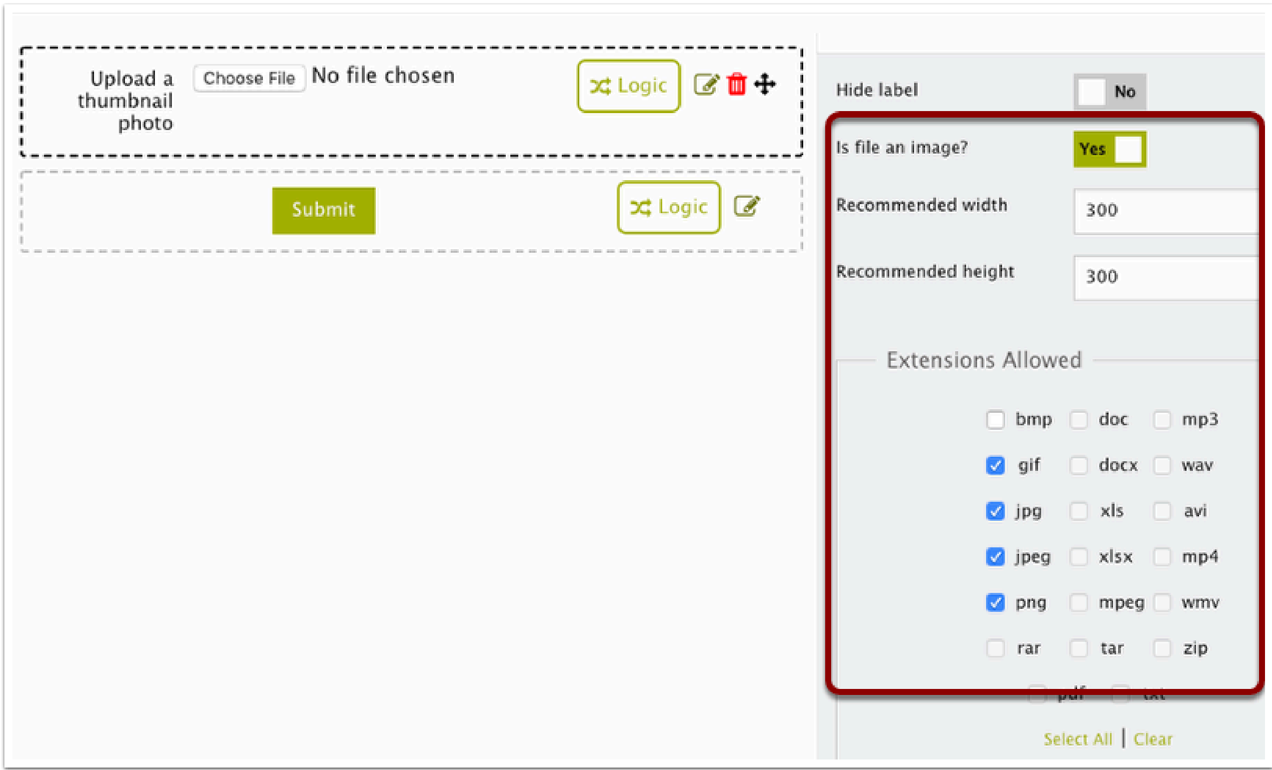
Forms: Ability to set file uploads as an image (HOC3-9402)

Forms have had the ability to allow users to upload files, which are then uploaded to .net and, if saved to a URL field in Salesforce, you'll be able to click on the URL and view or download the associated file.

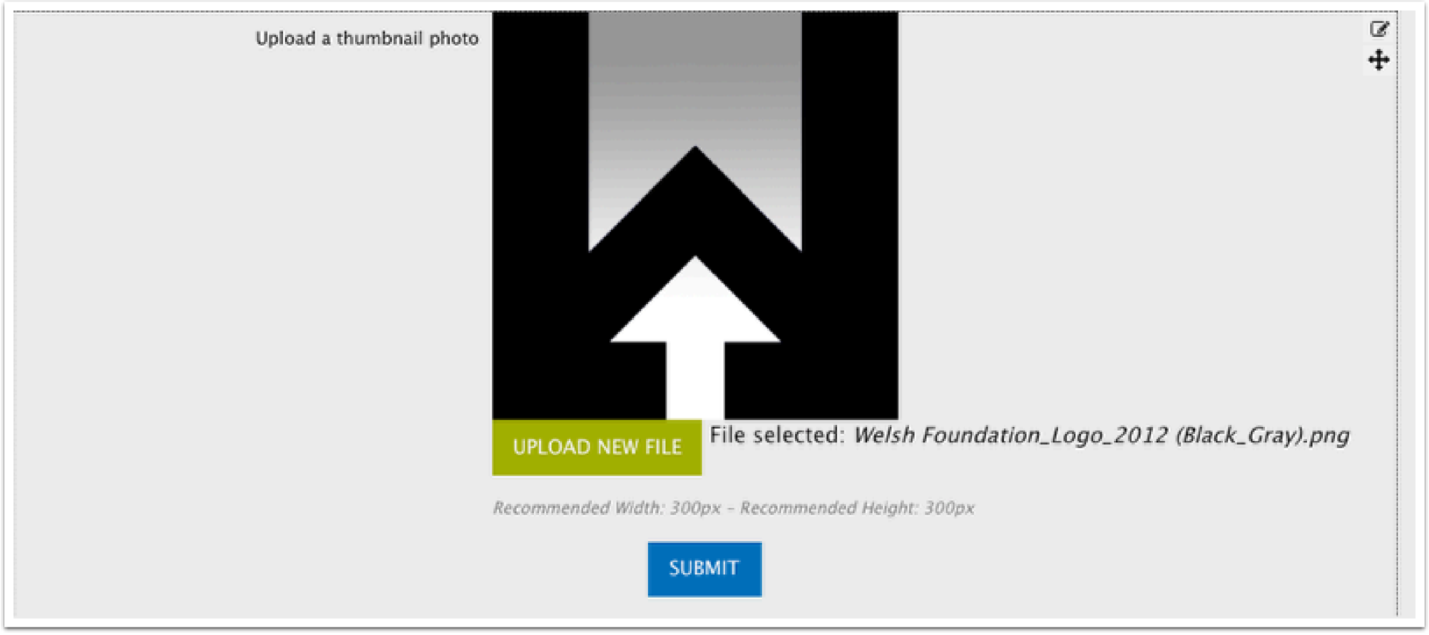
In an improvement, its now possible to specify that the image to be uploaded is an image file, and, the user, after selecting the file, will be able to see the image in the form before submitting it.

A new option in the File Upload component, allows you to specify, "Is file an image" -- you can also indicate the recommended height and width to the user (though the limits are not enforced or validated).   You can also set which file extensions are allowed for images (typically .gif .jpg. .jpeg. .png.

This is set in the form as follows:



When the form is displayed, and the user selects an image, they'll be able to see the displayed image before submitting the form:


Upload a thumbnail photo
UPLOAD NEW FILE
File selected: Welsh Foundation_Logo_2012 (Black_Gray).png
Recommended Width: 300px - Recommended Height: 300px
SUBMIT

Release Notes, December 2019

The HOC December release features updates that have been made to the HOC Package in Salesforce. It is largely small, under the hood bug fixes to address rarely seen bugs, and improvements made to support SF organizations with users in multiple time zones.

Bug Fix: Grouped Occurrences table not sorting correctly in SF (HOCAVV-1263)

For users of Grouped Occurrences: The table that shows the Occurrences that can be grouped was not sorting correctly when sorted by date. This has been fixed.

Lightning Bug: Run Answer Report Action not working in Lightning

Lightning Users who are still using the legacy "Volunteer Opportunity Questions" "Questions" and "Answers" (instead of the more robust Advanced Registration System), have reported that the "Run Answer Report" action button in the occurrence record, no longer produces the expected Answer Report. The report opens - but the answers for that occurrence are not shown and the result is "0 records"

This is due to a change in the way Lightning handles reports.

If you are using this feature, there's a very simple and short administrative speedup that needs to be done to the report to fix the problem:

- Go to the Report "Questions & Answers"
- Click Edit
- Click on the Filter Occurrence ID ewquals ""
- Uncheck the box that says "Locked"
- Resave the report

This video shows you how to go through these steps:

https://www.screencast.com/t/VGHQr5VDaxpi

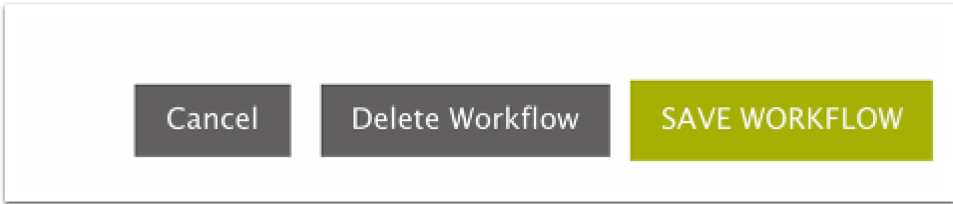
HOC 3.0.8.18 Release (Dec 12, 2019)

This release features a number of bug fixes, improvements in error handling, and some under the hood improvements. Also fixed are issues in the form builder related to using picklists, and selecting default values. Here's the highlights in this week's release.

ARS - ability to delete Opportunity Workflows (HOC3-3522)

ARS workflows for Opportunity Signup can begin to pile up - and maybe you have one that you are no longer using, or didn't work out. Now, if you want to permanently get rid of an ARS workflow, you can delete it. A new button at the bottom of the workflow page for Opportunity Signup workflows now includes a 'delete workflow' button.

Tip: Before deleting a workflow, make sure its not being used by any of your active Volunteer Opportunities or Occurrences :-)



Check-In Kiosk Improvement - Show existing Connections first, before guest check-in opportunities (HOC3-5523)

If you have guests enabled in the check-in kiosk, a volunteer checking in has to indicate if they are checking in for a connection they have already made, or select one of the other occurrences where they could check-in as a guest.

In an improvement to the interface, upon entering one's email address the kiosk will initially present a screen showing any currently existing connections the volunteer has for the day. (Rather than it being mixed in with all the day's occurrences that they could check in for as a 'guest').

If they opt not to check-in for their existing connections, they'll have the option to see all occurrences for that day that they could checkin for as a guest.

This will speed up the check-in process as a user will see their existing connections first (the ones they are most likely checking in for) without having to scroll through a list of all available occurrences that day).

Here's a short video showing this in action: https://www.screencast.com/t/pl5SWZJxW

Check-in Kiosk Bug Fix - prevent team members from accidentally checking out. (HOC3-8807)

Here's the scenario. You have teams enabled and check-in / check-out enabled. A team captain checks in the members of his team. There connections are updated as attended. One of the team members then types in their email address, unaware that they have already been checked-in... as a result, they are checked out :-(

Now, team members will be warned if they are already checked in, and asked if they wish to be checked out. This will prevent accidental check-outs for team members.

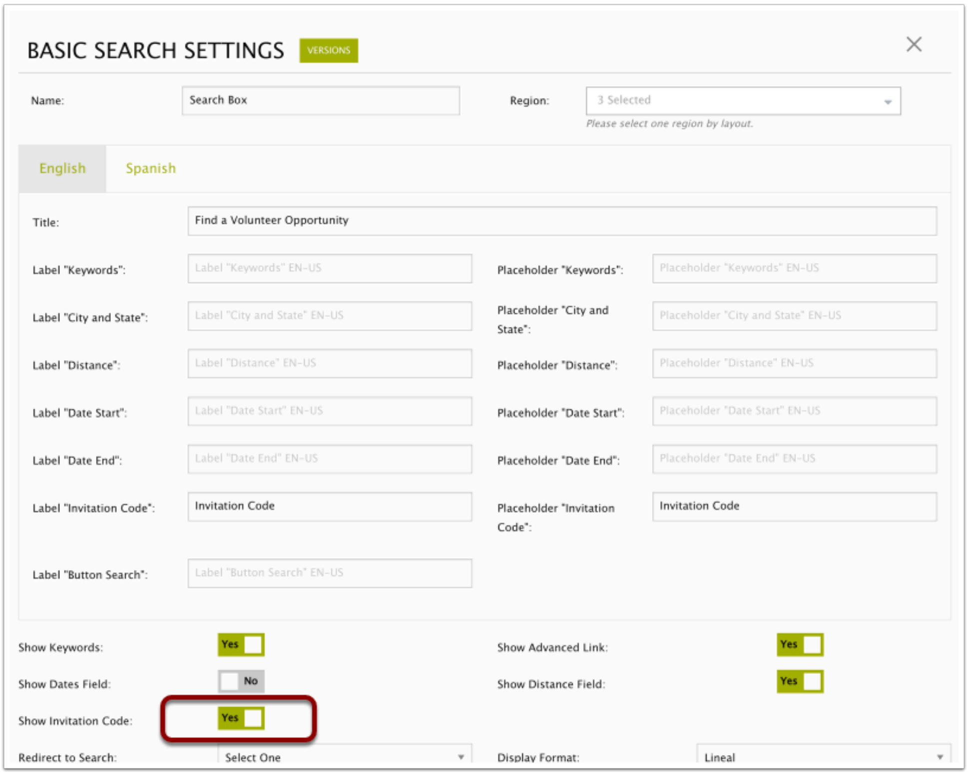
HOC 3.0.8.17 Release (Nov 28, 2019)

Happy Holidays. This week's release includes more under the hood improvements to make way for future functionality. It also includes improvements in the handling of data for International customers, improvements for sites with users in multiple time zones, and improvements in the handling of errors on public sites.

Basic Search Block - Ability to Display Invitation Code (HOC3-10217)

The Basic Search Block (generally displayed on the Home Page), is gaining some additional options. New for this release is the ability to show the "Invitation Code" field, for HOC sites that make heavy use of 'private' opportunities that can only be accessed via the Invitation Code.

Check out the basic search block customization options for this, and other customizations that are possible (editing placeholder text, and renaming the labels used in the search fields.



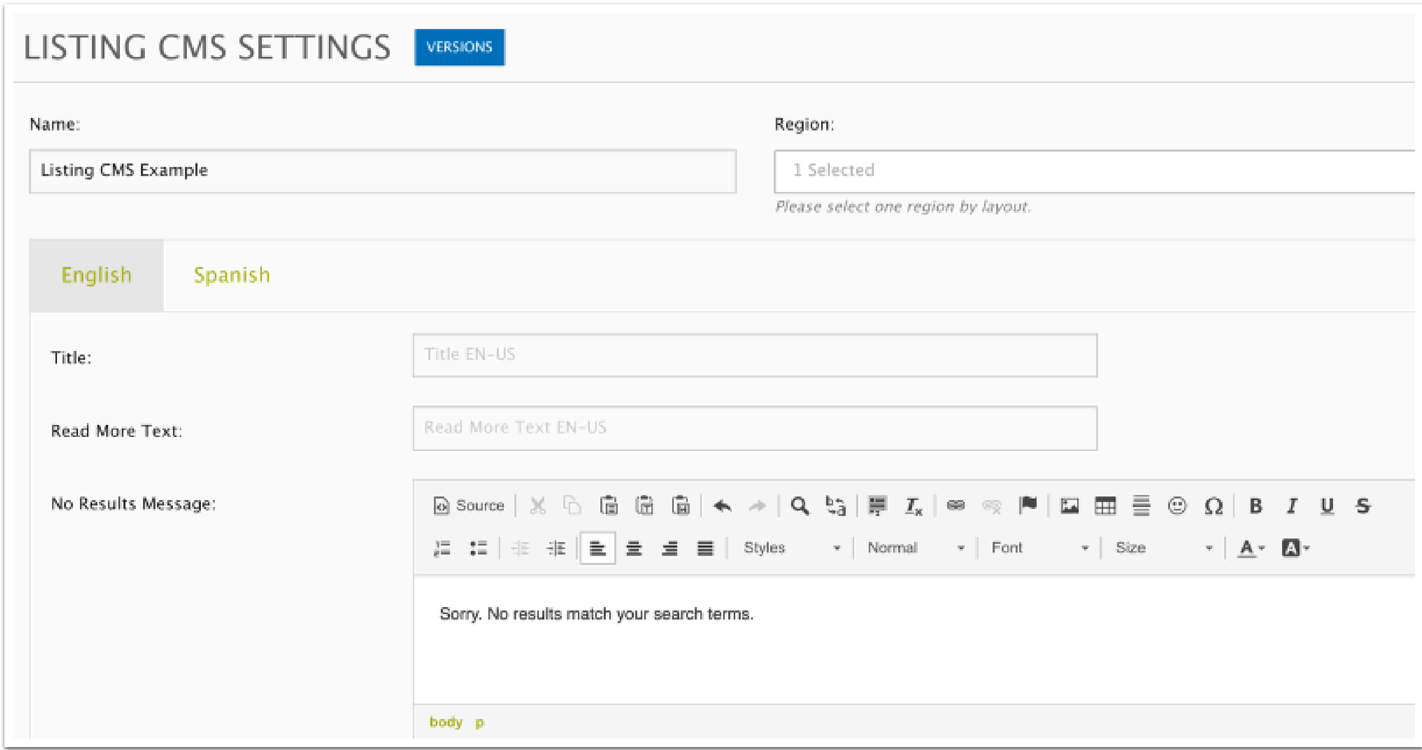
ARS/ Forms - Currency Fields can now have max and min value validations (HOC3-8212)

When using a currency field in a form, you can now set the minimum and maximum values that can be entered into the field.

Listing Block: Ability to set text when no results are displayed (HOC3-10030)

When using a listing block, users have the ability to 'search' amongst the listings. By default, the message that appears when no search results are available is "There are no items to display".

Now, the CMS for the Listing block makes it possible for you to customize the 'no results' message that appears:



Registration Cutoff Hours - zero is now a valid value (HOC3-10196)

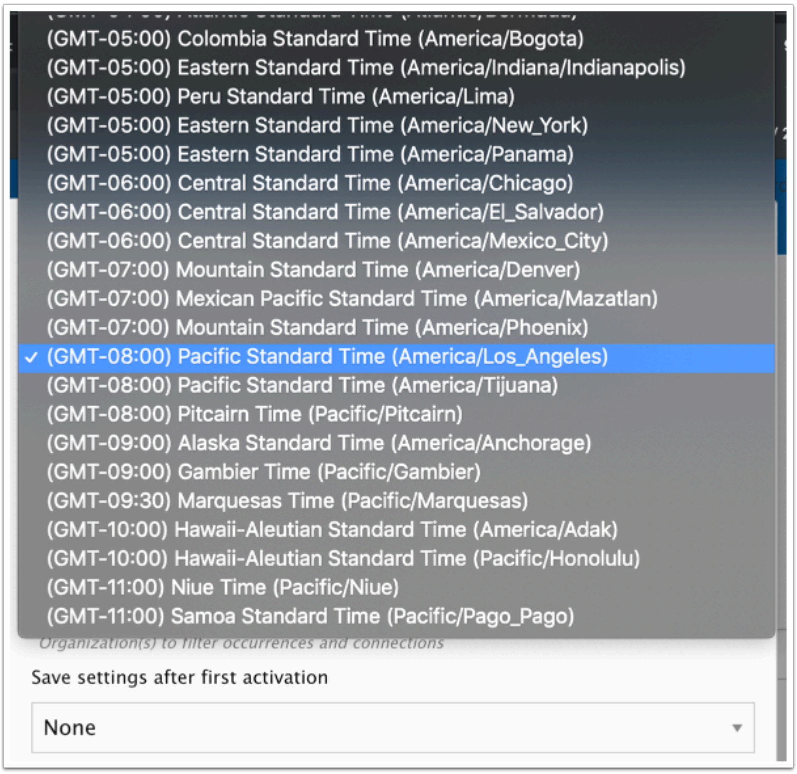
The field, Registration cutoff Hours, if displayed in the sharing portal when creating a volunteer opportunity, would not permit a value of 0. By default, registration cutoff hours was always automatically assigned a value of 1.

This has been corrected, it is now possible to set Registration cutoff hours to 0.

> Note: While this value is now permitted, it does mean that printing a check-in sheet may not include all individuals who have signed up - as people will be able to sign up to participate right up to the start time of the volunteer opportunity. For this reason, we still recommend setting the registration cutoff to their default value of 1 so that registration is cutoff 1 hour before the opportunity starts.
>
> Note: Registration cutoff hours must be a whole number. It is not possible to set a cutoff to .5 of an hour.

Kiosk Time Zone options improved (HOC3- 10244)

When Activating the Check-In Kiosk, you have the option to select the Time Zone you are using the kiosk in. The list of time zones has been updated to match the time-zones as they are listed in Salesforce. This should make it easier to find the correct time zone for organizations using the kiosk across multiple time zones.



Kiosk - users not asked to check out (HOC3-10277)

We had received reports of cases where users of check-in kiosk, with check-in / check-out enabled, were not being asked to check-out if they used the kiosk again after checking in. Improvements have been made so that a checked-in user always has the option to check out.

If you experience any scenarios in which a checked in user does not have the opportunity to check-out, please open a support ticket. We want to make sure the check-out option is always displayed when appropriate. Hopefully this recent fix picked up the scenario in which this wasn't happening.

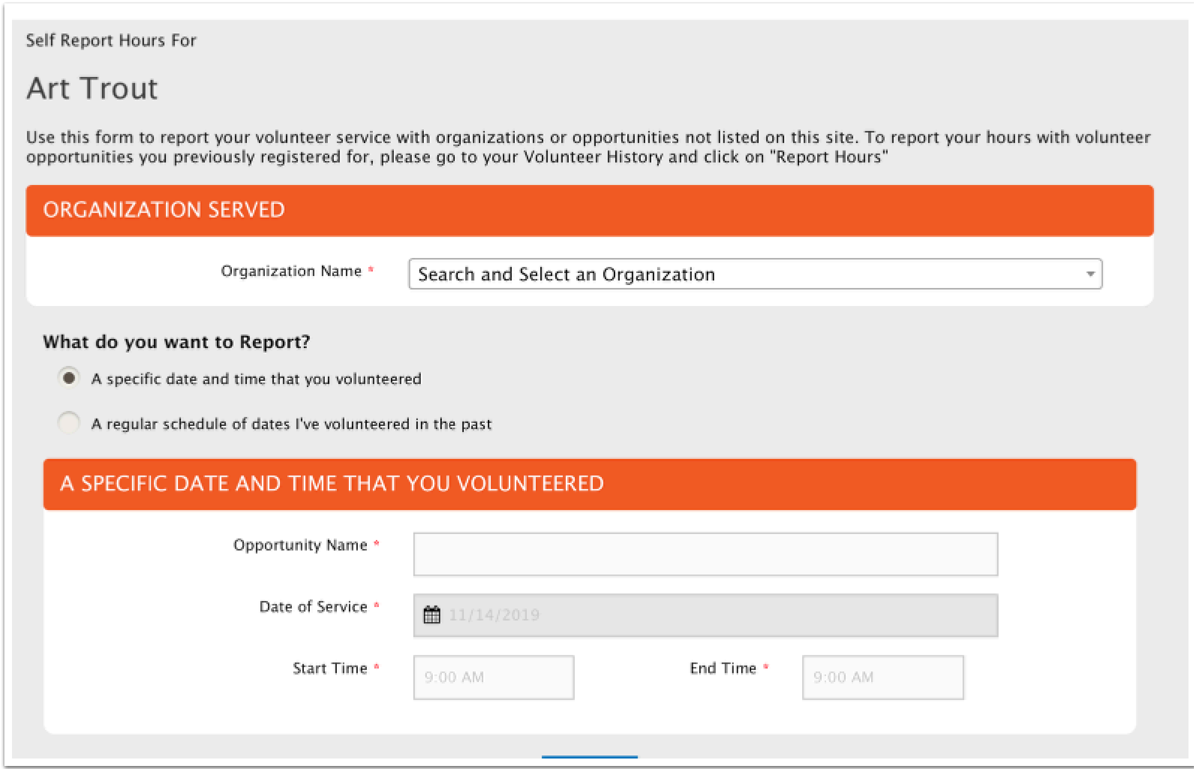
HOC 3.0.8.16 Release (Nov 14, 2019)

This release includes behind the scenes improvements to protect HOC Public Sites from malicious attacks and improve security, improvements in the synching of data between HOC forms and Salesforce,

More Granular Control over Self-Reporting methods (HOC3-9967)

HandsOn Connect has always had two ways Volunteers could self-report hours: "Self-Report Hours" and "Record Hours" both of which were referred to as 'self-reporting"

1. **Self-Report Hours:** The Self-Reporting navigation item, that allows volunteers to enter hours served for Opportunities with partners or outside organizations that weren't posted, managed opportunities.


Self Report Hours For

Art Trout

Use this form to report your volunteer service with organizations or opportunities not listed on this site. To report your hours with volunteer opportunities you previously registered for, please go to your Volunteer History and click on "Report Hours"

ORGANIZATION SERVED

Organization Name * Search and Select an Organization

What do you want to Report?

A specific date and time that you volunteered

A regular schedule of dates I've volunteered in the past

A SPECIFIC DATE AND TIME THAT YOU VOLUNTEERED

Opportunity Name *

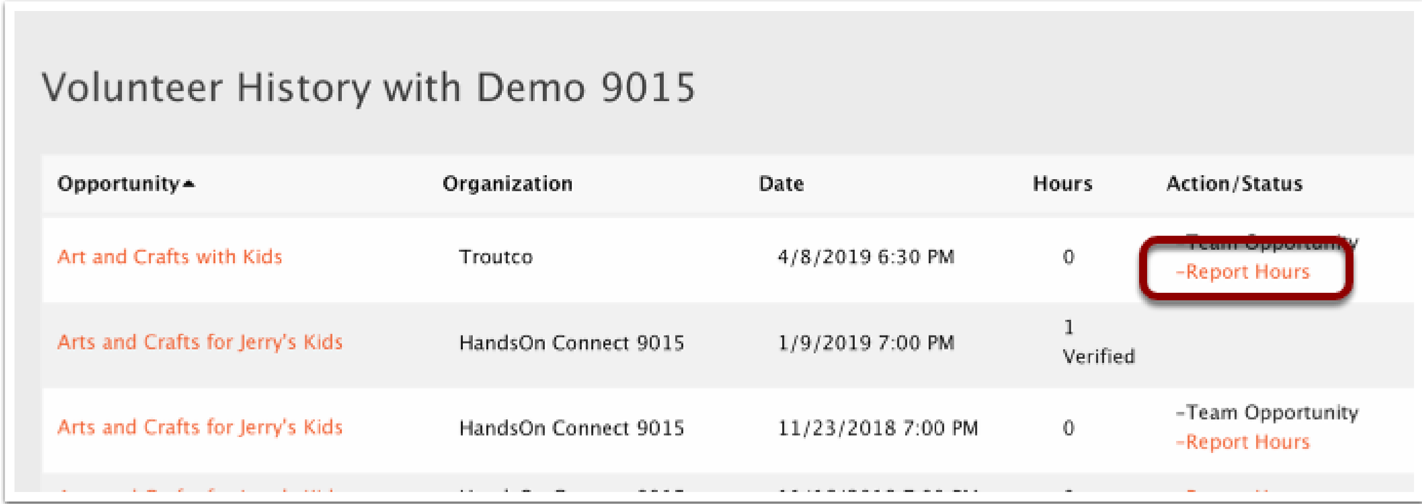
Date of Service * 11/14/2019

Start Time * 9:00 AM

End Time * 9:00 AM

Note: "Self-Reporting" via this navigation item has multiple configurations available. Please see this article for the possible options available for 'self-reporting".
https://training.handsonconnect.org/m/3428/l/1001662-advanced-self-reporting-configuration-options

2. **Report Hours:** On the Account Overview page, using the "Report Hours" link to self-report hours that had not been verified yet by the Opportunity Supervisor for existing opportunities.



While it's been possible for HOC to be configured with Self-Reporting either 'On" or "Off" its not been possible to have only one or the other of these types of Self-Reporting. You either enabled both or neither.

Now, with this release, its possible for the support staff to configure your instance of HOC with one or the other, or both or none of these 'self reporting' options.

If you wish to have one available, but not the other, please open a support ticket.

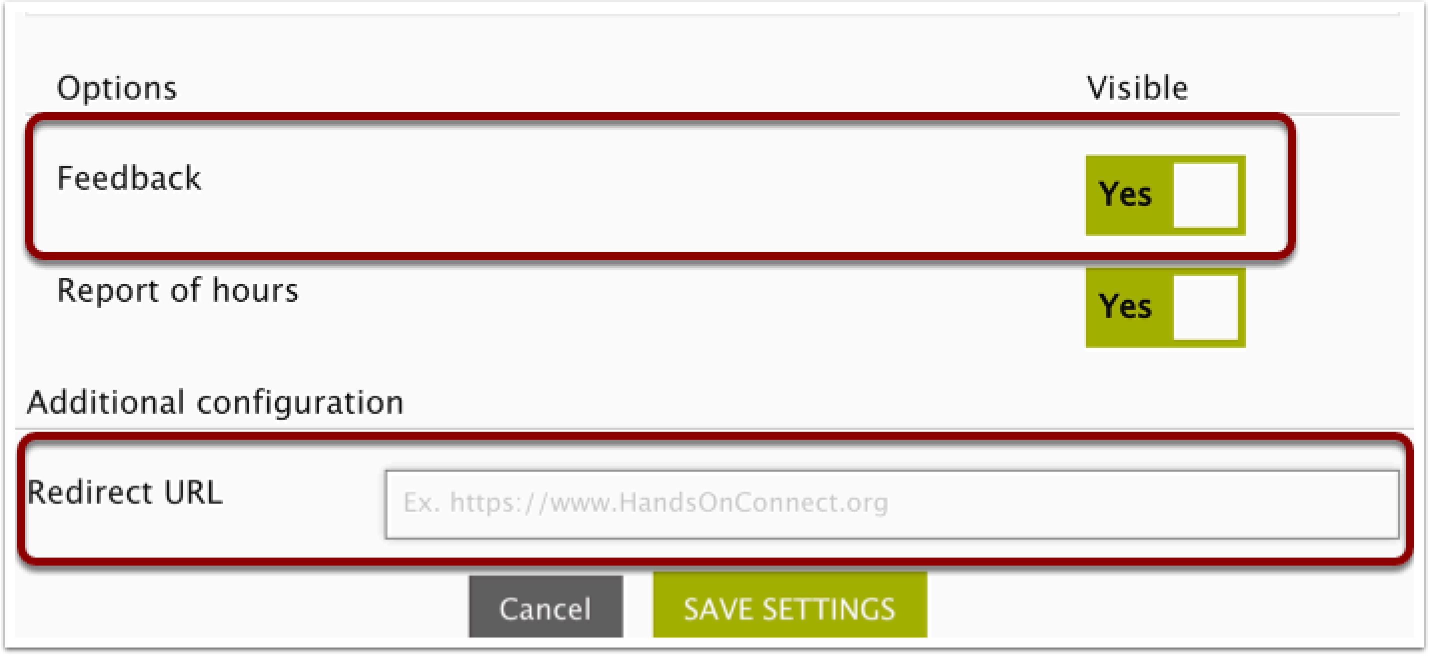
Going forward we'll refer to method 1 as "Self-Reporting" and method 2 as "Report Hours". So if you wish to request please turn off "Report Hours" but leave "Self-Reporting" active -- we can leave one on, but turn the other off! Open a support ticket if you wish to change your prior self-reporting configuration.

CMS: Ability to hide or redirect Feedback Link on Volunteer Overview Page (HOC3-10178)

In the Volunteer Overview page of the public site, there is a link in the Volunteer History section to give Feedback. Some people prefer not to allow feedback through this link, and/or have created an alternate form for gathering feedback.

In this release, the CMS now allows you additional configuration options for the Forms / System Forms / Volunteer Account Overview Page. Options allow you to:

- Not display the feedback link at all, or
- Display the link, but have it redirect to a different page (rather than the standard feedback pop-up)



The Redirect URL is only visible if you display the Feedback link, and, if populated, takes the user to the page of your choosing when clicking on the feedback link (rather than the default feedback interface which asks for a star rating and comments). This can be a form of your creation that optionally can be mapped to the connection object (or an external surveying application).

Beta: New ARS Type: Basic Log in. (HOC3-10221)

The ARS (advanced registration system) previously allowed customizations of the experience during Volunteer Registration, Partner Registration, or could create workflows and forms for Opportunity Sign-Up.

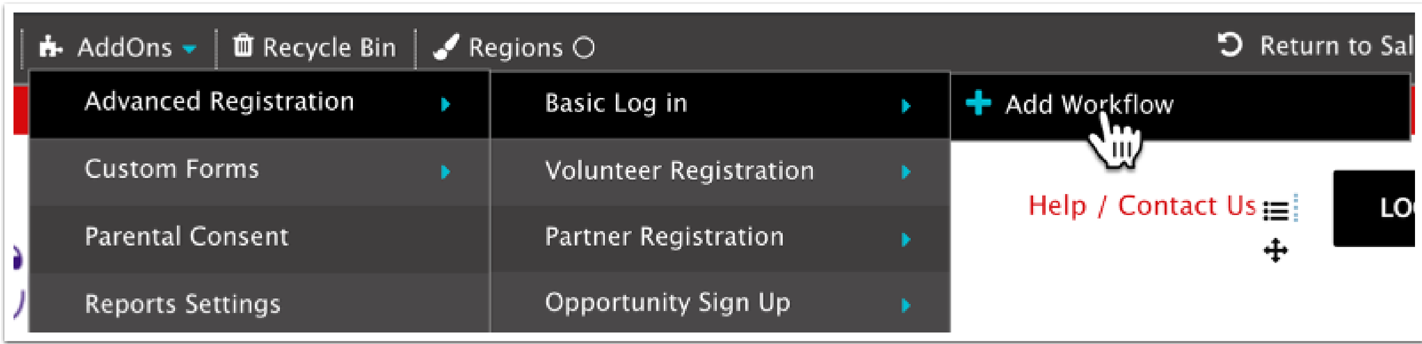
With this release, the ARS also introduces a powerful new feature: The ability to create workflows based on the User Log-In Experience

In a nutshell: This is a workflow that runs when a user logs into the public site. It looks up info from the contact record of the logging in person, and can be used to control what happens during the login process.

By default, a volunteer logging in is taken to the Account Overview page. Using the basic log in ARS, you could opt to take the logged in user to. a different page instead. Or ask additional questions or display additional information during the login process.

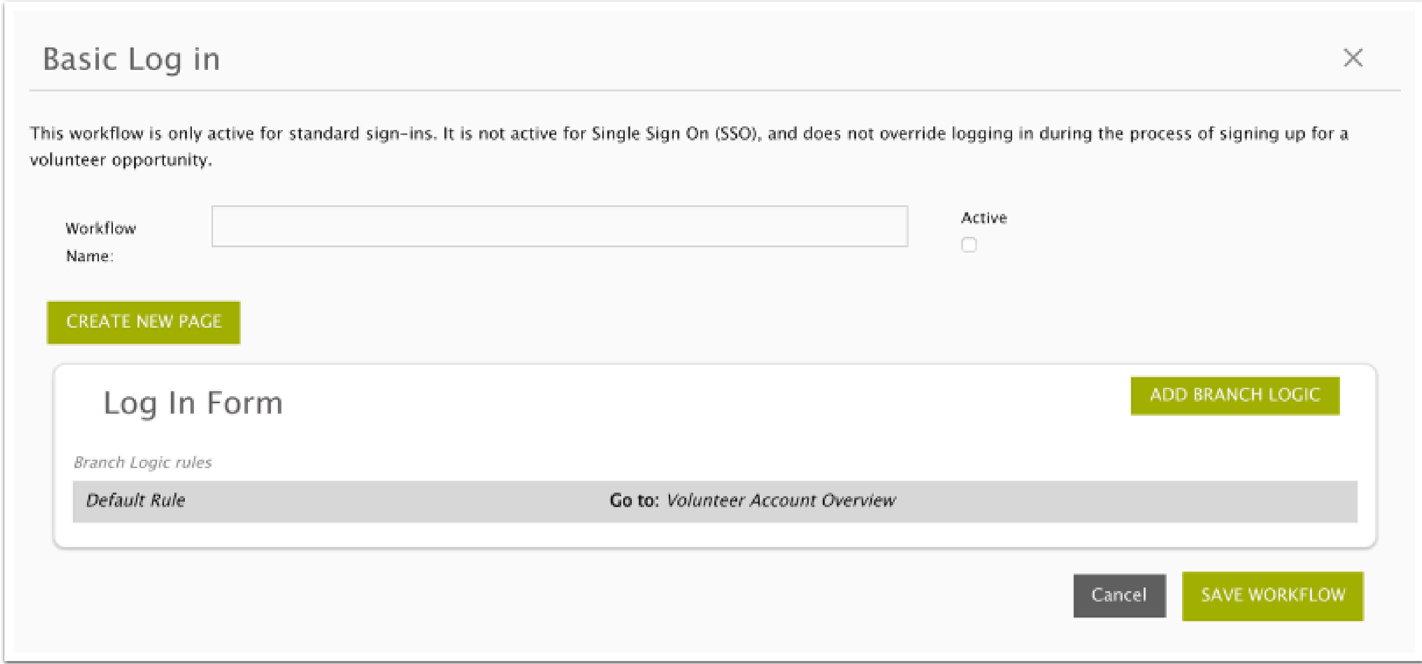
Notes:

1. This is a beta feature and therefore there may be limitations on what you can do using this feature. Please report any bugs or issues to support if you opt to use this feature.
2. If your site has SSO active you can not create an ARS login workflow
3. This feature only works when using the standard Log-In Widget at the top right of the page. The Log In Workflow does not work if a non-logged user signs up for a volunteer opportunity and is prompted that they must register or log-in to proceed. (So there are ways for a user to login without executing the ARS Log In workflow).
4. Only one Log In workflow can be active at a time:

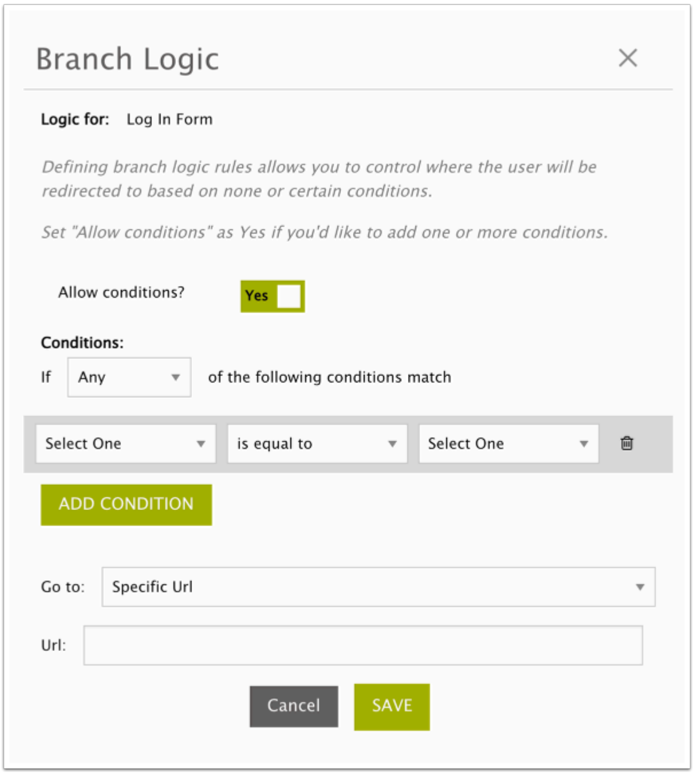


A log in Workflow is created from the CMS Advanced Registration Menu and is called "Basic Log In". Choose 'add workflow' to create a log in workflow.

Give the workflow a name, and designate whether or not it is active. You can then create pages and branch logic in the manner used for another ARS workflows:



Whether or not you choose to add additional pages or forms to the log-in process - you can use branch logic to specify where to direct the user after the log-in is completed. By default you go to Volunteer Account Overview - but you can set any specific URL as to the page the user is sent after log-in is complete. You can also set conditions based on fields from the contact record (through a form), so that a contact with certain characteristics is sent to one page, and another contact is sent to a different page.



⚠ The ARS is a powerful and complex tool. Because we are continually adding new options there is not extensive documentation on all of its features and use cases. For assistance on working with the ARS, we recommend you come to one of our daily labs and ask for assistance when you need specialized training.

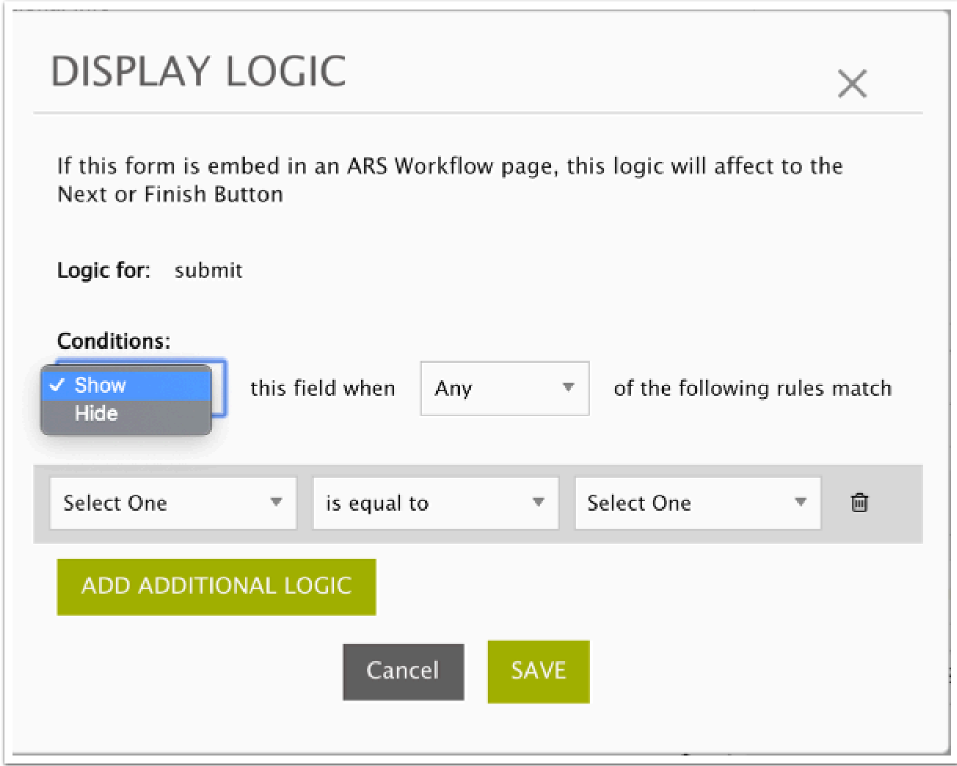
ARS/Forms Improvement: Hidden fields are now able to write to any field type (HOC3-6879)

Hidden Fields in forms and ARS are often used to pass a record id or record type id to SF. Its now possible to use hidden fields to write to any field type, including lookups.

ARS / Forms Improvement: Ability to hide submit or next button (HOC3-7161)

The final option on every form, and on every page of the ARS is a 'submit' button. There may be circumstances in which, if certain logical criteria aren't met, you do not want the user to be able to submit the form (or go to the next page of the workflow). To make this possible, there is now branch logic available for the submit button.

By default the button is always shown, but you can set conditions for showing the button or for hiding the button from the form:



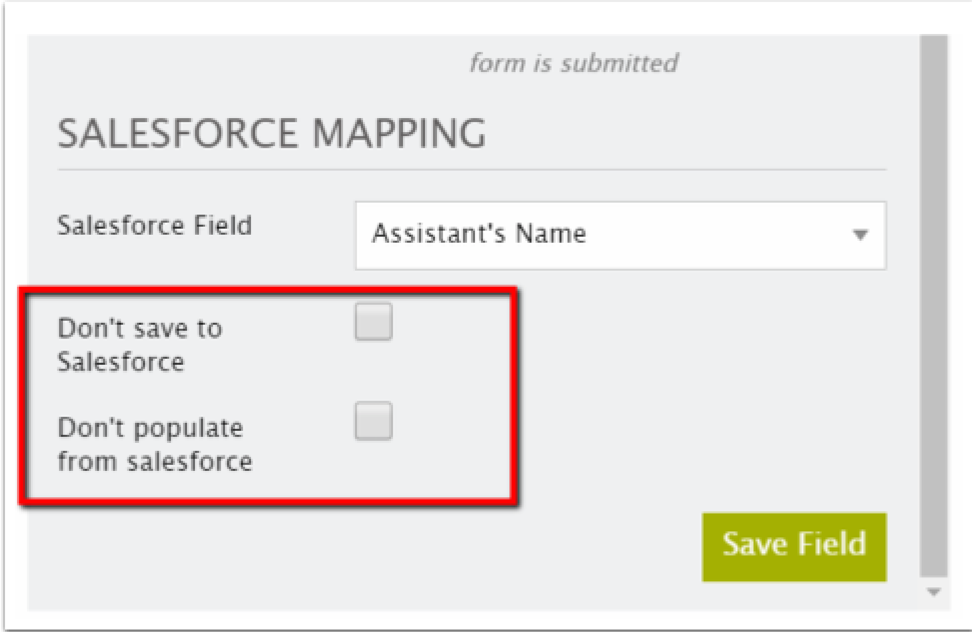
In a form - this affects the 'submit' button.

In an ARS workflow - this logic affects the "Next" button on the page you're working on in the workflow, or the "Finish" button on the last page of the workflow.

If no logic is applied - the submit, next, or Finish button will always be displayed by default.

More Granular Control over Salesforce Mapping in Forms: (HOC3-10164)

When mapping data to a Salesforce field, there is now granular control over whether you do or don't wish to Save data from the form to Salesforce and whether you do or don't populate existing data that exists in the field in Salesforce. By default, mapped fields DO populate from existing SF data and overwrite that data with info submitted in the form. However now you can surpress either of those behaviors through two new checkboxes in the mapping section:



Bug Fix: Ability to drag fields in forms (HOC3-10194)

The ability to drag a field type directly onto a form had stopped working. This has been fixed. Now you can drag a field type directly to a location on a form again.

HOC 3.0.8.15 Release (Oct 31, 2019)

Happy Halloween! This update includes a number of under the hood improvements including updates to user login via facebook, improvements to Chinese translation, and a number of improvements related to working in multiple time zones, and a number of minor bug fixes.

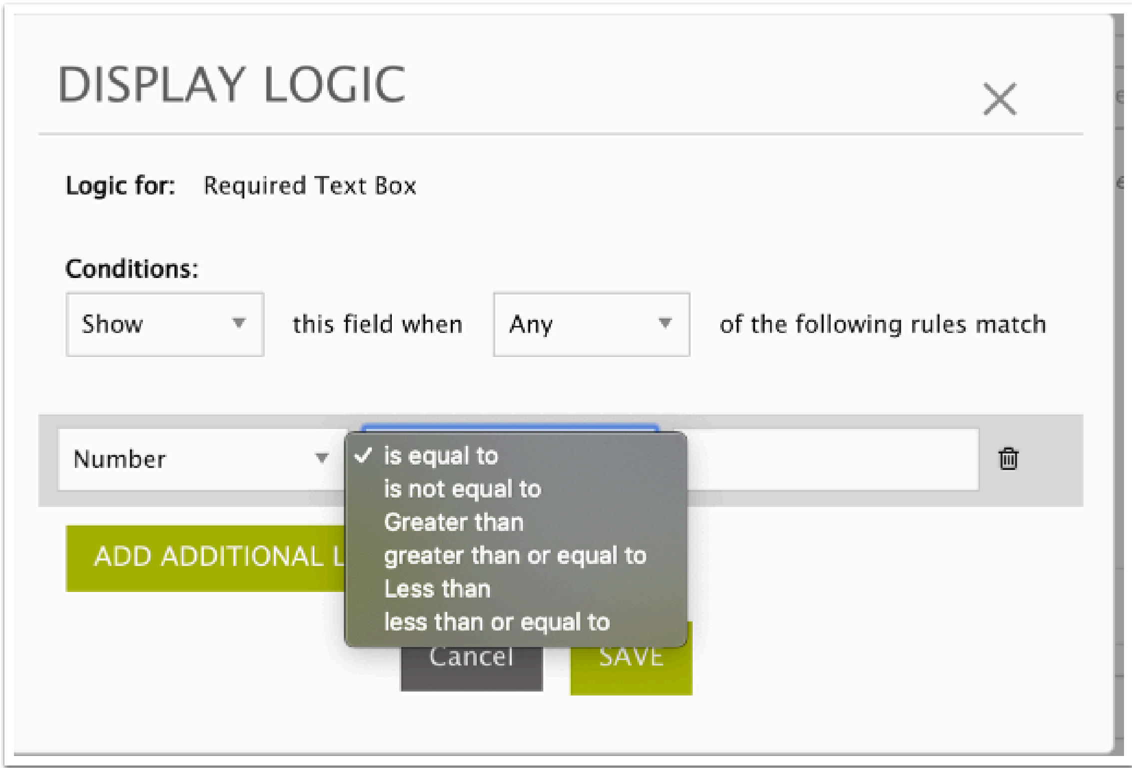
There's a hidden treat too (internal beta only), which we'll be sharing with you in the next release :-)

Here's a few new items currently available for your enjoyment!

ARS / Form Improvements to Branching Logic (HOC3-6917)

The ARS (advanced registration system) and forms continues to become a more powerful tool with continual additions to its branching logic.

New in this release, is the ability to set branching logic based on numeric values.   You can take any field of type 'number' and set branching or display logic based on the numerical result, using equal, greater than, less than, etc.



Volunteer Transcript improvement (HOC3-10136)

In the Volunteer History .pdf that volunteer can download from their account overview page, self-reported connections were being labeled as "Self-Reported Hours". The transcript will now display the user-defined self-reported name for self-reported connection, just as it is displayed on the Overview Page.

Bug Fix: Contact not created during organization signup (HOC3-10150)

In some configurations, the Organization Registration page was not creating the primary. contact during organization registration. This occurred when the 'title' field was not visible in the form. This has been fixed.

HOC 3.0.8.14 Release (Oct 17, 2019)

This release includes bug fixes related to forms, additional branching logic available in the ARS (for advanced use cases), and work to support future time zone management for organizations with SF users in multiple time-zones. Also included are improvements to sharing portal reports, and groundwork to provide better future integration between Salesforce Files and the public site and forms.

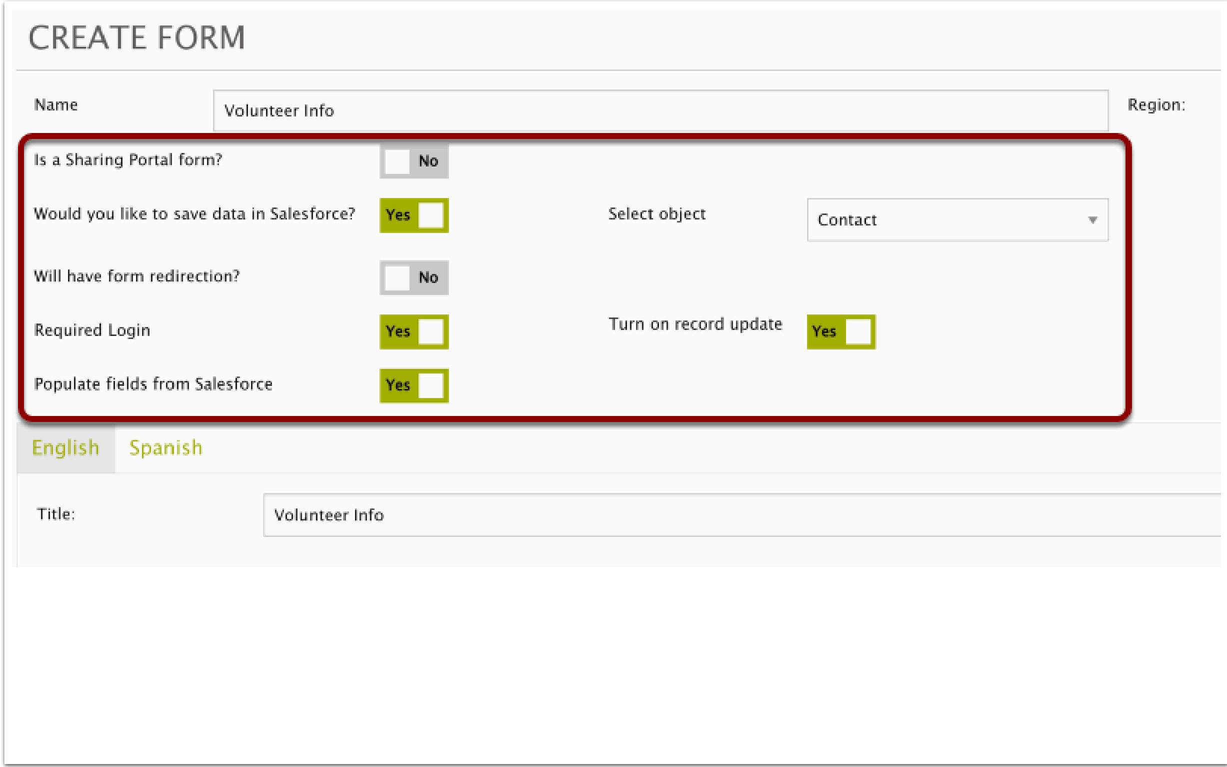
There is one nice improvement to forms that is visible and available now:

Forms: Ability to display formula fields from Salesforce

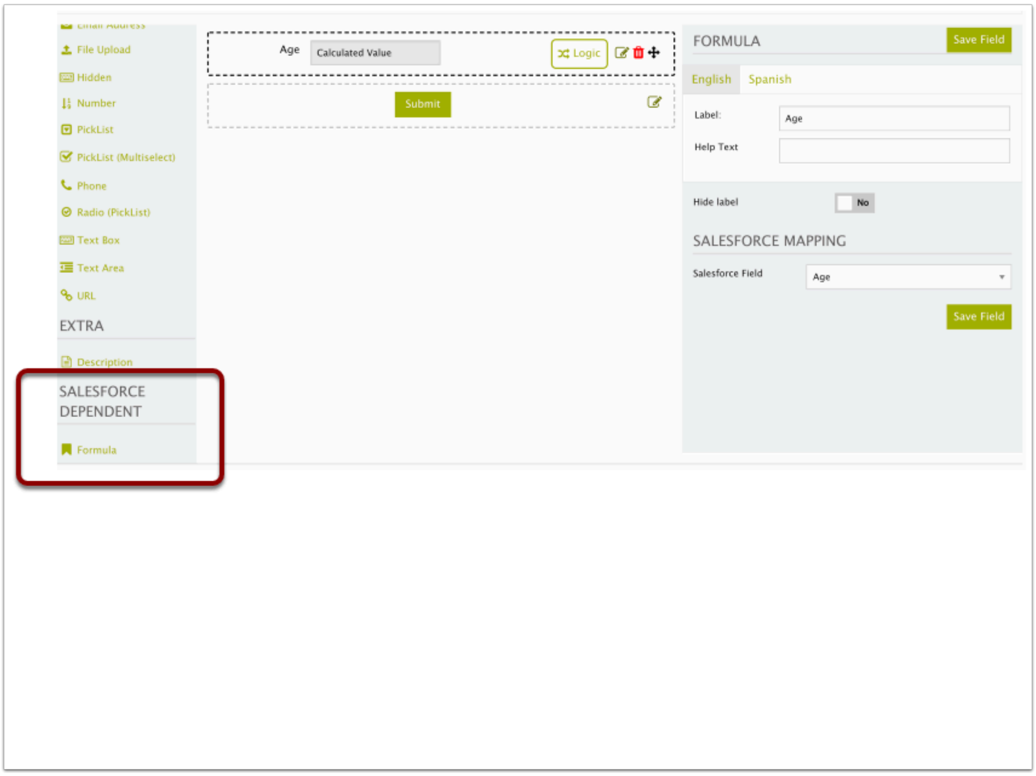
Formula fields in Salesforce are read only - but sometimes its helpful in an HOC form to be able to display (in read only mode) a formula field. This can be helpful for displaying things like people's names, age, etc.

To add read only formula fields to a form:

- Select "Would you like to save data in Salesforce
- Choose the object. (i.e. Contact)
- Select "Required Login"
- Sellect "Turn on Record Update"
- Select "Populate fields from Salesforce"



You'll then have the option in the fields column to place a Formula Field



Release Notes October, 2019

This release to HandsOn Connect's administrative side (Salesforce) contains more granular control over invitation codes (private opportunities), true time clock capabilities for the check-in kiosk, and a variety of bug fixes. Here's the highlights:

Invitation Codes now available for Events, Volunteer Opportunities and Occurrences (HOCAVV-1243)

The field "Requires Invitation From", which is how you create a 'private' opportunity by associating an invitation code with it, had only been available at the Volunteer Opportunity Level.

Now, the fields "Requires Invitation From", and "Invitation Code" (which is a read only formula field), are available for the Volunteer Event object, and the Occurrence object.

- If an invitation code is set at the Volunteer Event level - then that invitation code will be automatically applied to all volunteer opportunities (and their occurrences).
- If an invitation code is set at the Volunteer Opportunity level - it applies to all occurrences.
- If an invitation code is not set at the event or volunteer opportunity level - it can be set for individual occurrences.

Administrative Speedup:

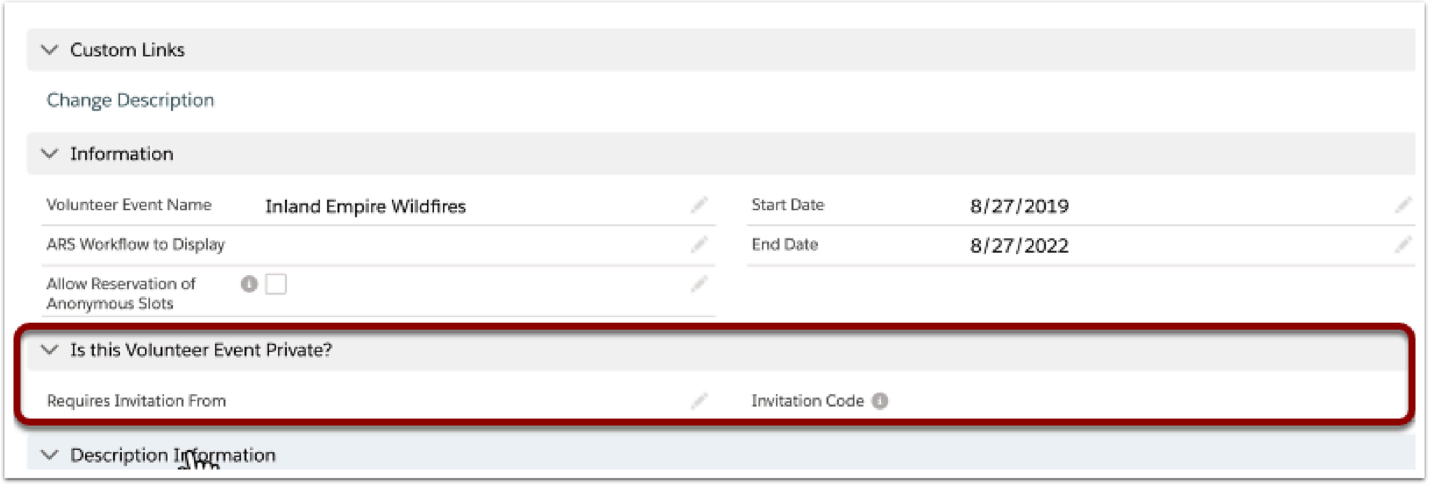
If you wish to use invitation codes at either the Event or Occurrence level, you need to do the following:

1) Update the profiles you are using, and give read and write access to the field "Requires Invitation From" and Read Access to the field "Invitation Code" in both he occurrence object and the volunteer event Object.

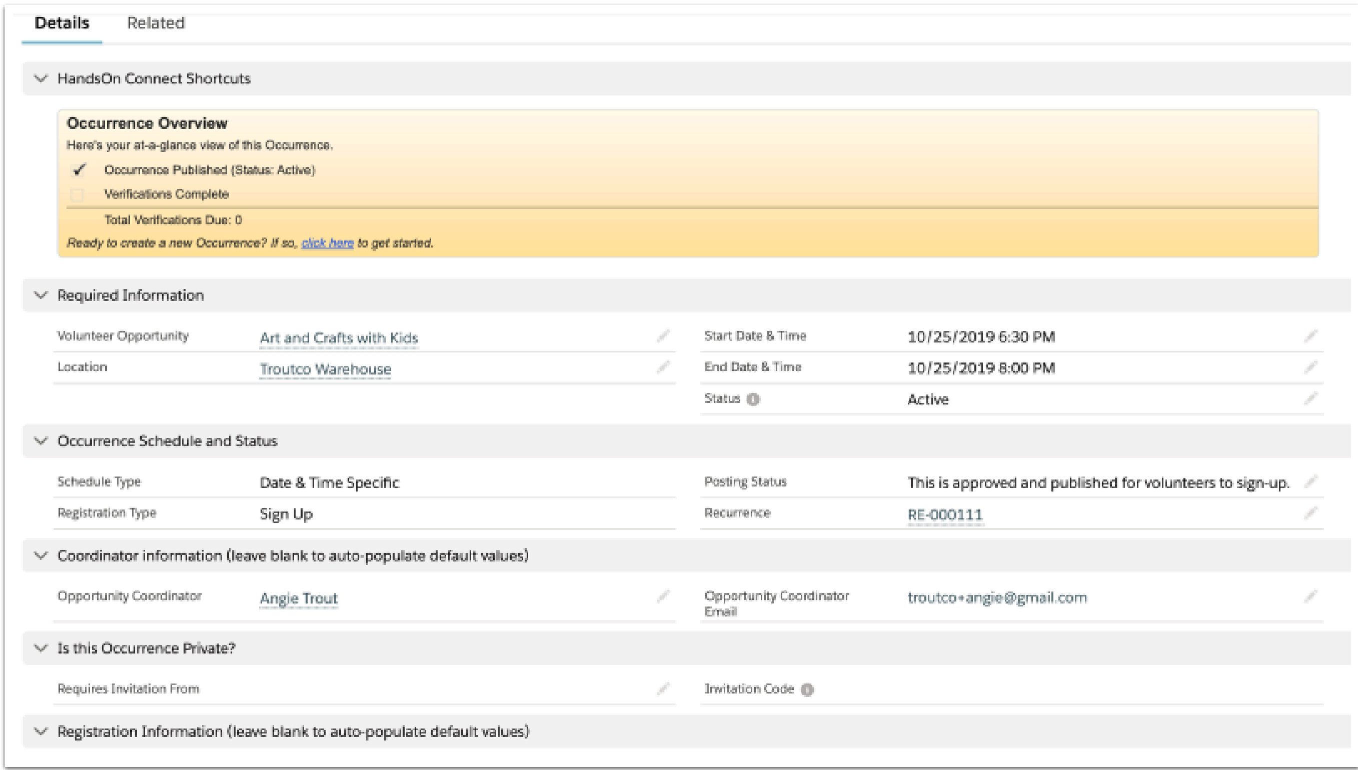
2) Add the fields to the Event and/or Occurrence Page Layouts:

We recommend creating a section and placing the two fields in it as shown here:

Volunteer Event Layout:



Occurrence Page Layout:



Check-in Kiosk tracking of actual check-in time / check-out time now available (HOCAVV-1254)

When using the check-in, check-out feature of the Check-in Kiosk, the following is how connections and hours served are calculated:

Checking In:

If a volunteer comes early or on time they are checked in at the start time of the occurrence. (The kiosk does not credit time for early check-in, but assumes they start when their connection is scheduled to start)

If a volunteer comes late, they are checked in at the time they arrive (The start time of their connection is edited, to reflect the time they actually started, after the scheduled start time)

Checking Out: (optional)

If a checked in volunteer enters their email in the kiosk again, they are informed they are already checked in and asked if they wish to check out.

A volunteer who checks out before the connection end time, will have the end time of their connection updated and the 'hours sereved" will be recalculated to reflect the early check-out.

A volunteer who checks out after the scheduled end time, will be credited with extra time in the hours-served of their connection. (The end time cannot be updated beyond the occurrence end time - but the volunteer will be credited with the extra time reflecting that they stayed beyond the scheduled end time.

The reason for this behavior is that connection start times and end times cannot be altered for Date and Time Specific Opportunities:

But: What if you want to actually record the actual time a volunteer checked in and checked out?

Up to now this hasn't been possible, but in this release we've added two new fields that actually track the exact time the check-in occurred, and the exact time the check-out occurred. With these two fields, you can use the kiosk as an actual time clock -- recording the arrival time and exit time of a volunteer checking in for a scheduled connection.

Using these two new fields requires an administrative speedup:

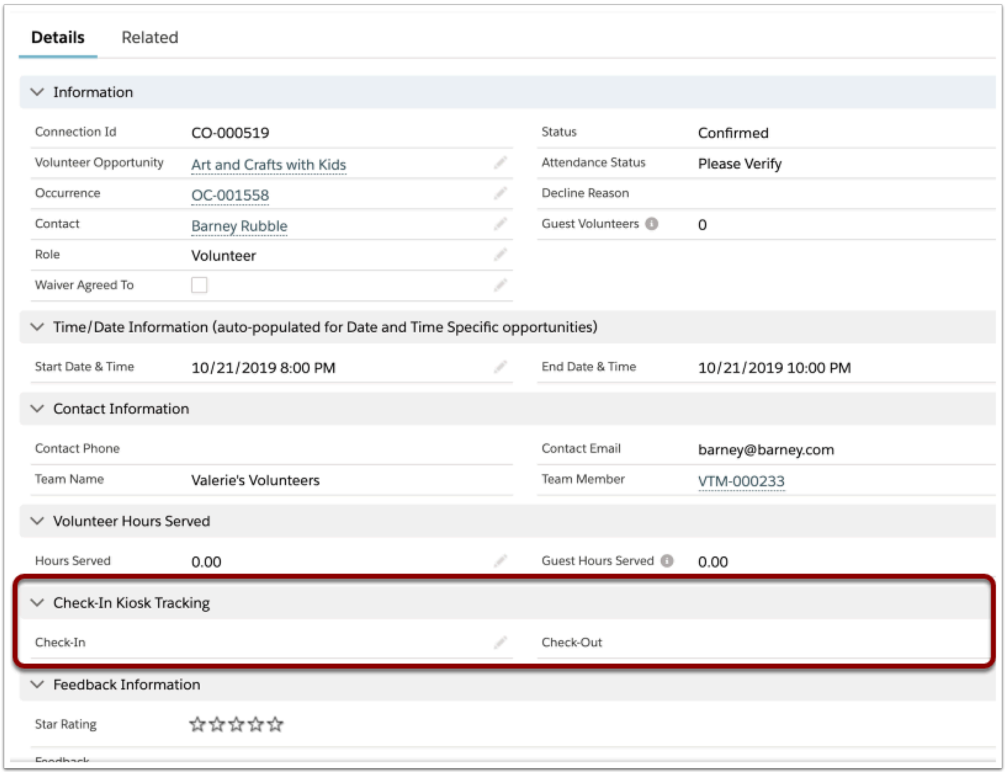
Administrative Speedup for check-in, check-out real-time tracking.

1. Update the profiles you are using for HandsOn Connect. (System Administrator, Staff, and any custom profiles you are using), to grant Read (or Read/Write) access to these two fields in the Connection object:

- Check-In
- Check-Out

> The fields will be automatically filled in by the check-in kiosk when someone checks in and checks out, so "Read" Access is sufficient. However, if you want SF admins to be able to manually input or edit check-in/check-out times, then grant read/write access.

2. Add the two new fields to the connections page layout you are using. Here's a suggested way position for adding these fields to the page layout:



Note: The Check-in Time and Check-Out time do not affect the Volunteer Hours Served which is always calculated based on the start time of the occurrence/connection. If you wish to calculate hours (For a true 'time clock' functionality based on arrival time and departure time, you may wish to add a formula field that calculates "Kiosk Hours Served" by subtracting the check-in time from the check-out time, and use that field for reports instead of "Hours Served".

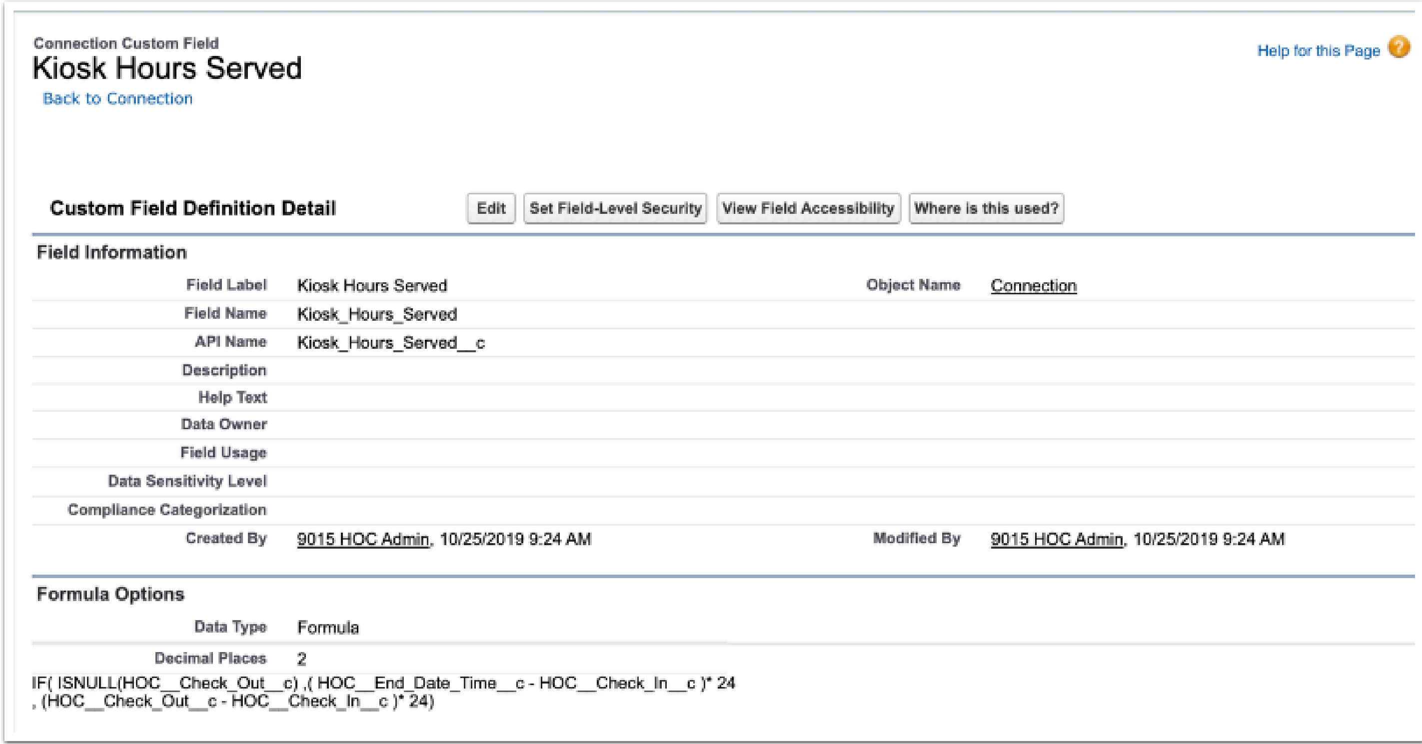
Here's an example of how to create a field that calculates the number of hours between check-out and check-in:

Create a new field on the connection object:

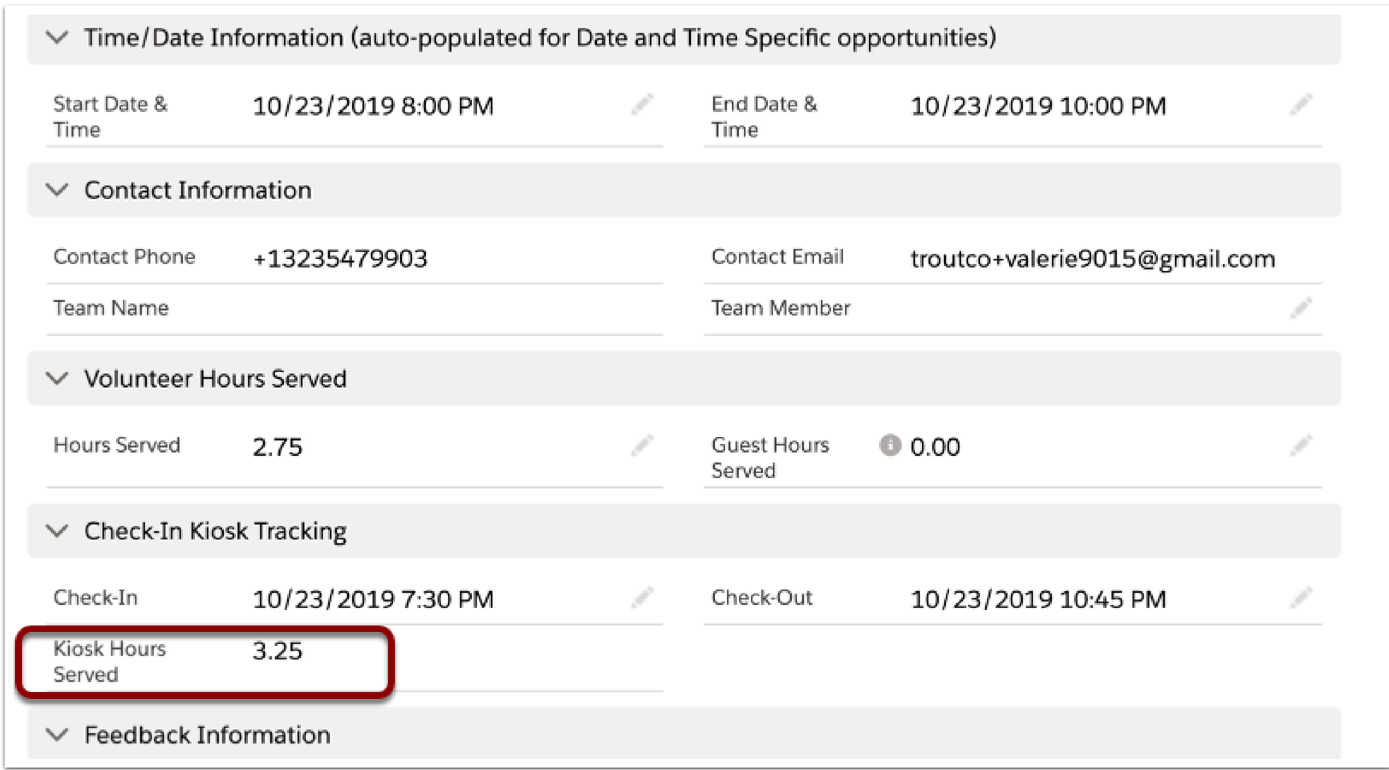
Make it a formula field of type 'number' with two decimal points. Name it "Kiosk Hours Served" (since it will use the check-in kiosk's check-in times like an actual time clock.

We want a formula that subtracts the check-in time from the check-out time and tells us the number of hours. Also - if a person checks in but doesn't check-out, we want to assume that the connection ended at the scheduled end date. A formula that will calculate this in both scenarios is this:

IF(ISNULL(HOC__Check_Out__c) ,(HOC__End_Date_Time__c - HOC__Check_In__c)* 24 , (HOC__Check_Out__c - HOC__Check_In__c)* 24)



Now add this to this field to the page layout in the new 'check-in Kiosk Tracking' section you've created.



In the example above, The connection was scheduled for an occurrence taking place from 8 pm - 10 pm.

The volunteer checked in early at 7:30 pm, and checked out late at 10:45 pm.

The connection schedule remains 8 - 10 (because that was the occurrence scheduled date and time). It can't be altered to an earlier start time or later end time (because of the rules governing connections and occurrences).

Hours Served: Always calculates the time from the scheduled start time of the connection, (or later if the volunteer checks in late) and adds time if the volunteer checks out late. (The kiosks adds time IF the volunteers checks out past the scheduled end time of the connection).

In this example: The check-in kiosk calculated the extra 45 minutes the volunteer stayed late, updating the 'hours served' but does not give credit for arriving early, so the 'hours served' on the project is calculated as 2.75. (start time of occurrence until the actual check-out time because the project ran long).

Kiosk Hours Served: Calculates the 'real time' between the actual time the volunteer checks in, and the actual time the volunteer checks out. (Like a time clock would). If the volunteer does not check out, then the scheduled end time of the connection is assumed to be the check-out time for the purposes of calculating 'kiosk hours served".

The Kiosk Hours Served field calculates the hours based on when the volunteer first arrived (7:30) and when they checked out (10:45).

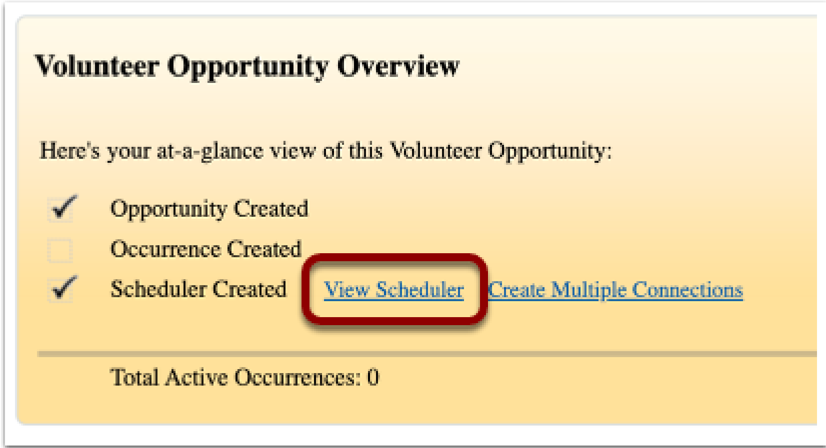
Which you want to use to calculate the actual hours of service depends on your business practices. Do you credit volunteers for arriving earlier than scheduled? If not, then use 'hours served'. If you do count hours that start before the scheduled start time - then "Kiosk Hours Served" will be the actual total time from check-in to check-out. (Be sure to add these new fields to reports if you want to report on actual check-in / check-out and kiosk hours served."

If a volunteer doesn't check-in using the check-in kiosk - there will be no value listed for "Time Clock Hours Served"

If you need help adding these fields, and creating the 'time clock hours served' (If you want to track actual attendance hours rather than the scheduled volunteer time), just come to lab and we can help you with this administrative speedup!

Bug Fix: Scheduler for Individually Scheduled Opportunities (HOCAVV-1235)

Editing the schedule for an Individually Scheduled Opportunity sometimes resulted in the wrong day being removed. This has been fixed and schedules can now be edited in Salesforce.



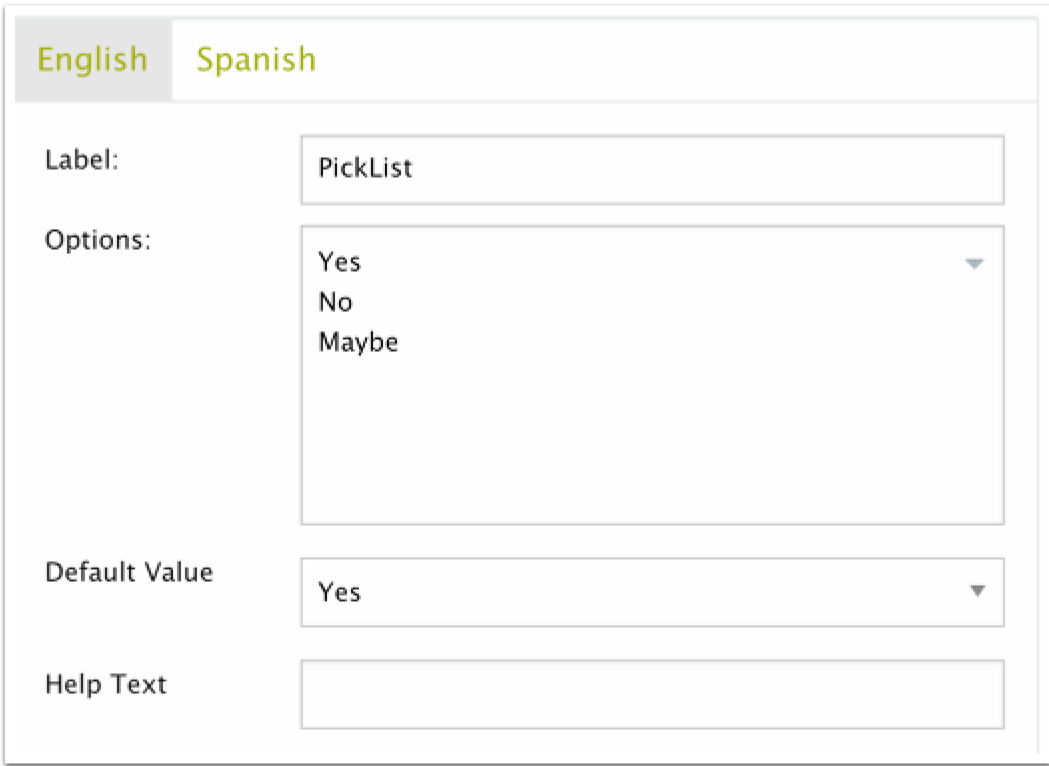
HOC 3.0.8.13 Release (Oct 3, 2019)

This release features internal improvements to better support multi-lingual sites, improvements to branch logic in forms,

Forms/ARS: Improvement to user interface for picklists, multiselect, and radio buttons (HOC3-6880)

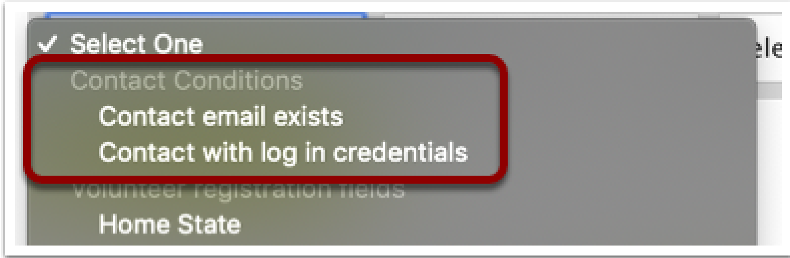
Previously, when defining picklist values in a form, you had to enter each value as a separate entry. The interface has been streamlined so you can now enter all values at once (separating each value with a carriage return. This makes for faster and easier entry. (This also makes it possible to 'paste' in a list of picklist values all at once.)

Additionally, the English values are initially filled in for other language(s), so that there are no blank values. (You can then translate and update the list to the appropriate language).



ARS Branch Logic improvements for Volunteer Registration (HOC3-9887)

New branch logic conditions available for Volunteer Registration ARS. You can branch based on the contact that is registering if a contact with that email already exists, or a contact's email address already has login credentials.



Search Results Block pre-filter improvements (HOC3-9993)

The search results block now offers the same pre-filters as the feature opportunity block, for those who want to limit the search results for that block.

Sharing Portal: Connections Grid Column can now be configured to show Occurrence Name (HOC3-9994)

For those who are using 'occurrence names' in the sharing portal, its now possible to show the occurrence name in the connections grid that appears in the portal. To request visibility of this column, please open a support ticket and we can enable this column for you.,

HandsOnConnect Cloud Solutions

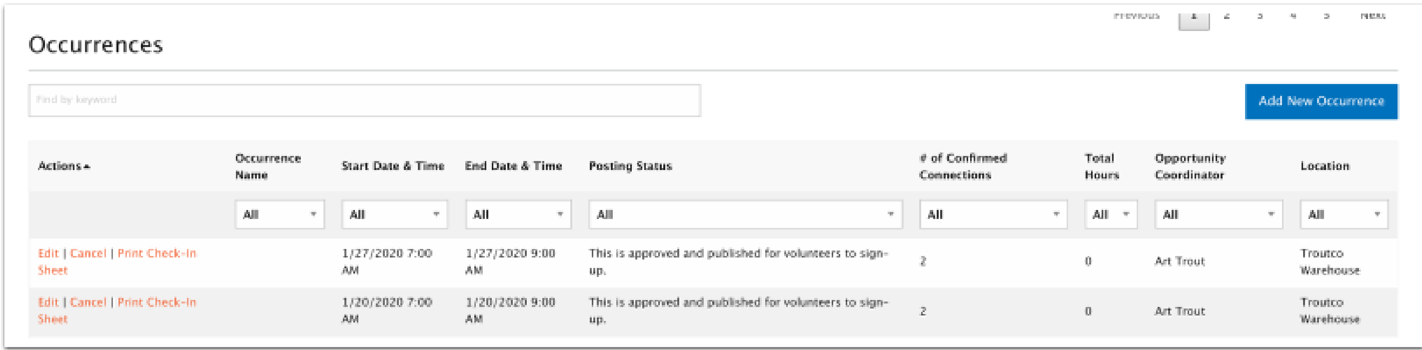
HOC 3.0.8.12 Release (Sept 19, 2019)

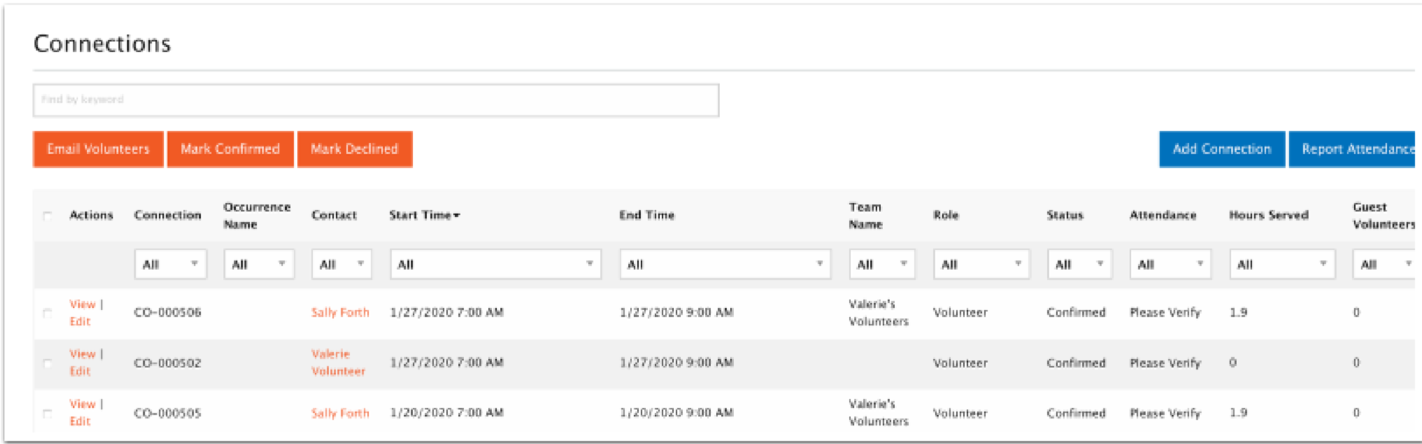
This release has a number of back end improvements, some minor improvements to the donation form, more flexibility in the sharing portal, and new options for the check-in kiosk. Here's the highlights!

Sharing Portal: Additional fields available for display in occurrence and connection tables (grids) HOC3-9978

In the sharing portal more fields are available to be displayed in the occurrence grid and the connection grid seen in the volunteer opportunity detail page:

The fields "Occurrence Name" (useful if your partners are using occurrence names and descriptions, and posting status (for occurrences) can now be displayed if desired.





If you wish any of the above columns added (or any removed) from your tables, please open up a support ticket. This is not user configurable, but the support team now can make these customizations for you upon a request.

Check-In Kiosk: New Configuration Option: Allow guests to check-in for invitation code opportunities (HOC3-922)

Here's a new feature that has been requested by a number of kiosk users. Up to now, only volunteers who had an existing connection to an 'invitation code', private opportunity, could check-in for that opportunity. Guests would not be able to check in (since it was a 'private' opportunity it didn't appear as an option).

Now, if you PREFER to allow guests to check in for private opportunities, we can update your kiosk configuration so that guests WILL see private opportunities on the day of check-in.

If you wish your kiosk configuration to be updated to allow guests to check-in for private opportunities, please open a support ticket with the following request:

"Update our check-in kiosk to allow guests to check-in for private (invitation code) opportunities."

Kiosk Bug Fix: Handling of unregistered team members (HOC3-9763)

A rarely encountered bug has been fixed that occurs when guest configuration #4 (register volunteer), and Teams are enabled.
If a person, who already has a contact in the system, says they are a member of a team, but has no connection, instead of updating their current contact and making them a team connection, they received a message "“This email address is already registered. Please login using your existing account. If you do not recall the password, click on the ‘forgot password’ link in the login widget to reset your password.”

Obviously they can't do that in the check-in kiosk. The bug has been fixed, and now in this circumstance, a new connection will be created for this volunteer, as well as a team member record if it didn't already exists.

HOC 3.0.8.11 Release (Sept 5, 2019)

This release features a significant improvement in team functionality, added flexibility to the check-in kiosk, and improved security for your public site.

One Step Team Creation/Sign-up (HOC3-9017)

We continue to find ways to make working with teams easier for Volunteers. This new feature will greatly simplify and speed-up processes when someone wants to sign up a team that doesn't exist yet!

Currently, when a team captain creates a new team that they want to sign up for an opportunity, they first had to create the new team, and then after creating the team, they had the additional step of then Selecting the team, selecting the team members they wishes to sign up, and submitting the form again to sign up the team.

The extra step some times confused team captains who thought that the act of creating the team, actually signed them up. (It didn't), Even though the system told them they now had to proceed and 'sign-up' the team members, that required an additional step. Now, HOC will automatically assume that if a team captain creates a new team after clicking on the sign-up button, that they then wish themselves and all the newly created team members to be signed up.   Here's how it will now work!

If a team captain creates a new team, once they submit the newly created team, they will see a pop-up that all the members on their newly created team will be signed up for the opportunity. Clicking submit will both create the team and complete the team signup. (They also have the option to cancel if they don't want the entire team signed up or have made a mistake.). But in most cases, they'll confirm the team signup and go right to the success page.

If you've enabled the "Allow Reservation of Anonymous Slots" feature for this opportunity or occurrence, they will be taken to the team signup page, with their team already selected, and all their team members opted in for signup — but have the opportunity to also populate the field "Unnamed Team Members" if they want to, before completing the team sign up.

Either way - this new approach will greatly speed up team signup for captains created a new team!

Kiosk Enhancement: Option to disable check-ins after 'x' minutes (HOC3-9913)

When activating the check-in kiosk, users will now see a new option:

A new field labeled “Disable Late Check_ins (Minutes) will be displayed. This field can be populated with a number (of minutes) after a volunteer’s connection start time after which you will not allow volunteers to check-in.

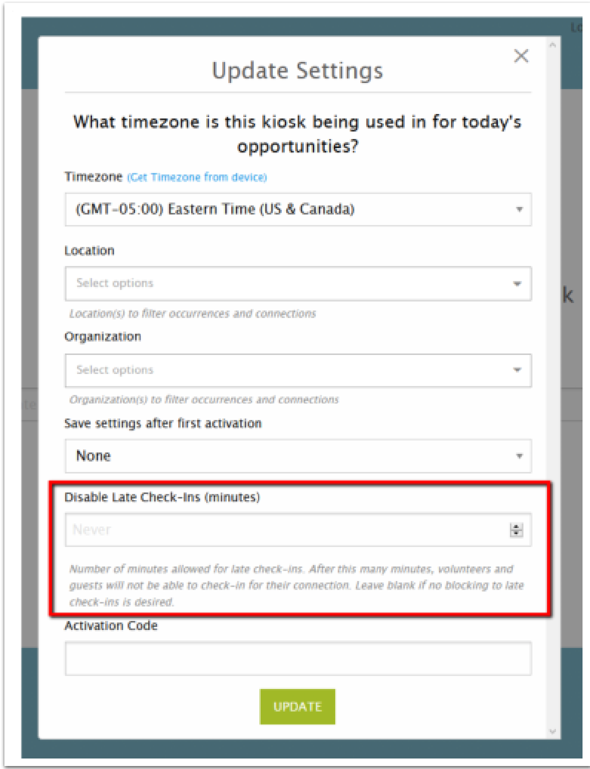
If you do not want volunteers checking in late via the kiosk (as may be the case for court-ordered service for example), then enter the cut off in minutes.

Example: If you enter ’15’ and the connection was scheduled to start at noon. The volunteer will be able to check in until 12:15

At 12:15 and later, they will instead see the message “Check-in Closed. We are sorry. Check-in is closed and no longer available.”

If you do not want to cut off late check-ins, just leave this field blank, and Volunteers can check in up to the connection end time.

[See this article on activating the check-in Kiosk for full details.]()



Improvement in Volunteer History - Support for more than 990 connections (HOC3-9900)

In a volunteer's history section of 'my account' - it was discovered that not all connections were always shown. The reason was there was a limit of 990 connections (for self-reported connections, for example).   While most volunteers are not likely to have more than 990 connections in their history - we've now added support so that these records can be accessed. A link will appear to get more records if there are more than 990 connections in the volunteer's history!

HOC 3.0.8.10 Release (Aug 22, 2019)

This release features a significant improvement to the Advanced Registration System (ARS), and internal improvements to pave the way for future features. Here's the highlights!

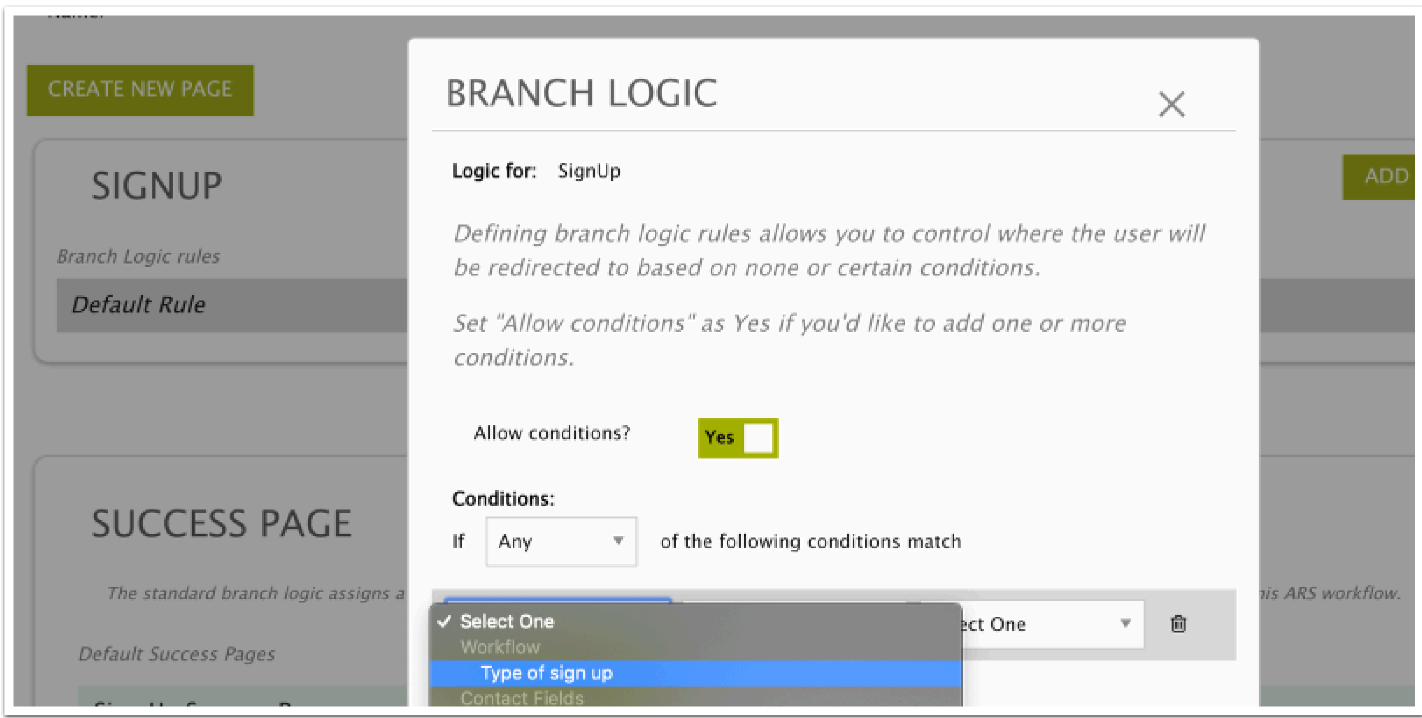
Advanced Registration System now supports branching logic for team signup / individual signup (HOC3-8464)

Up to now, it wasn't possible to create an ARS Workflow for opportunity signup - that allowed you to present different screens and forms for team signup, as opposed to individual signup. (The workaround used by some was to make the first screen in the workflow ask "are you signing up as a team or as an individual" and basing the branching logic on the answer to that question.

With this release, that is no longer needed! Branch logic now allows you to specify one branch pathway for individual signup, and another for team signup. If you don't need separate paths for individual vs team signup, you can leave this branch logic blank (or optionally select 'both' to indicate whether its a team signup or individual signup - go to the same next form.

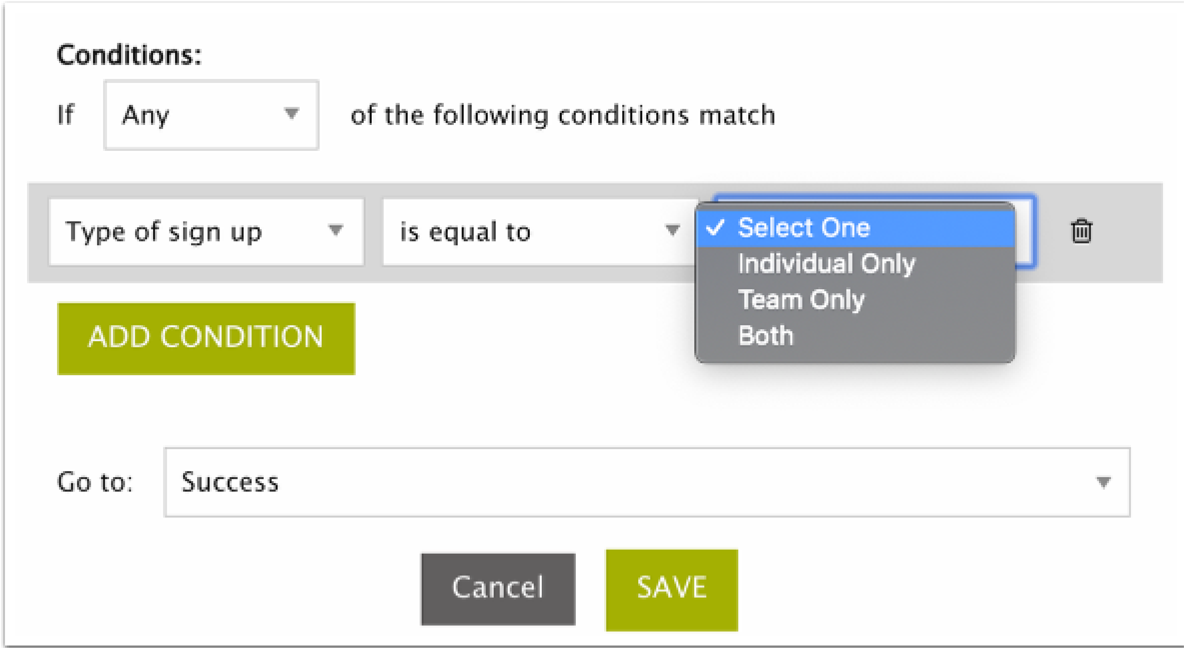
Here's how it works:

At any page in the workflow, (or as may often be the case, starting with the SIGNUP page... you can set branch logic to "Type of Signup"

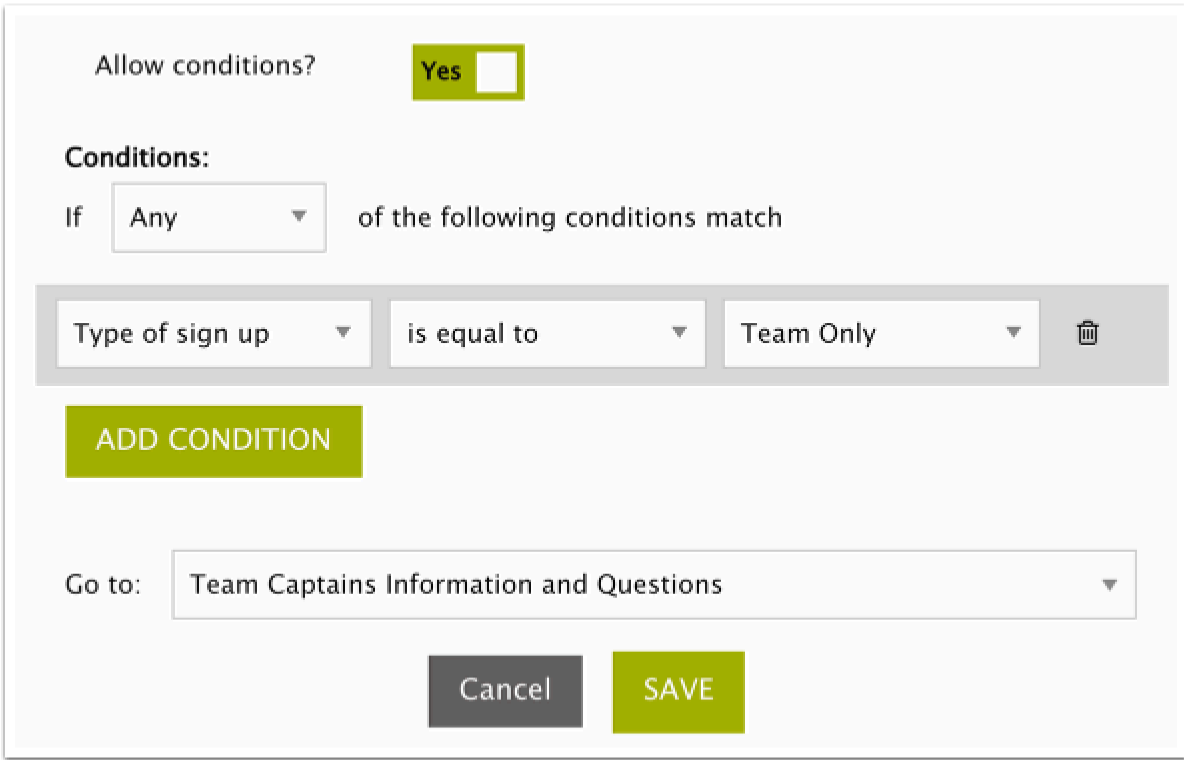


Then use 'is equal to' and choose whether the branching is for Individual Signups, Teams Signups, or Both.

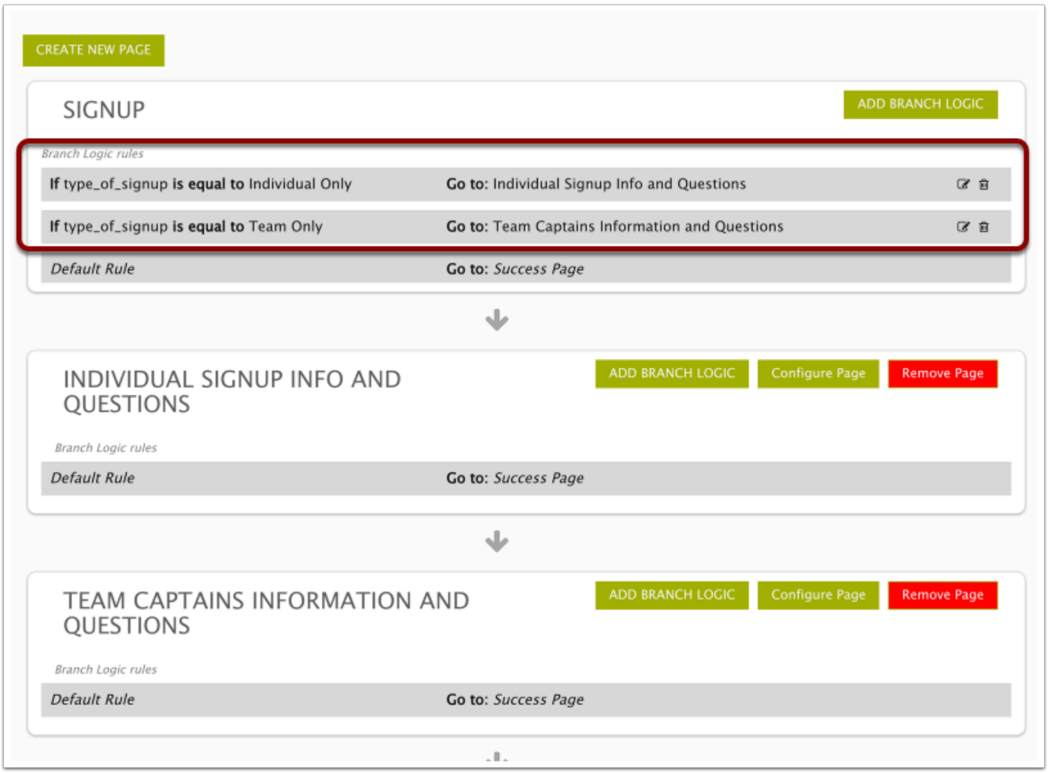
(Note: You do not have to select 'both' if you don't want to for internal clarity. If no signup criteria is selected, the workflow will proceed to the same next item in the workflow for both team and individual signup.



Then set the page to go to for Individual SIgnup, and set a branch logic for the page to go to for Team Signup.



This allows you to create a simple workflow that looks like this:



1) This new functionality will not affect any existing ARS workflows. They will continue to function as they have before because if no signup type logic is added, the workflow remains the same for both team and individual signup. This new feature just allows you to build more complex workflows where you present different information and/or questions to team captains than you do to individuals.

2) Remember: That in the team workflow -- any form questions that are asked, are asked only to the team captain (and can be populated on the Team Captain connection. The workflow does not present the same questions for each member of the team separately.

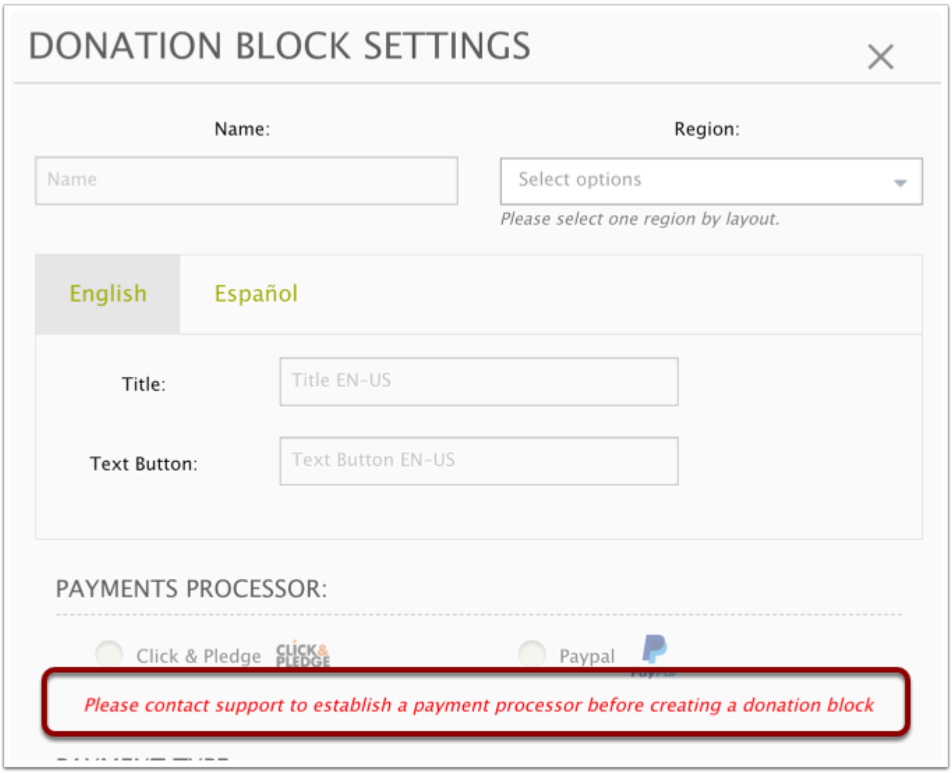
3) The workflow for team captains is presented BEFORE the team captain is asked to select (or create) their team and specify which team members will attend.   That dialog happens AFTER the ARS workflow pages are presented, and before the final success screen.

CMS: Donation Block improvement (HOC3-9810)

Using a donation block in the ARS or Form does require you to first request that your site be configured and synched with either your Click & Pledge account or your PayPal Account.

Some clients were surprised that the donation block doesn't work - even if you haven't requested configuration or set up a click *& pledge account or a paypal account for processing your donations.

So, for clarity sake, a message now appears if you attempt to use a donation block before having it configured and synched to your accounts:



Bug Fix: Search Result block not returning all opportunities (HOC3-9864)

In some cases, users of the /searchresult block for opportunity search, were finding that the block would say there were 59 results, but only 50 were being displayed.

This issue has been fixed - and all opportunities that should be displayed (based on the filter selected), will now be visible.

Improvements were also made to ensuring that the default sort order defined for the block is respected.

HOC 3.0.8.9 Release (Aug 8, 2019)

This release has a handful of new features / improvements along with the usual under the hood improvements and bug fixes. Improvements were made to site security to further deter malicious bots. Here's the highlights of this week's release:

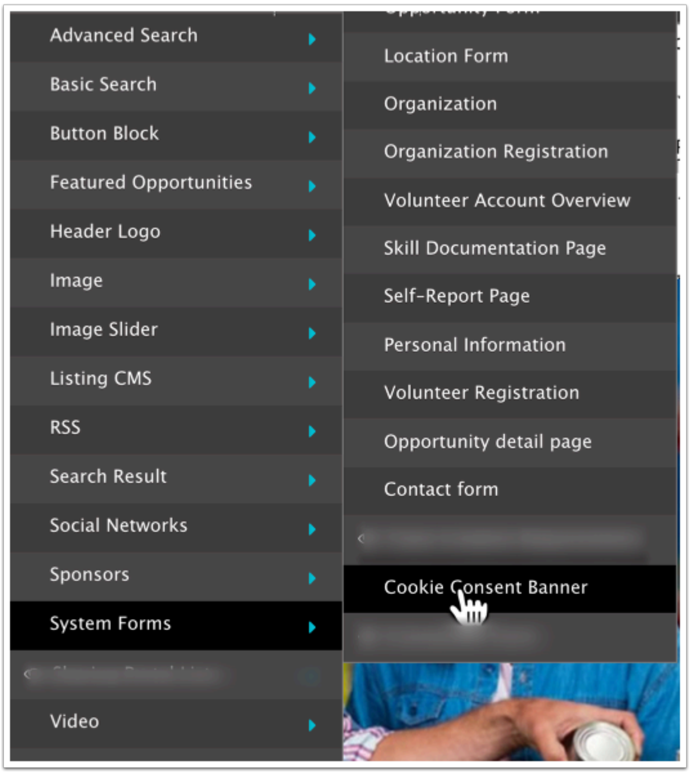
Cookie Consent Banner - (HOC3-9353 HOC3-9760)

You've all heard of the GDPR, right? New laws in certain countries making sure that websites alert users when cookies are being used, privacy policies, etc.

We've now added to the CMS options, the ability to place a cookie consent banner on your site! You've seen these - they are popping up on websites all over letting you know the site is using cookies. Then users dismiss them, and at least know that this site (like almost all sites these days) is using cookies to store information :-)

In your CMS, you'll now see a new option:

Go to Blocks / System Forms / Cookie Consent Banner if you wish to activate the banner:

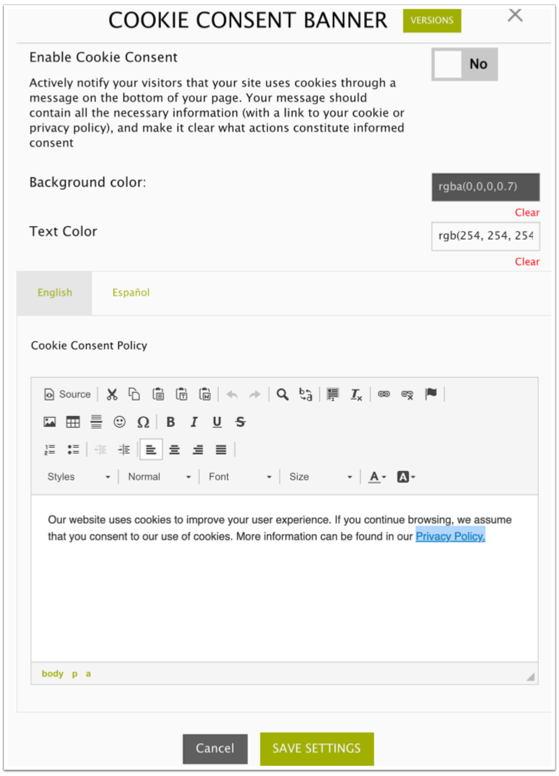


This is off by default, but you can click 'enable cookie consent" to turn it on. You can set the background color and the text color as you wish.

We pre-populate a default cookie consent policy which is:

"Our website uses cookies to improve your user experience. If you continue browsing, we assume that you consent to our use of cookies. More information can be found in our Privacy Policy." The words 'privacy policy' are linked to the page /privacy-policy on your site.

You can edit the text that appears as you wish. (Note however that if you edit it, you can't restore the original text, so keep a copy of it.



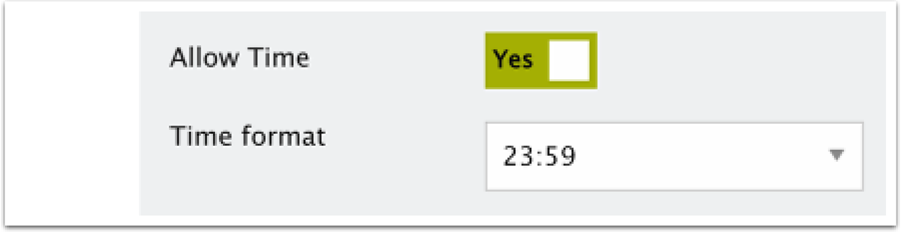
Here's what the banner looks like on your site when its enabled. It appears on the bottom of the page and once dismissed (by clicking the x) it will not appear again in that browser for about a year. So its a one-time notification.

ARS/Forms Improvement - Date Field Validations. (HOC3-8211)

When adding a date or date/time field to a HOC form (standalone or as part of the ARS), you now have additional validation options for the dates that can be entered into the form:

1. Allow Time (select Yes if you wish both a date and time to be supplied)

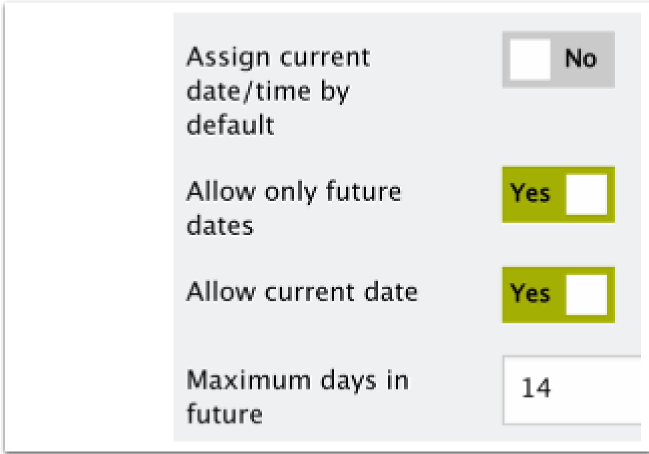
• You can choose the format you wish the time to be entered in if you select 'yes



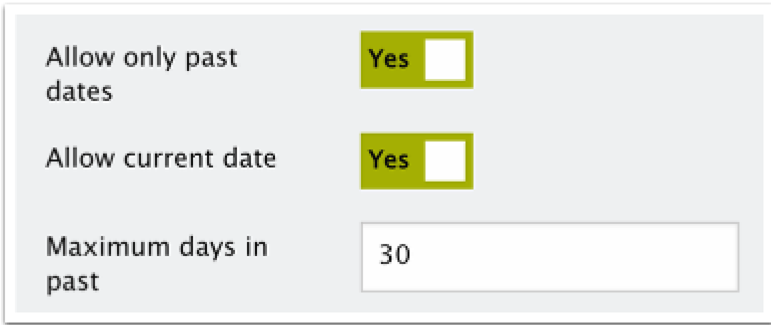
2. Assign Current date/time by default   (will pre-enter today's date in the form). Can be edited by the user if they don't wish to use today's date.

3. Allow only Future Dates.   When selected, you also have the option of allowing the current date as well

You can also set a limit to the maximum days in the future that can be entered.

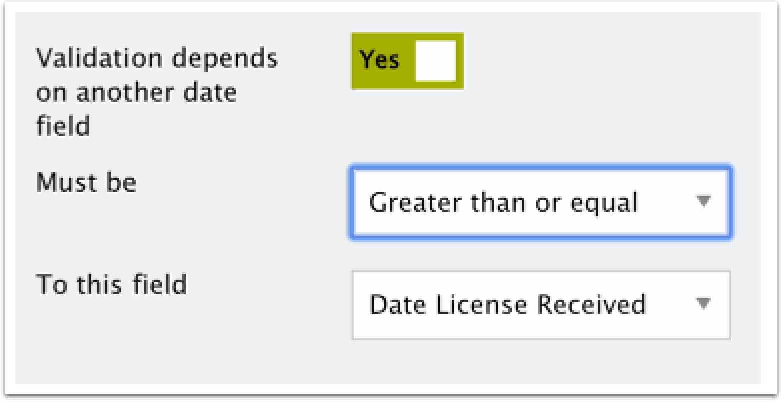


4. Allow only past dates.   This offers the same options when selected....



5. Validation depends on another date field

You can make a date field in the form dependent on the answer given to another date field in the form.   If enabled, you select a logical operator (i.e. greater than, less than or equal), and which field it is dependent on:



These validation options give you greater control over what dates can be entered into a form you create, and allow for much more robust forms that use dates.

ARS Opportunity Workflows map team signup info to team captain connection (HOC3-9759)

ARS workflows previously weren't mapping to SF when a team signed up (because you were actually signing up many people. So the mapping info was lost. Now, if a team captain signs up a team to an opportunity with an ARS workflow associated with it - the info captured in a form will be mapped to the team captain's connection.

Note: You may want to use different wording, or different questions when a team captain is signing up a team. For example, for individual you may ask "What is your T-Shirt Size", but for a team signup you may want to ask a text-based question, "Please enter the number of shirts of each size you need for your team." You can do this by making the first form in your workflow one with a question, "Are you signing up as an individual or as a team" -- based on that answer, you can use branch logic to present a different form for individuals and a different one for team captains.

Kiosk Bug Fix: Guest registration will respect configured minimum age for volunteers (HOC3-9770)

For clients who have set the registration minimum age to an age above 13 -- the check-in kiosk will respect that age validation if you are using guest registration configuration 4. (allow guests to register themselves).

HOC 3.0.8.8 Release (July 25, 2019)

This release has a much-awaited new feature - the ability to make reports available to Volunteer Leaders! Also is some new flexibility in using the Check-In Kiosk and improvements to the search-result block. Here are the highlights of this release.

Reports can now be made available to Volunteer Leaders in Sharing Portal (HOC3-2924)

Up until now, reporting in the sharing portal has been limited to Partner Staff. We're happy to say, that with this release, Volunteer Leaders can now run reports in the sharing portal.

If you already have reporting enabled for partner staff, and wish to make reports available to Volunteer Leaders - you'll need to submit an activation request. Just open a ticket in the support center, or send an email to support@handsonconnect.org and tell us "Please enable reporting for Volunteer Leaders".

If you don't yet have reporting enabled in the sharing portal, then send us a request and say "Please enable reporting for our sharing portal" (and specify if you wish reporting to be available for Partners, Volunteer Leaders, or both.

NOTE: You should create reports to share before requesting we turn on this feature... otherwise your portal users will see a reporting option, but no reports that they can run :-(

Once we've activated reporting for you (or added Volunteer Leader reports), you'll need to choose which folders to share in the CMS. See this article for information on how to designate the folders you wish to make available to Partners and/or Volunteer Leaders, and the rules regarding which report types can be made accessible in the portal.

Additional Kiosk Activation options (HOC3-9443)

For those of you using the check-in kiosk, we've added more flexibility in activating the kiosk. Currently, you must activate the kiosk every day (using your activation code), and some users report that they always use the kiosk in the same configuration (i.e. time zone, location, organization filtering), so they prefer to just save the configuration, to make it easier for those using the kiosk to activate it. OR, in some cases, they do not want to even have to activate the kiosk each day -- they have it permanently installed and just want to configure it once and leave it ready to go.

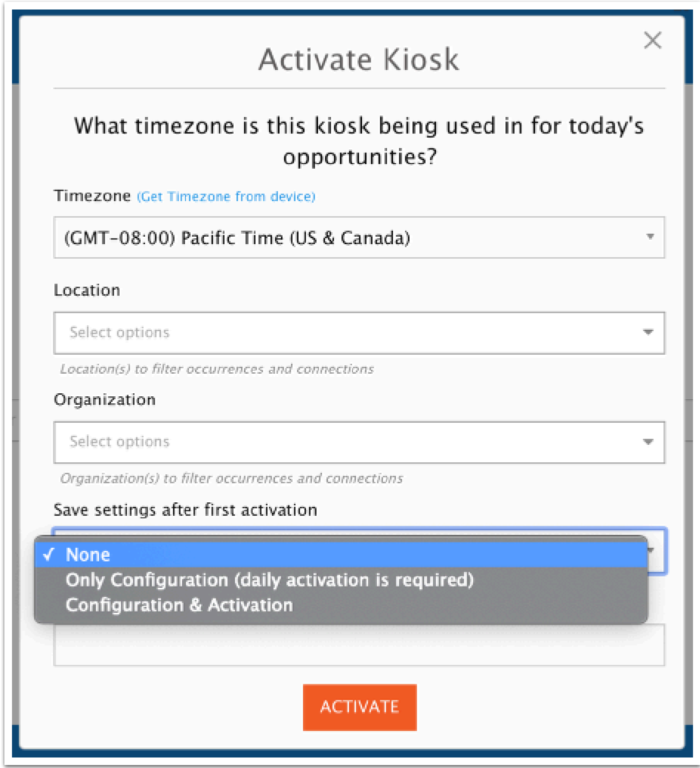
Now you have options!

When you first activate the kiosk you have a newoption to "Save Settings after first activation". Here's what those options do!

1) **None:** The kiosk continues to work as it does today. You need to activate and optionally choose filters each day.

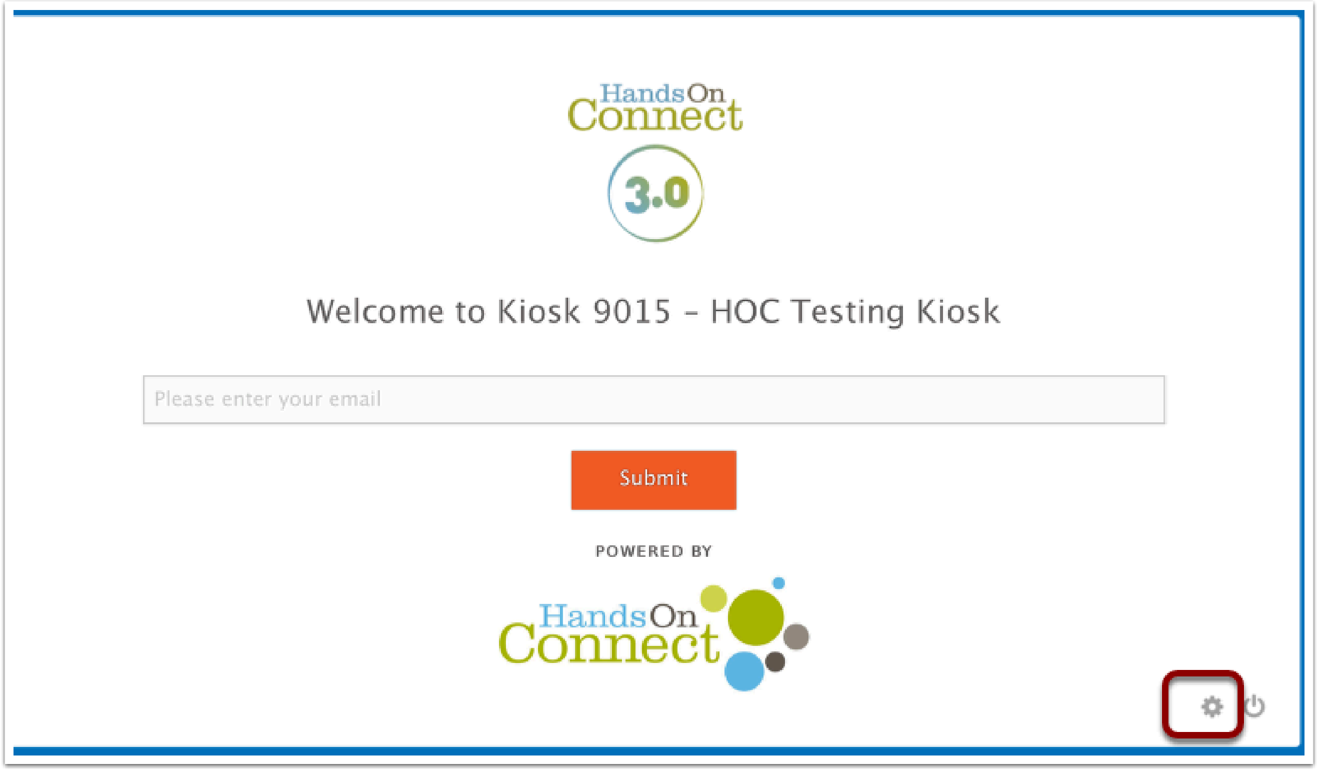
2) **Only Configuration (daily activation is required).** After initially activating the kiosk, the filters will be hidden and maintained. (i.e. if you are using no filters, because you want all occurrences to be displayed in the kiosk), that can be saved, and each day you'll only be asked for the activation code. A simpler activation process if you wish to hide the filters from your kiosk activators.

3) **Configuration & Activation** - • With this setting, the kiosk will remain activated day after day. This has some possible security down-side as anyone will be able to use the kiosk on this device even without someone activating it... but if you have a permanently placed kiosk and wish it to be 'always live' - then choose to save this setting.



Note: If you choose to save the configuration, or the configuration AND activation - then the kiosk will remain in that state until you reset it.

To reset the kiosk, click on the cog in the lower right of the kiosk home page. This will show you the current settings, and allow you to request access by entering your activation code and making changes to any of the activation settings.



Improvements to Search Result Block (HOC3-7165)

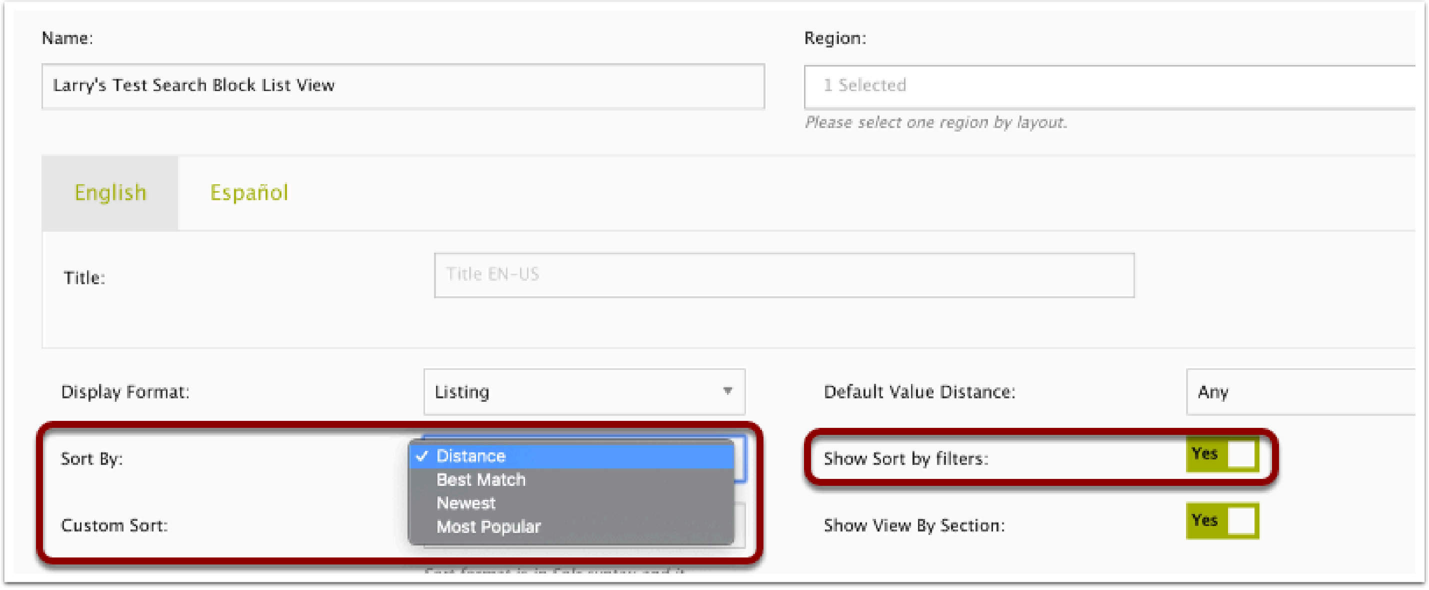
For those of you using the "Search Results Block" instead of the standard search or calendar pages, we've made a few improvements to the Search Results Block:

1) When an occurrence is full, instead of saying "0 slots available" it will now say "WaitList Available". (unless you have waitlist turned off or you are not displaying full occurrences at all). If you have waitlists turned off, it will say 'waitlist not available"

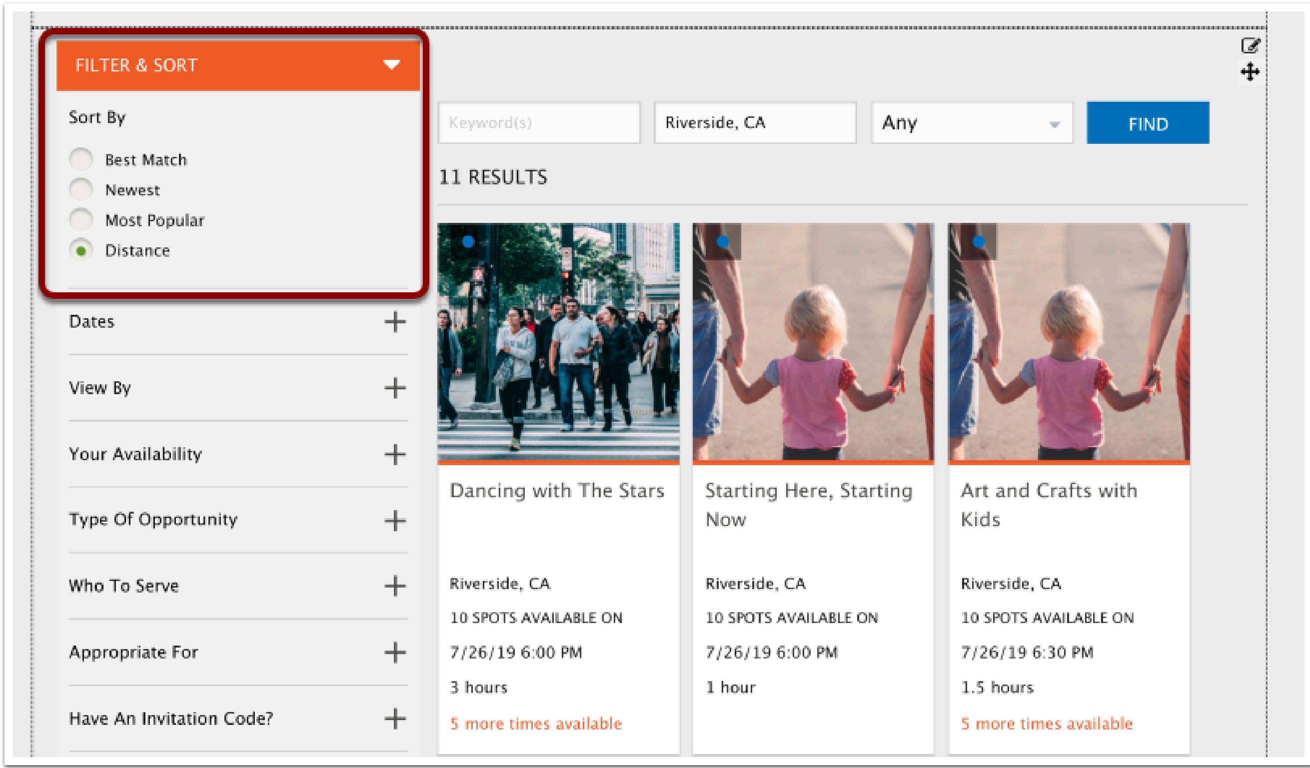
2) Filtering Improvements:

Previously, the search result block (in listing mode) by default, sorted by 'best match' which wasn't terribly useful. It now defaults to Distance. In the Search results block configuration, you can set the default sort to either distance, best match, newest, or most popular.

Additionally, you can choose to Show the sort by filters on the public site - so that users can resort the results based on their preferences.

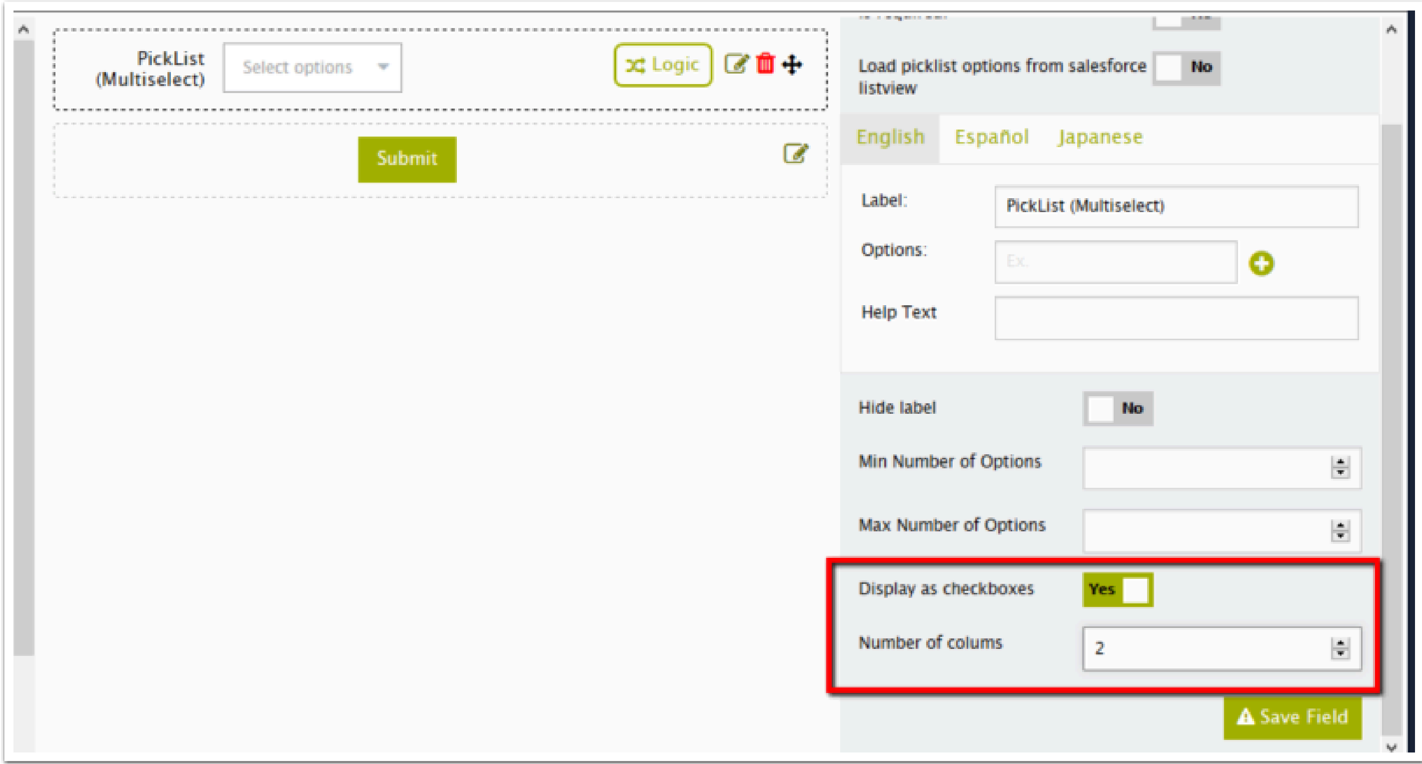


When 'show sort by filters' is enabled - the sort by filters are shown on the search block page:



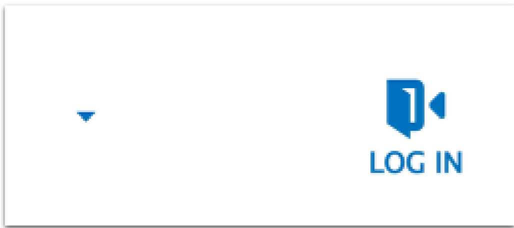
ARS: Ability to display muti-picklist as checkboxes (HOC3-9170)

For those of you using Advanced Registration System (ARS), the forms now support displaying multi-picklists as checkboxes, rather than as multi-selectable picklists. You can also define how many columns you want the picklist options displayed in.



"Login" and "Logout" changed to "Log In" and "Log out" (HOC3-1680

Though they are widely used - there are actually no words "login" and "logout" - so, in response to a general request to improve language on the public site - the term login has been replaced by "Log in" and Logout has been replaced by "Log out". We suspect most folks won't even notice this - but it does look a bit nicer!



HOC 3.0.8.7 Release (July 11, 2019)

This release features continued improvements to HandsOn Connect's search servers (SOLR), internal improvements in the management of teams and team member records, improvements to sites with subsites, and a number of internal improvements. Here are a few visible improvements and fixes of general interest.

Bug Fix: Calendar. Filter "Type" not works as expected (HOC3-9686)

When filtering the calendar for opportunity by "Opportunity Type" the filter was not working as expected. This has been corrected and you now can filter by opportunity type (project or activity) if you have that filter enabled in the calendar.

CMS Improvement: for users of Universal Template, ability to set block order for mobile and tablet layouts. (HOC3-9646)

For CMS users who have a public site built on the HOC Universal Template, you'll now have the ability to view and reset the block order for mobile and tablet layouts. Previously, reordering the blocks in these templates could only be done by the support staff.

Improvement to error message when updating team member (HOC3-9497)

Now that its possible for a team captain to edit the team member record of an existing team member who has not yet registered on the public site - team captains can enter an email address for a team member they didn't previously have an email address for.

Howevder, if that email address is already in the system, the team captain can't create a duplicate contact with that same email address. Attempting to do so resulted in a rather inscrutable error message.

We've improved the error message which now reads "This email address is already registered. To add this team member, click on the 'Add New Members' button and enter the team member's information."   Doing this will add the existing contact to the team, rather than trying to create a duplicate contact.

The team captain, once they've added the team member (as opposed to editing one), will be able to delete the team member which had that name but no email address.

Improvement to error message when Salesforce is unavailable (HOC3-9710)

Our recent updates to HOC search services ensures that even when Salesforce is temporarily down, search will operate and opportunity detail pages will display. However, if SF is unavailable then volunteers will not be able to sign up for opportunities (i.e. create new connections in Salesforce). A new error message has been added that will explain when this condition exists. "Sorry, at the moment, sign up or express interest is temporarily not available. Please try again later."

This will ensure that volunteers are aware that service is temporarily interupted.

HOC 3.0.8.6 Release (June 27, 2019)

This release includes improvements to the Advanced Registration System to better support subsites, improvements to Listing blocks, and a variety of internal improvements. It also includes some fixes for bugs that occur in rare situations. Here's the most notable of these:

Bug Fix: Editing Team signups not respecting 'registration cutoff (hours' setting (HOC3-9474)

We've fixed several bugs related to the management of team signups by a team captain related to the setting for registration cutoff hours in the occurrence.

1) Team captains could not remove their team if the cutoff deadline had passed. They were also not able to remove themselves or individual team members after the cutoff deadline was reached. They'll now be able to remove their team or any team members anytime up to the start of the opportunity.

2) Team captains were able to add additional team members to an occurrence after the cutoff deadline had passed. Team captains will no longer be able to add addition team members after the cutoff hour deadline has been reached.

Bug Fix: Sharing Portal reports - column headings misaligned (HOC3-8415)

In some summary reports viewed in the sharing portal, the column headings weren';t lining up with the actual columns, making it difficult to read and understand the reports. (Headers were shifted to the left). This has been corrected!

Bug Fix: Sharing Portal - errors when creating ISO-EIO connections administratively (HOC3-9621)

A rare bug was fixed wherein a sharing portal user, whose age in their contact record was less than the minimum age for an opportunity, was unable to administratively create connections for ISO-EIO opportunities. This has been corrected.

Search Improvement: Opportunity details available even if Salesforce is down (HOC3-9487)

Salesforce doesn't go down much, but when it does, search was no longer able to return opportunity detail (because the data was pulled directly from Salesforce). This can cause problems even if Salesforce is briefly unavailable.   To address this, our search server (SOLR) now will have the most recent versions of opportunity details so that even if Salesforce is temporarily offline, opportunity detail pages will still display.

Bug Fix: Check-in Kiosk: Errors resulting when guests check-in for an occurrence that is part of a grouped occurrence (HOC3-9588)

A rare bug was discovered when using the check-in kiosk with guest registration active, for an occurrence that was part of a grouped occurrence. An error message prevented the guest from checking in.   The reason was - when a guest checks in the connection is made in 'attended' status, however, because the occurrence is 'grouped' - additional connections for future dates are made, and these cannot be marked as attended because they haven't taken place yet.

Here's the corrected behavior that will take place IF a guest checks in for an occurrence that is part of a grouped occurrence.
1) A connection for that day's occurrence will be made and marked attendance.
2) Connections will automatically be made for the remainder of the grouped occurrence, but these will be in 'please verify' attended status.

This will prevent an error message from preventing guest check-in - but will have the consequence of signing up a guest for multiple occurrences.

Because the occurrence is grouped - checking in as a guest will automatically make connections for that new, guest volunteer for the remainder of the group. This may prove unexpected and not be your intent.

It is recommended that if you are allowing guest check-in, and **don't** want the guest signed up for future occurrences (which incidentally, may mean that you have more than the maximum attendance for those future occurrences), then you should **remove** the occurrence from the group on the day the occurrence takes place, so a guest could check in for just the sole occurrence.

This could be done manually - or you could create a process builder that removes the group association for an occurrence on the day it takes place.

OR -- if you want to avoid this fairly confusing scenario, do not use the check-in kiosk for grouped occurrences if you are allowing guests to sign up. The rules pertaining to grouped occurrences will be applied and the guest will be unaware that the occurrence was grouped - as the warnings that appear on the public site do not show up as part of checking in via the kiosk. If you regularly use grouped occurrences with the check-in kiosk, then you may want to request turning off guest registration.

Talk to a support agent in lab to get advise on the best solution scenario for you regarding guest check-in and grouped occurrences.

HOC 3.0.8.5 Release (June 13, 2019)

This release features continued under the hood improvements to both the public site CMS, mobile sites, and the capabilities of a future HandsOn Connect mobile app. Here's a few items of note fixed or improved in this release.

Bug Fix: Express Interest Button appears when when ISO-EIO opportunity is at capacity (HOC3-9275)

While Individually Scheduled - Express Interest Only opportunities typically allow large numbers of volunteers to express interest -- it IS possible to lower the default number of connections allowed to express interest. It was discovered that when the max attendance was reached that the express interest button remained visible.

This has been updated so that even this opportunity type will show as full if the allotted number of connections has been reached.

Check-in Kiosk: Bug fix. Unable to close check-in kiosk. (HOC3-9276)

In some browser, it was discovered that the 'close' box that allowed you to shut down the check-in kiosk and return to the activation screen, was not working as expected. This has been fixed.

Check-in Kiosk: Bug fix. Role not being populated when a connection is created via kiosk (HOC3-9289)

The check-in kiosk creates connections for guests checking in (whether a previously registered volunteer or a new contact). It was discovered that these new connections did not have the 'role' field populated with the value "Volunteer". This was a minor inconvenience, but it has now been fixed.

Check-in Kiosk: Bug fix. Negative hours being reported for connections (HOC3-9560)

If check-in / check-out is active in the kiosk - it was possible for a connection to get a negative total of hours. Here's how this happened:

1) A volunteer can check in early for an opportunity. When they do so, they are marked as attended starting at the start time of the opportunity (credit is not given for checking in early -- they are credited with arriving as scheduled.

2) However - checking out calculates the actual check-out time, and if a person checked out before the opportunity was scheduled to start they'd wind up with negative hours.

A validation has been created wherein a connection updated by the kiosk cannot have an end time earlier than the start time. If someone checks out before an opportunity starts, they will be checked in and out at the same time resulting in 0 hours.

> To avoid this problem - do not schedule an occurrence for 2 pm - 4 pm (for example) and expect it to accurately record hours for someone arriving at 10 a.m. and leaving at 1 pm. They'll get 0 hours.
>
> If you wish to use the check-in kiosk as a 'time clock' and capture the actual check-in and check-out time -- set the occurrence to start at 12:01 a.m. and end at 11:59 pm. If the volunteer checks in the start time will be updated to the actual check-in time, and the end time will be updated to whenever they checked out.
>
> Note however if they do not check-out - they will be credited for all the time between when they checked in and the 'scheduled' end time of the occurrence.

Check-in Kiosk: Improvements to tracking (HOC3-9563)

The various fields that can be used to track where a connection was created and last updated, that can give you insight into whether that happened administratively, via the public site, via the sharing portal, or via the check-in kiosk have been updated to better reflect activity taking place in the check-in kiosk.

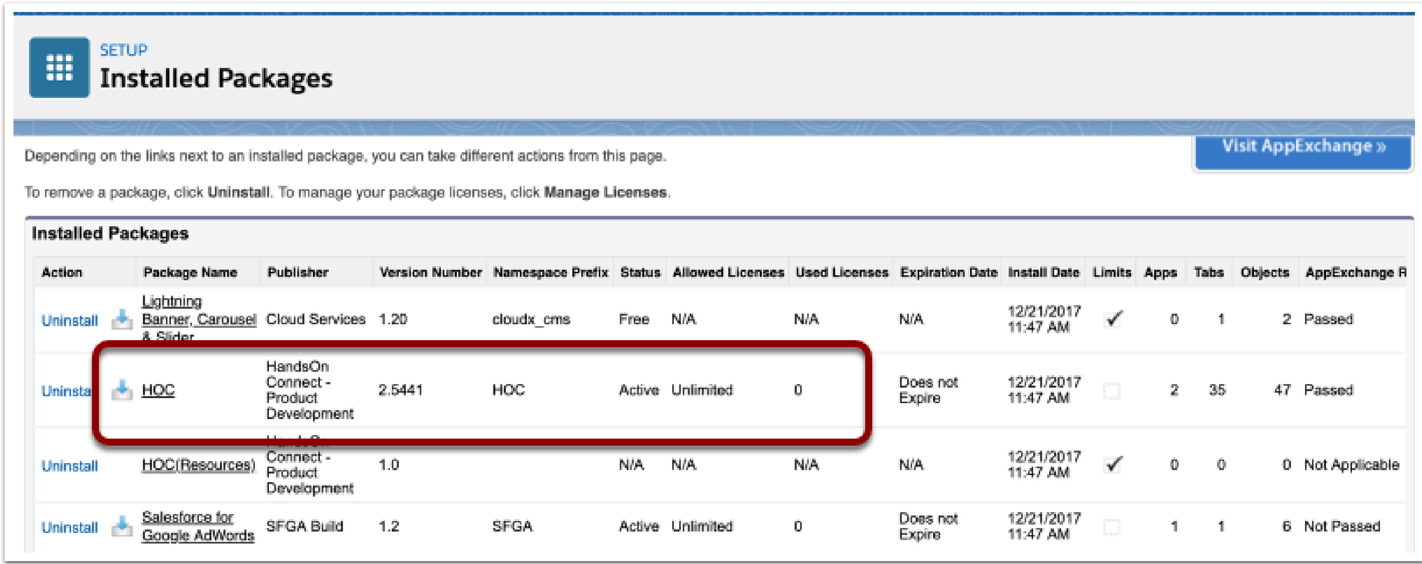
See this article for more information on HOC tracking fields, which can be useful for reporting and/or added to page layouts.

HandsOnConnect Cloud Solutions

Release Notes - June 2019

This update to the HOC package in Salesforce adds new fields to support new optional features, and fixes a minor bug.

By the way -- Lightning doesn't provide a way for us to put the current release logo in view (so you only see the June logo in classic. But you can always check what release you are in by going to Setup / Installed Packages and checking the Version Number of the package "HOC".   The June release is version number 2.5441


SETUP
Installed Packages

Visit AppExchange »

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange R
Uninstall	Lightning Banner, Carousel & Slider	Cloud Services	1.20	cloudx_cms	Free	N/A	N/A	N/A	12/21/2017 11:47 AM	✓	0	1	2	Passed
Uninstall	HOC	HandsOn Connect - Product Development	2.5441	HOC	Active	Unlimited	0	Does not Expire	12/21/2017 11:47 AM		2	35	47	Passed
Uninstall	HOC(Resources)	HandsOn Connect - Product Development	1.0		N/A	N/A	N/A	N/A	12/21/2017 11:47 AM	✓	0	0	0	Not Applicable
Uninstall	Salesforce for Google AdWords	SFGA Build	1.2	SFGA	Active	Unlimited	0	Does not Expire	12/21/2017 11:47 AM		1	1	6	Not Passed

Support for option to allow team captains to reserve space for Unnamed Team Members (HOCAVV-1227)

Changes were made to the package to provide support for the new optional feature to allow Team Captains to sign up anonymous volunteers. [See this article for details on this feature and how it works!]

To support this feature, a new checkbox field was added to the Volunteer Event, Volunteer Opportunity and Occurrence objects. The new field in each object is called "Allow Reservation of Anonymous Slots". [See this article for instructions on enabling this feature and updating page layouts to include this field necessary for this feature.]

Bug Fix: Workflow for sending email when declining individually scheduled opportunities with schedule (HOCAVV-1232)

The workflow "Volunteer Status has been declined for Individually Scheduled v2" sends an email to a volunteer when a connection for an individually scheduled opportunity / express interest with schedule is administratively set to declined. However, it was not working as expected if you choose to decline an ISO with schedule opportunity. This has been fixed, and the email "Volunteer Status has been declined for individually scheduled will now be sent as expected.

For the record - this is the default email that is sent when you decline a volunteer for a date they have expressed interest in for an ISO - EI With Schedule:

```
{!HOC__Connection__c.HOC__Contact__c}

Thank you for your interest in participating in
{!HOC__Connection__c.HOC__Volunteer_Opportunity__c}
on {!HOC__Connection__c.HOC__Start_Date_Time__c}.

While we appreciate your offer to volunteer on this day and date, we do not need additional
volunteers on that date and time.  We may contact you in the future to propose a different
date and time to volunteer.

We may have confirmed some of the other dates and times you've offered
to volunteer, and you can see which dates have been confirmed by
logging into your account and viewing your My Account page.

{!Connection__c.HOC_Domain_Name__c}

Any additional dates and times where you've been confirmed to
volunteer will appear in the "Upcoming Opportunities" list.

If you have additional questions about why you were not scheduled for
this date and time for this opportunity, please contact:

{!HOC__Volunteer_Opportunity__c.HOC__Managing_Organization_Name__c}
{!HOC__Occurrence__c.HOC__Opportunity_Coordinator__c}
{!HOC__Occurrence__c.HOC__Volunteer_Coordinator_Email__c}

Thank you,
The {!Organization.Name} Staff
```

The text of this email can, (like all email templates) be modified by you to better suit your purposes.

Note: Because there is no need to decline a connection made to an ISO - Express Interest Only opportunity -- there is no email or workflow associated with that.

HOC 3.0.8.4 Release (May 30, 2019)

This release includes a new optional feature for team signup, and an improvement to the way teams are checked-in when using the Check-In Kiosk add-on. This release also includes bug fixes and some under the hood groundwork for an upcoming feature in development to provide more flexibility in opportunity detail pages. Here's details on the most prominent fixes and features in this release.

New Beta Feature: Option to allow team captains to reserve slots for unnamed team members. (HOC3-7339)

A new advanced option is now available for Volunteer Opportunity sign-ups by teams. With a short speedup by your system administrator, It is now possible, as an option, to allow team captains to sign up both named team members as they've done in the past, AND to additionally reserve slots for unnamed, anonymous team members. For more info on how this feature will work if enabled, see this article.

https://training.handsonconnect.org/m/3437/l/1099031-advanced-allowing-team-captains-to-reserve-space-for-unnamed-team-members

For those of you wanting to enable this feature - here's instructions for system admins on how to make this available in Salesforce.

https://training.handsonconnect.org/m/5794/l/1099103-enabling-allow-team-captains-to-reserve-slots-for-unnamed-anonymous-team-members

Improvement and change to the Check-in Kiosk, for those who allow team check-in as well as Guest check-in. (HOC3-7339)

In the past, if you allowed team check-in AND guest check-in, a person who said they were part of a team, but did not have an existing connection for the opportunity, would receive an 'error' message saying "Sorry, you are not part of this team. Please see your team captain or opportunity leader, or sign in as an individual volunteer today rather than as a member of this team."
Essentially, this was a roadblock to a team captain bringing additional volunteers with them, as there was no way for a guest volunteer to check-in as part of their team. The best that could be done would be to have them register as an individual guest, and subsequently you would have to administratively go in and create a team member record for them and associate that guest volunteers connection with the team they came in with.

Now, with this release, we've made two major improvements to how teams can check-in when you've enabled guest check-ins as well.

1. If your guest configuration only allows those with confirmed connections to check-in guests, team captains will now be able to indicate how many guests they've brought with their team. (This was only available for individuals previously).

2. If you have guest configuration 4, where you have guests create new accounts as part of check-in, team members without existing connections will now be able to register and connect themselves as part of their existing team. No administrative clean-up necessary!

See this article for the details on how check-in for teams in conjunction with guest configurations will work.

https://training.handsonconnect.org/m/65752/l/1099106-how-teams-and-guest-configurations-work-together

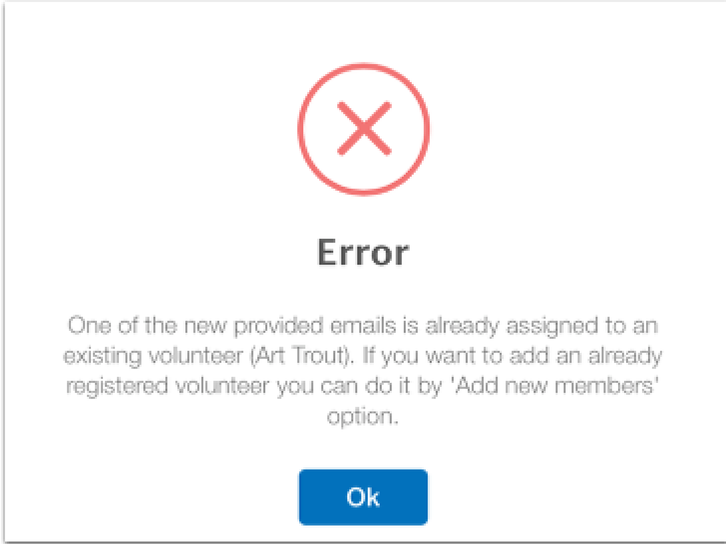
These changes are now live for kiosk users. If you have any questions or concerns about these changes to team check-in in the kiosk, please come to one of our daily lab sessions and/or open a support ticket at http://support.handsonconnect.org

Bug Fix: Mobile view of team check-in via check-in kiosk (HOC3-9363)

On some mobile devices, the view for a captain checking in their team in the check-in kiosk was difficult to use, with check-boxes obscuring parts of the names. This has been fixed.

Improved error message when editing a team member's email address (HOC3-9501)

In a prior release, we made it possible for a team captain to edit the information for a non-registered team member (i.e. correct spelling errors in the name, or add an email address where they previously hadn't entered one or entered it incorrectly). However, if they entered an existing email address as the email address, it resulted in an error (since no two contacts can have the same email address). The error message was somewhat user unfriendly, so now the error message is specific and clarifies the issue and proposes ways to address this:


Error
One of the new provided emails is already assigned to an existing volunteer (Art Trout). If you want to add an already registered volunteer you can do it by 'Add new members' option.
Ok

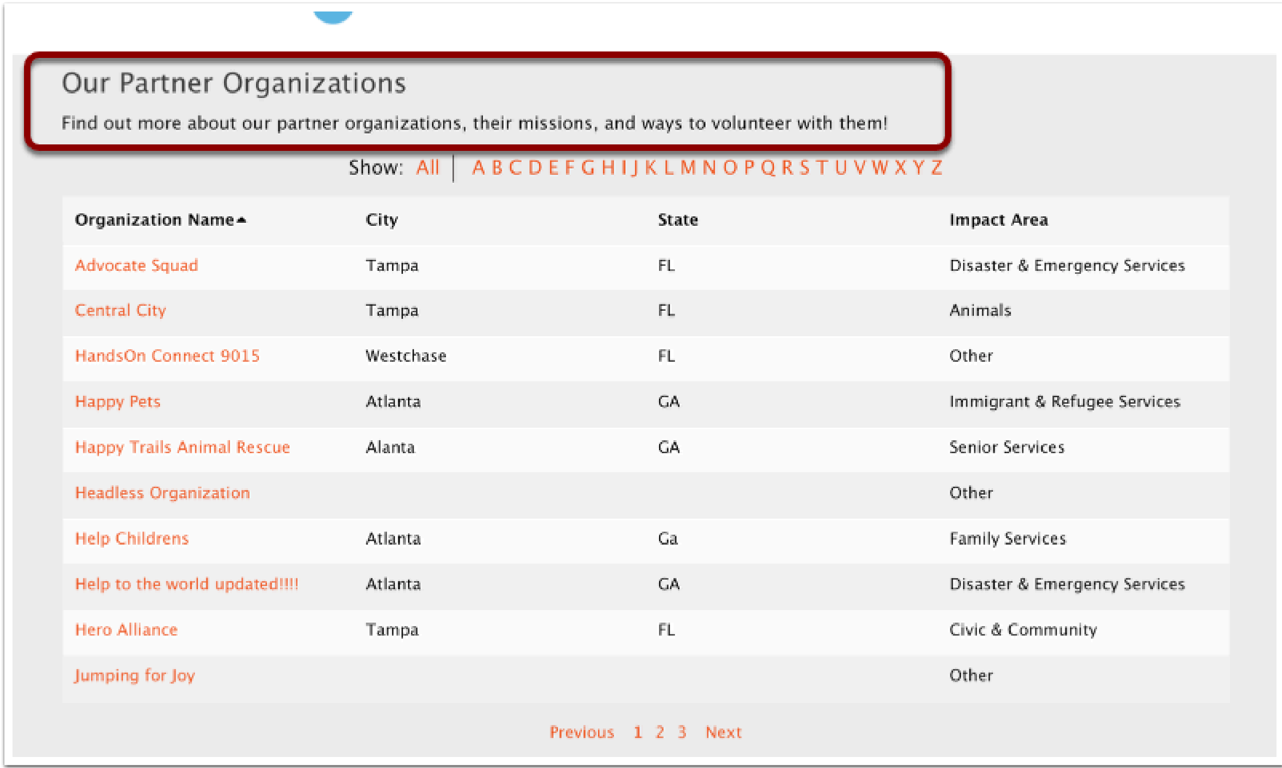
HOC 3.0.8.3 Release (May 16, 2019)

This release continues to lay the groundwork for a future HandsOn Connect mobile app. Also included in this release are continued improvements to web security during Organization Registration. Also featured are improvements to SSO (Single Sign On) integration for those clients using SSO for registration and login.

CMS: Ability to edit the Title and Content on the /organizations page (HOC3-9371)

We continue to provide more access to customizing system pages in the CMS by adding the /organization (Browse Organization) page to our list of editable System Pages. You can now edit the Heading and introductory text on the page.

Default Page content for /organization


Our Partner Organizations

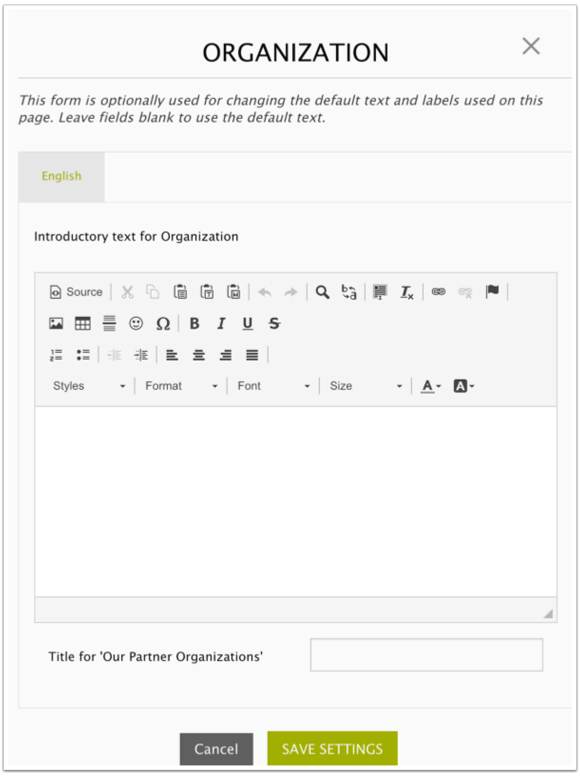
Find out more about our partner organizations, their missions, and ways to volunteer with them!

Show: All | A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Organization Name ▲	City	State	Impact Area
Advocate Squad	Tampa	FL	Disaster & Emergency Services
Central City	Tampa	FL	Animals
HandsOn Connect 9015	Westchase	FL	Other
Happy Pets	Atlanta	GA	Immigrant & Refugee Services
Happy Trails Animal Rescue	Alanta	GA	Senior Services
Headless Organization			Other
Help Childrens	Atlanta	Ga	Family Services
Help to the world updated!!!!	Atlanta	GA	Disaster & Emergency Services
Hero Alliance	Tampa	FL	Civic & Community
Jumping for Joy			Other

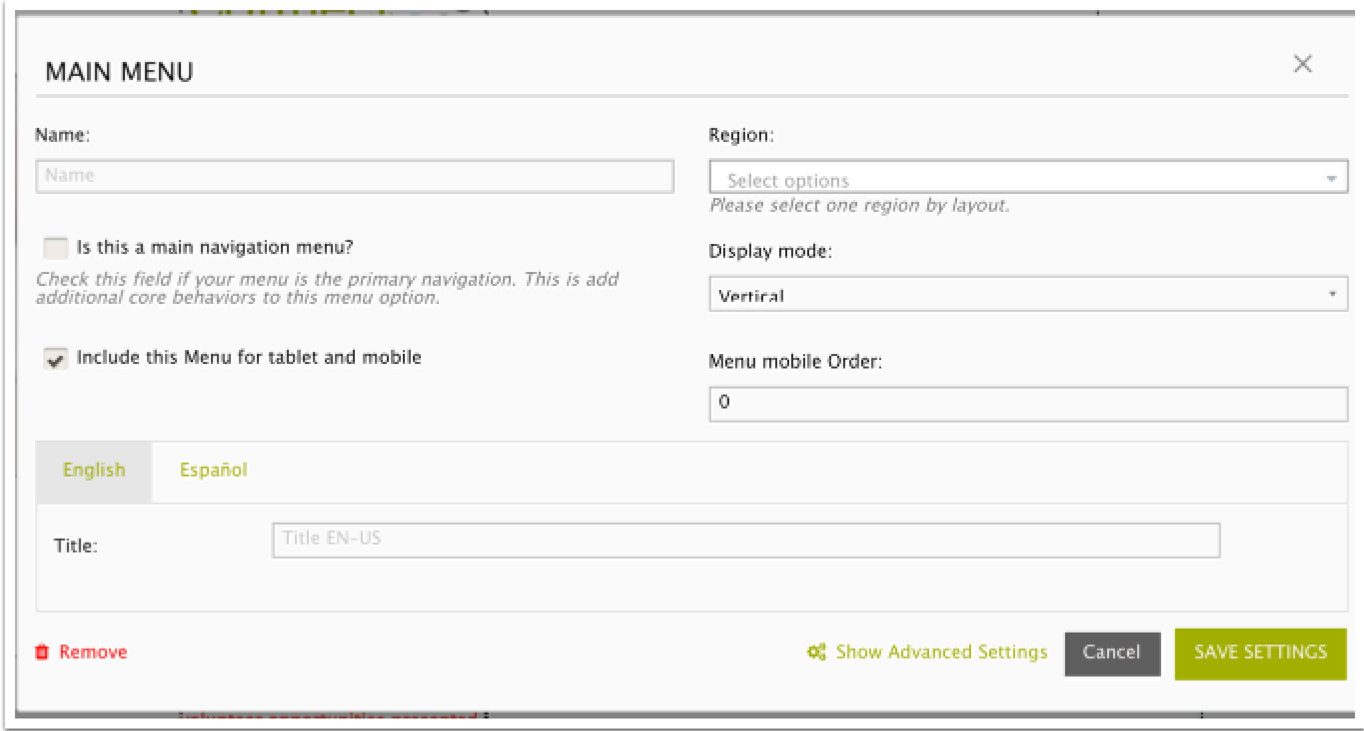
Previous 1 2 3 Next

To change the Title (heading) or the introductory text n the CMS, go to Blocks / System Pages / Organization and there you can override the default text on the page as well as the Heading on the page. When left blank, the default text will appear



CMS: (Universal Template only): Additional options for Mobile Navigation (HOC3- 9448)

In the CMS, when creating a menu via Menus / Add Menu there are new options available to allow for more granularity in controlling menus for mobile platforms.



If the setting "Is this a main Navigation menu?" is checked. The menu is automatically included as the main menu for mobile or tablet use.

If the setting "Is this a main navigation menu?" is not checked, then the setting "Include this menu for tablet and mobile" is displayed. When that is checked, You have the option to define the order in which this menu item appears on mobile.

Bug Fix: Confirmed ISO/EIO connections not showing up in volunteer overview (HOC3-9412)

in 3.0.8.3.2 we fixed the bug wherein confirmed ISO/EIO connections (which were confirmed and scheduled administratively to take place on a given date and time) were not displaying in the volunteer's account overview as an upcoming opportunity.

Any future confirmed connection (including an ISO/EIO on those occasions when they are confirmed) will now show up in the volunteer's profile.

HOC 3.0.8.2.x Releases (May 2 - May 8, 2019)

This release includes improvements to public security to combat the increased agressiveness of the occasional bot attacks some clients have experienced. Bug fixes include handling special characters when they appear in a team name, and addressing some occasional errors that occur as a result of incomplete or corrupted data. Here's some other notable bug fixes and improvements in this release:

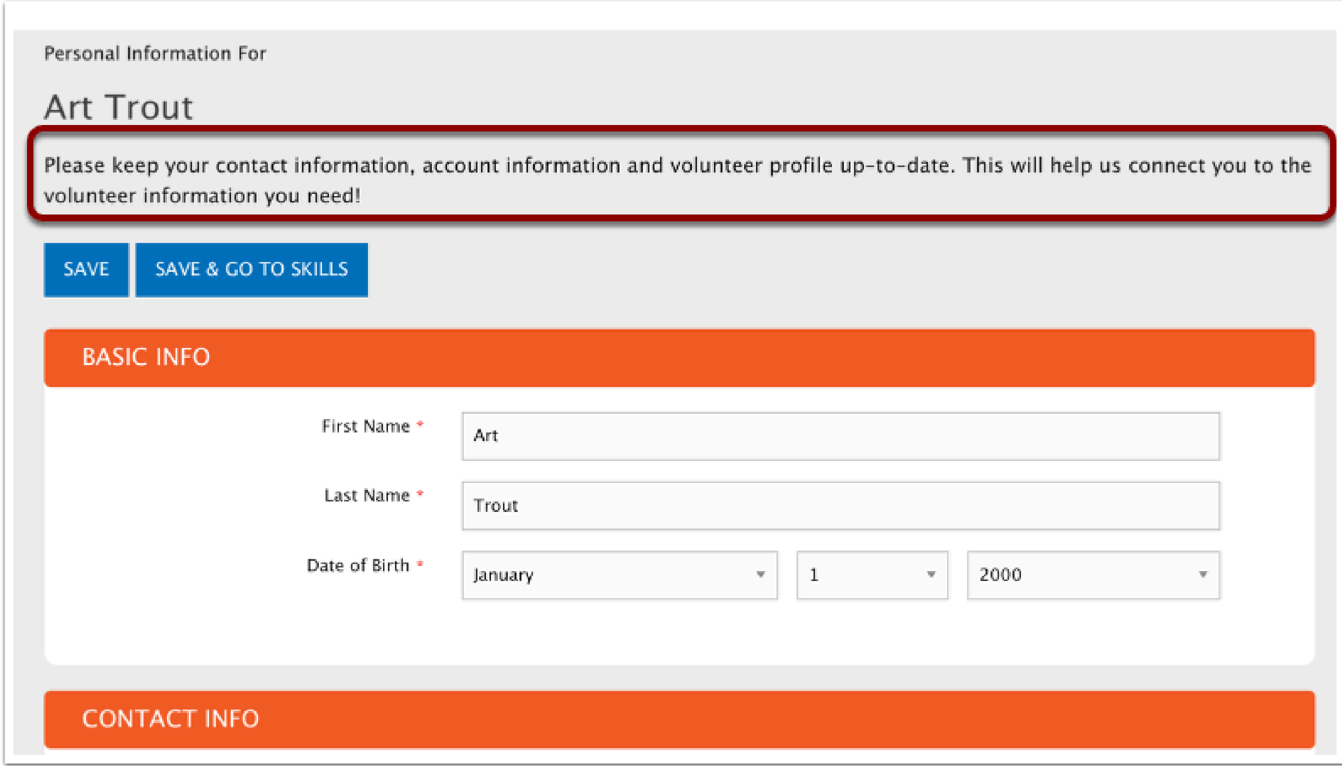
Improvement to User Experience (UX) when encountering a 403 error page (HOC3-9185)

CMS Pages that require the user to be logged in, cannot be accessed if you're not logged in. (Makes sense right?). Well, if you were to manually enter the URL for a page that requires you to be logged in, the result would be a page that showed that you encountered a 403 error. Since most users wouldn't know what a 403 error is - this error has been changed so that instead of seeing an error code, the user will be shonw a message "Please login to access this page".

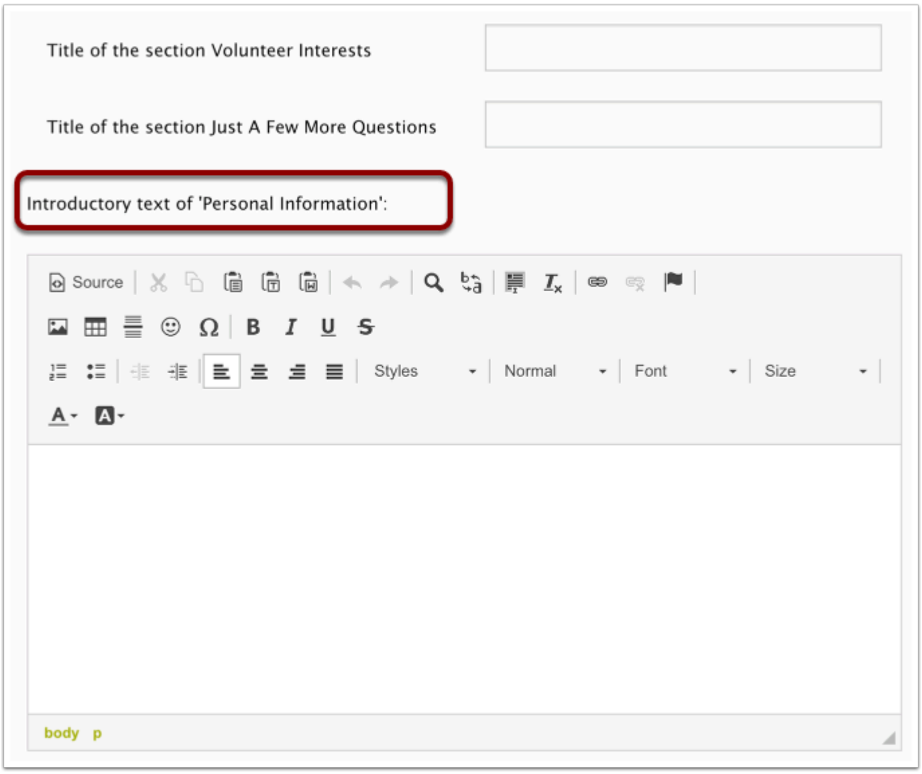
This page will now also provide the option to login. If the user then logs in to their account - they will be redirected to the page they were originally trying to access.

Ability to edit the introductory text of the personal information page on public site (HOC3-8279)

The System Page, "Personal information" /volunteer-personal-Information now includes the ability to edit the introductory text at the top of the page



This can be edited in the CMS by going to Blocks / System Forms / Personal Information. (You can also rename the section headers here). Left blank, the default text and header names will continue to be displayed.



Bug Fix: Unexpected display of Chinese Characters in Grid View

Calendar Page (HOC3-9369)

Some clients, who were using the Search Results Block in Calendar display format were seeing Chinese characters appearing next to the date. This has been fixed.

Bug Fix: Add to Calendar not adjusting for time zone for Outlook Desktop (HOC3-9384)

In the previous release, the 'add to calendar' functionality was updated to support organizations that listed opportunities in multiple time zones, by using the location of occurrences as the criteria for determining what time zone the calendar files should be set to.

The Outlook Desktop calendar did not recognize the time zone specific information included in its file. This has been corrected. The file for adding to outlook desktop calendar has been recoded so that it populates the correct time in an Outlook calendar. (Note: Do not use the ICAL file to add to an Outlook calendar. Use the file designated for Outlook Desktop).

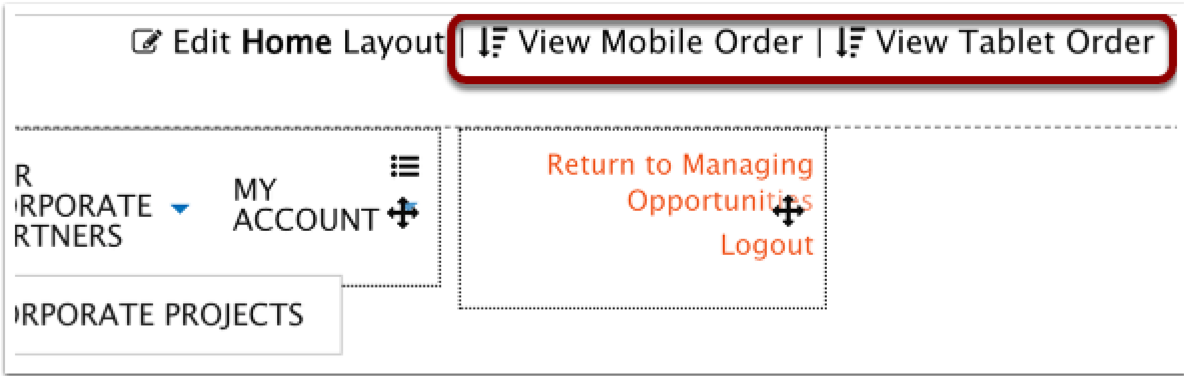
HOC 3.0.8.1.x Releases (April 18-23, 2019)

This release includes additional security improvements, additional merge tokens for the sharing portal email templates feature introduced in the last release, and improvements to reporting in the sharing portal. Here are some bug fixes included in this release.

CMS Bug Fix: Links to view mobile order and view tablet order (as well as edit them) no longer visible on desktop (HOC3-9208)

For users of the Universal Template (which allows for separate editing of mobile and tablet layouts), recent updates to the way the website adjusted on the desktop caused the links to "view mobile layout" and 'view tablet order" to no longer be visible when working at a desktop width.

These links have been restored and once again are visible. Clicking on the corresponding view provides the opportunity to edit that view's layout.



Bug Fix: Add to Calendar showing wrong time for opportunities in national organizations (HOC3-8986)

For organizations with volunteer opportunities in multiple time zones - HandsOn Connect practice has always been to set the time of an opportunity to the time it will take place at its local location rather than making any adjustment based on time zones(i.e. you do not have to change the time of the opportunity if your Salesforce Org is on the East Coast and the opportunity is on the West Coast. If its taking place at 6 pm in Los Angeles, you still say the opportunity takes place at 6 pm).

This works great on the website, and in email confirmations, as all opportunities take place at the stated time of the people who will be volunteering locally. However, because the files that are generated to allow a user to add an opportunity to their personal calendar after signing up were translating the opportunity time to the time zone your SF instance is set to. So, for an organization with a SF instance set to East Coast Time, posting an opportunity that takes place at 6:00 pm in Los Angeles, when you used 'add to calendar' - it showed up on your calendar as 3 pm! Yikes. Confusing. (It's confusing just to try to follow this). Luckily, this was only an issue for national organizations posting opportunities that take place in different time zones.

In this release we've resolved this bug by making a time zone adjustment on the downloadable file used to add items to personal calendars (apple calendar, google calendar, outlook calendar). The adjustment takes into account the location the opportunity is taking place in, so that 'add to calendar' will automatically show the correct local time on personal calendars. So just as on the website, a project taking place at 6 in Los Angeles will show up as 6pm on personal calendars as well as on the website (even though the project doesn't really take place until 9 pm eastern time).

Confused? Don't worry. Just keep posting times as you've done - and rest assured that the correct time will now appear when people add an opportunity to their local, personal calendar.

Bug Fix: Possessive words showing an additional comma on the public site (HOC3-9272)

Some sites reported that possessive words in event descriptions showed on the public site with an additional comma. Example: The Forsyth County **Governor',s** Volunteer Service Award Breakfast Table....

This issue has been corrected.

Bug Fix: Volunteer Leaders unable to email volunteers from the sharing portal (HOC3-9318)

This bug was detected and quickly fixed. Its once again possible to send emails to volunteers from the sharing portal.

Bug Fix: Emails not sent to Partner Approval Manager when partner requests sharing portal access for an organization contact

Another bug that came up shortly after the sharing portal email templates were introduced. This too was quickly fixed.

Release Notes - April 2019

The April release contained small improvements and bug fixes to the core HandsOn Connect package (i.e. the way things operate in Salesforce). Here's the most notable improvements:

"Overview' components no longer profile dependent (HOCAVV-1214)

The Visualforce components on many HOC objects such as volunteer opportunities, occurrences, and recurrences, have links to 'publish' or 'approve' records (so that they are published to the public site). However, the publish and approve links were only visually accessible to users with either System Administrator or Staff profiles. (the original two HOC-based profiles).

As more and more HOC users do more things in Salesforce - more and more profiles are being created (or pre-existed the use of HOC), and the limitation of seeing these links to just two profiles became problematic.

As of this release - these links are no longer profile-dependent. So any user with a profile that has access to the object and its page layout - will be able to see and use the publish or approval links.

New fields added to support team / account relationship feature (HOCAVV-1219)

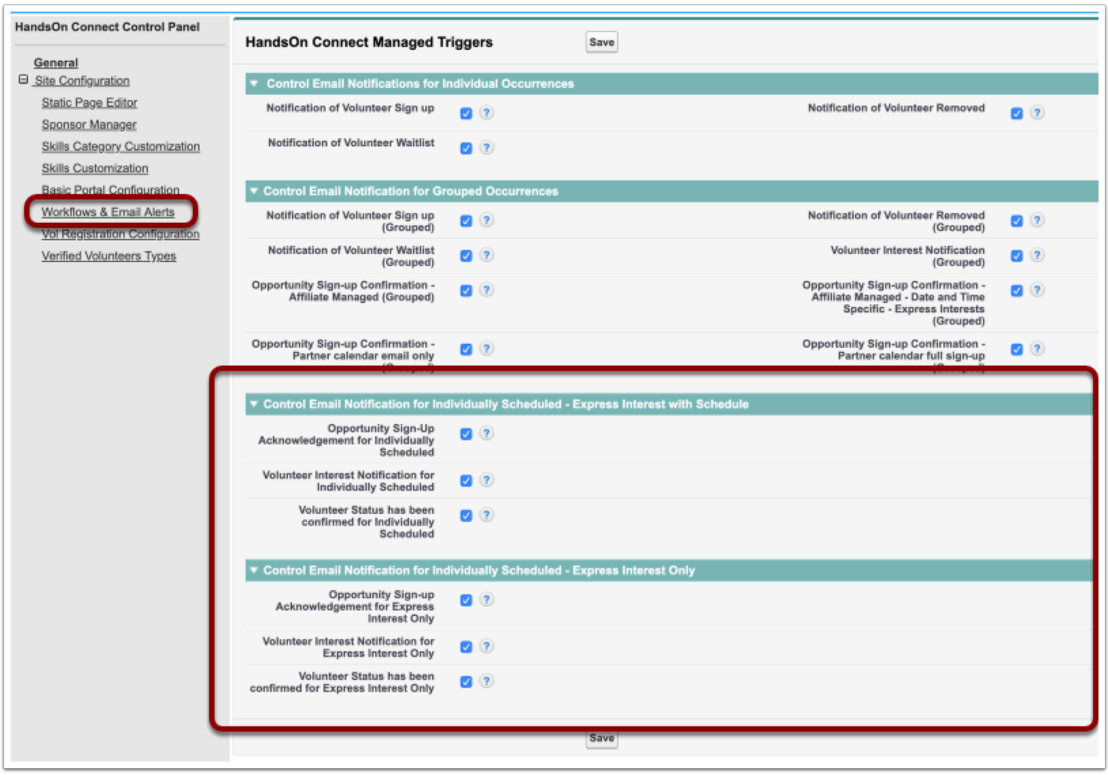
Two new fields have been added to HOC objects to support the new option for creating teams via account lookup. [See this documentation that describes the feature, and the rules governing these two new fields:]

Object: Volunteer Team
New picklist field: Type of Group

Object: Accounts (Organizations)
New checklist field: Use for Team Creation

Ability to disable sending of Individually Scheduled Opportunity - related emails (HOCAVV-1221-1222-1223)

The control panel now has two new sections to allow disabling emails managed by HOC Triggers related to Individually Scheduled Opportunities - both ISO Express Interest with schedule, and ISO Express Interest Only. Help tips are available describing each email.



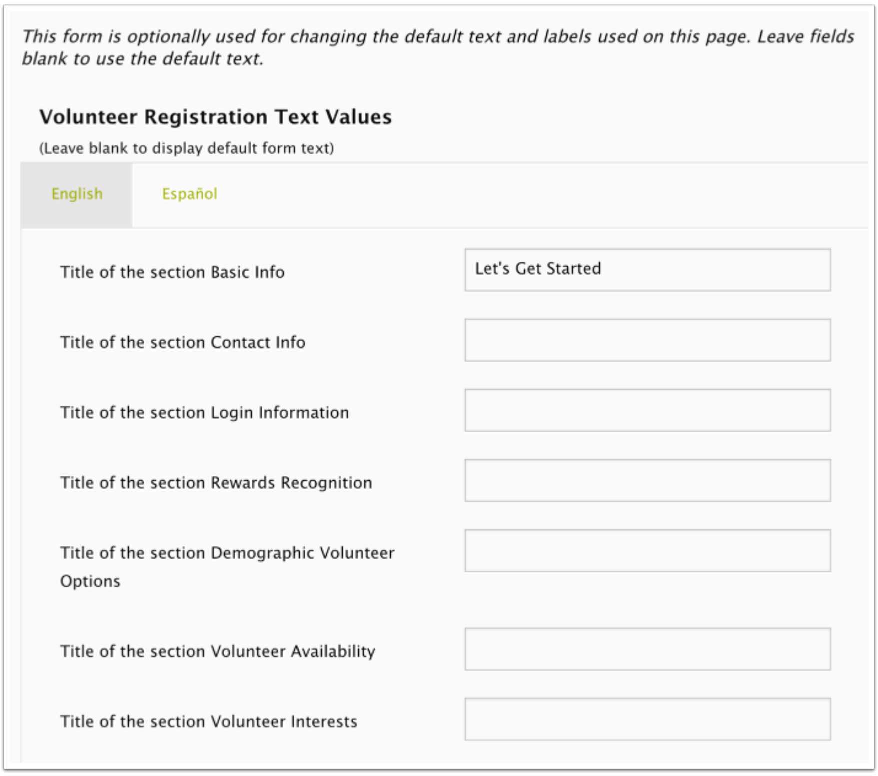
HOC 3.0.8.0 Release (April 5, 2019)

This release continues to add internal improvements to make HandsOn Connect faster and more efficient. It also includes a number of security improvements. Also addressed are circumstances in which the use of certain foreign letters such as "é", were creating display issues on some pages. Here are the highlights of this release:

New Feature: Section Headers of System Pages can now be edited (HOC3-9122)

The CMS now makes it possible to change the names of section headers on system pages. For example, on the Volunteer Registration Page if you don't like the section header: "Basic Info" you can change the header of that section to anything you like. "Let's Get Started" for example.

You'll find the ability to rename sections in the CMS under Blocks / System Forms and go to the system form you wish to edit. Header names can be edited in multiple languages if your site is bi-lingual.



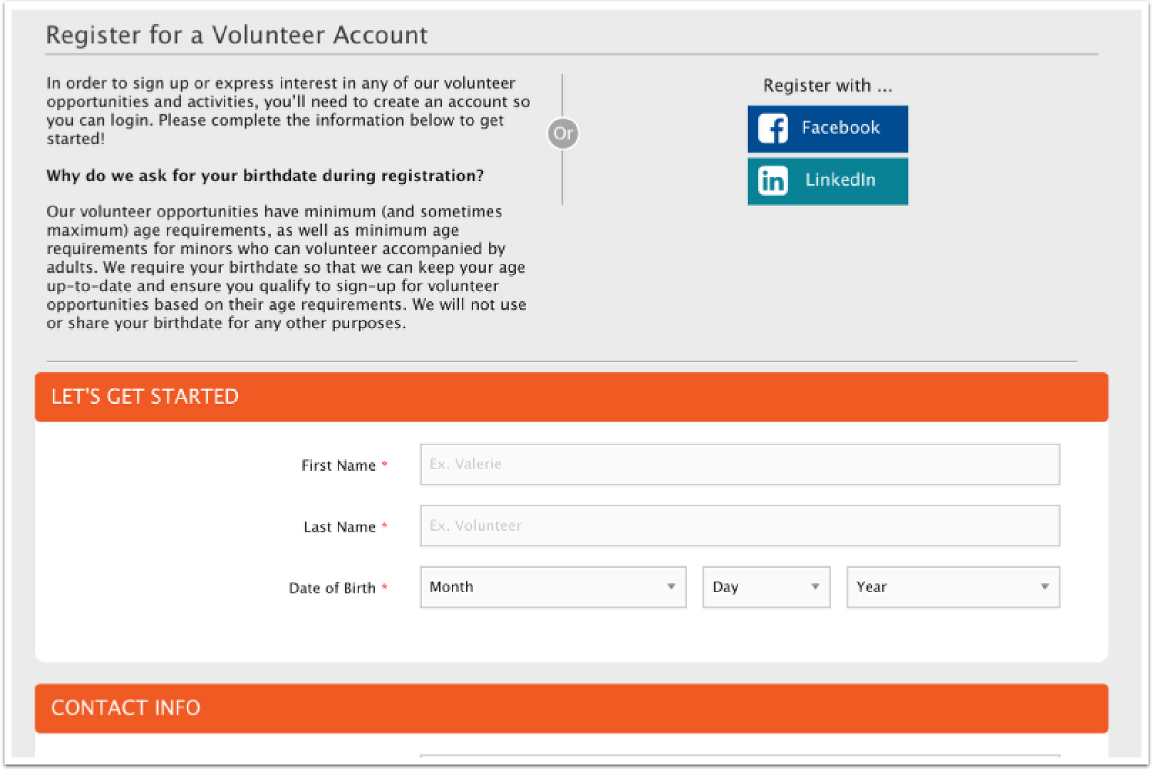
This form is optionally used for changing the default text and labels used on this page. Leave fields blank to use the default text.

Volunteer Registration Text Values

(Leave blank to display default form text)

English   Español

Title of the section Basic Info	Let's Get Started
Title of the section Contact Info	
Title of the section Login Information	
Title of the section Rewards Recognition	
Title of the section Demographic Volunteer Options	
Title of the section Volunteer Availability	
Title of the section Volunteer Interests	



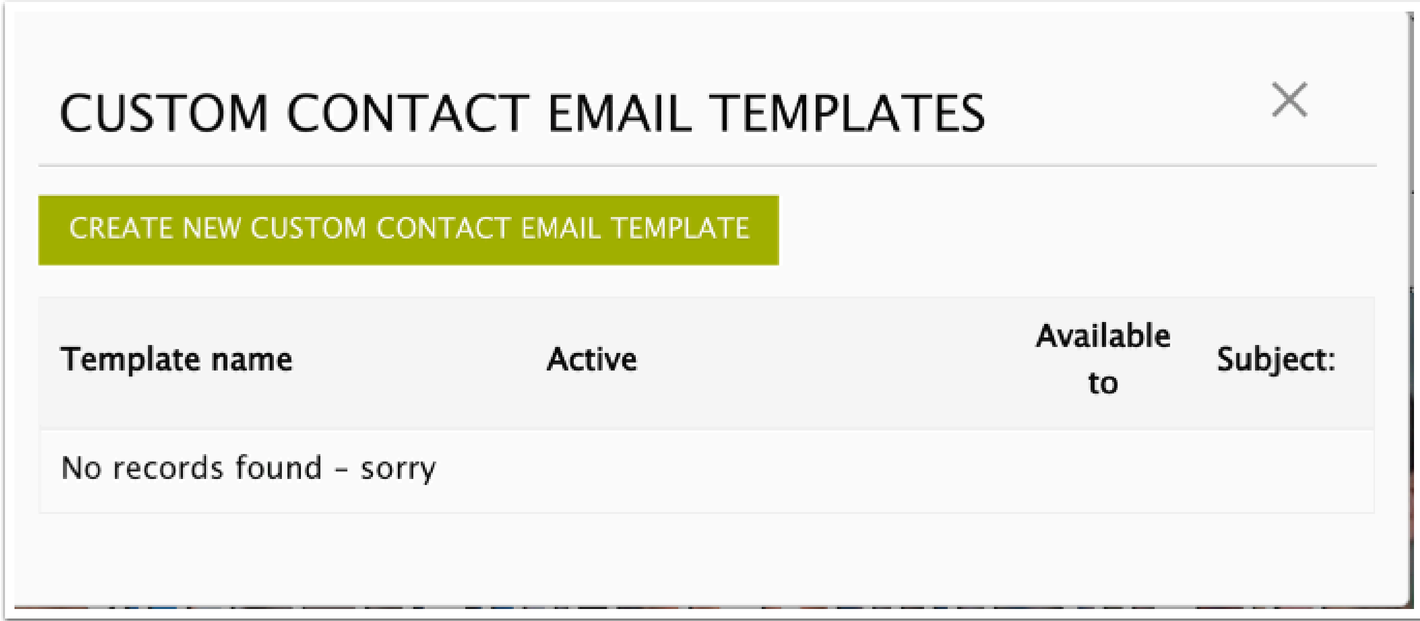
New Feature: Multiple Email Templates can be made available in Sharing Portal (HOC3-9173)

When an opportunity coordinator or volunteer leader sends an email to connected volunteers in the sharing portal, there has always been a default email template available (which can be edited before sending).

It's now possible for a CMS user to create additional email templates, with merge fields, should you want to give the opportunity coordinator other pre-formatted emails to send to connected volunteers.

To create a sharing portal email template:

In the CMS, go to Add-Ons/Custom Contact Email Templates, and click on "Create new Custom Contact Email Template"



A form for creating your email template will appear.

1) Give your template a recognizable name

2) **Available Role:** Specify which profiles should have access to this template. (You can make some templates only available to Partner Staff, and others available only to Volunteer Leaders, or both.

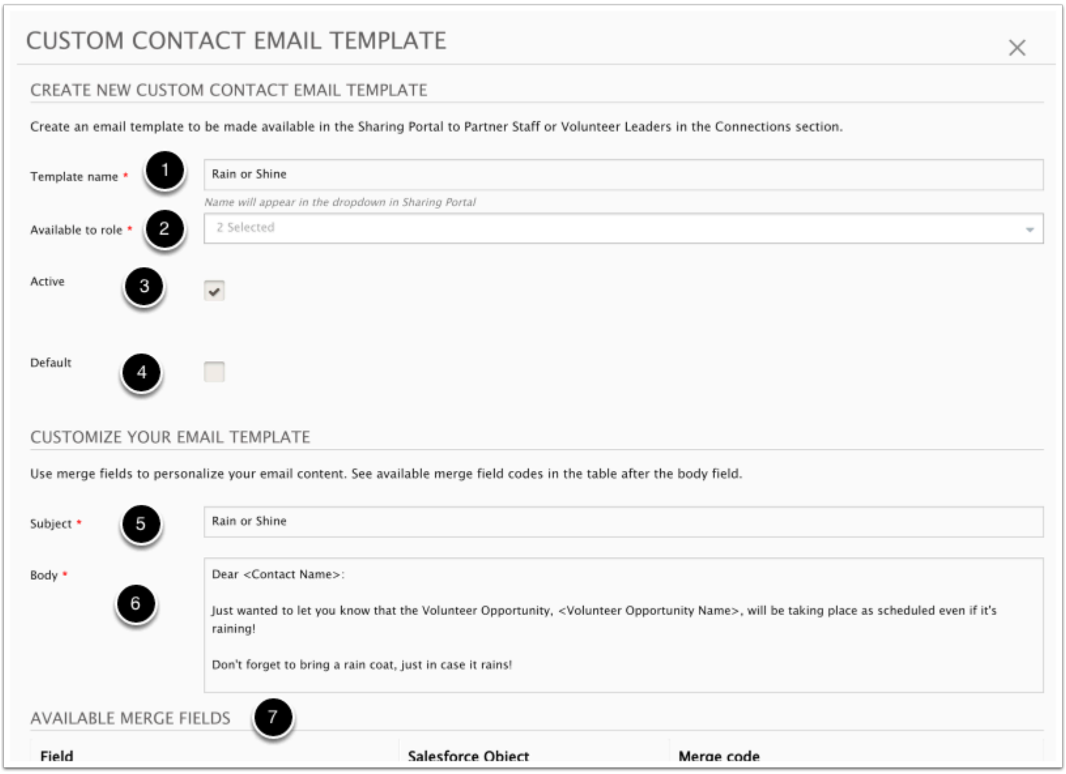
3) **Active:** check this box to make the new email template active in the sharing portal.

4) **Default:** check this box if you want this to be the default email template available.

5 & 6: The Subject Line and Body of the email template.

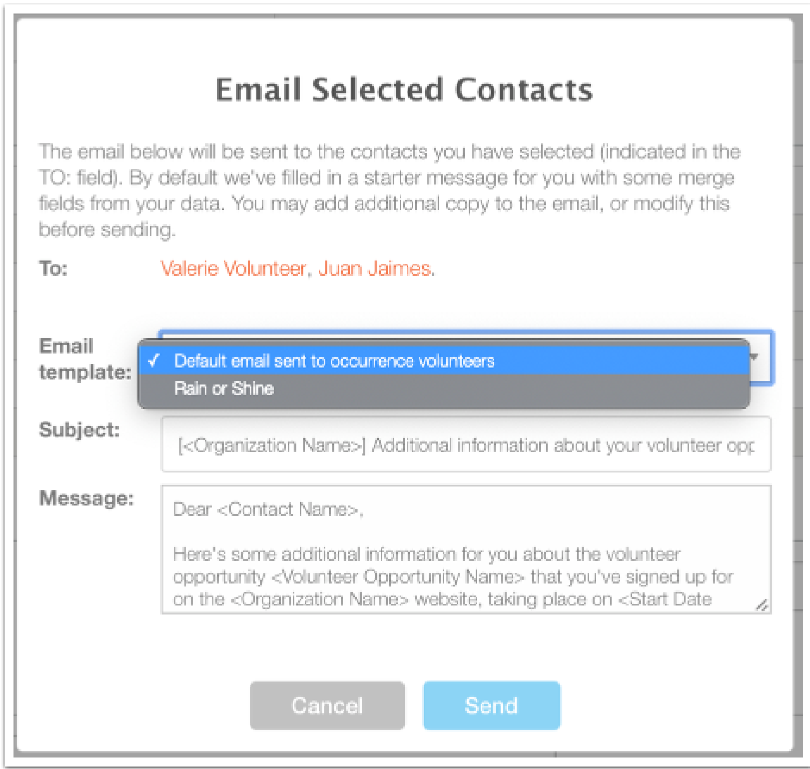
7) A list of merge codes you can use to merge in data from Salesforce objects. Merge codes take the form <merge code> and will merge in data from various objects associated to the connection.

Click Save to save your email template.



Once your email template has been created: A new option will appear when selecting connections and clicking on "Email Volunteers"

A new field "Email Template" will be shown - which will enable you to select which email template you want to use:



Bug Fix: Maximum Waitlist field not respected (HOC3-9192)

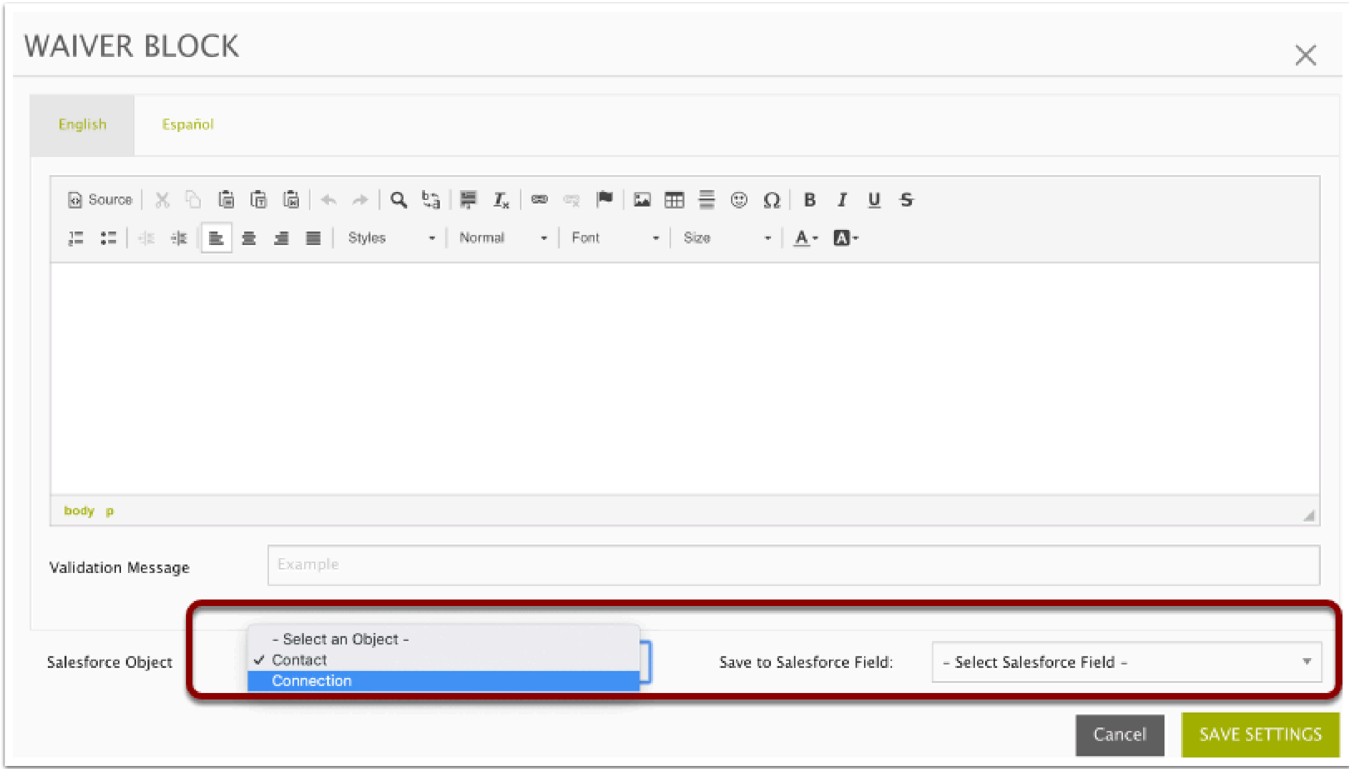
One of the advanced occurrence options that are available (albeit, rarely used) is a field called "Maximum Waitlist". If used, this puts a cap on the number of people who can add themselves to the wait list for a full occurrence. The 'limit' set in this field was not being respected. This has been fixed.

HOC 3.0.7.15 Release (March 21, 2019)

In this release we continue to improve the performance of HandsOn Connect with improvements to the overall application. There are also improvements to sites with one or more subsites. Here are a few of the more visible fixes and improvements.

ARS: Waiver Block Form Improvement (HOC3-8957)

When using a waiver block as part of an ARS workflow - it's now possible to map the acceptance of the waiver to a custom checkbox field in other the Contact or the Connection Record. Previously, you could only map to checkbox fields in the contact record.   For opportunity sign-up, you can now map the acceptance of the waiver directly to the connection if desired.



Layout of fields and field names on Personal Info Page updated (HOC3-

The Personal Information page generally offers the same fields as the Volunteer Registration page -- however the personal info page had slightly different naming conventions for the fields, and presented them in a different (and sometimes non-intuitive) order. The personal information page layout is now in line with the presentation when the volunteer first registers.

Note: The Volunteer Registration page and the Personal Information Page are both independently edited in the CMS as to which fields you want to display and require. So they will only be identical if you choose to have the same fields visible in both. In some cases, organizations choose to keep registration simple and uncluttered, and make additional fields visible in the personal info page for volunteers to optionally fill in at a later date.

Bug Fix: Populations Served in Organization Record (HOC3-9003)

The Organization Object multi-picklist field "Population Served" appears in the sharing portal (on the My Organization Page), and on the public site on the Partner Registration Page, as a single picklist called "Primary Population Served".

If you update the picklist values for this field in Salesforce, the updates will be now be reflected and available on the public site and in the sharing portal.

Changes to picklists in Salesforce generally take about an hour before they show up on the public site. So clear your caches and wait an hour to see the new values :-)

Improved Autosizing / Mobile responsiveness of Browser Layout on desktop (HOC3-9047)

As part of the mobile responsiveness of HandsOn Connect, if your browser window is narrowed significantly, the site shifts into its tablet or mobile layout mode. In the past however, if you widened your browser window back to a desktop width, HandsOn Connect stayed in a mobile or tablet layout. This has been corrected. If you widen a browser window on the desktop - it will revert back to the standard desktop layout and navigation.

There were also reports that forms occasionally lost data when windows were resized... This too has been corrected.

HOC 3.0.7.14 Release (March 7, 2019)

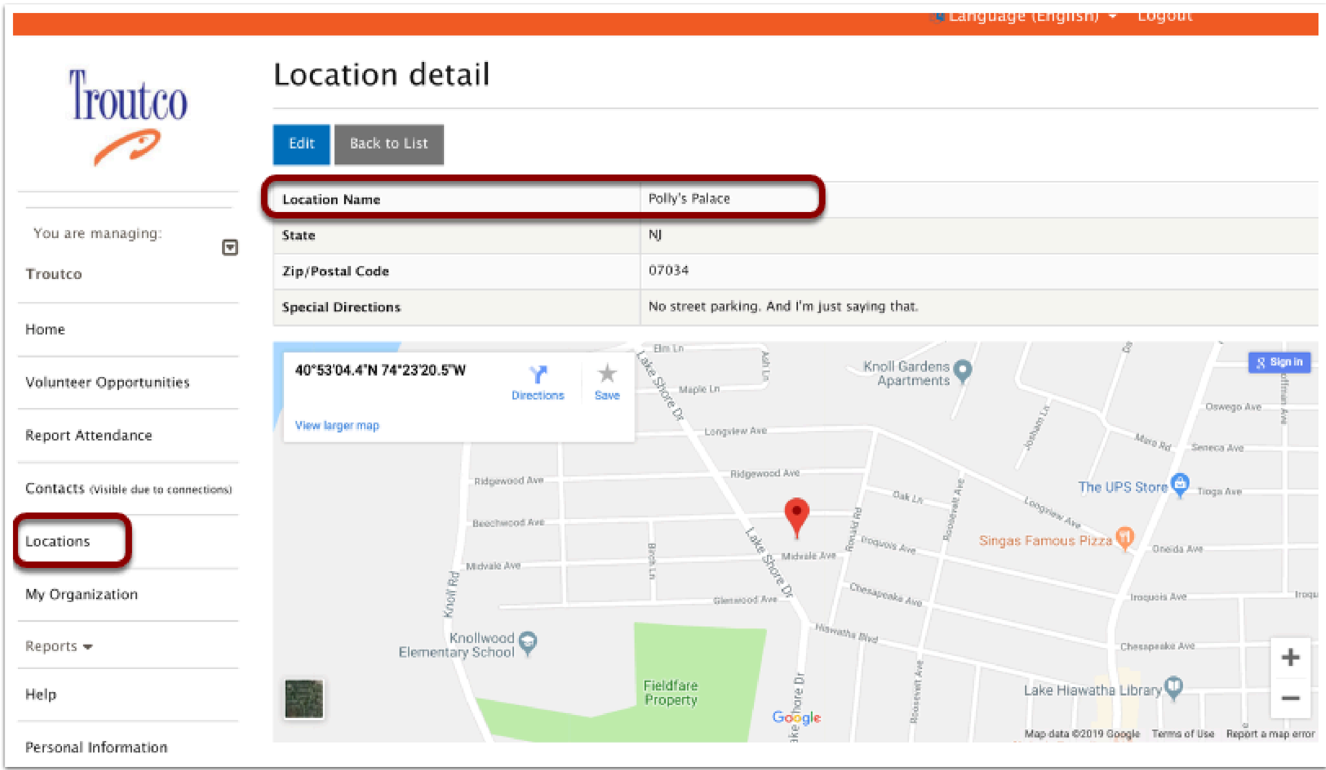
This release continues to add 'under the hood' improvements to performance and flexibility in the system. There have also been some grammatical improvements to some of the help tips within the CMS system. Here are some of the most notable improvements in this release.

Improvements and added visibility to Google Maps (HOC3-7385)

We've updated the way we use Google maps in HandsOn Connect, to take advantage of the latest updates to the Google Mapping system.

As you know, Google Maps are displayed to volunteers when they look at the 'location details" on the public site.

For those of you who have made the request to allow sharing portal users to View and Edit locations in the sharing portal -- Viewing a location will now also display the google map that Volunteers will see on the public site.



If you do not have the locations menu item in your sharing portal, and you wish your partners and/or volunteer leaders to have the ability to view and/or edit location records -- open a ticket and request we activate this for you.

In your request - specify which profile(s) Partner and/or Volunteer Leader. And whether each should have permission to edit (or just to view)

NOTE: If you'd rather keep things simple - there is no need to add this menu item. Partners will still be able to create or select existing locations when creating Volunteer Opportunities and Occurrences.

Improvement to Volunteer Registration Options: Smart Phone Number option (HOC3-8768)

There have been several slightly irritating issues about getting volunteer phone numbers in HandsOn Connect that have vexed some of our users.

1. While you could choose which of four numbers to display in the form ("Home Phone, Work Phone, Mobile Phone, Other Phone") you couldn't require a volunteer to fill in at least one of them. You COULD require a mobile number, but you couldn't require (for example) EITHER a mobile number or a home number.
2. If you were only interested in two phone numbers, and you chose to display the field "Main Phone Type", it still showed a picklist of all 4 phone types, even if you only showed 2 of them to be populated.
3. If a volunteer selected their Main Phone Type to be "Mobile" - and then they didn't put a value in Mobile Phone Number -- their primary phone number in SF would be blank.

In this release we've made it possible to resolve these issues for those who wish to make it required for volunteers to fill in at least one phone number, and have it correspond to the Main Phone Type they indicate. (Which populates the field "Primary Phone?" in the contact record in Salesforce)

See this article for information on how to:

1) Limit the options for "Main Phone Type" to less than all four phone types.

2) Require that the user populates the phone number for the Main Phone Type they select.

If you are happy with the way you're capturing phone numbers now - no action is needed on your part. Your Registration Form (and personal info page) will continue to work as it has been working.

Bug Fix: Column Headings in wrong place in exported form data (HOC3-8737)

When exporting .csv files containing form data through the CMS, in some cases the column headers were being split across multiple columns making the exported form hard to read.

This was due to certain characters, like columns, that were sometimes used in forms, and created confusion when exported into csv files.

The issue has been corrected and forms exported as .csvs will have column headers properly placed so that you know which responses correspond to which columns :-)

TIP: Keep in mind that the 'field name' you use in a form is going to be the column heading for the data that users submit. Keep your Field Names short and clear, and use help tips in forms (or descriptive sections) to avoid having long field names like "Tell us a bit about yourself, your history as a volunteer, and why you want to be of service to your community?"

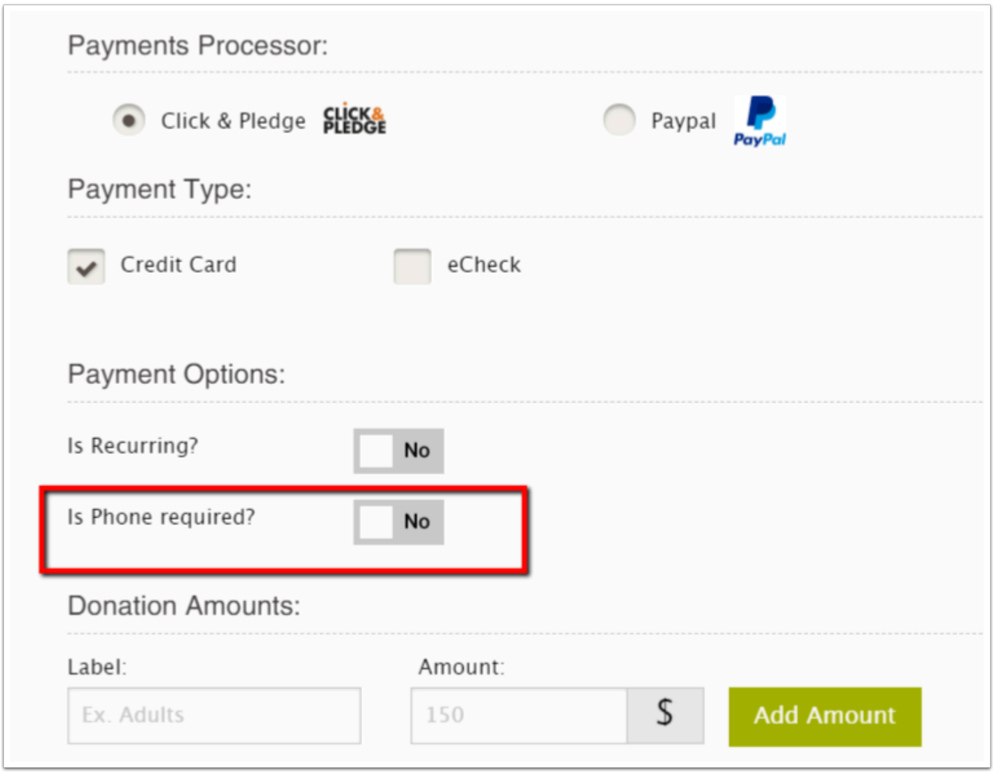
If you make this the text field name they populate, then the heading on your exported file is going to be very very wide. Use some introductory text before the field, (or a help tip for the field) and call the field something like "My volunteer story".   It'll make reading your exported data so much easier

Bug Fix: Team Signup for opportunities with pre-requisites (HOC3-8797)

For advanced users creating volunteer opportunities with prerequisites - we've found that during team sign-up, the team members who signed up for the prerequisite opportunity, were not being signed up for the opportunity that required the prerequisite. This has been fixed and team members will be properly connected to both the original opportunity and its prerequisite.

Click and Pledge Donation Form allows phone number to be 'not required" (HOC3-8907)

Its now possible, if creating a donation form for Click and Pledge - to ask for a phone number but NOT make it required.

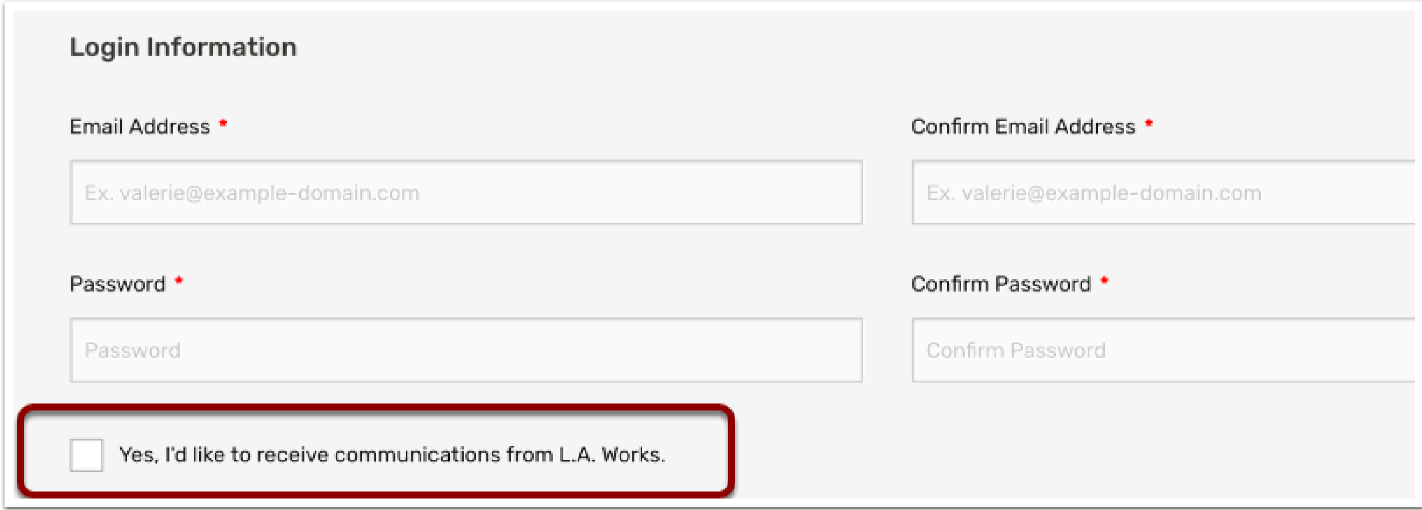


Bug Fix: Emails sent from sharing portal not merging <start date time>. (HOC3-9037)

When sending emails to connections via the sharing portal - the default email message has a number of merge tokens that bring in info about the connection. It was recently observed that the merge field <start date time> was not being merged and was left blank in the emails sent. This has been fixed. The start, date and time of the connection will be properly populated when this token is used in the email."

Volunteer Registration updated to comply with GDPR (HOC3-8940)

In order to comply with GDPR, the communication preferences checkboxes in the Volunteer Registration form have been changed from opt-out, to opt-in.   A volunteer must choose to opt-in to receive communications by checking the box (if these fields are displayed on your registration form.)


Login Information
Email Address *
Ex. valerie@example-domain.com
Confirm Email Address *
Ex. valerie@example-domain.com
Password *
Password
Confirm Password *
Confirm Password
Yes, I'd like to receive communications from L.A. Works.

Release Notes, Jan - Feb 2019

The January / February release of the HOC application in SF has a number of under the hood fixes, which are pretty complicated to explain technically. Included are updates to triggers that caused errors in some fringe cases. Also addressed were issues related to mass importing data causing conflicts for NPSP users due to batch apex errors related to too many SOQL aggregate queries -- (We warned you this stuff was very geeky :-)

Here's a couple of the items in this release with easier to understand implications :-)

Bug Fix: Address issues with special characters causing errors in self-reported Volunteer Opportunities (HOCAVV-1206)

There were problems that could occur when a self-reported connection title or description had special characters such as "&". This fix addreses that and provides support for organizations with & in the name of the organization.

Tracking fields added to Recurrence Object (HOCAVV-1207)

The tracking fields used to identify the creation and modification source of occurrences were not present in the Recurrence object. That means that occurrences created in the sharing portal via recurrences, were missing this tracking info. This has been corrected.

For more information on tracking creation and modification of records via the public site and sharing portal, see this article.

HOC 3.0.7.13 Release (Feb 21, 2019)

This release completes the significant internal improvements we've done to HOC to migrate to using the Rest API which will result in better performance, and more flexibility for the future. It also sets the stage for development of future mobile applications! There are also a number of improvements to the public site, the ARS and forms. Here's the highlights of this release:

More options for making documents accessible via the public site (HOC3-8847)

We've always recommended using Salesforce Files as the best way to make documents available via the public site, but we've now made it possible to link files that are uploaded directly into the CMS as well. There are pros and cons to each approach, but now you have multiple choices.

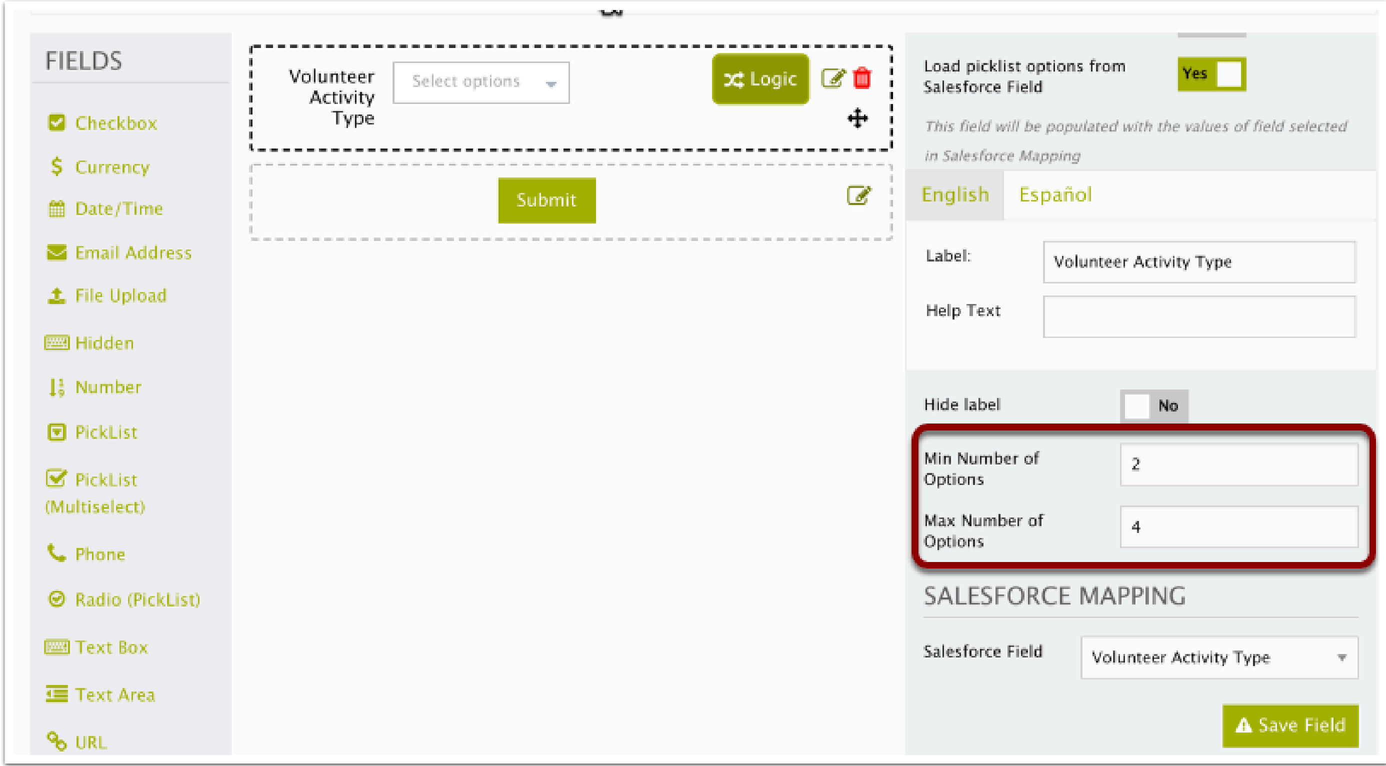
To learn about both ways of linking to documents and the pros and cons of each approach [read this article!]

ARS Improved Options for Multi-Picklists fields in forms (HOC3-7554, 7907)

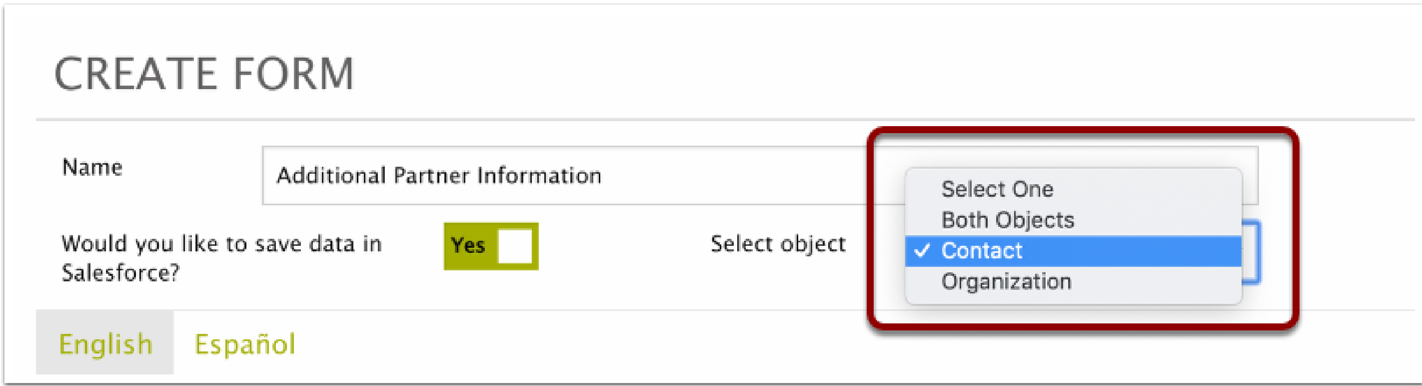
1. Previously, in the ARS you couldn't set logical conditions to **branch** the workflow based on input to multi-picklist fields. (only to regular picklists). Now multi-picklists are supported for branch logic.

If you set the condition to equal to -- then if the value is one of the values in the multi-picklist it will be considered true.
If you set the condition to not equal to -- then if the value is not one of the selected values in the multi-picklist it will be considered true.

2. Additionally, when placing a Multi-Picklist on a form (in the ARS or in a stand-alone form), you can optionally require that the user select a minimum number of options and/or a max number of options when submitting an answer to that question on the form. If they do not submit the right number of selections on the multi-picklist, a message is displayed "**Please select between [minNumber] and [maxNumber] option(s).**" If these values are left blank, the user can select just one option (if the field is required), or none (if the field isn't required)



ARS for Partner Registration now supports mapping to accounts ()HOC3-8167)



Previously, when creating an ARS workflow for partner registration - you could only map data to the contact record of the person submitting the form). Now you can choose to create an ARS workflow for partner registration that maps to either contact OR account. Or both! It makes a lot of sense to put additional information about the organization itself on the account record. And now you can! How sweet it is!

Improvements to reports in partner portal (HOC3-8544 and 8670)

1) **Headers now visible in exported summary reports:** When a report was a 'summary' report - in some cases the headers were not visible in the exported report. This has been fixed. Headers will now be visible as expected. Note: the rows with 'summary' groupings have no headers. But the headers in the report will apply to all the 'data' within each grouping.

2) **Formulas now supported in sharing portal reports:** Previously reports in the sharing portal did not show the calculated totals and subtotals in summary reports. Now those summary figures are visible in the sharing portal (just like they are in SF). Additionally, custom formula fields added to a report, will now show up in reports in the sharing portal! Yay and Double Yay!

Summary reports are nice and easy to read in the sharing portal - but not as useful when exporting.

To minimize confusion when exporting summary reports -- limit the number of groupings you create. The grouped headings are exported -- but aren't useful when trying to deal with the exported data because they are just 'summaries' - and not actual data.

We recommend using **tabular reports** in the sharing portal for reports designed for exporting. (They are also searchable and sortable in the sharing portal so tabular reports have real advantages!)

Summary Reports and Matrix Reports are great for reading and viewing in the sharing portal, as they can show calculated results through summary totals and formulas. But they are kind of awkward for exporting, since they mix summary info and groupings with actual data.

Public Site Improvement - picklist values in fields now match the order you set in SF (HOC3-8605)

In the Search Opportunity Filters, the picklist options often appeared in a random order. They did not reflect the order of the picklist values in the fields themselves in Salesforce. Now, whatever order your picklist fields are in Salesforce, will be reflected on the public site. You'll see this in filters such as "Organization To sServe" "Issues Areas to Address" (Skills" "Activity Type" etc.

Improvements to public site for volunteers who use Screen Readers (HOC3-8704)

The navigation (menu items) used in HOC public site have been improved to provide greater compatibility for users with visual disabilities who rely on screen readers to navigate websites. Additionally, system forms for login, advanced search, basic search, calendar, opportunity detail pages, search filters and options, partner signup, volunteer registration, and social networking have been made accessible to screen readers.

An FYI for customers who originally used HOC 2 and migrated to HOC 3

When you migrated from HOC 2 to HOC 3, any volunteers or partners logging in were able to log in with their original password. This made transitioning to HOC 3 pretty much transparent. We did this by preserving their previous password from their original Salesforce User records.

Starting with this release however, any volunteer or partner, who has not logged into the public site since you migrated to HOC 3, will find their previous password is no longer preserved. They will have to click on 'forgot password' and create a new password in order to log into the HOC 3 public site or sharing portal.

This should only affect those rare volunteer or partners who have not used the system in the many months since you migrated from HOC 2 to HOC 3, so we don't expect this to have any real impact. (If they haven't logged in in such a long time, they probably are unlikely to now). However - if you have a volunteer or partner who hasn't logged in to your site in a long time - and they find their password doesn't work, just tell them to click on the 'reset password' link. (We imagine most people will do this intuitively if they see their password doesn't work :-)

HOC 3.0.7.12 Release (Feb 7, 2019)

This release features a ton of internal improvements that improve the speed and reliability of HandsOn Connect allowing it to function more efficiently for HOC customers with a lot of data! We won't bore you with the technical underpinnings of improving the way we handle APIs -- but here's two visible improvements to Listing blocks and Search Results blocks :-)

Listing Block Improvements (HOC3-7948)

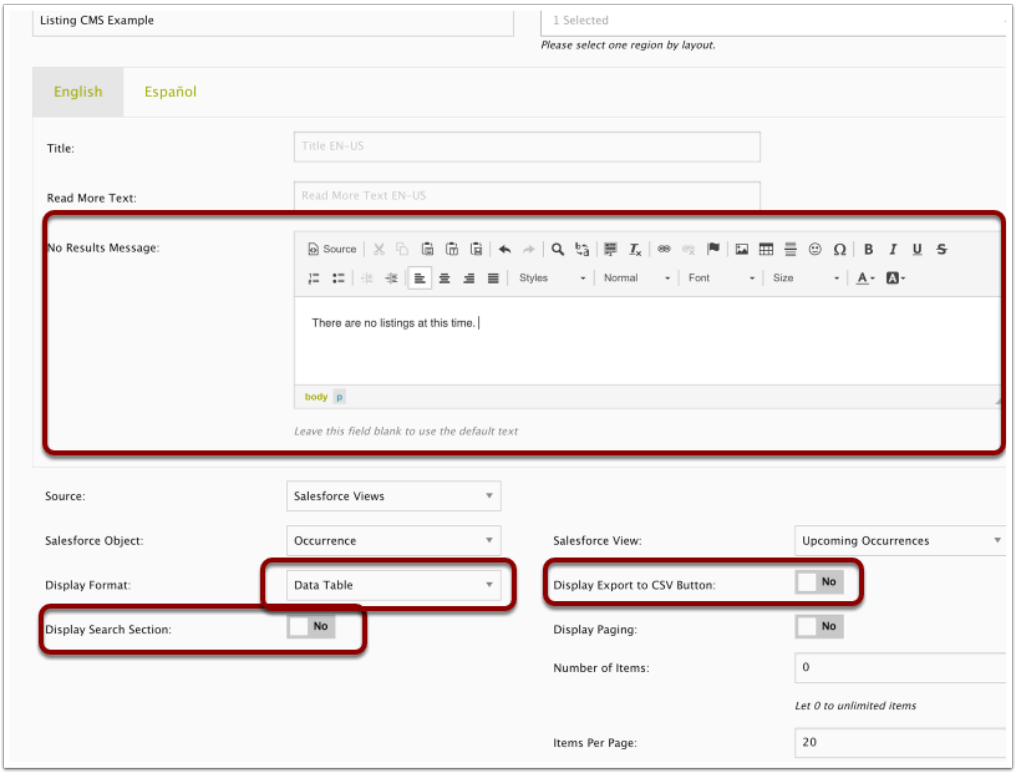
The CMS Listing Block continues to have expanded flexibility and power. Here are some of the latest options for configuring Listing Blocks.

1) The default message that will be displayed when there are no available results for a listing block has been updated to "There are no items to display"

2) You have the ability to customize the text you wish to appear when no results are available. An html editor is available to populate your custom "No Results Message"

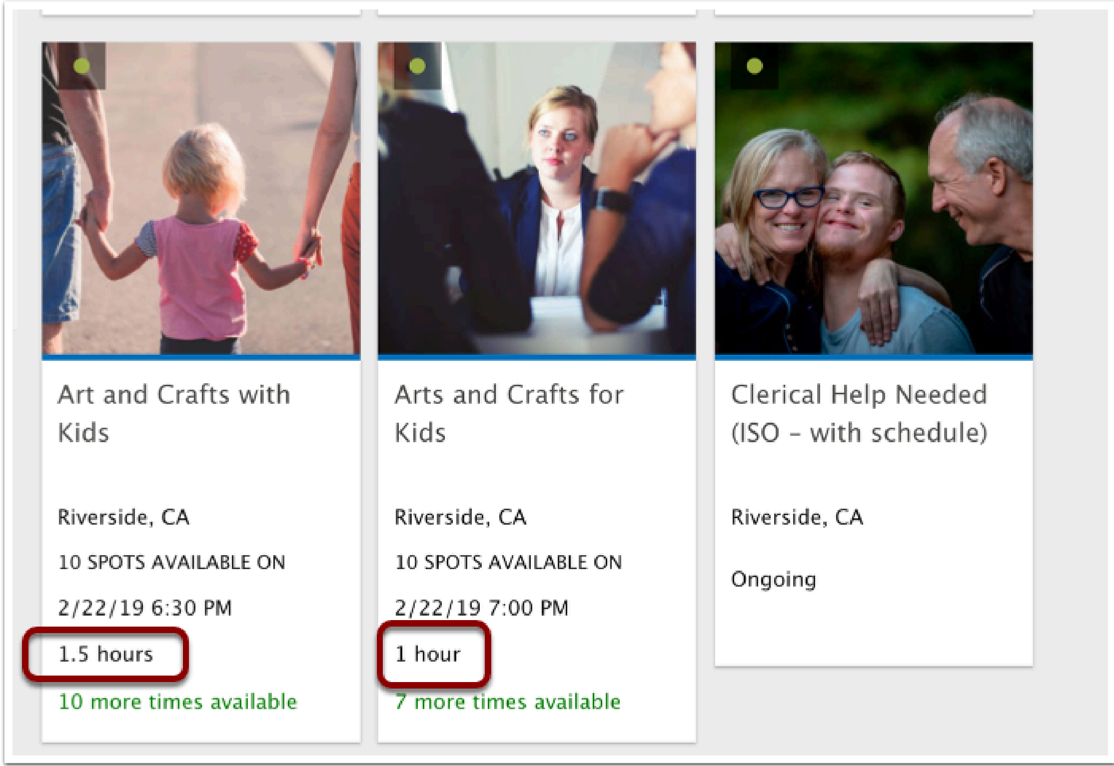
Other recent, handy options include:

- The ability to display a salesforce view as a data table
- The ability to allow exporting to CSV
- The ability to Display a Search Section in some display formats



Search Results Block Improvements (HOC3-8481)

For customers using the search results block as an alternative to the standard HOC /search or /calendar pages -- the search result cards now includes the 'duration' of the Volunteer opportunity for date and time specific opportunities.


Art and Crafts with Kids
Riverside, CA
10 SPOTS AVAILABLE ON
2/22/19 6:30 PM
1.5 hours
10 more times available
Arts and Crafts for Kids
Riverside, CA
10 SPOTS AVAILABLE ON
2/22/19 7:00 PM
1 hour
7 more times available
Clerical Help Needed (ISO - with schedule)
Riverside, CA
Ongoing

HOC 3.0.7.10 Release (Jan 10, 2019) and HOC 3.0.7.11 Release (Jan 24, 2019)

These two releases have implemented a number of 'under the hood' improvements to improve speed and performance in HOC. They include technical improvements to the Listing Block, ARS, forms, and overall speed and reliability of HOC public sites. Here are some of the highlights in this month's releases.

Greater clarity during team signups for opportunities (HOC3-8652)

Various customers have indicated that sometimes, during team signup for opportunities, a team captain accidently signs up all their team members, without meaning to. In other cases, the team captain only signs themselves up (not realizing they need to select the team members they also wish to sign up).

To help the team captain to catch mistakes like this, the following behavior is now introduced during team signup for opportuniities.

1) When a team captain selects all their members a popup will appear and say:

"You are about to register **all** XX of your team members for this opportunity. If this is not correct, please cancel and unselect the team members that are not attending."

2) When a team captain selects a subset of their members the popup willsay:

"You are about to register XX of your team members for this opportunity. If this is not correct, please cancel and select (or unselect) the team members that are attending (or not)."

3) When a team captain selects no members (or only themselves as captain) the popup will say:

"You have not selected any of your team members for this opportunity. If this is not correct, please cancel and select the team members that are attending."

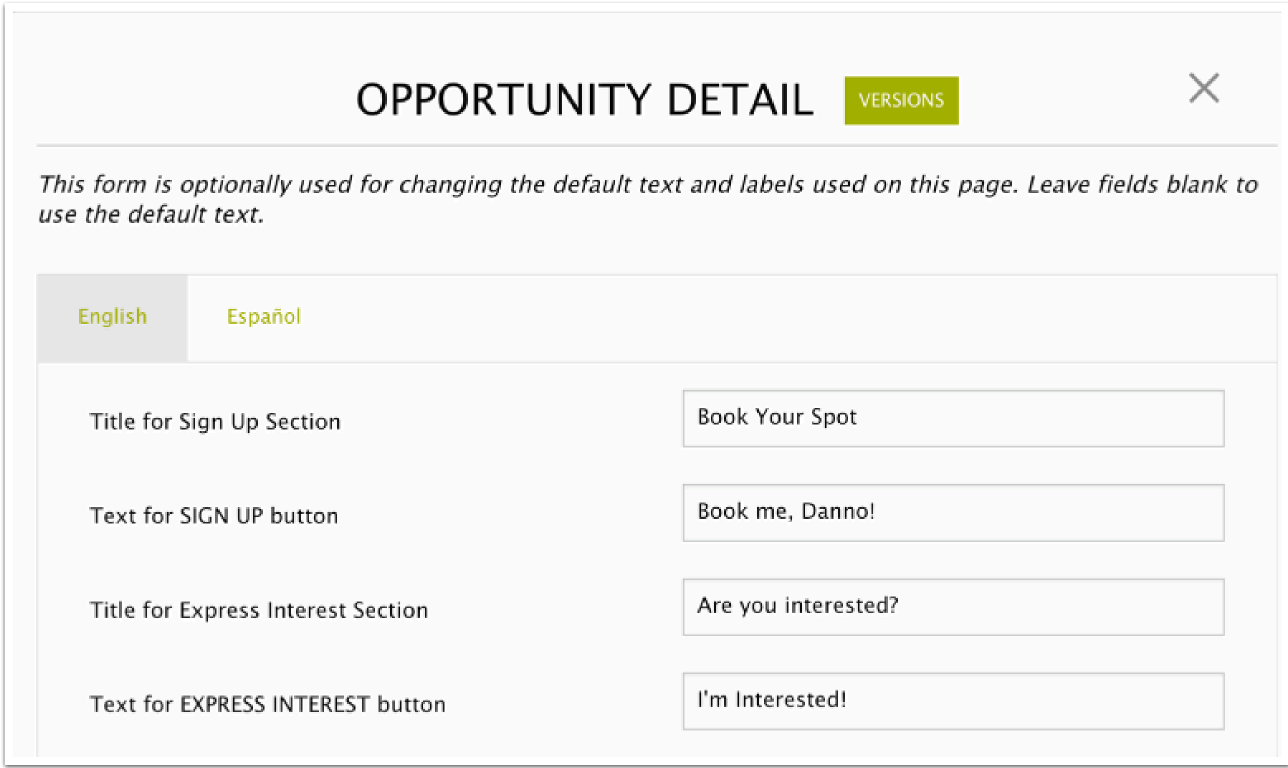
These popups will make sure that the captain is aware of how many team members they are signing up, and give them the opportunity to confirm the signup before proceeding -- or cancel and correct their mistake!

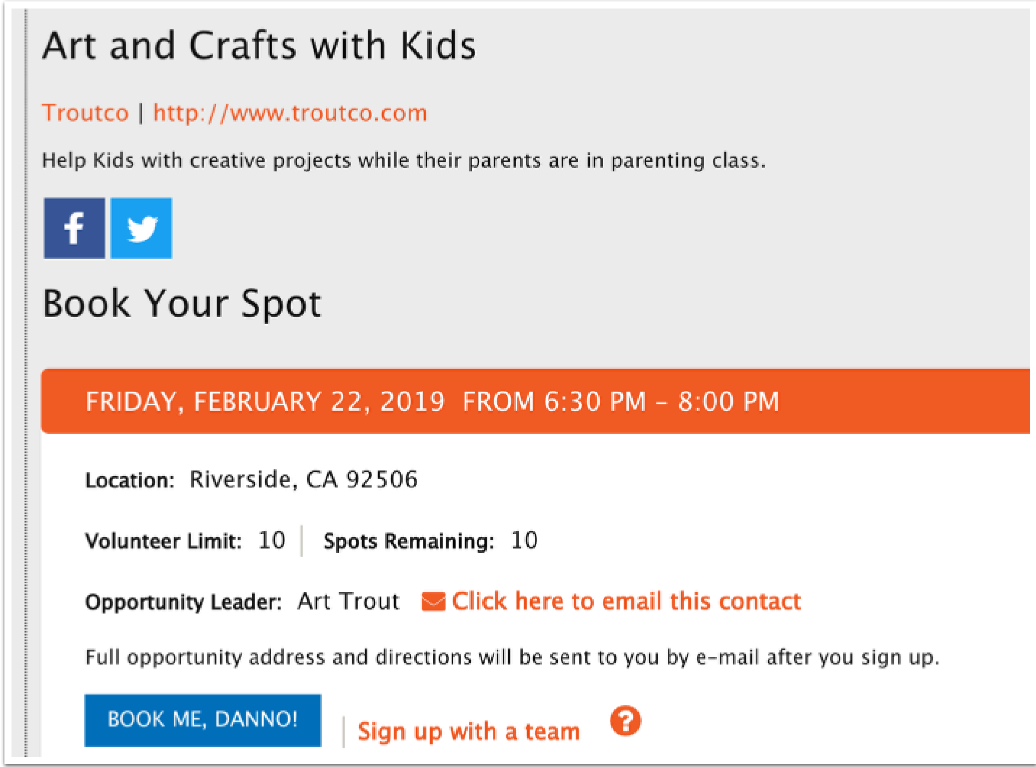
Additional customization available for Opportunity Detail Page (HOC3-8753)

In previous releases we made it possible to edit the text in the sign up and express interest buttons. However, people opting to use alternate language for 'sign up" such as :"Book your Spot" instead of "Sign Up" - noted that even though the button text changed, the header on the page above the date still said "Sign Up" or "Express Interest"

Now you can edit that text as well:

In the CMS go to Blocks / System Forms / Opportunity Detail Page and you can change the default text for both the 'section' and the Button:





As before, we remind you that if you opt to change "Sign Up" and "Express Interest" on the opportunity sign-up page, you should also consider updating all the other places (such as your email templates) that currently use that language - and make it consistent with your custom terminology. Email templates, by default use the terms 'Sign Up" and "Express Interest" but can be edited to match your revised terminology.

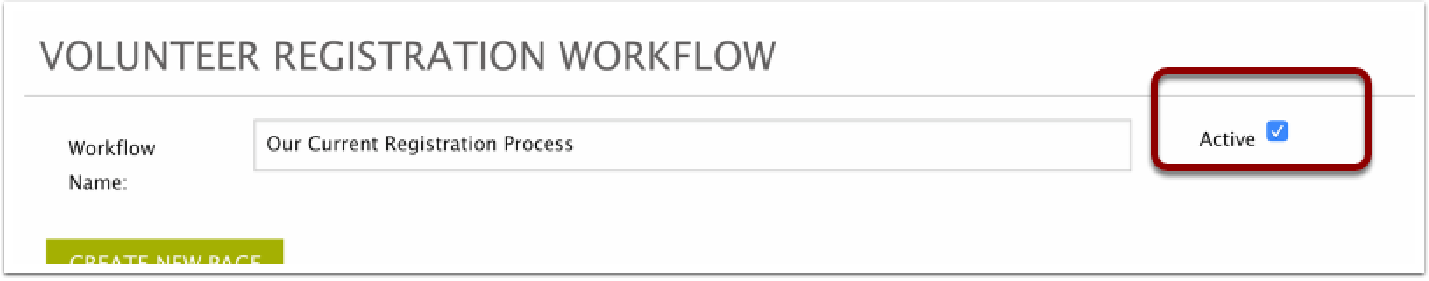
Ability to have more than one ARS workflow for Volunteer Registration and Organization Registration (HOC3-8519)

While there can only be one active ARS workflow for Volunteer or Organization Registration - what do you do if you want to start building an alternate ARS workflow, without affecting the one that is already in use?

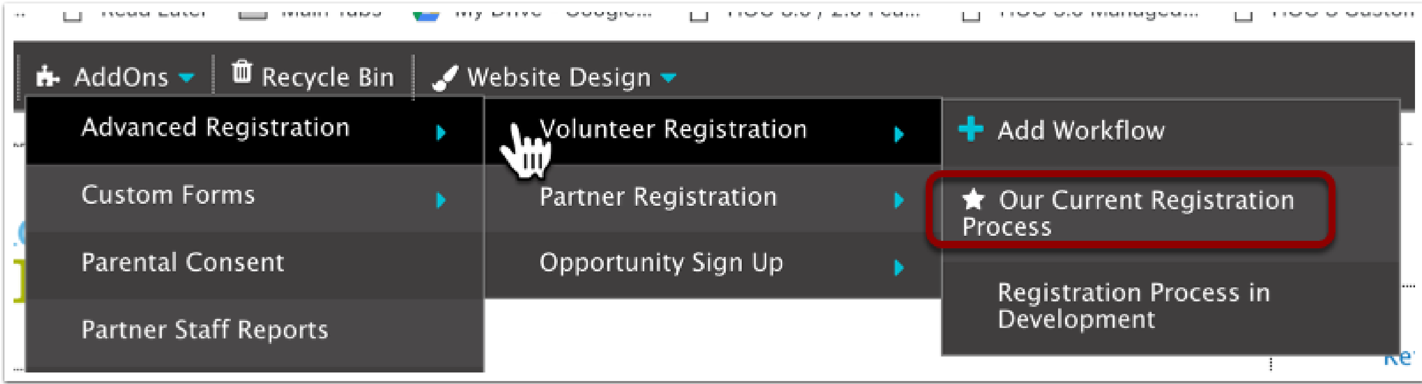
Up to now, there was no way to handle this. But now, its possible to create multiple ARS workflows for Volunteer and Organization registration. (One would be currently active, and another might be in development and testing by you. Or you seasonally want to have a different process for registering volunteers)

You can now create multiple workflows if desired -- and must specify which one of them is the active workflow.

By default, if you are using ARS right now, your existing workflow has been selected as the active workflow.   There is now a checkbox in the workflow configuration page where you indicate that a given workflow is active.



When its the active workflow - it appears in the CMS menu list with a Star next to it.



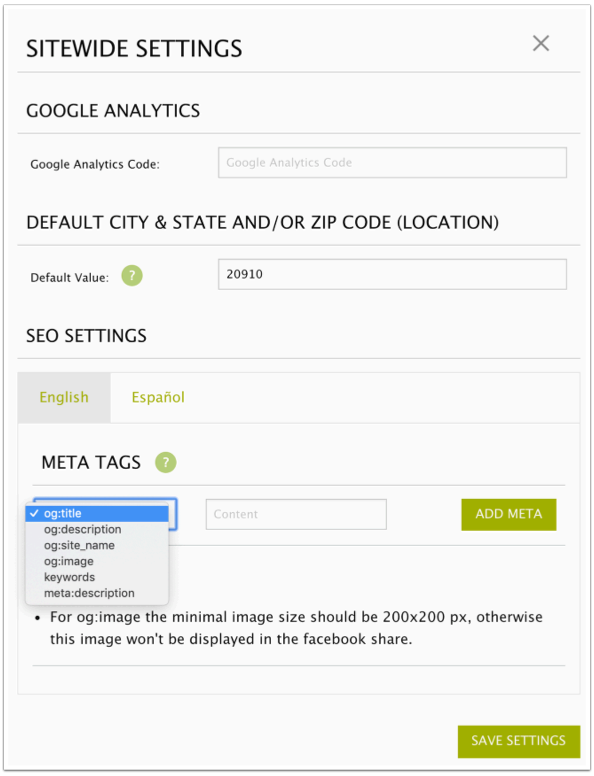
If you activate a registration workflow, it will deactivate whichever workflow had currently been active. Only one workflow can be active at a time.

If you deactivate all workflows, so that none are active, you are turning off ARS and the standard registration process will be active.

Improvements to Facebook Meta tag behavior (HOC3-8346)

Users are now able to set facebook open graph metatags that will be used for facebook sharing of any HOC system pages including the Home Page. All system pages (which previously could not be tagged, will inherit their OG tags from the sitewide settings in the CMS.   (Note: Opportunities and Special Events shared on Facebook will pull their description from the first words of the opportunity description or can have custom tags added to the /opportunity page in CMS / Content / Pages which will override the usual default.

To set new defaults for your sitewide social sharing tags to be used when sharing system pages, In the CMS go to AddOns / Sitewide Settings, and then populate any or all of the og: tags you wish to use site wide.



To set your image: Upload an image (usually your logo in square format) into the CMS - get its URL - and put the URL in as og:image. Then click "Add Meta" to enter it. See the tip below for more details on choosing the right og:image size for your needs.

To set your Description: Put the text you wish to appear in og:description.

To set your Site Name -- enter the name of your site as og:site_name

Be sure to Save Settings after entering your metatags:

Then - Scrape facebook to bring in the new values if you want the update to take place as soon as possible.

Go to https://developers.facebook.com/tools/debug/

Enter the URL of a home page or system page on your site and click on "Scrape Again" so Facebook starts using the new image and description you've added in Sitewide Settings.

Tips on selecting your og:image

For Facebook sharing, Facebook recommends that the og:image used should have the following characteristics:

For Square Images

- The image must be at least 200 x 200. Otherwise it won't display on Facebook.

- For square logos as your og:image, we find that 300 x 300 is a good general size to use.
- Square Images that are 600 pixels or wider, are likely to be displayed in landscape mode - and will be cropped to a 1.9:1 ratio. So if you use a large square image - choose one that will look OK when cropped in this way.

For landscape images:

- Use images that are at least 1200 x 630 pixels for the best display on high resolution devices. At the minimum, you should use images that are 600 x 315 pixels to display link page posts with larger images.
- Images can be up to 8MB in size. Try to keep your images as close to 1.91:1 aspect ratio as possible to display the full image in News Feed without any cropping. If your image is smaller than 600 x 315 px, it will still display in the link page post, but the size will be much smaller.

Multiple og:images

- the og:image tag you set in the sitewide settings will be used for your Home page, and System pages throughout HOC.
- You can set a different og:image tag that will be used whenever sharing an opportunity detail page by setting a separate tag in Content / Pages / on the page /opportunity. You cannot set different images to be used on different opportunity pages. (the og:description for each opportunity page will be the first sentences of your opportunity description, unless you choose to set an og:description tag to be used on all opportunity detail pages.

Other sites that use the og:image tag - may crop and display your image differently. The guidelines above are how Facebook handles the tag.

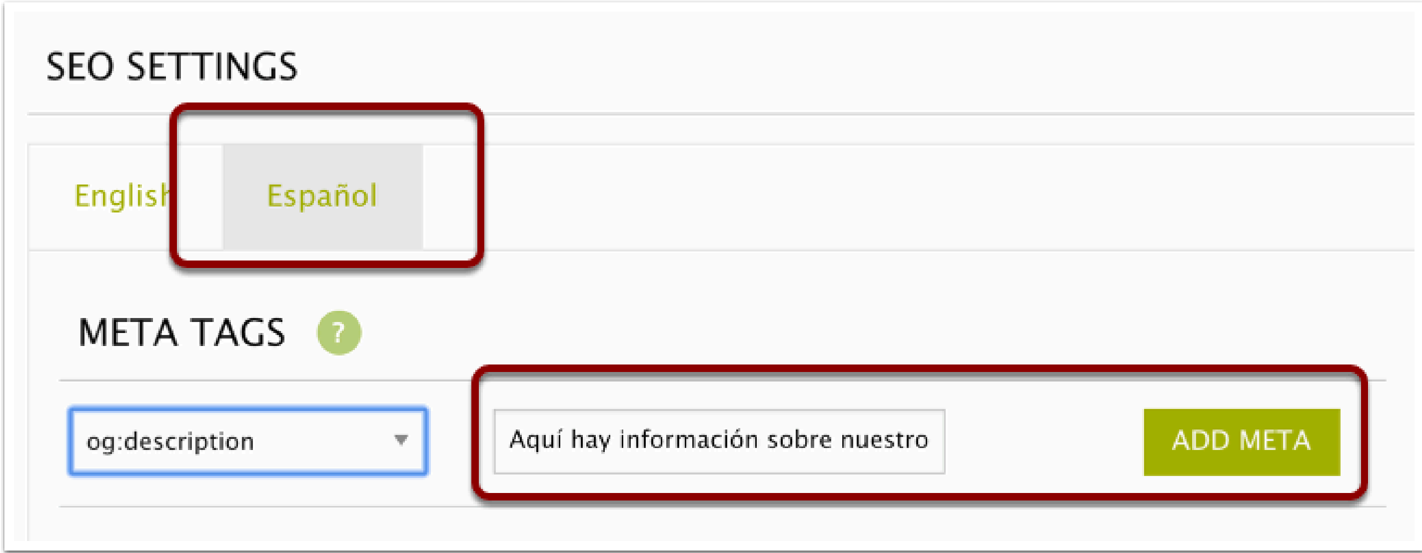
To learn more about og:image, the challenges on selecting the correct image to use, and how the tag is used when sharing links on a variety of Internet sites — see this article:

https://iamturns.com/open-graph-image-size/

Support for multi-lingual Facebook meta tags (HOC3-8536)

Multilingual sites can now set separate metatags for each language. So that when sharing to Facebook from your site in English, English metatags are used, and if viewing your site in Spanish, Spanish Metatags are used.

On pages and settings with meta tag capability, you can select and set tags for each language:



Bug Fix: Title of Image Block not appearing as expected (HOC3-8632)

The issue where the Title was not displayed as expected in an image block has been resolved.

Bug Fix: Sharing Portal administratively created connections made for logged in user instead of contact (HOC3-8787)

A temporary issue, where administratively creating a connection in the sharing portal created the connection for the logged in user instead of the selected contact has been resolved.

Kiosk Bug Fix: (HOC3-8795)

There was a bug discovered in the check-in kiosk, wherein a contact logging in who had a connection in either pending, waitlist or declined status, was successfully checked in (as expected when guests are enabled), however, the attendance status remained at 'please verify' instead of "Attended"

The hours were logged, but the attendance status was not updated to reflect that attendance had been reported. This has been corrected.

Bug Fix: Record type of a registering volunteer (HOC3-8798)

For organizations that have existing contacts of various contact record types - it was discovered that a contact registering via the public site - was having their record type updated to record type = volunteer. Existing record types will now be preserved, so that if you are using multiple contact record types - the existing record type will not be updated via the registration process.

Improvement in display of custom fields in sharing portal (HOC3-8511)

For HOC customers who have requested the display of custom fields for objects in the sharing portal (Contacts, Connections, Volunteer Opportunities or Occurrences), this had previously been implemented for them by displaying the additional custom fields on a separate page for that object. The user had to click on 'next' to see the additional fields)

Now -- additional custom fields - when implemented in response to a request for sharing portal customization, will appear on the same page as the standard fields under a section heading "Additional Information. No need to click on a next button to see all the fields!

Release Notes 2018

HOC 3.0.7.9 Release (December 27, 2018)

A small release during the holiday break addresses a few performance improvements. Included are improvements to logging in as a public site or sharing portal user, improvements to 'one step signup' in conjunction with the Advanced Registration System, and continued system migrations to the REST api for performance improvements.

System Issue: Previous versions of blocks, forms and pages slow or unable to load (HOC3-8597)

The versioning system that allows you to return to earlier versions of blocks, forms and other items created in the CMS had been suffering from poor performance as the number of pages, blocks, forms and versions of each has grown. The versioning system has been revamped so that you can more easily return to previous versions of items if needed. This is the start of major work to develop a more robust versioning system for HOC's CMS.

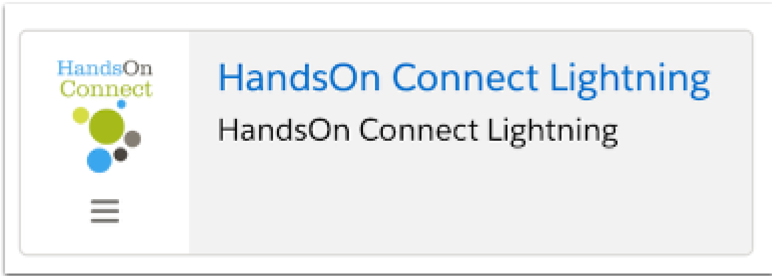
Improvements to .csv data exports of form data (HOC3-8631)

When using forms in the CMS and not synching to Salesforce - data from forms is accessed through a .csv export of form data. Improvements have been made to the way the data is presented in the export form to make it easier to read and use the data.

December 2018 Release

The highlight of the December release is the availability of the native HandsOn Connect Lightning version of HandsOn Connect. Using HandsOn Connect in Lightning no longer requires a custom install. Read the release notes for information on how to self-configure HandsOn Connect Lightning when your organization is ready to migrate to Lightning. In addition, there were some under the hood improvements made to the application to make it more efficient in organizations with data outside of the HOC application, and improvements to Single Sign On integrations.   Here's the highlights of this release.

HandsOn Connect Lightning



By now you've realized that Salesforce is increasingly pushing its user base to leave Salesforce Classic behind, and make Salesforce Lightning the primary way you use Salesforce.   During the last year, a number of HandsOn Connect users switched over to lightning, and we offered a manual installation of a native Lightning version of HandsOn Connect. This manually installed ("unmanaged") version of our app is called "HOC Lightning" and a number of you are already using it.

After many months of testing and refinement, we have in this release, added a native lightning version of HandsOn Connect to our main package. This makes a lightning native version of HandsOn Connect available for all HandsOn Connect customers whenever they are ready to start using the Lightning environment. This "Managed" version of the application is called "**HandsOn Connect Lightning**".

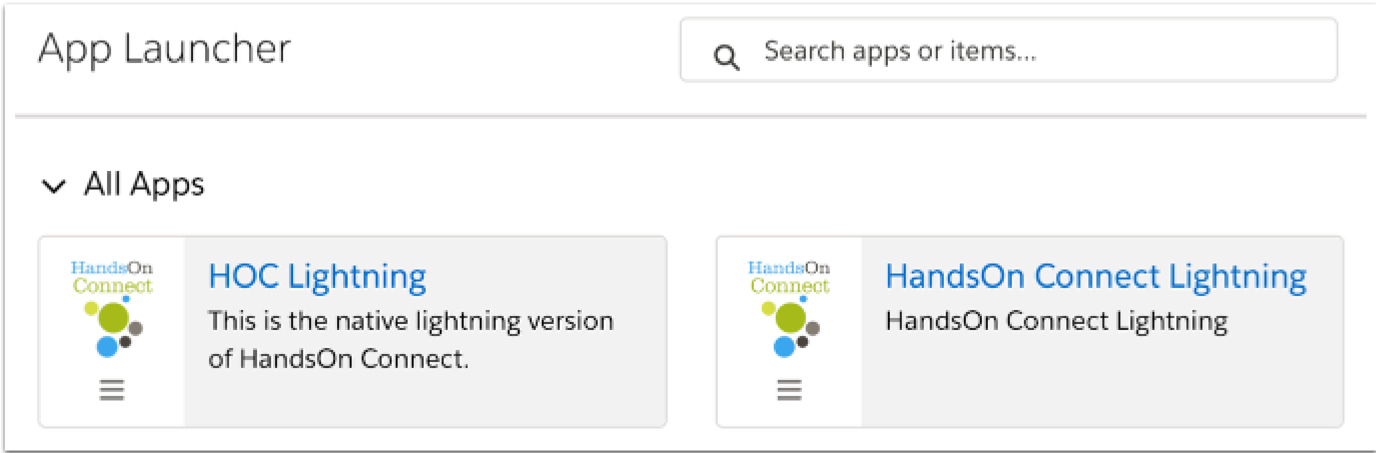
For those customers who didn't ask for a manual install of a native lightning version of HOC in the past year, the HandsOn Connect Lightning application is now installed and ready for you to configure when you decide to activate lightning and start using it! It will require a small bit of configuration on your part when you decide to start using it. Instructions on activating lightning in your organization and configuring the HandsOn Connect Lightning app can be found in [this series of articles in the Advanced System Administrator Guide.]

If you need help doing the configuration or in learning the ropes of using HandsOn Connect in Lightning drop into any of our [daily lab sessions.]

Note: if you prefer to continue working in Salesforce Classic you absolutely can do so. There is a learning curve to working in lightning - and we suggest you take your time getting familiar with lightning before switching all your internal users over to it. We've just made it easier to use HandsOn Connect when you're ready to start getting familiar with Lightning.

Question: "You've already installed "HOC Lightning" for us, so do we now need to switch over and start using the "HandsOn Connect Lightning" app?

No. The two applications are essentially the same. And both will be available in your lightning app selector. You can continue to use HOC Lightning since its already configured and has some advantages to you going forward. Since the "HOC Lightning" app is 'unmanaged' - it is a bit simpler for you to customize when you wish to - and when we installed it manually for you, we did a lot of advanced configuration for you. You can continue to use HOC Lightning, and can, for now, ignore the HandsOn Connect Lightning application which is also installed in your organization.



What's the difference between HOC Lightning and HandsOn Connect Lightning?

"HOC Lightning" is an unmanaged package - which means that everything that was installed can be customized by the system administrator. We were able to include more features in the Utility Bar, Give you more flexibility in the navigation elements, and overall it is easier to make changes to the application.

"HandsOn Connect Lightning", because its part of the 'managed' application, has some restrictions on what you can and can't edit or change in the application's configuration. Luckily, Lightning allows you to clone most parts of the application (Lightning Pages, Page Layouts, Home Page, etc.) so system admins can expand and customize the majority of HandsOn Connect Lightning. It just requires a bit more work than working with the unmanaged version of the application.

We'll continue to publish tips and tricks on how to customize the HandsOn Connect Lightning application.

For those of you who did not previously have "HOC Lightning" installed -- you can start using "HandsOn Connect Lightning" now, as soon as you [enable lightning and configure the application.]()

Bug Fix: Posting status for Individually Scheduled Opportunities when date extended (HOCAVV-1191)

In the sharing portal, when the end date of the single occurrence of an Individually Scheduled Opportunity was updated - the posting status of its volunteer opportunities did not reflect that the opportunity was now published. This has been corrected.

Improvements made to occurrence check-in sheet .pdfs in Salesforce (HOCAVV-1192)

Cleaned up issues where rows of a check-in sheet were split across two pages and addressed random page breaks that sometimes appeared.

HOC Release 3.0.7.8 (Dec 13, 2018)

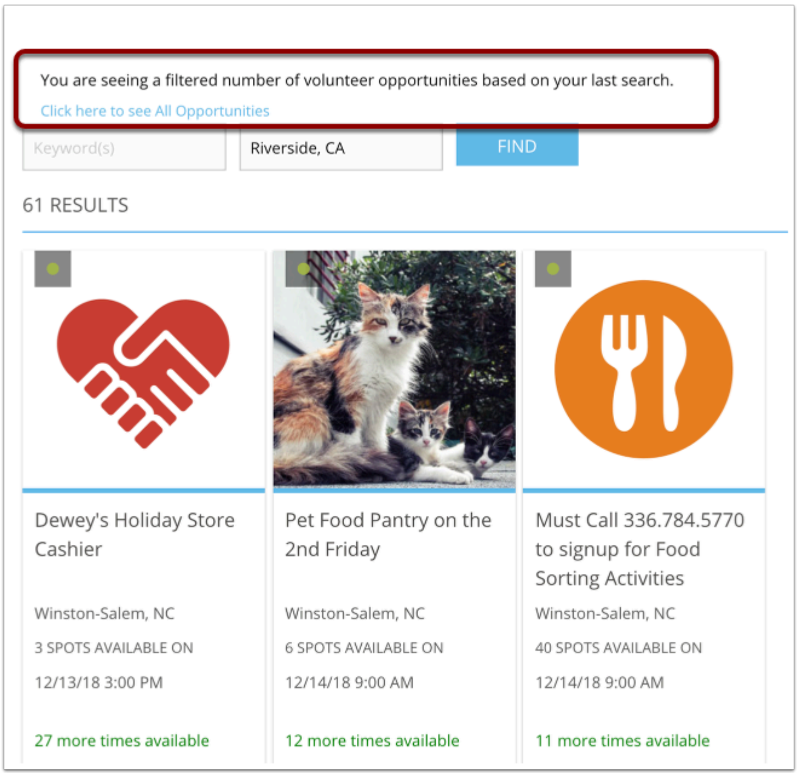
In this release, a lot of 'behind the scenes' abilities have been added to the CMS that will make it possible for us to produce public sites and custom features with greater flexibility to meet your specific business needs. This means that customization requests you might need for your site or programs, can be done in fewer hours by our staff, reducing the costs to you when you need custom work done!

Eventually, some of this new functionality will become user accessible allowing advanced users to do more and more with their public site. For now however - rest assured that HandsOn Connect will be even more powerful and flexible in 2019! We'll be letting you know some of the cool new stuff that is possible in the months to come!

Here's a few new items and fixes you'll notice in this release:

Search Results Block Improvement - clearer indication of filtering and how to clear filters (HOC3-8351)

For those clients using the Search Results Block for search, it wasn't always obvious when a search result was filtered and how to clear filters to see all opportunities. We've added the following to the top of filtered search pages:



Improvement to Individually Scheduled Opportunity signups (HOC3-8514)

Previously if a volunteer tried to express interest in an Individually Scheduled Opportunity for a valid time taking place on THAT day -- they received a message saying "11/15/2018 12:00 am is not a valid date"

Now, it will be possible for a volunteer to express interest in volunteering (create a pending connection), for any valid time in the schedule, including today's date (as long as the time is greater than or equal to the current time"

Improvements to Forms

A number of improvements have been made to HOC forms including:

- Issues where forms would not save without errors
- The ability to define minimum and maximum number of characters in text fields. (if these values are left blank - the defaults defined by the field in SF will be used)
- Issues resulting from having two forms open for editing at once - where changes made in one form carried over to the other open form.

HOC 3.0.7.7 Release Notes (11/29/2018)

Today's release adds a few improvements, fixes some bug fixes, and addresses the continued issues with Internet Explorer 11.

Internet Explorer Issues

There have been a number of reports of problems for users of HOC public sites when using Internet Explorer 11. Ultimately, Microsoft's lack of update for IE 11 have made the browser a bad choice for the modern Internet and there are increased reports of problems using HOC via IE11.

We have addressed the most critical of these issues - but have also announced (as many sites have done), that IE 11 will not be supported by HOC after March 31, 2019. Read those details here.

We have however resolved the following issues impacting IE11 users:

(HOC3-8483, HOC3-8448)). Volunteer Opportunities not showing up when entering invitation code on Business Pages. Fixed.

(**HOC3-8494)** Users unable to log into public site using IE11. Logo and Header images not shown Fixed.

(HOC3-8495). Image Slider on Home Page not visible when using IE11. Fixed.
Opportunity Detail page signup options and details not shown when using IE11. Fixed.

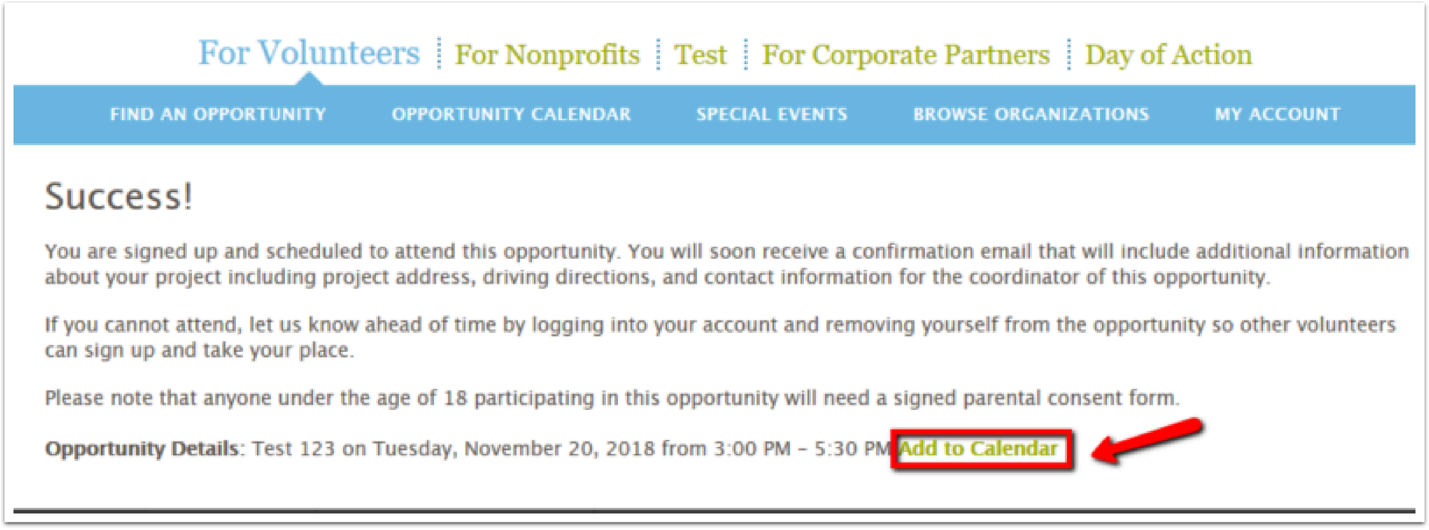
We will continue to address the most critical problems with IE11 up until 3/31/19, but IE11 is no longer working on many advanced web sites, so it's best to discourage your users from using it.

We encourage you to post a notice on your Home Page that IE11 may no longer work on your site after 3/31/2019 and encourage your users to update to using a modern browser such as Chrome or Firefox or Safari. This will encourage people to think about upgrading their web browsing methodology.

You can include any of the text from our announcement linked above if you desire to explain why support is being dropped.

Add to Calendar link visible on Success Pages (HOC3-8421)

Some users reported that the "Add to Calendar" link was no longer appearing on Success pages for Date & Time Specific - Sign up Projects. This has been corrected and the link will now appear for any confirmed connection created via the public site.



The "Add to Calendar" link also appears in the account overview page for any confirmed connection.

Advanced Registration System (ARS) Improvements and Bug Fixes (HOC3-8473)

(HOC3-8473) The branch logic for 'less than' a number was not working. This has been fixed.

(HOC3-8465) Branch logic did not work as expected with international date format. This has been fixed.

Forms: Bug Fix: Branch logic now responds to current state of a picklist value (HOC3-8395)

If you were using the value of a picklist item in a form to determine whether or not to display a field, it only was working when someone initially selected the picklist value. It has now been improved so that if a picklist value already exists that branch logic is depending on - the branch logic will be applied.

Improvements to Sharing on Facebook

Facebook recently changed its API for sharing opportunities in Facebook posts, and we've improved the open graph tagging used in HandsOn Connect to comply with their new standards.

Sharing Volunteer Opportunities: (HOC3-8431) The og:title will now be the title of the Volunteer Opportunity. The og:description will now be the opportunity description (as much of it as facebook allows to be published).

Sharing Volunteer Events: (HOC3-8432) The og:title will now be the volunteer event title. The og:description will now be the Special Event Description. (Note: there is currently an issue being corrected regarding this... it is finding html content instead of the description text itself). This will hopefully be fixed in the next week.)

Organization Registration Form Improvement (HOC3-8496)

Users can now update the Organization Registration form and remove the requirement for the submitting contact to state their 'title'.

Note however: that its a best practice to know what position a person requesting permission to post volunteer opportunities for an organization has. We recommend keeping the 'title' field as required -- however if your business practices do not require knowing the position an organization's primary contact holds - you can remove this requirement.

October, 2018 Release Notes

The October, 2018 release reflects updates made to the HOC application in Salesforce. This update patches several bugs that occur under complex circumstances, but nonetheless needed to be addressed, including problems that occasionally occurred with organization-wide email addresses, and error messages encountered when installing some unmanaged packages. We've also done some cleanup such as updating descriptions in HandsOn Connect workflows (to clarify those that are no longer used and should not be active), to make things clearer for System Administrators. Here's a few other bug fixes and improvements in this release.

Bug Fix: Email to approve new Individually Scheduled Opportunities with Schedule not received by Opportunity Approval Manager. (HOCAVV-1186)

Some organizations reported that Opportunity Approval Managers were not receiving an email notification when a partner created an ISO - Express Interest with Schedule opportunity in the sharing portal. This has been addressed and emails will now be sent.

System admins may want to check that there are no pending ISO - Express Interest with Schedule opportunities or occurrences that have been submitted in the past, and not yet approved. (This can be done easily through a list view looking for "Pending" occurrences.

Bug Fix: Random page breaks in check-in sheet when printed from Salesforce (HOCAVV-1188)

When printing a check-in sheet via the connections grid in the occurrence record in Salesforce - the .pdf sometimes included random, irregular page breaks. This has been fixed.

Verified Volunteer Improvement (HOCAVV-1182)

For those customers using the Verified Volunteers add-on, a concern has been that Verified Volunteer background checks are validated for only 1 year. Some organizations however, accept a clear background checked as good for two years.

If you are using verified volunteers, and wish to to change the default duration of background check validations to something other than VV's standard 1 year -- HOC can now support custom times for duration of verifications in Eligible or Clear status.

Open a zendesk ticket if you wish to have us modify the default durations for background checks:

By Default the settings are:

- For Eligible or Clear; 1 year
- For Consider: 1 month

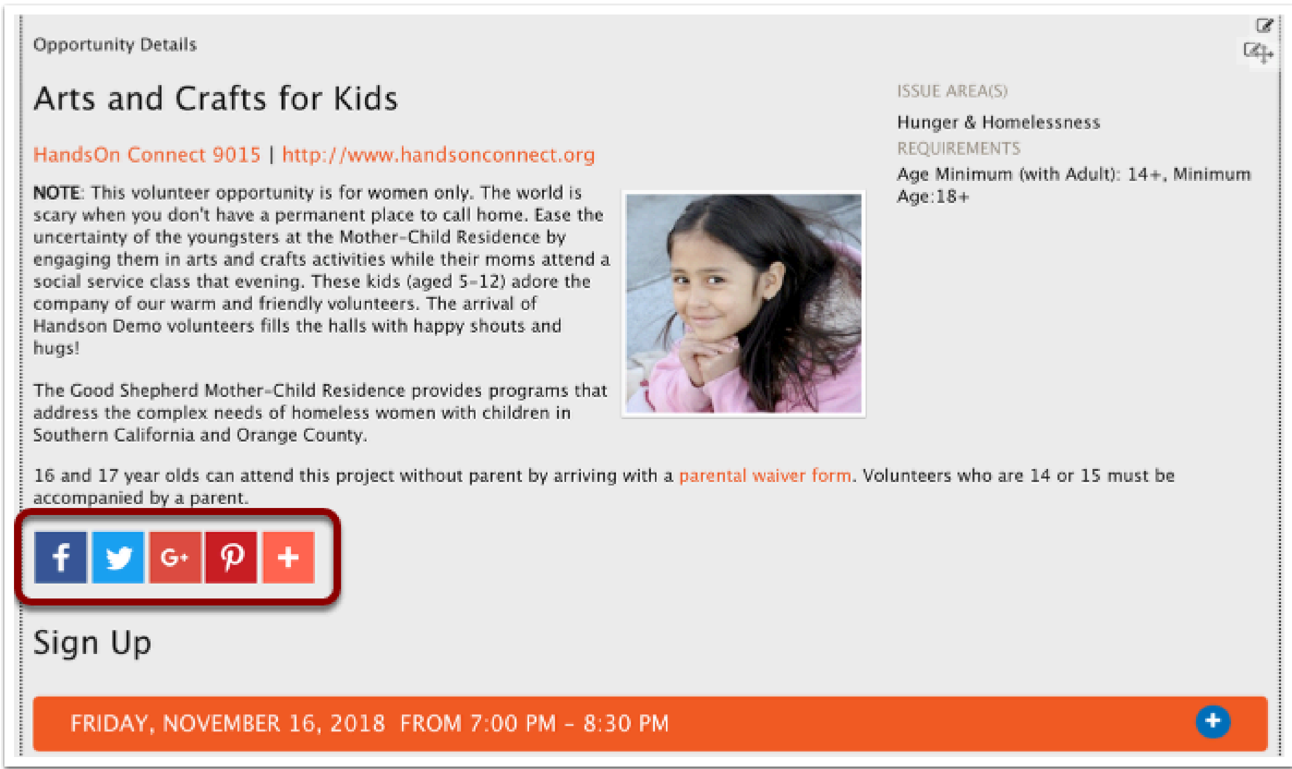
HOC 3.0.7.6 Release Notes (Nov 15, 2018)

This release brings significant improvements to using the Advanced Registration System for opportunity signup, as well as a variety of bug fixes to the ARS. We continue to make more system pages in the system editable if you want to change the default content or labels.

More modern look for sharing volunteer opportunities on public site (HOC3-8400)

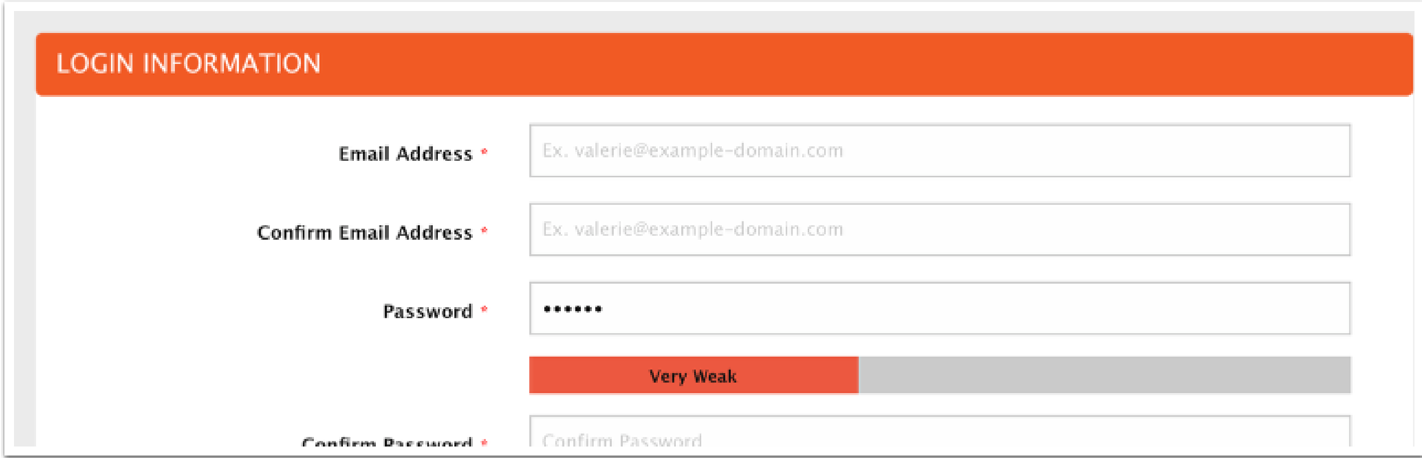
We're working to improve your social media options in HOC. We'll be working towards improving your ability to add metatags to various system pages in the system.

With this release, we've improved the look and feel of sharing opportunities from the Opportunity Detail Page. We've replaced the aged 'Add to any" interface, with a new one called "Addthis". The result is a more attractive look with icons for the most popular social media sites and a + button giving access to sharing opportunities in hundreds of ways.



Improved look for Password Strength Meter (HOC3-8317)

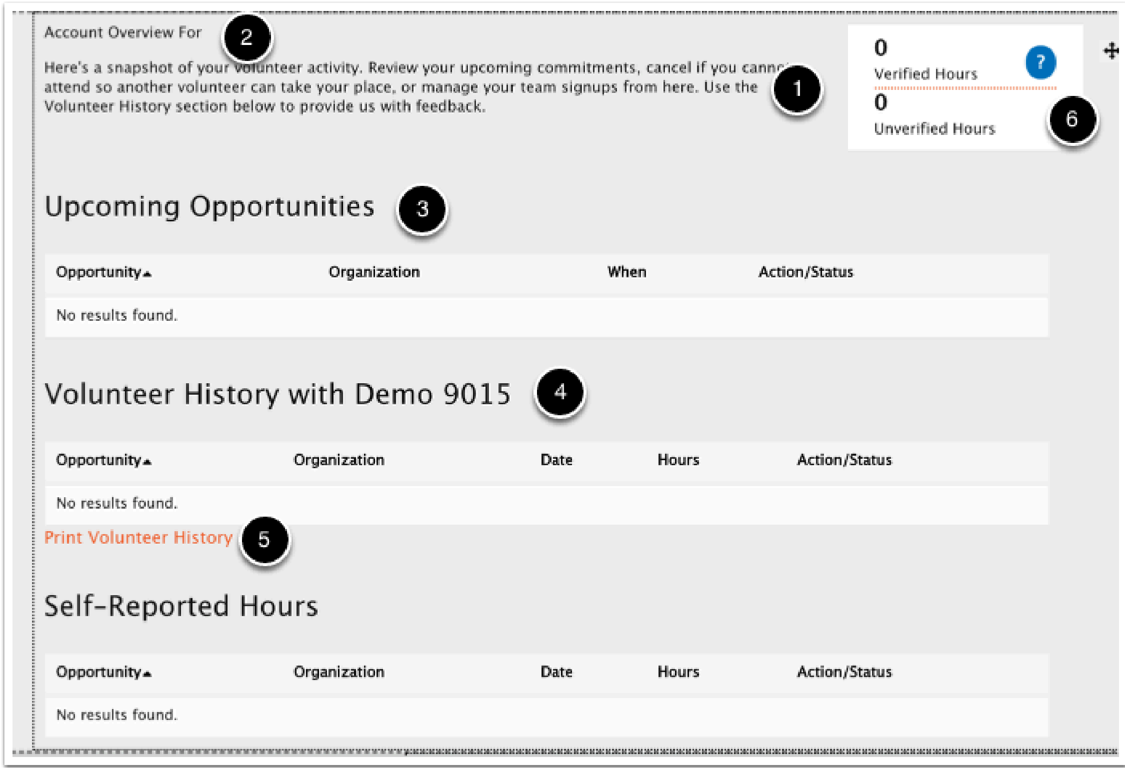
We've improved the style and look of the password strength meter that appears when you create your password during registration. Much nicer looking!



CMS - Ability to edit Volunteer Overview Page (HOC3-8308)

A new form has been added to the CMS making it possible to change labels and content on the My Account / Overview PAGE at /volunteer-account-overview.   We recommend the defaults - but if you wish to customize the terminology or info on this page - you now have access to do it.

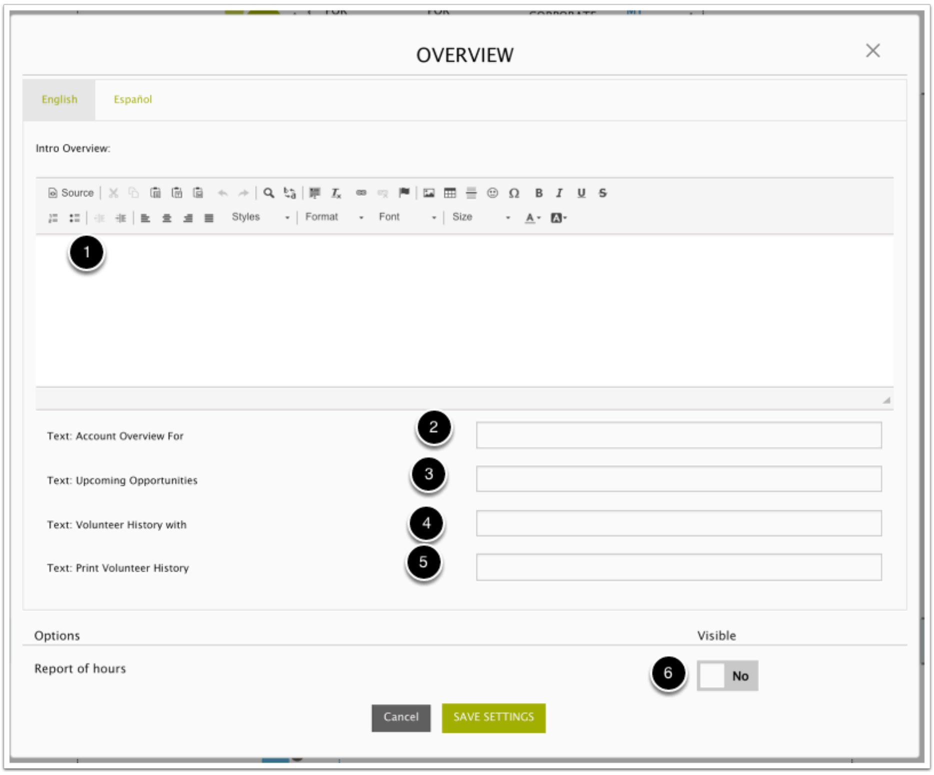
Here's the page as it exists by default:



System Block for customizing Overview Page

allows you to override the default text and labels.

NOTE: Leave fields and sections blank to continue displaying the default content.



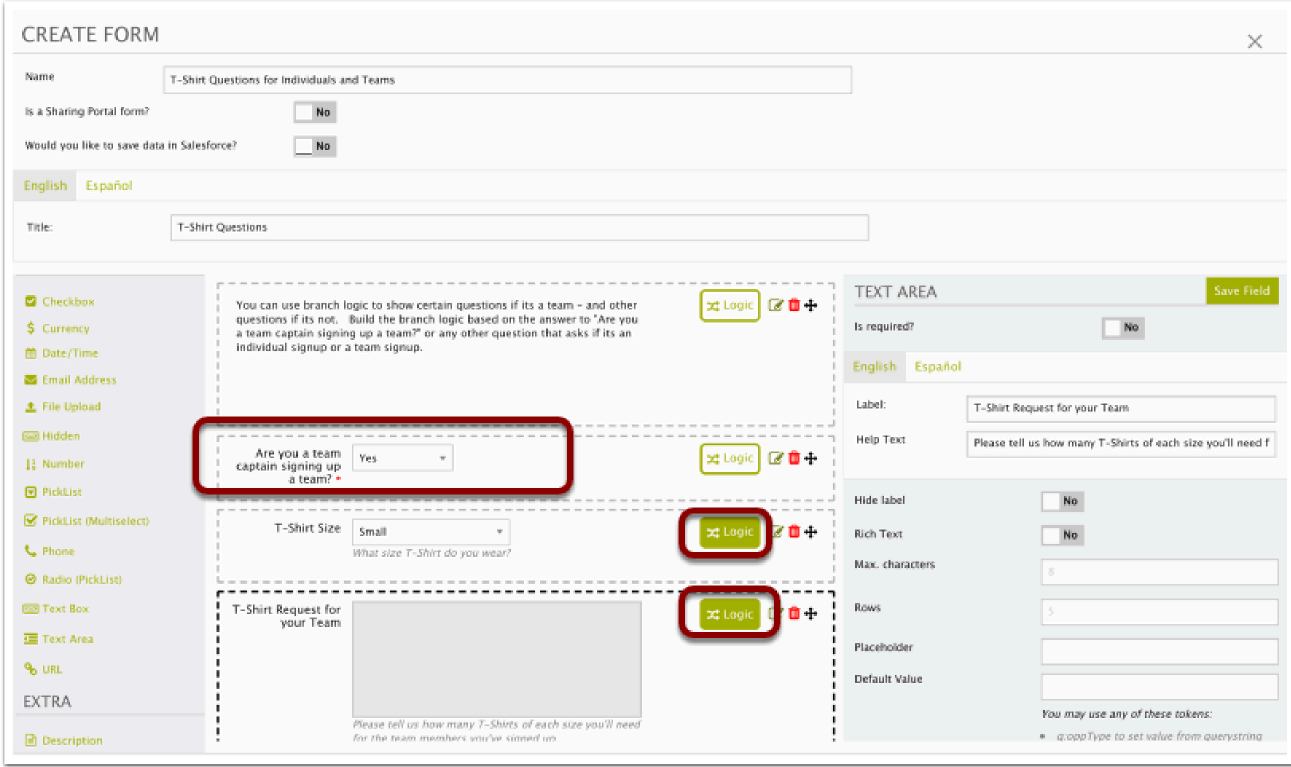
In CMS / Blocks / System Forms is a new form called "Overview". - It allows you to change the following if desired:

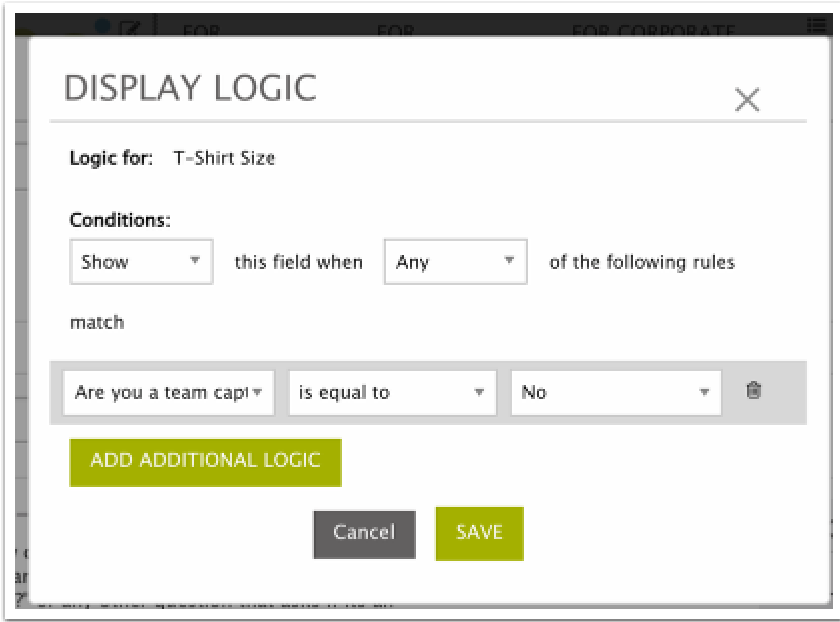
CMS: Advanced Registration System opportunity signup now supports team signups as well as individual (HOC3-7234)

Previously, the ARS, when used for opportunity sign-up - only ran its workflow when an individual signed up. Now, the same ARS will be triggered when someone signs up a team during opportunity signup!

Consider however, that questions you might ask in the form and data synching to Salesforce for an individual might need to be different for a team. A simple question like "What is your T-shirt size" makes sense for an individual signup, but not a team signup. But there's an easy solution for this:

If you want to capture different info for a team signup than for an individual signup -- consider asking a question "Are you a team captain signing up a team?" and then building branch logic to show certain questions if its an individual signup - or other questions if its a team sign up!





CMS bug fix: ARS opportunity signups now work with

Individually Scheduled - Express Interest With Schedule Opportunities (HOC3-7844)

A bug was discovered where ARS workflows for opportunity signups did not execute when a volunteer expressed interest in multiple connections for an ISO-with schedule opportunity. This has been fixed.

CMS bug fix: ARS opportunity sign-up does not go to correct success page (HOC3-8116). (HOC3-8343)

There were reports where in some workflows with branch logic, the ARS did not go to the correct success page at the end of the workflow. This has been corrected.

Also corrected were situations in which the Opportunity Details were not displayed as expected on success page. (i.e. Name of Opportunity, etc)

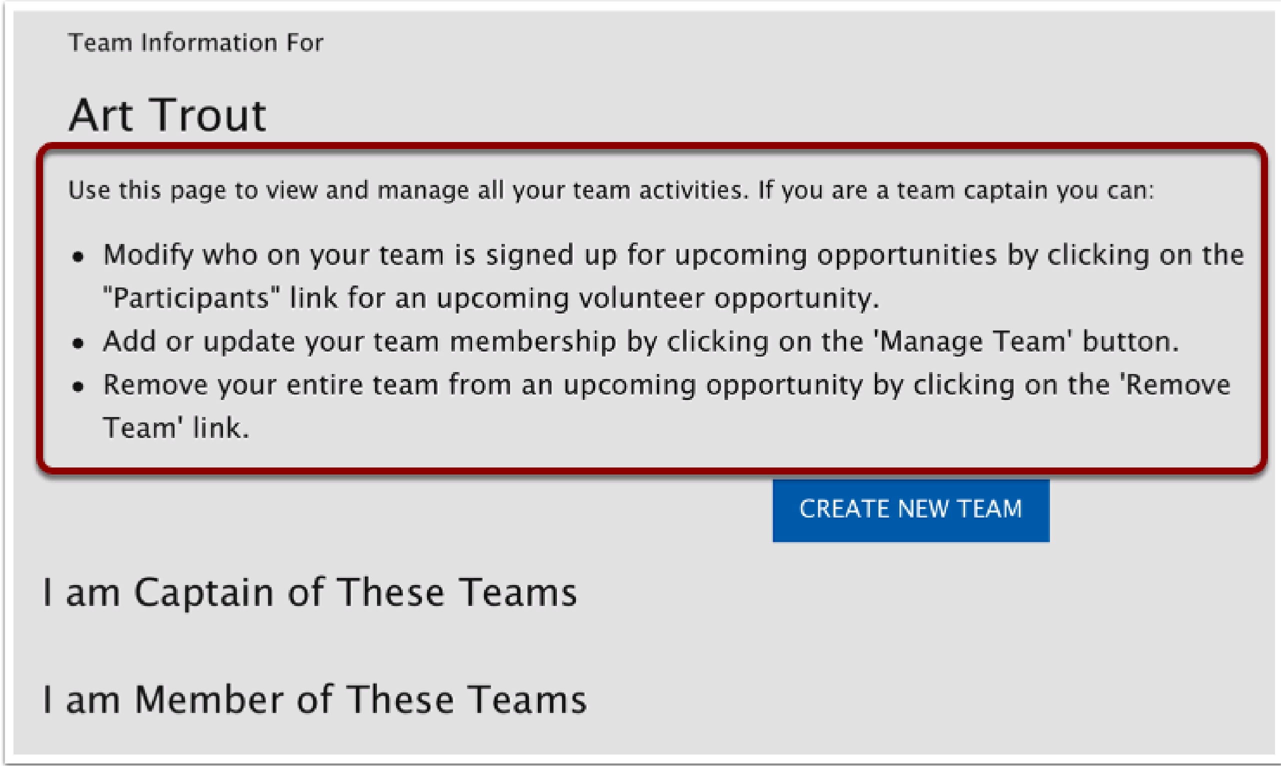
CMS bug fix: ARS Redirect fixed when requirement not met occurs (HOC3-8217)

Also corrected were instances in which the ARS did not return the user to the opportunity sign-up page when they didn't meet the signup requirements for the opportunity.

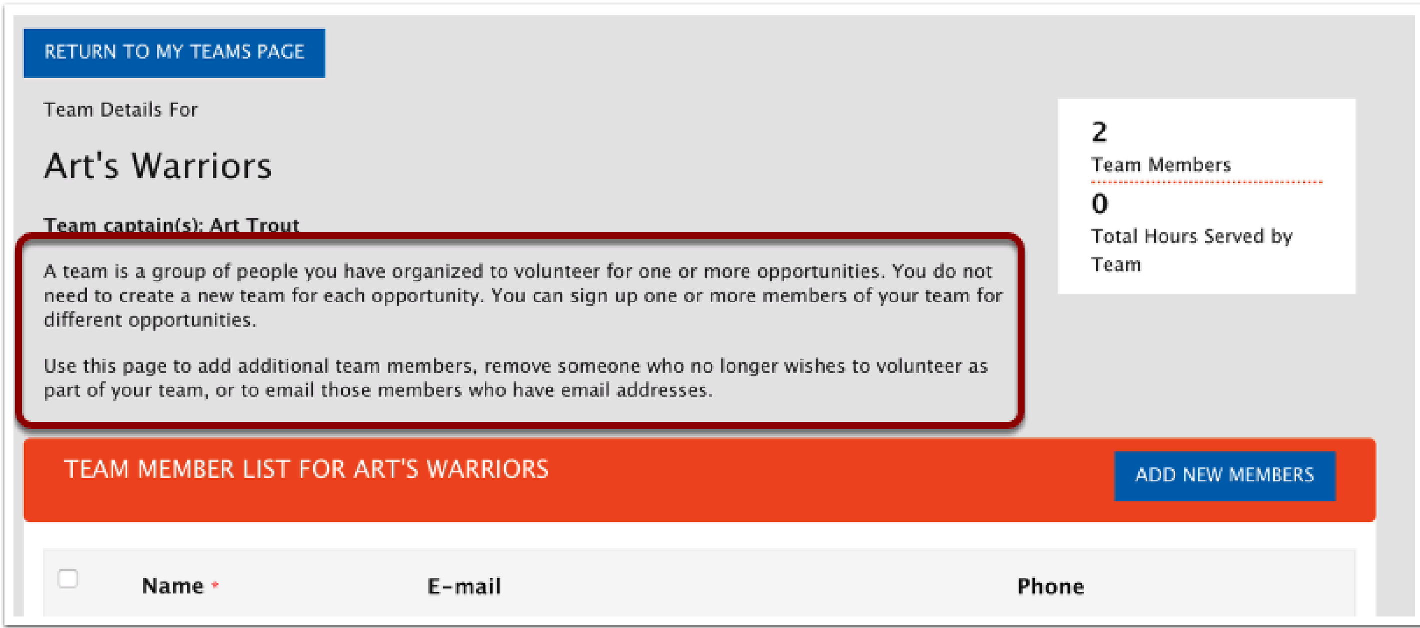
Additional Pages related to teams that can have text updated (HOC3-7337 and HOC3-8393)

We continue to expand the Beta Program of being able to request changes to the Team Creation Process, and changing the default text on a number of team-related pages. Here is the list of pages where the content can be changed for you by the support team:

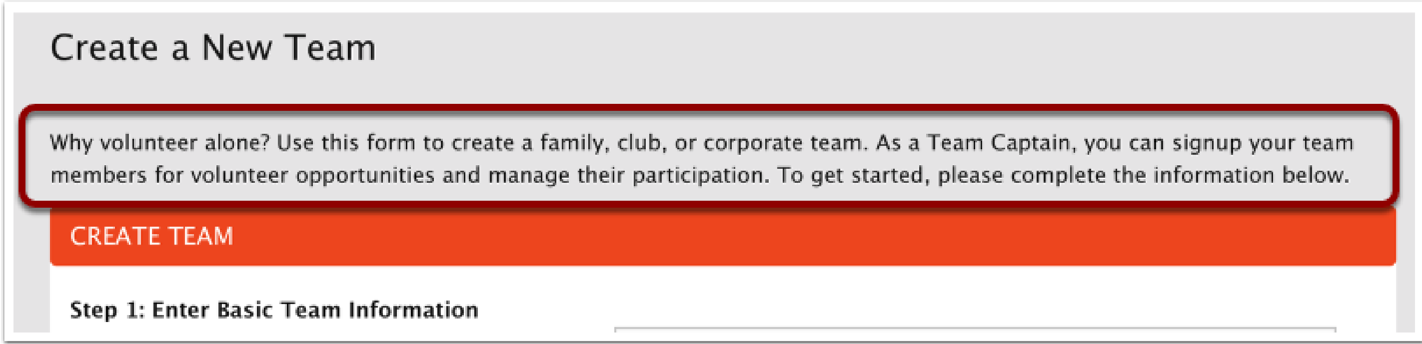
/my-teams



- /my-teams/details

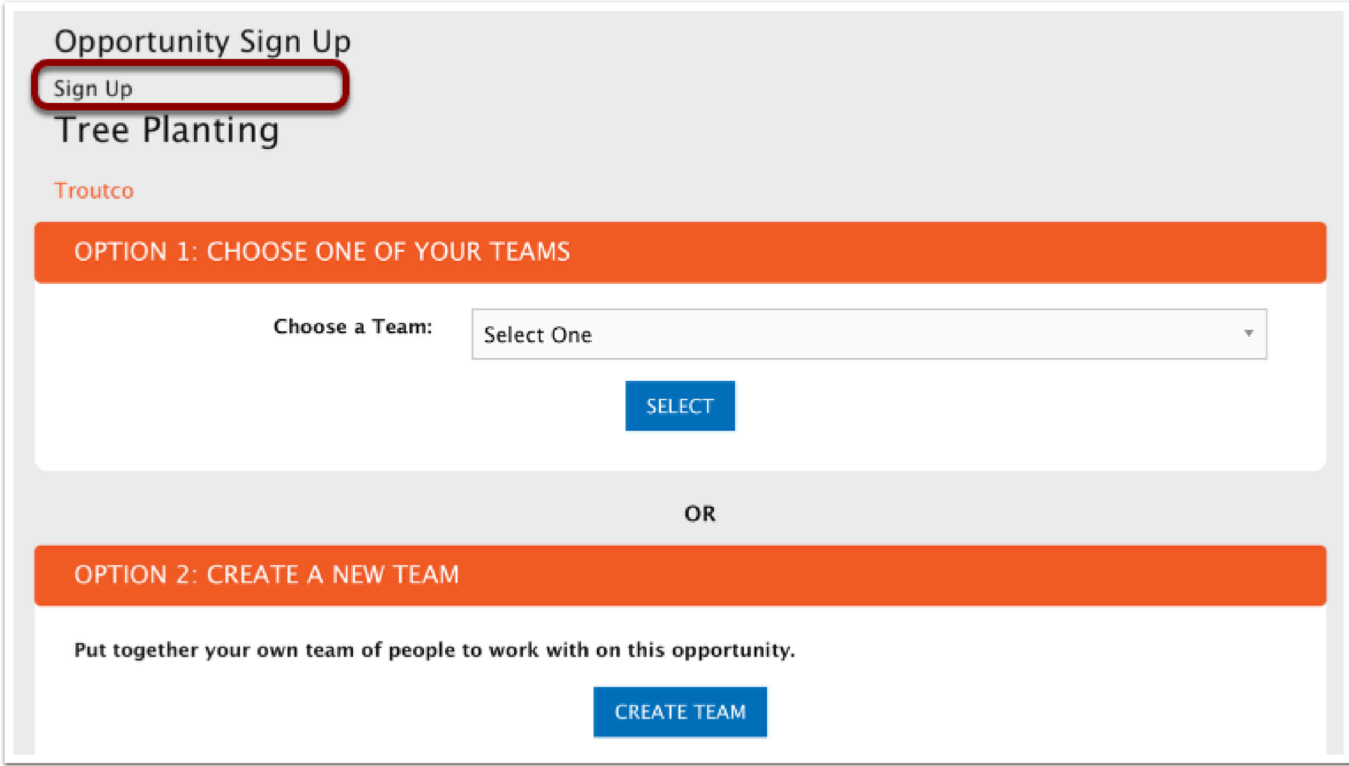


- /my-teams/create



/Opportunity-Signup-Team/   and separate text for team signup when expressing interest....

You can add additional content to place on the page that appears when you sign up or express interest as a team (in case you want to add additional information



While these pages are not yet accessible to you in the CMS - the support team now has access to edit the text for you if your business needs require it. Please open a Zendesk ticket if you need this text edited on your site, and indicate which page(s) and the content you wish to have to replace the editable content on these pages.

You do have direct access to edit the Success Pages after a team signs up or expresses interest. Those pages are available in the CMS under Content / Pages

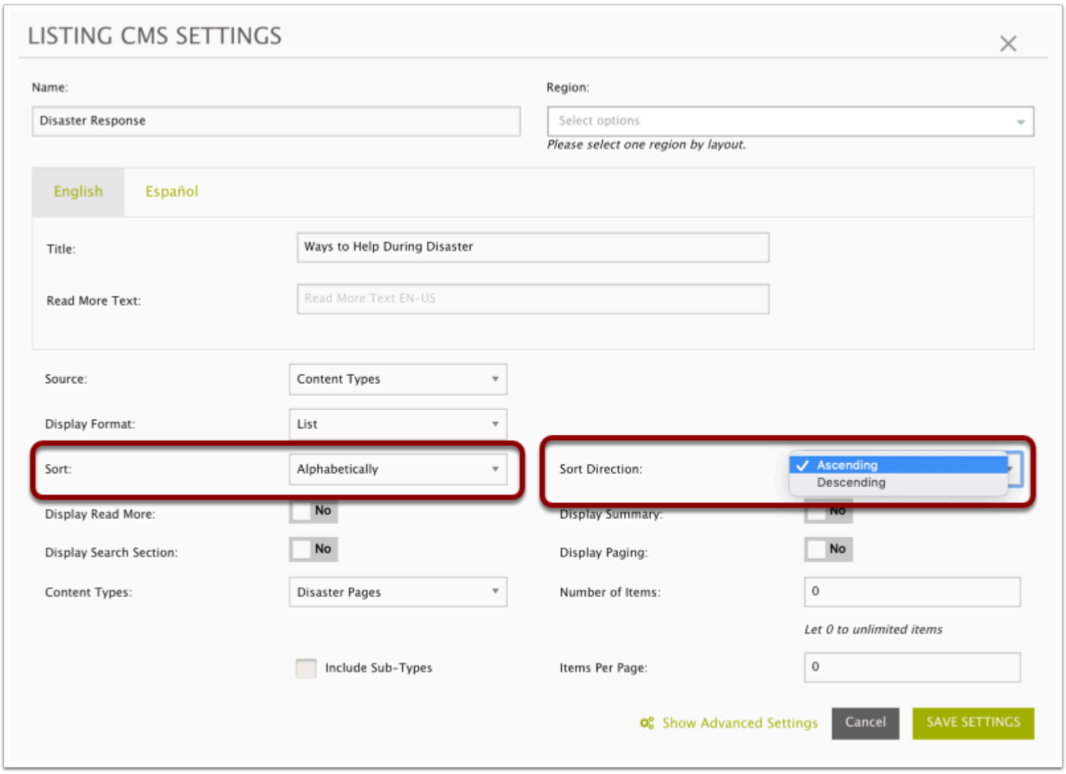
- Volunteer Opportunity Confirmation - Team Express Interest

- Volunteer Opportunity Confirmation - Team Sign-Up

⚠ This capability is still in Beta - and may not be available for all site designs.

CMS: Listing Block now allows sorting by ascending or descending order (HOC3-7735)

When creating or editing a listing block, where the source is a content type -- you now have the option of sorting either alphabetically or by created date. And you can now change the sort direction so that the sort is in either ascending or descending order.



Note: Sorting is not available if you are using a list view as the source for the block. (Sorting is handled in the list view itself in SF directly).

HOC 3.0.7.5 Release Notes (Nov 1, 2018)

This release has a number of improvements to strengthen the speed and reliability of integrating the public site with Salesforce. This included fixes to avoid problems when dealing with malformed data.

Here are a few bug fixes and improvements in this release, as well as some advanced functionality available to those with needs to customize their public site more deeply.

Bug Fix: Partner Reports menu not visible in CMS (HOC3-8350)

For those customers who were using partner reports in the sharing portal - the CMS was not showing the Partner Reports menu item in the AddsOn navigation. This has been fixed.

Improvements to display of CMS menu system (HOC3-8347)

Some CMS users have had problems when the number of created blocks or forms exceeds the available space on a monitor so that the entire submenu can be seen.

Improvements have been made to manage this and adjust size relative to the number of menu items displayed.

Improvement to navigating back to calendar (HOC3-8356)

In a recent release we improved the behavior when using the back button to navigate back to the calendar by ensuring that the date last viewed was returned. However, if you were in week view, and navigated back to the calendar you were put back to month view. Now the view state of the calendar is preserved so that you will return to the month, week or day you previously viewed -- and in the same view mode.

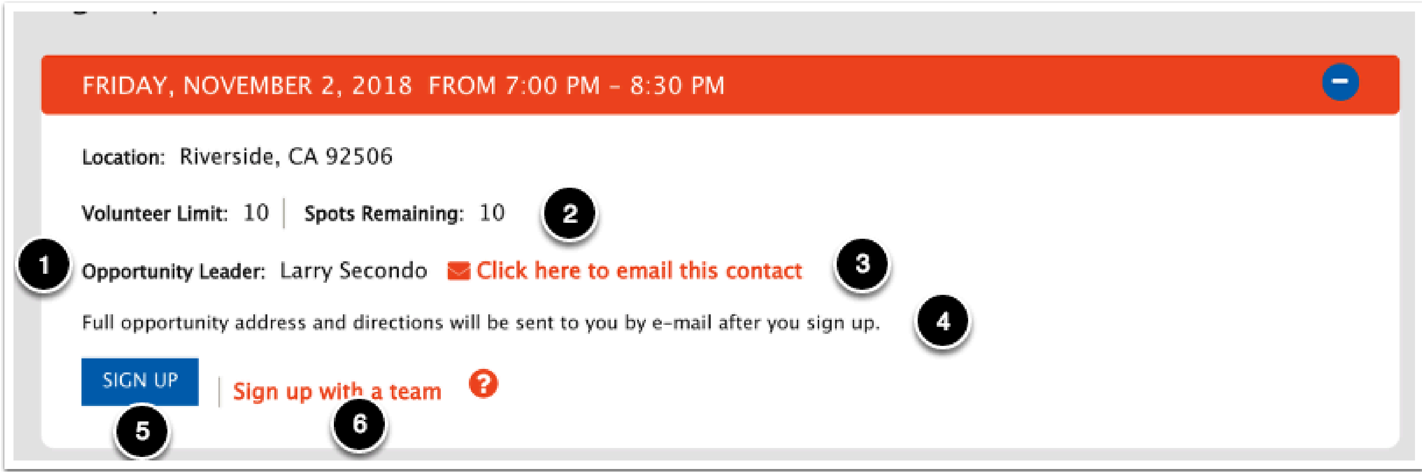
For advanced users: Additional Customization available for Opportunity Detail Page (HOC3-8366)

The occurrence section of the opportunity detail page has elements and text that can be customized if desired via the CMS through Blocks / System Forms / Opportunity Detail Page.

In a previous release, we made it possible to change the 'SIgn Up" "Express Interest" buttons to links, and the "Or sign up with a team" and "Or express interest with a team" links into buttons.

We've now given additional options to show or hide elements on the page, and update the default text and labels.

Here's the items that can now be edited or changed on opportunity detail pages.



1. You can choose to hide the display of the Opportunity Leader

2. You can choose to hide the envelope icon and the ability to email the opportunity leader.

3. You can change the text "Click here to email this contact"

4. The html text that appears can be edited. (Different text is used by default for each opportunity type. So be sure the text is appropriate based on the volunteer opportunity type. You can adjust the content for each opportunity type.

5. The Sign Up button can be changed to a link instead of a button, and the terms "Sign Up" and "Express Interest" can be changed if desired.

6. The Sign up (or express interest) with a team link can be changed to a button, and the text can be changed if desired.

For full details on this form, see this article.

Before changing the labels and/or the Description Messages - be sure to look at the defaults so you know the recommended messaging associated with each Opportunity Type.

Also, be aware that if you rename "Sign Up" and "Express Interest" you'll probably want to update success pages and email templates to match your new terminology so people won't be confused by buttons that say one thing on the public site - and email templates and success pages using the original terminology "Thanks for expressing interest" or "Thanks for Signing Up".

For advanced users: Shareable calendar URLs can now use date parameters (HOC3-8300)

In the course of the last year, we've made it possible to create calendar URLs that will open to a specific month, week or year. See this article for information on how to add parameters to a /calendar URL to create a calendar that is date and view specific.

This 'advanced' feature made it possible for you to create a navigation or hyperlink item to a calendar in a specific view and date. However -- the calendar appeared unfiltered, so there was no way to JUST show 'holiday projects" in the month of December with a simple.

Well good news - just in time for the holiday season. It's now possible to Filter a search, and using the Saved or Searchable link of the filtered search, you can now append parameters that will open that filtered search to a specific month, week or year. For those needing this functionality, here's how to append date parameters to a saved search or shareable link:

HOC 3.0.7.3 and 3.0.7.4 Release Notes (Oct 4 - Oct 18, 2018)

Release 3.0.7.3 was mostly focused on internal performance issues, including improvements in sharing portal performance when more than 1000 records have to be accessed, improvements to salesforce mapping in forms. A number of other improvements that address reliability of forms were also implemented. Form error messages have been improved so that when saving an incomplete form it's clearer why the form won't save.

We've also improved the sorting of dates in the system in the 'my accounts' page and elsewhere.

In 3.0.7.4 a number of improvements were made to the CMS. Most notably, inappropriate html tags that some users were pasting into the source code of pages were breaking the CMS. We've updated the CMS to prevent using inappropriate tags such as <html>, </html>, <head>, </head>, <body>, </body>, <applet>, </applet>, <object>, </object>, <embed>, </embed> which should never be included when pasting pure html into any block or page in the CMS.

Additionally some fixes and improvements were made to grouped occurrence functionality.

Here are some notable bugs and improvements including in these releases.

Team Creation Success Page can now be updated (HOC3-7843)

In addition to the previously announced ability for support to [update the html text in various team-related pages,](#) we have now made the 'success' page that appears after a team is first created editable. CMS users can edit this page directly from the CMS system by accessing Content / Pages and searching for the page "Team Creation Success

The default content here is quite useful - and if you edit this page the default content may be lost. So be careful if you choose to edit the messaging.

Here's the default content that appears on the page when you create a new team:

"If you supplied us with email addresses for your team members, we have emailed them, and asked them to create their own individual account. This will make their team experience more enjoyable. As team captain, you are now able to sign up one or more members of your team (whether or not they have created an account here) to volunteer as part of your team for upcoming opportunities.

As captain, it is your responsibility to ensure that any team members you sign-up for an opportunity have agreed to attend and have the information they need. Please promptly remove team members from opportunities you have signed them up for if they tell you they can't attend.

You can modify your team opportunity signups by clicking on the “ Participants ” link for this opportunity which can be found on the My Account / Overview page and on the My Teams page."

Other content that appears on this page (such as the names of team members, and the button saying you can now sign up the team (if the team is created during sign-up) are not editable. Just the main text content as indicated above."

Bug Fix: Personal Information Page doesn't update State (HOC3-8221)

In some instances of HOC, if a volunteer updated their state on the personal information page, it did not correctly update it in Salesforce. This has been fixed.

Bug Fix: "Humans only please" in donation form(HOC3-8240

Some users of donation blocks in the ARS workflow for volunteer signup were receiving an error that said "Humans only please" as part of the donation process. This has been corrected.

Occurrence Description text limit increase (HOC3-8238)

For those users using the option of adding Occurrence Names and Descriptions, we've updated the functionality so that the occurrence description can be as long as 32000 text characters. (though we don't recommend making a text description that long :-).   This raises it from its previous limit of only 1000 characters.

Improvement to calendar monthly view when using back

button in browser (HOC3-8266)

When a public site user moves the calendar to a subsequent month. (example, views december even though its October) - clicks on an opportunity and then decides to go back to the calendar via the browser back button - the calendar page reappears as expected -- but the date is always set back to the current month.

This has been addressed, and in addition to whatever calendar filters were in place when the calendar was last viewed, the month that was being used will also be recalled.   This will make it easier for a user to get back to the exact view of the calendar they were last lookig at.

HOC 3 Release Notes 3.0.7.2 (Sept 20, 2018)

In this release improvements were made to address occasional errors in finding the day's connections in the Check-In Kiosk, and a variety of small bugs that occasionally occurred were corrected. Here's the highlights of this release.

Team Signups now validate all signup restrictions (HOC3-3904)

There were reports that the restrictions that were set for signup to a volunteer opportunity were not always enforced if a team was signing up. Signing up as a team previously allowed team members to sign up even if the opportunity had these restrictions indicated:

- Orientation Required
- Maximum Age
- Minor Waiver on File

Going forward - if these restrictions are set for an opportunity - then team members will be unable to be signed up if their contacts don't meet the restrictions specified.

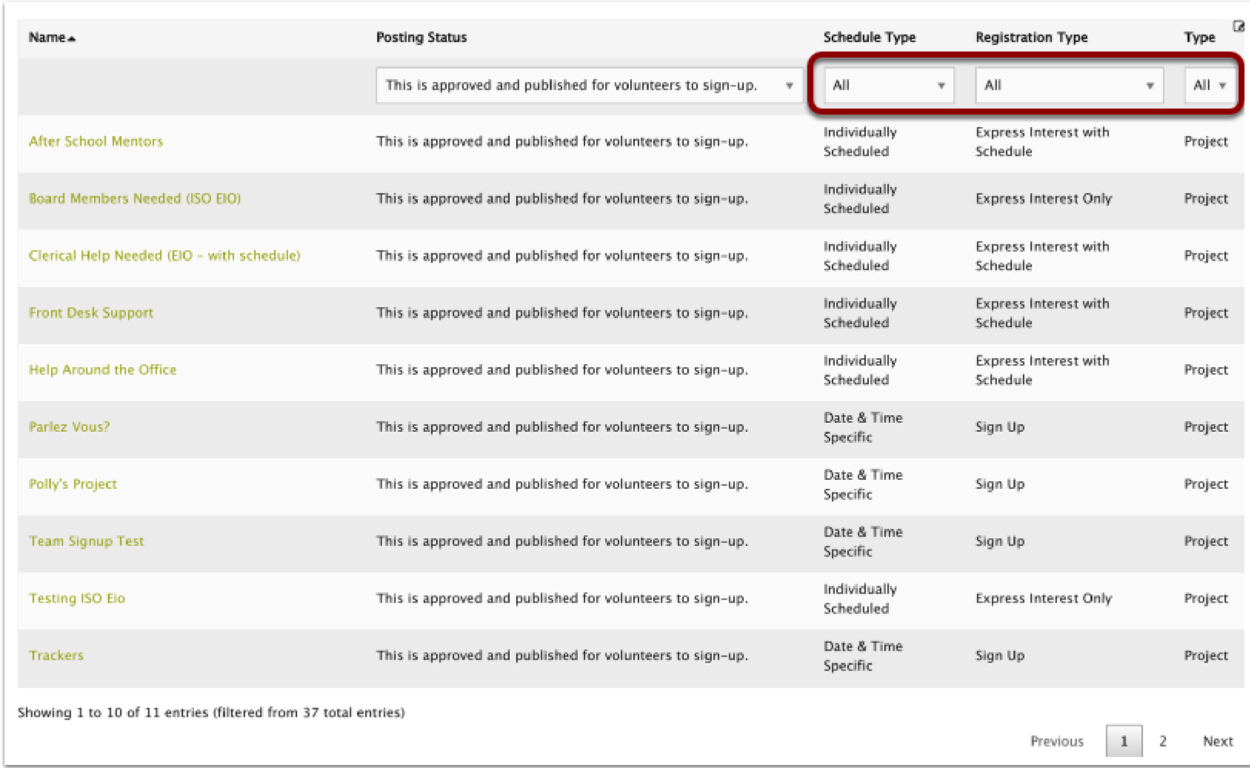
Note: This presents some challenges to teams signing up if these restrictions are placed on signup AND you allow team signups. For example the members of a newly created team will not have gone through an orientation (and had their contact records updated), or have a minor waiver on file.

If you wish to apply these restrictions to opportunity sign up - you may want to consider turning off team signup for that occurrence / opportunity. OR -- the only teams able to sign up will be those that were formed previously - and its members have registered, gone through the orientation, etc. BEFORE the team captain tries to sign them up for an opportunity.

Sharing Portal Improvement - Data Filters now include an 'All' option (HOC3-7911)

The various data grids used throughout the sharing portal have filters that allow you to decide which records to show by filtering them on a particular value. Previously, there was a 'blank' value in these filters which few people understood to mean, "Apply no filter here" (i.e. show any value). But few users understood what this meant or how to use it.

We've updated this filter selector to show the word "ALL" which means -- show all values for this filter. So you are either filtering on a specific value or showing ALL values for that filter. This is a much more intuitive user interface and should make the sharing portal data grids even easier to use.



Name▲	Posting Status	Schedule Type	Registration Type	Type
	This is approved and published for volunteers to sign-up.	All	All	All
After School Mentors	This is approved and published for volunteers to sign-up.	Individually Scheduled	Express Interest with Schedule	Project
Board Members Needed (ISO EIO)	This is approved and published for volunteers to sign-up.	Individually Scheduled	Express Interest Only	Project
Clerical Help Needed (EIO - with schedule)	This is approved and published for volunteers to sign-up.	Individually Scheduled	Express Interest with Schedule	Project
Front Desk Support	This is approved and published for volunteers to sign-up.	Individually Scheduled	Express Interest with Schedule	Project
Help Around the Office	This is approved and published for volunteers to sign-up.	Individually Scheduled	Express Interest with Schedule	Project
Parlez Vous?	This is approved and published for volunteers to sign-up.	Date & Time Specific	Sign Up	Project
Polly's Project	This is approved and published for volunteers to sign-up.	Date & Time Specific	Sign Up	Project
Team Signup Test	This is approved and published for volunteers to sign-up.	Date & Time Specific	Sign Up	Project
Testing ISO Eio	This is approved and published for volunteers to sign-up.	Individually Scheduled	Express Interest Only	Project
Trackers	This is approved and published for volunteers to sign-up.	Date & Time Specific	Sign Up	Project

Showing 1 to 10 of 11 entries (filtered from 37 total entries)

Previous 1 2 Next

Bug Fix: Only send one email per person when sending confirmation emails for Individually Scheduled Opportunities via sharing Portal (HOC3-7837)

Because a volunteer can express interest in multiple dates and times for an ISO with Schedule (by creating a recurring pattern), the opportunity coordinator typically might confirm ALL those connections at once. Administratively, when you do this, only one confirmation email is sent. However, in the sharing portal, it was discovered that multiple emails were being sent, one for each connection.

This has been corrected. If you select multiple connections for the same volunteer and mark them as confirmed at the same time - only one email will be sent to the volunteer letting them know they have been confirmed for one or more connections, and to check "My account" to see the dates and times they have been confirmed for.

Bug Fix: Add to ICalendar now works on IOS (HOC3-7741)

The 'add to calendar' function for confirmed volunteer opportunities, was producing an error when trying to add to iCalendar on an IOS device. This has been fixed and will now work as expected.

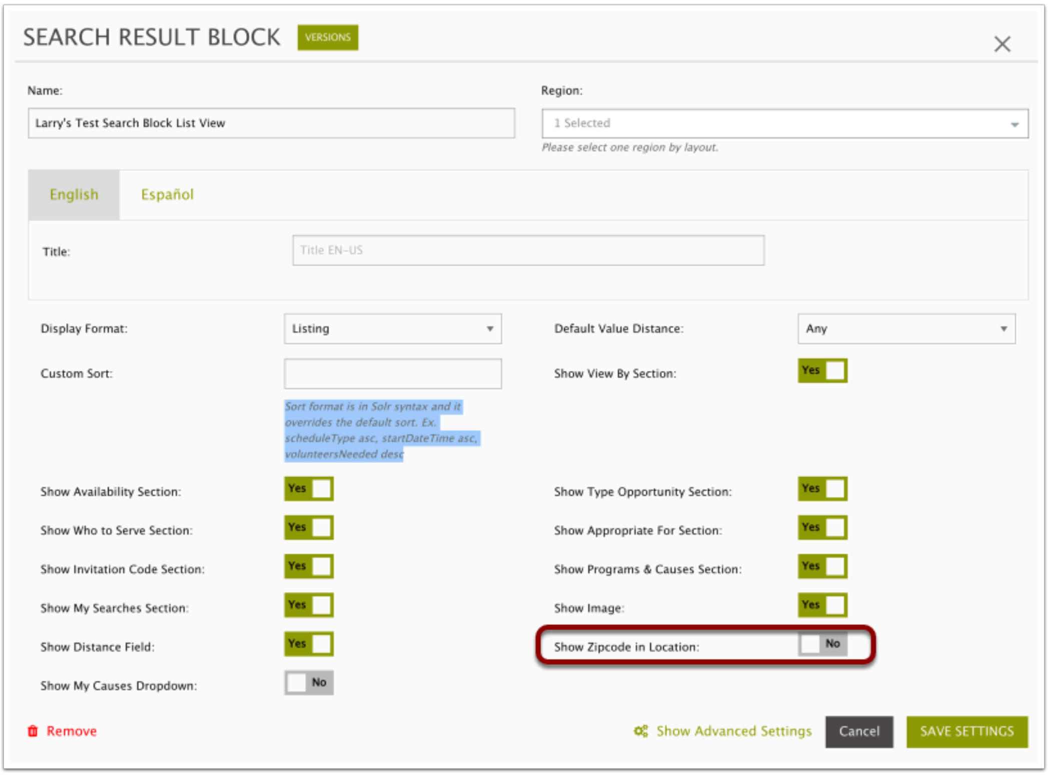
Bug Fix: ARS not sending user to correct success page (HOC3-7967)

It was reported that for those using the ARS for opportunity signup, the flow was not sending the user to the correct success page (based on the opportunity type). This has been corrected and the user will be sent to the correct Success Page as the last step in the ARS workflow.

Bug Fix: Drop a logo feature not always working in Header Logo Settings (HOC3-7993)

In some sites, the ability to drag and drop a picture to set a logo was not working. You could browse to a logo and successfully load it, but drag and drop did not work as expected. This has been fixed.

Search Result block now allows you to show zipcode in location if desired (HOC3 - 8023)



The additional new field "Custom Sort" is for support staff use only. It makes it possible for us to create custom sort orders if needed for special cases. The "Soir Syntax" referred to here has to do with the language used by our search server.

HOC 3 Release Notes 3.0.7.1 (Sept 6, 2018)

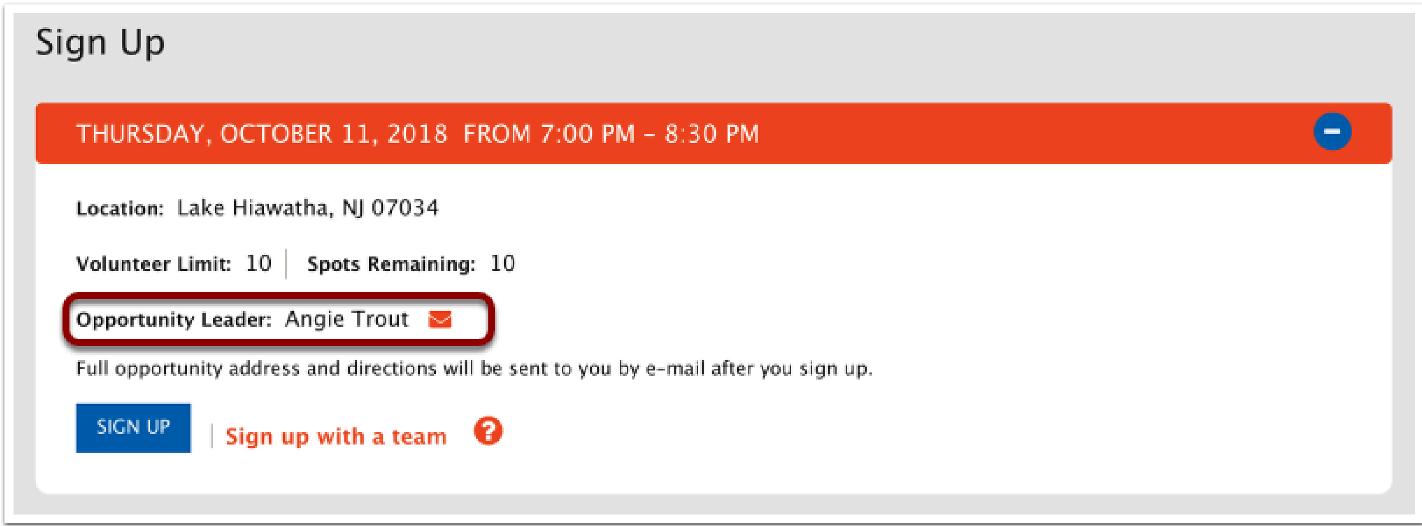
Since the 3.0.7.0 release a number of incremental improvements were made including improvements to sites using internationalization and multiple languages, improvements to business page search results, and menu performance on some site designs. A number of short term bugs were also fixed.

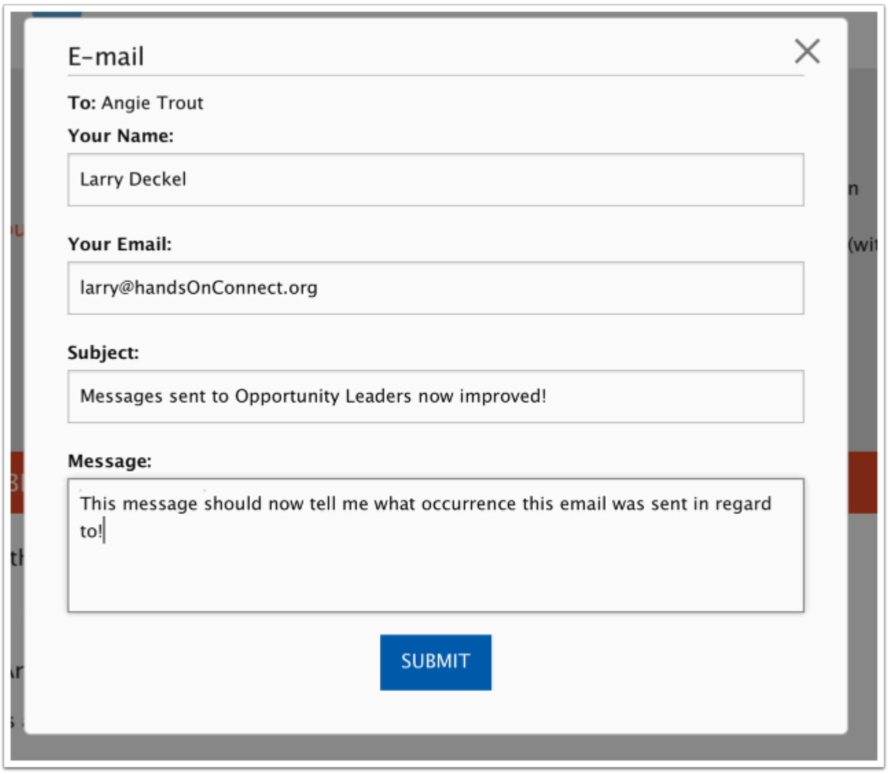
In the 3.0.7.1 release (and its incremental releases since Sept 6), a number of performance improvements have been made, and some typos in error messages have been corrected. Here are some of the most visible improvements in the release.

Improvements to emails sent from public site to Opportunity Leader (HOC3-7229)

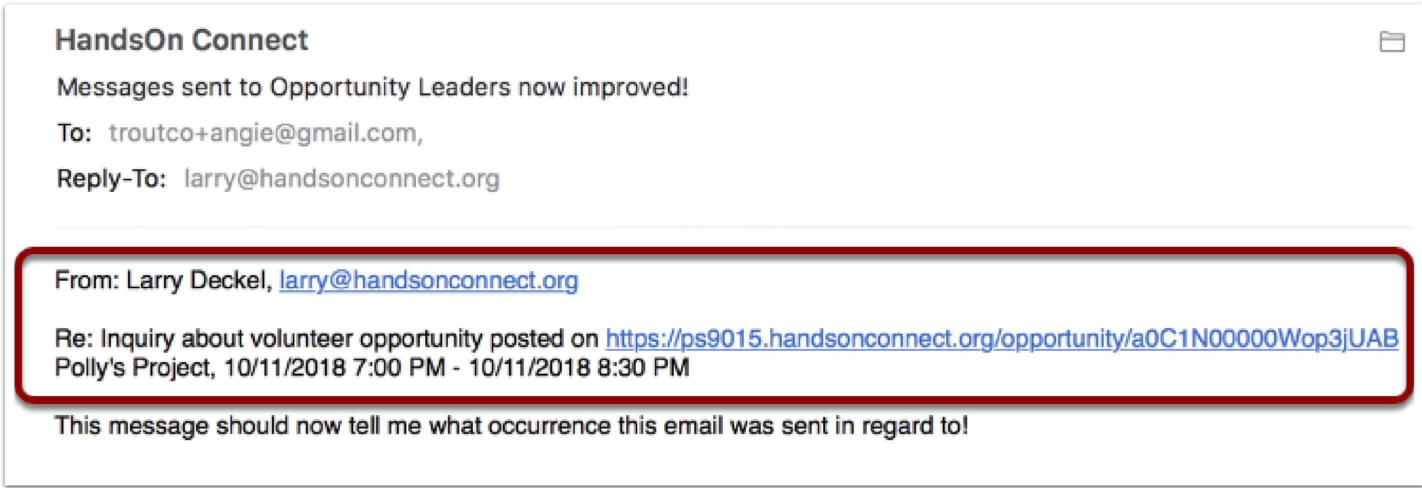
In a recent release we improved the security and process of sending emails from the public site to an occurrence's opportunity leader. We've improved the email sent even further by now providing both the email of the sender AND making that the 'reply-to' address for easy response.

We've also added a link to the volunteer opportunity it was sent from along with the name of the opportunity and the occurrence date and time so the leader will know which occurrence the inquiry is about!





And here is the email that Angie receives:



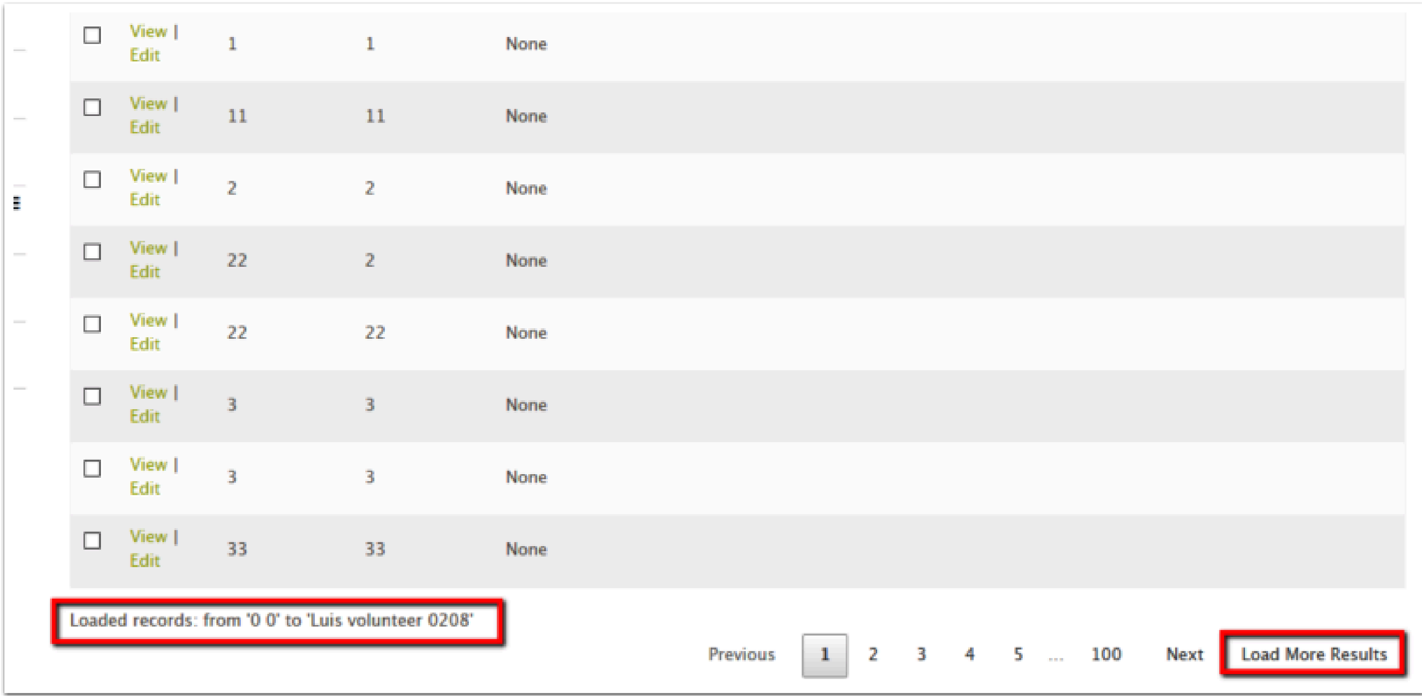
HOC Public Site Password Improvement (HOC3-7783)

Previously, HOC public site passwords did not recognize special characters. Using a special character returned an error. Lower case letters, Upper case letters and numbers were recognized, but not 'special characters".   Passwords may now include characters such as & and # allowing for greater password security for those who desire it.

Ability to access more than 1000 records in the sharing portal

(HOC3-7994)

Methods have been added to the sharing portal to handle requests for data when the number of returned records would be greater than 1000 (the API limit for a request from Salesforce). It's now possible for us to return any shared records through a "Load More Results" link which appears if more than 1000 records are called through search or filters:



☐	View | Edit	1	1	None
☐	View | Edit	11	11	None
☐	View | Edit	2	2	None
☐	View | Edit	22	2	None
☐	View | Edit	22	22	None
☐	View | Edit	3	3	None
☐	View | Edit	3	3	None
☐	View | Edit	33	33	None

Loaded records: from '0 0' to 'Luis volunteer 0208'

Previous 1 2 3 4 5 ... 100 Next Load More Results

Bug Fix: Inability to sign up for Individually Scheduled Opportunity with Schedule for today's date (HOC3-7835)

If a volunteer tried to sign up for an ISO with Schedule that was expecting volunteer's that day - they received an error message saying the day was not a valid date. This has been corrected. Volunteers can now express interest in an ISO opportunity for that day if the schedule allows it!

Note: The connection would still be in pending status, and its possible that the Opportunity Coordinator won't be able to confirm the connection in real time -- but this makes it possible for a connection to be created via the public site -- and, if you are using the check-in kiosk, that pending connection can be checked in for as soon as its been created.

Additional Options available for alternate Team Creation rules BETA (HOC3-7228)

The pilot program for creating alternate rules for creating teams as been moved to Beta status. In addition to previously announced fields that could be hidden or made required - its now possible to require or remove the fields "Team Description" and "Company/Group Affiliation"

See this updated article for full details on the issues regarding requesting changes to HOC's default rules regarding creating teams.

https://support.handsonconnect.org/hc/en-us/articles/360001023363-hoc3-release-notes-3-0-6-8-june-14-2018

August, 2018 Release

This month's release of fixes in our HOC applicaiton for Salesforce fixes some annoying bugs and behaviors that occasionally crop up. We also have an administrative update that System Administrators of organizations using lightning should take action on. (It'll improve your lightning experience, as we bring you the first two HandsOn Connect Lightning Components! Read on!

Lightning Users: Administrative Action Recommended: New Lightning components for occurrences (HOCAVV-1174) and recurrences (HOCAVV-1175) now available!

More and more HOC users are using Salesforce's new lightning interface, and many others are testing it out and learning how to take advantage of the new interface. For those users who have switched to lightning, we strongly urge you ask for the upgrade to the Lightning Native version of HandsOn Connect (a $100 upgrade that replaces the "classic' version used in lightning with a Lightning native version.)

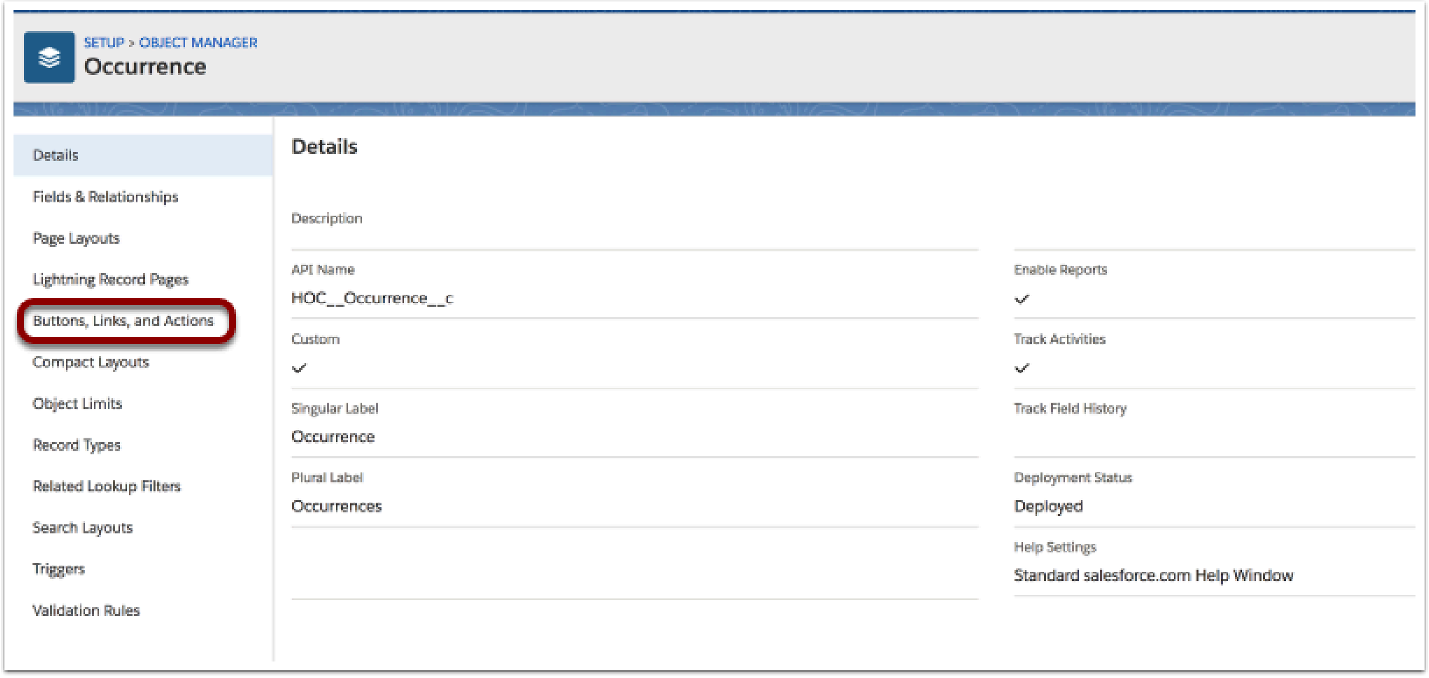
This release offers a fix for those users who have run into the problem wherein editing an occurrence and saving it does not close the occurrence editing window. Administrators should also add new HOC Lightning components included in this release, to fix two small issues with the Occurrence and Lightning Page layouts.

This is easy to do - and a good way for you administrators new to lightning to get under the hood and get some Lightning administrator Experience.   If on the other hand this isn't something you're comfortable with - come to a lab and we'll walk you through the steps - or just open a support ticket and say "Please update my occurrences and recurrences" and we'll take care of it for you.   But I bet you're eager to try this one yourself :-)

If you are not experiencing the problem of the edit window in occurrences not closing - Skip steps 1 - 4. Go directly to Step 5.

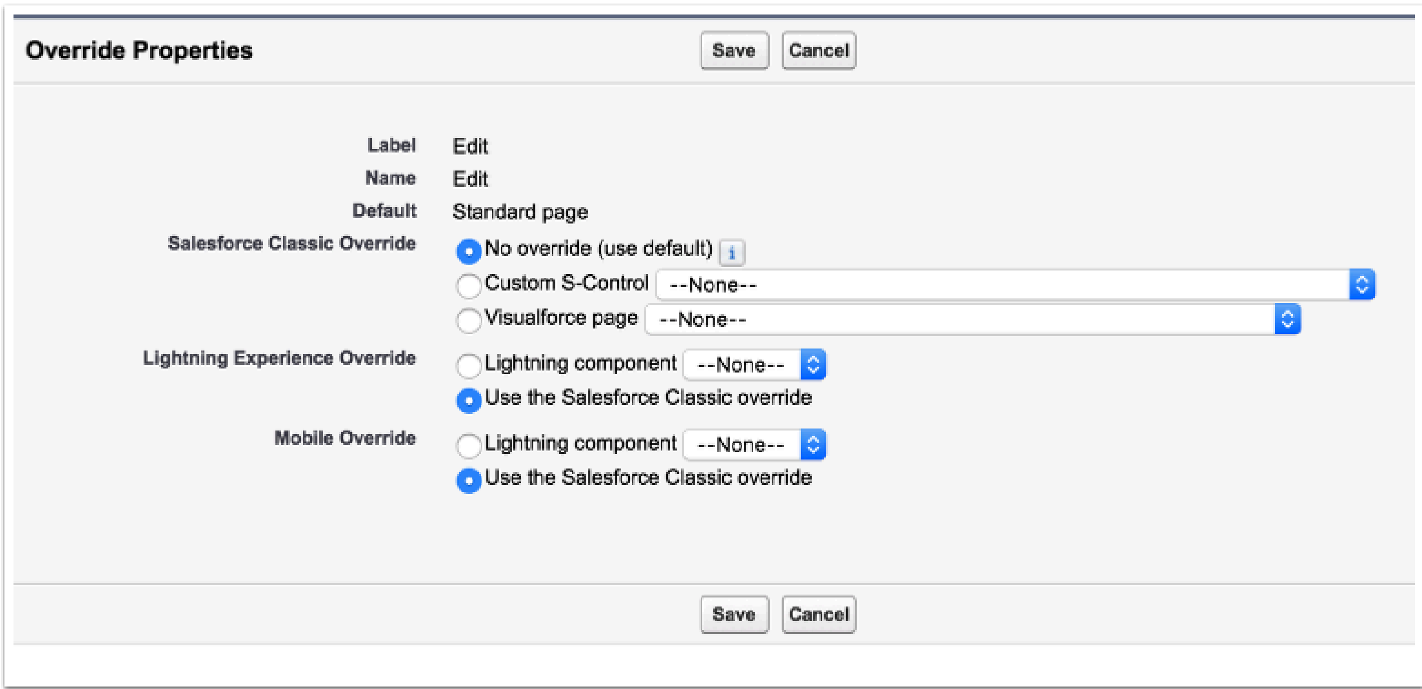
UPDATE THE OCCURRENCE OBJECT

1. Go to Setup Object Manager and select the occurrence object. Select "Buttons, Links, and Actions"

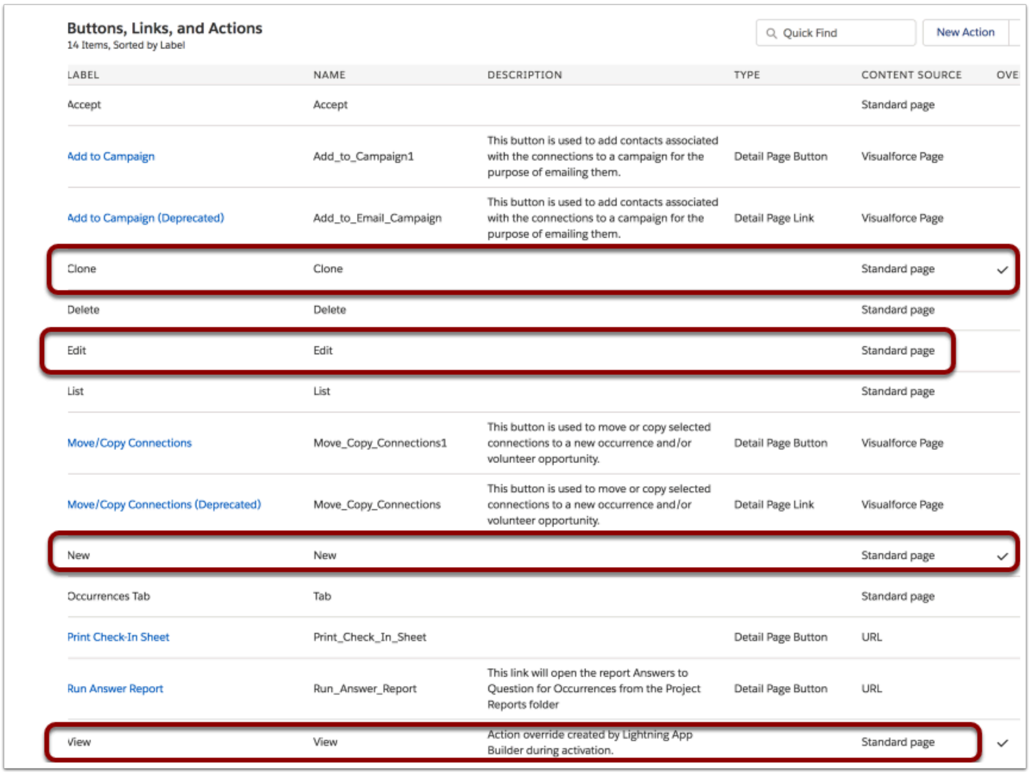


2. Select the button "Edit" and clicking the triangle to the right, select 'edit". to

3. Update the override properties changing the Salesforce Classic Override to "No Override" and the Lightning Experience Override to "Use the Salesforce Classic Override". (this part may have already been done for you by support when setting up lightning for you.



4. Also edit the buttons for NEW, VIEW, and CLONE if needed. All should have as 'content source" Standard Page.

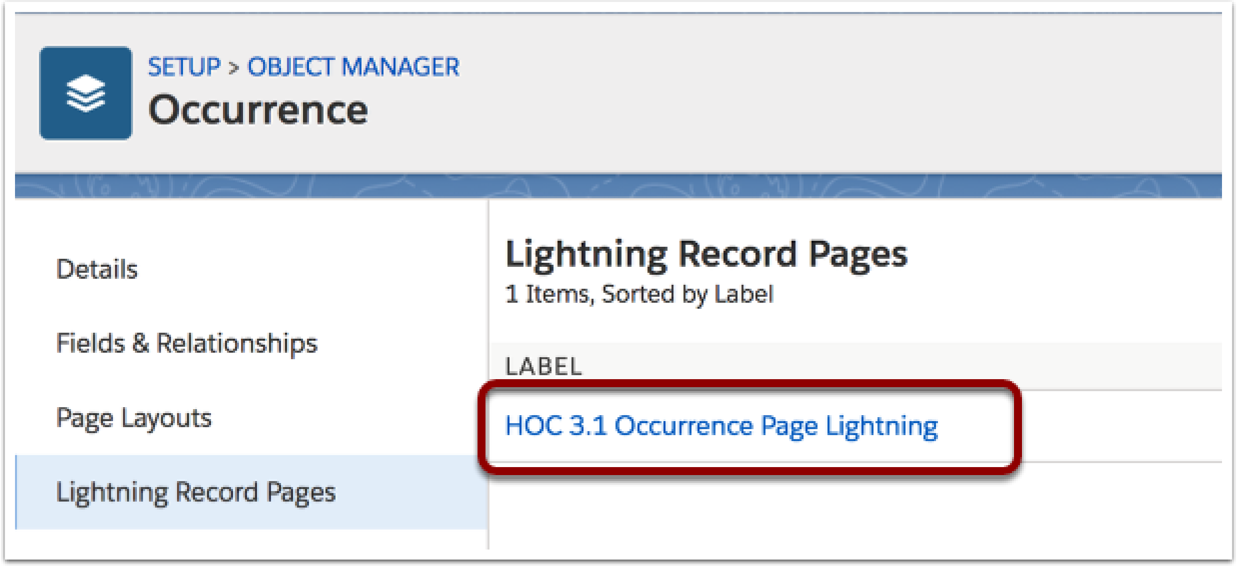


Buttons, Links, and Actions
14 Items, Sorted by Label

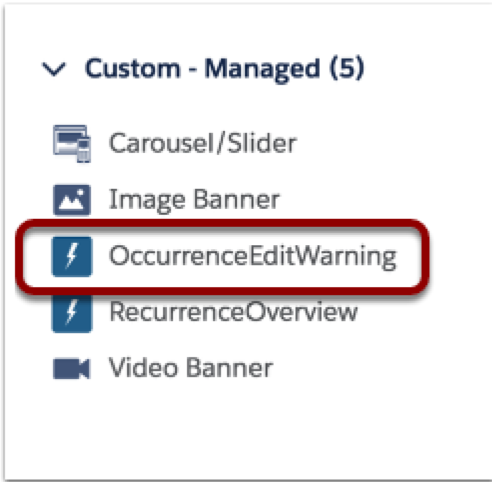
LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVE
Accept	Accept			Standard page	
Add to Campaign	Add_to_Campaign1	This button is used to add contacts associated with the connections to a campaign for the purpose of emailing them.	Detail Page Button	Visualforce Page	
Add to Campaign (Deprecated)	Add_to_Email_Campaign	This button is used to add contacts associated with the connections to a campaign for the purpose of emailing them.	Detail Page Link	Visualforce Page	
Clone	Clone			Standard page	✓
Delete	Delete			Standard page	
Edit	Edit			Standard page	
List	List			Standard page	
Move/Copy Connections	Move_Copy_Connections1	This button is used to move or copy selected connections to a new occurrence and/or volunteer opportunity.	Detail Page Button	Visualforce Page	
Move/Copy Connections (Deprecated)	Move_Copy_Connections	This button is used to move or copy selected connections to a new occurrence and/or volunteer opportunity.	Detail Page Link	Visualforce Page	
New	New			Standard page	✓
Occurrences Tab	Tab			Standard page	
Print Check-In Sheet	Print_Check_In_Sheet		Detail Page Button	URL	
Run Answer Report	Run_Answer_Report	This link will open the report Answers to Question for Occurrences from the Project Reports folder	Detail Page Button	URL	
View	View	Action override created by Lightning App Builder during activation.		Standard page	✓

Note: By turning off the redirect and fixing this in lightning, you will be removing a warning in classic that alerts users that editing an occurrence that's part of a recurrence will remove its relation to that recurrence. No big deal, but it is a handy alert to have. By making this change, we're going to stop this alert in classic but add it Lightning. (So don't make the change above yet if you're only dabbling in lightning).

5. Now we are going to add a new HOC lightning component to the Lightning Page Layout. To do so, click on Lightning Record Pages and select the page HOC 3.1 Occurrence Page Lightning. After selecting it, click on the Edit Button.

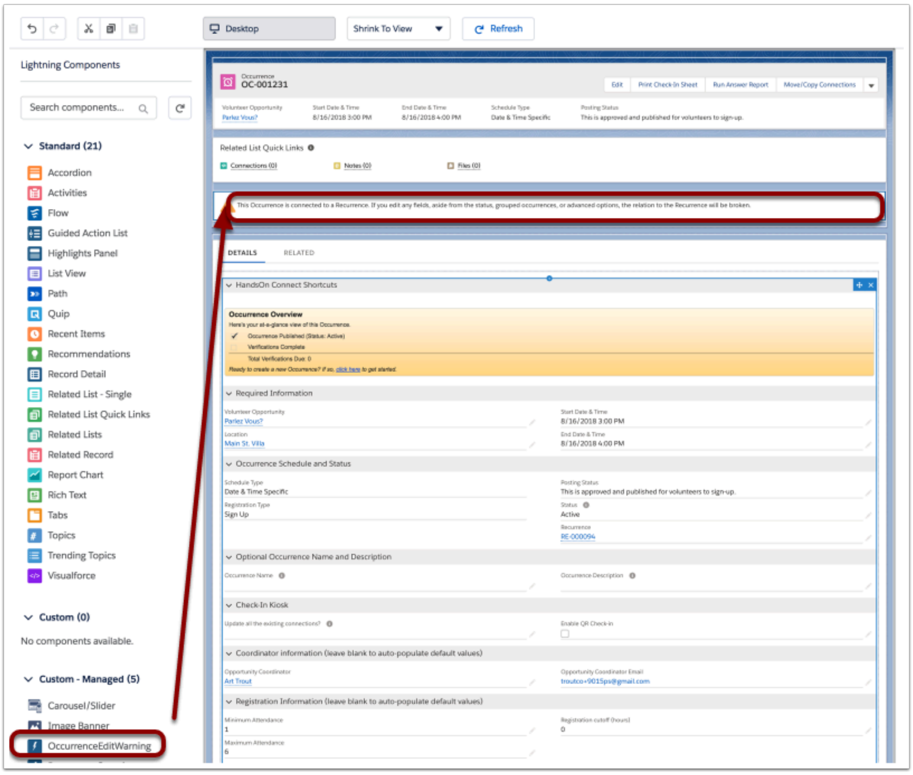


6. In the left column of the lightning page are all the available lightning components. In this release we've added two HOC lightning components: "OccuirrenceEditWarning" and "RecurrenceOverview". You'll find them at the bottom under 'custom - managed'. For the Occurrence lightning page we're going to add the component "OccurrenceEditWarning".

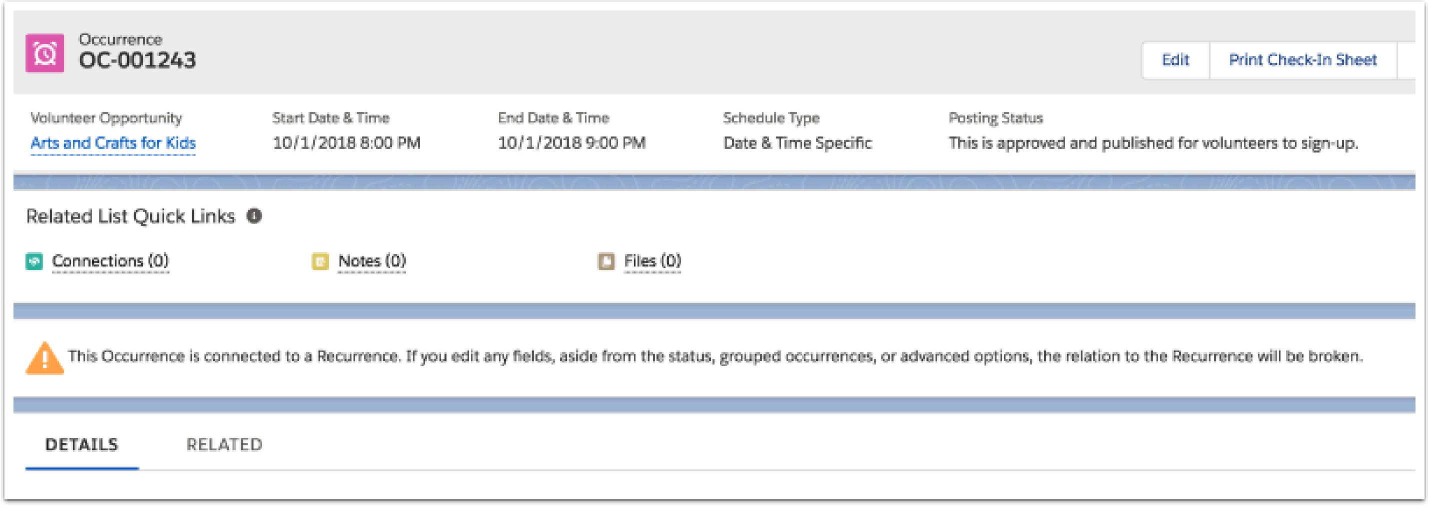


Not seeing the Custom Lightning components? Make sure you've activated "My Domain" as part of your initial lightning activation process. If you haven't done so yet, we strongly urge you to do so now :-). My Domain is required for certain lightning features, like custom components to be used.

7. Drag the component and place it on the page. We recommend placing it right under "Related List Quick Links". Then SAVE the Lightning record page.



Why are you doing this? Good question. Here's what this component does. In Classic, a VisualForce redirect page was used whenever you edited an occurrence, that checked if the occurrence was part of a recurrence, and gave a friendly warning that editing the occurrence would remove the occurrence from its recurrence. (Obvious yes, but nice to be warned, right?). The VF redirect page was what was causing the awkward behavior of the edit window in Lightning. So for lightning users, you'll want to turn off that redirect (Steps 1 -4 above), and this new Lightning component will display that warning message when you view an occurrence that's connected to a recurrence! If its not connected to a recurrence, then the warning won't be displayed!

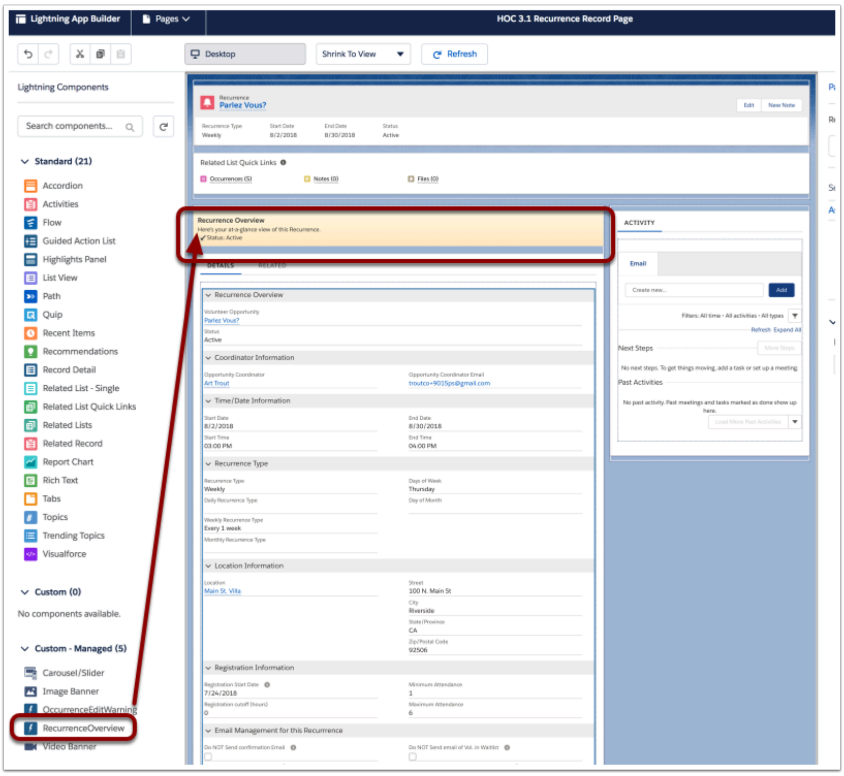


UPDATING THE RECURRENCE LIGHTNING PAGE LAYOUT:

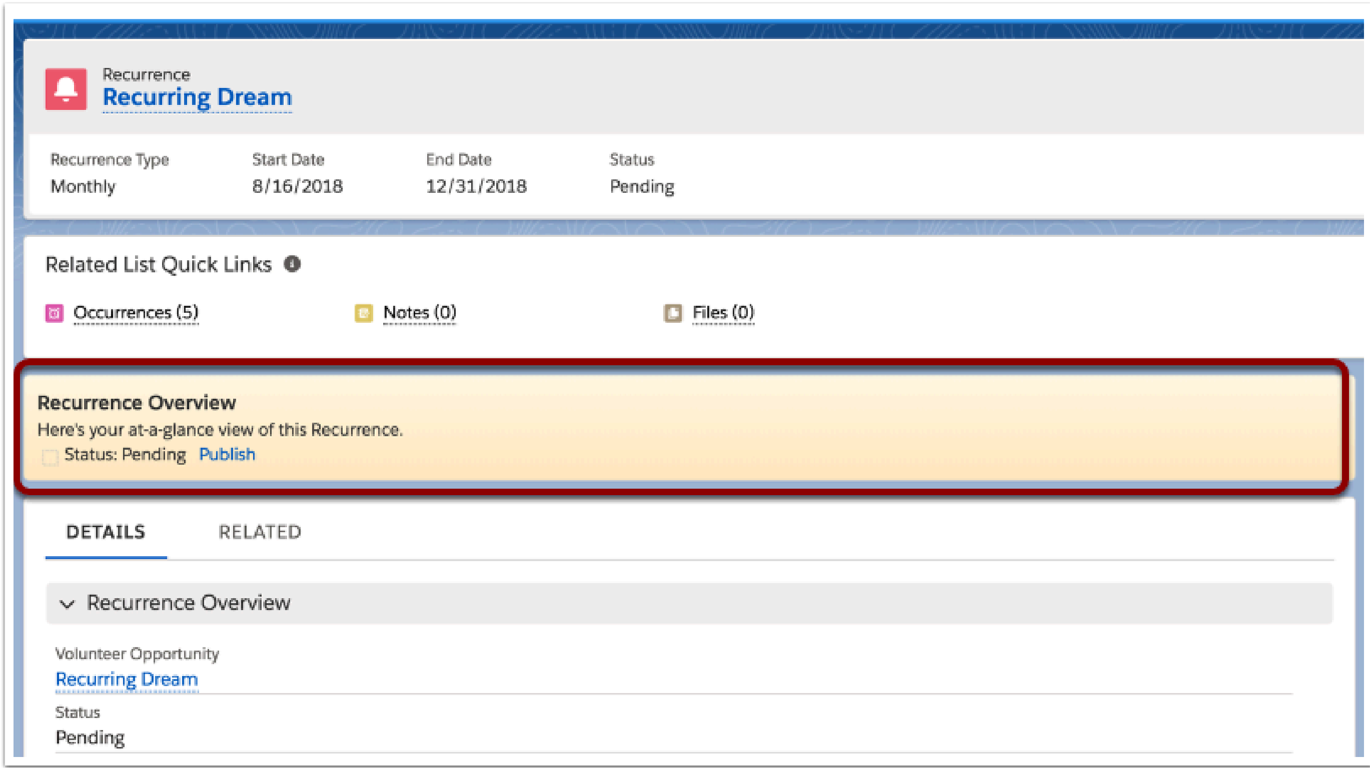
Another annoying thing we found in lightning is that the "Recurrence Overview" was not visible when VIEWING a recurrence. You had to click on edit to see the overview and publish it. You'll fix this with another lightning component!

1. Go to Object Manager and select the recurrences object. Select Lightning Record Page and select the page "HOC 3.1 Recurrence Record Page", and then click on Edit when you get to the next screen.

2. Drag the lightning component "Recurrence Overview" onto the page layout. (Place it just about the record detail section). Then click Save.



Voila! Now when you 'view' a recurrence - the recurrence overview IS visible and you can publish a recurrence without clicking on edit :-)



> OK. Admit it. Lightning is fun, right? And its the future of Salesforce. So if you haven't tried out lightning, now's the time to give it a whirl and decide if your organization is ready to switch over to lightning!
>
> If you ARE going to use lightning, we strongly urge you to request the $100 upgrade (a bargain!) for us to install the native lightning version of HandsOn Connect. It will save you a ton of setup headaches!
>
> Just want to learn more about lightning? We're here to help. Drop into any lab and we can show you the ropes of using lightning!

Bug Fix: Unable to update a contact's email address (HOC-1171)

When updating a contact's email address, all related records in which that contact's email address has been brought over must also be updated. In isolated cases, a single contact (like an Opportunity Coordinator for many opportunities and occurrences), Salesforce was not able to perform the update due to the number of records. Instead you got a delightful error message like this:

```
Error:Apex trigger HOC.contactTrigger caused an unexpected exception, contact your
administrator: HOC.contactTrigger: System.LimitException: Apex CPU time limit exceeded
```

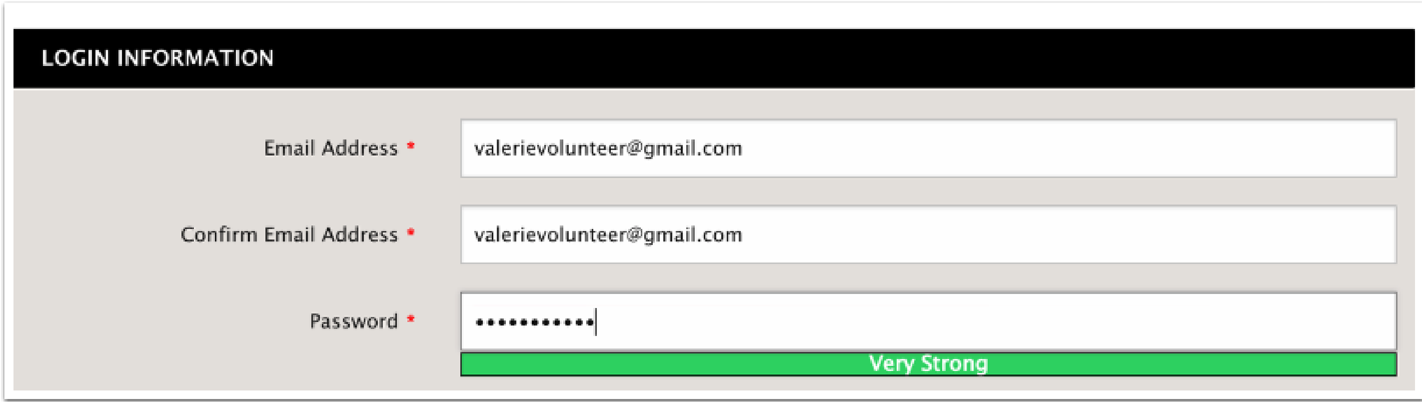
The apex code that manages these mass updates has been improved, and the contact trigger will now be able to handle as many records as it needs to update as a result of a change to the email address or contact name.

HOC 3 Release Notes 3.0.7.0

This week's release includes improvements in HandsOn Connect public site security, improvements in our universal public site template, improvements to the calendar view of invitation-code based opportunities, and performance improvements to saved searches in the /searchresults block. Here are the highlights in this release:

Security Improvement: Password Strength Meter (HOC3-2129)

HandsOn Connect's public site has a low threshold for user-defined passwords (6 characters) to make it easy for non-technical folks to enter a password when registering. However, in order to encourage users to opt for stronger passwords, we've added a password meter that shows the strength of the password they are choosing.   This should encourage people to avoid 'weak' passwords if they want greater security for their account information.



Security Improvement: Log in Throttling (HOC3-1792)

We have seen rare instances where 'brute force attacks' have been attempted against HandsOn Connect public sites. To protect sites from these attacks, where a bot tries to log in to an account over and over again, logins are now throttled so that after 12 unsuccessful login attempts, further attempts are blocked for 3 hours.

When a user reaches 6 failed login attempts, the system will let them know when they have only 5 attempts left and provide a countdown from thereafter. "You have X login attempts left before we have to lock your account for too many failed attempts. If you forgot your password you may want to use the password reset."

After 12 failed attempts the user is notified that "Your account has been locked for 3 hours for too many failed login attempts. This is to protect your account."

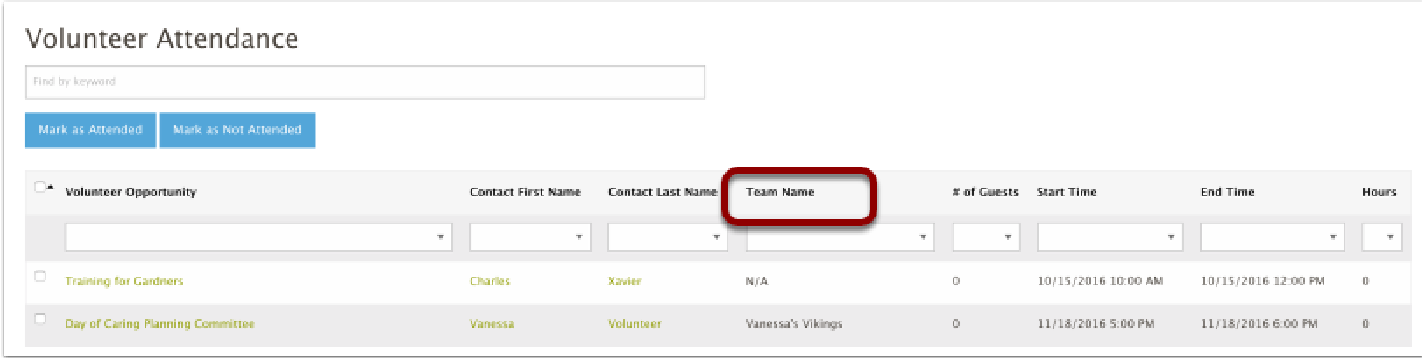
Sharing Portal: Reporting Improvement for Summary Reports (HOC3-7641)

Summary reports, when made available to partners in the sharing portal, were not providing calculated totals and subtotals.   This has been corrected and now any calculated totals or subtotals that are part of the original report will be visible in the sharing portal as well.

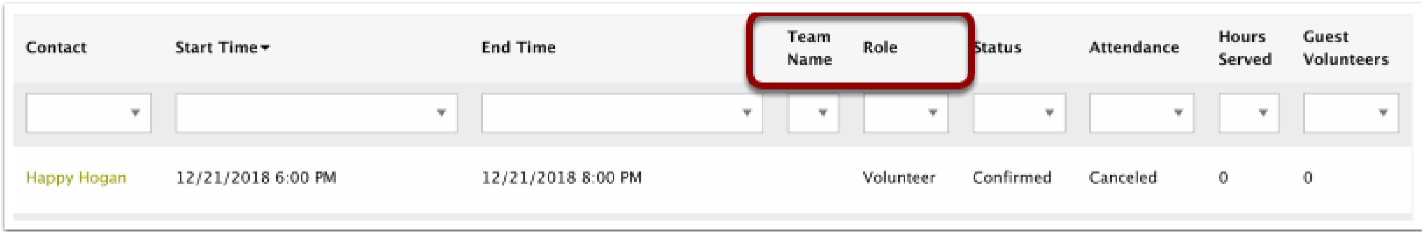
Contact	Contact Email	Start Date & Time	End Date & Time	Organization Served (User Defined)	Hours Served
Attendance Status: Please Verify (Total: 2 Records)					4.00
Volunteer Opportunity (User Defined): Coding Instructor Mentor (Total: 1 Records)					2.00
Sa[illegible]	[illegible]	1/10/2016 3:00 PM	1/10/2016 5:00 PM	Volunteer Center Serving Howard County	2.00
Volunteer Opportunity (User Defined): test (Total: 1 Records)					2.00
Ni[illegible]	[illegible]	2/26/2018 9:00 AM	2/26/2018 11:00 AM	Volunteer Center Serving Howard County	2.00
Attendance Status: Attended (and Hours Verified) (Total: 5 Records)					12.17

Sharing Portal: Improvements to tables in Sharing Portal (HOC3-7763)

The field "Team Name" has been added to the Volunteer Attendance reporting page:



The fields "Team Name" and "Role" have been added to the Connections Table (making it possible for partners to know which connections are part of a team, and identify who the team captain of a team is!)



Note: It is now possible for support to 'turn off' any of the columns appearing in these tables (list views). If you want a column to no longer appear, please make a request in a support ticket.

If these columns are not currently visible in your sharing portal but you DO wish them to appear, please open a support ticket and we can add them for you if they are not already there!

Bug Fix: Logging in from admin as a volunteer leader. (HOC3-7800)

We've fixed a bug in which 'logging in as' a contact from Salesforce with the Volunteer Leader profile - did not give you the correct permissions and sharing settings for a Volunteer Leader. This has been fixed. You will now see what the leader sees when logging in from the public site.

June, 2018 Release Notes

The June release of the HOC application is a minor release that addressed a few items necessary to maintain compatibility with the SF Summer 2018 release. There are no significant changes that will be noticed by HOC users.

Workflow to unpublish opportunities upon edit, updated for HOC 3.0 compatibility (HOCAVV-1072)

The workflow, "Notification of Volunteer Information Edited - Field Update" has been updated to be compatible with the HOC 3.0 sharing portal.

What is this workflow? It's one NOT used by the majority of HandsOn Connect customers, but available for use for organizations that do not wish their partners to be able to edit a published volunteer opportunity without first having it reviewed again by the affiliate organization and republished.

What it does, if enabled, is change the status of a volunteer opportunity BACK to inactive, any time a partner edits the title or description of a previously published opportunity.

Most customers, use only the workflow "Notification of Volunteer Opportunity Information Edited (email alert)" which sends an email notifying the Opportunity Approval Manager when a partner-managed opportunity is edited. This is sufficient for most organizations that just want to be advised when changes are made, without removing the opportunity from published search.

But for those who do wish opportunities to be removed for review anytime an edit is made -- the workflow "Notification of Volunteer information Edited - Field Update" is now available for use. If turned on, be sure to advise your partners that any edits they make will cause their opportunity to be unpublished until re-approved by your organization.   It is recommended that if you do opt to use this, you also leave "Notification of Volunteer Opportunity Information Edited (Email Alert) on -- so you know to review and republish the opportunity.

May, 2018 Release Notes

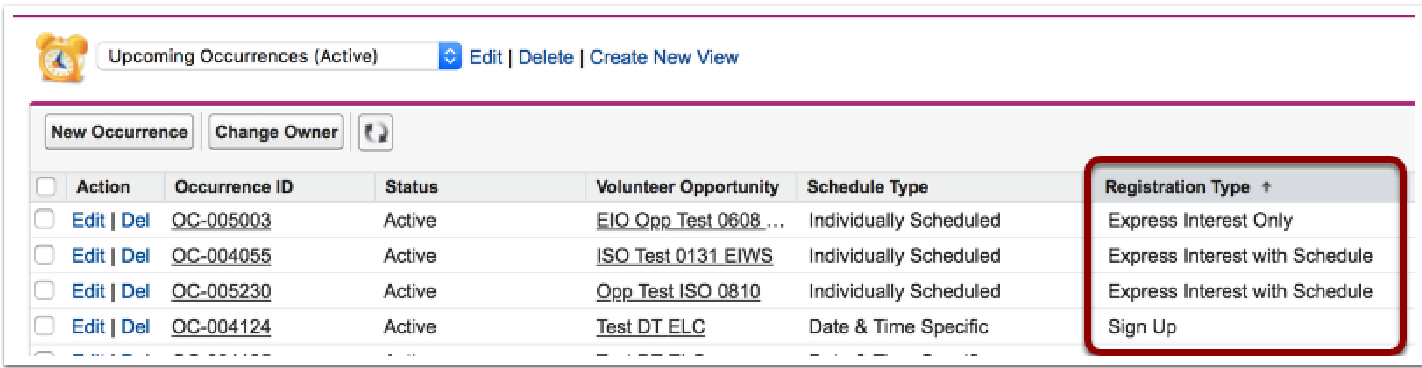
This release extends the auto-approve functionality introduced in last week's sharing portal update to opportunities created on behalf of partners in Salesforce. Occurrences will be automatically approved when 'auto-approve' is active for a partner. There are also improvements to the management of partner staff profiles in organizations using the Flex Configuration of HandsOn Connect or having contacts manage more than one partner organization. There were also corrections to a few typos in error messages. Also fixed were circumstances were organization primary contacts were not receiving email notifications when new self-reporting connections were submitted.

And here's one small but handy improvement for those of you working with list views and reports. (Note: It does require a quick administrative speedup to take advantage of this new field!

Registration Type field added to Occurrence object. (HOCAVV-1133) - (Suggested Admin Speedup)

Here's a much requested little improvement. In the past, if you wanted to create a view of occurrences of a specific opportunity type (i.e. Individually Scheduled Opportunity - Express Interest Only) it wasn't possible to do it. The field "Schedule Type" existed, and allowed you to filter on Date & Time specific or Individually Scheduled Opportunities -- but there was no way to filter and find the Registration Type at the occurrence level :-(

We've added a new field "Registration Type" to the occurrence object. This makes it possible to create a view and quickly see your upcoming occurrences and know exactly what type of opportunity each occurrence represents, as you can now see both the Schedule Type AND the Registration Type of any occurrence.

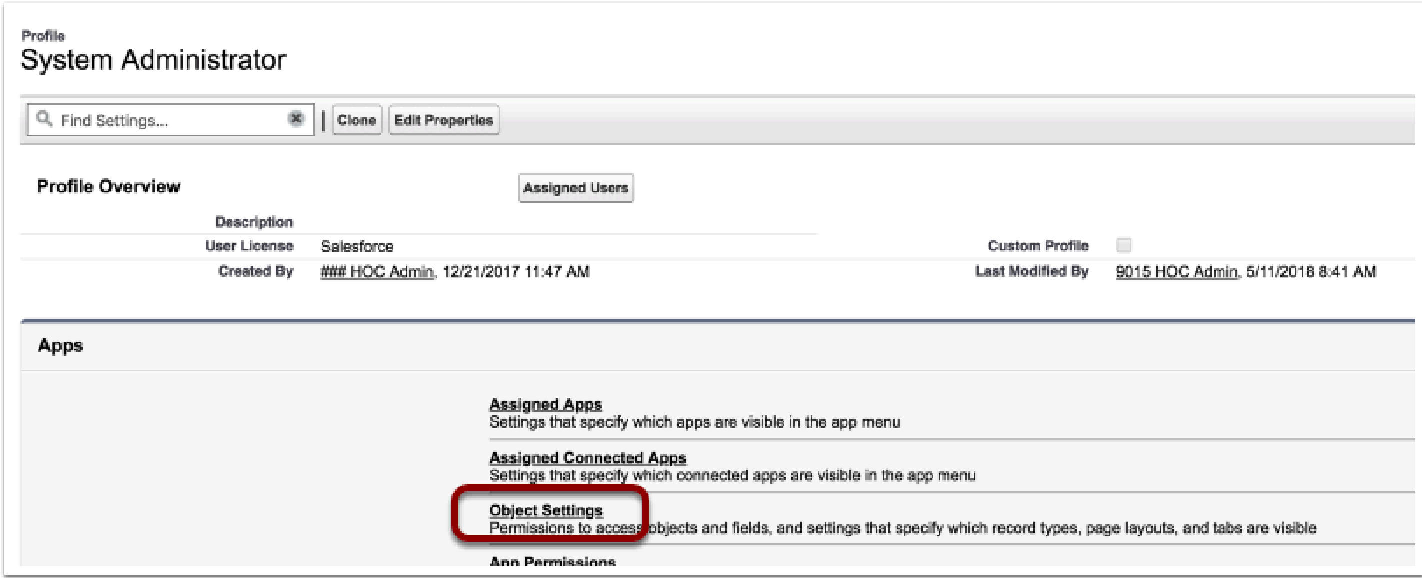


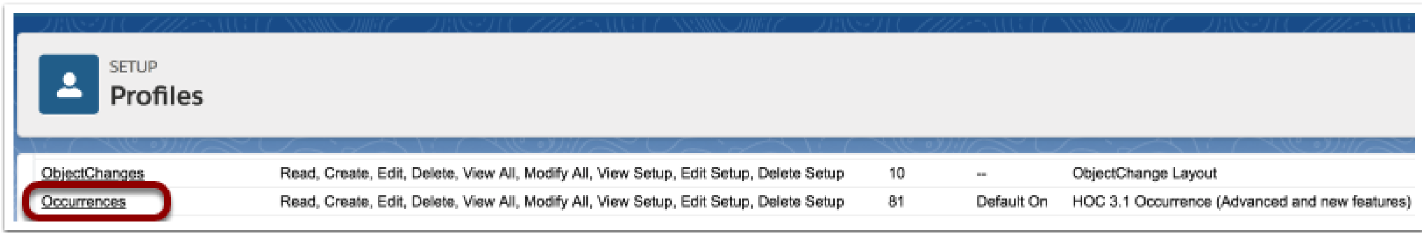
Admin Speedup: In order to take advantage of this new field for views, page layouts and/or reporting, you must first update your system admin and staff profiles to access the new field.

Go to setup / Profiles / System Administrator.

Then click on "Object Settings'

Select the object 'Occurrences"



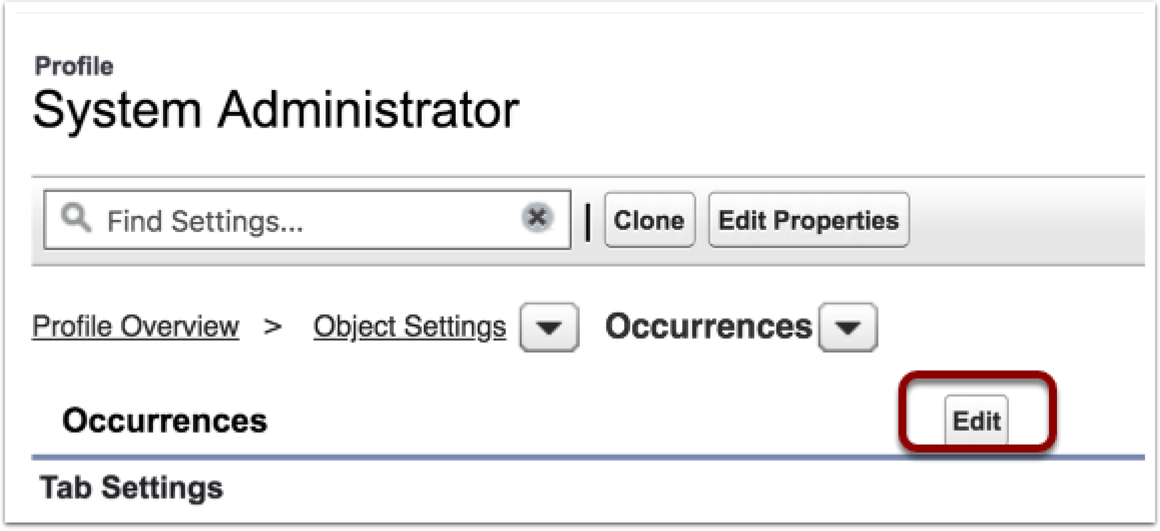


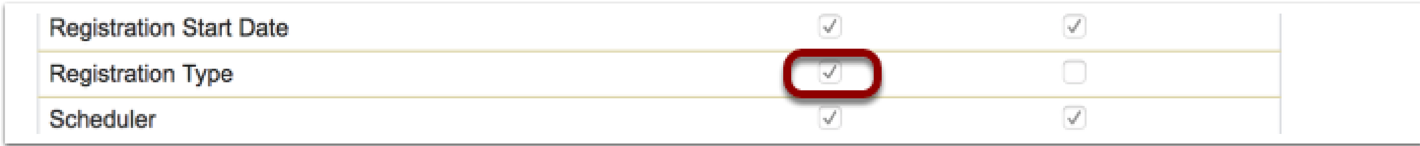
Click on the Edit Button:

Scroll down to the field "Registation Type" and put a checkmark in the first column "Read Access".

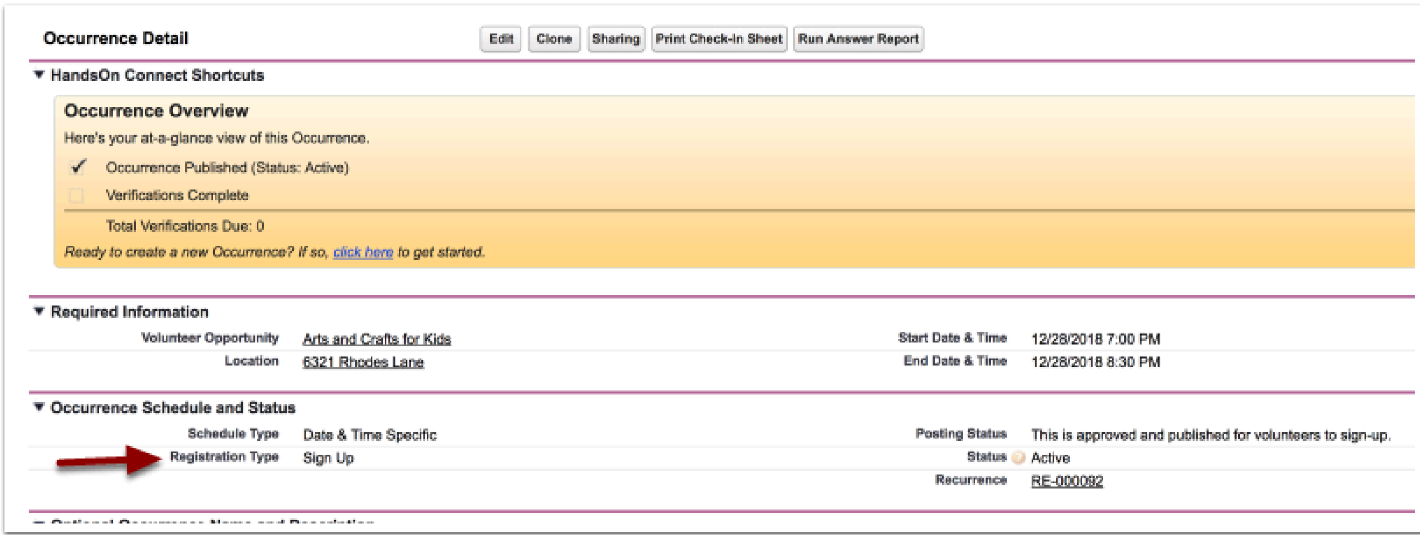
Save.

Now repeat for the Staff Profile.





Suggested addition of this field to Occurrence Record Page Layout:



You can now also add the field "Registration Type" to any views you create or edit of Occurrences!

Help Site for Partners Now Available

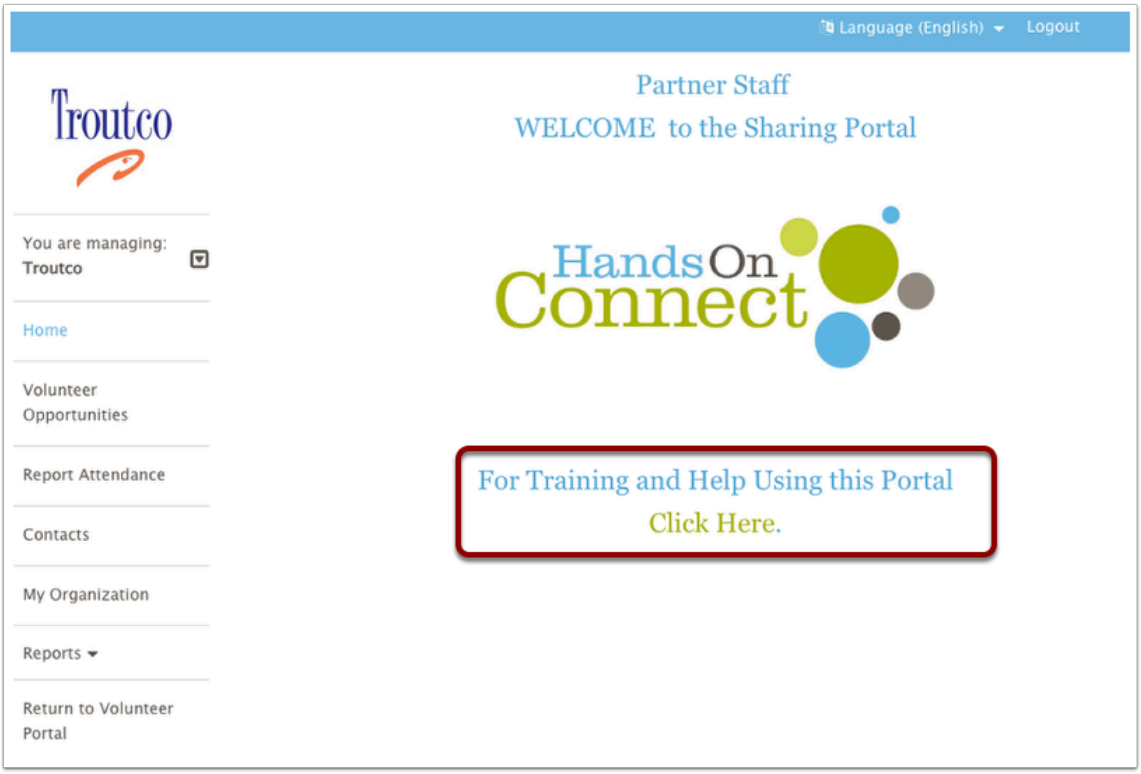
Because your partner organizations do not have access to documentation in the Zendesk Help Center - we've created a site, just for partners, that gives complete documentation on using the Partner Sharing Portal.

The documentation is written to take into account the fact that navigation items, fields, and permissions may vary from organization to organization, but provides overall information on how to use the portal including "creating volunteer opportunities""reporting attendance" and other features.

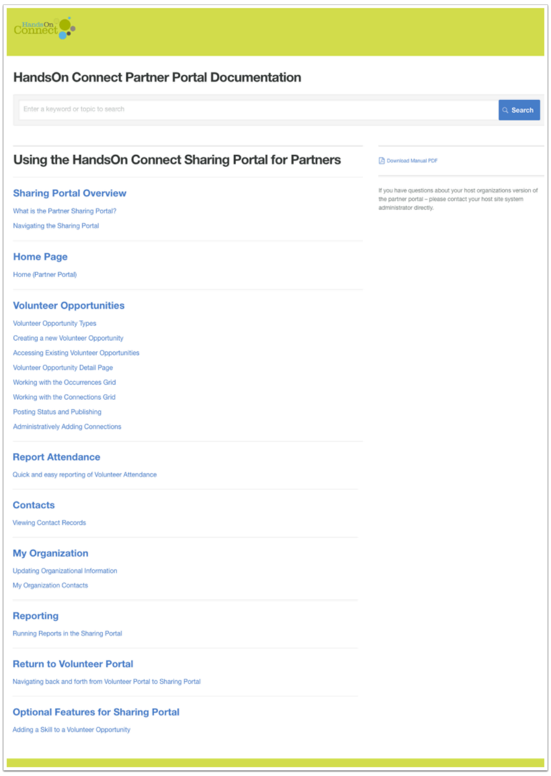
How to reach the Partner Portal Documentation

The partner portal documentation can be found at the URL
 http://partners.handsonconnect.org

You can share this info with your partners via email, or better yet, provide a link to it on the partner Home Page that partners see when first logging in. Just add a prominent hyperlink (and set that hyperlink to open in a separate tab of their browser)



Here's what the new partner help site looks like:



The sharing portal is designed to be simple to use and mostly self-explanatory -- but a little help never hurt anyone :-)

We hope this helps your partners who want to fully explore and understand how to manage their opportunities and volunteers via the sharing portal.

HOC 3 Release Notes 3.0.6.13 (August 9, 2018)

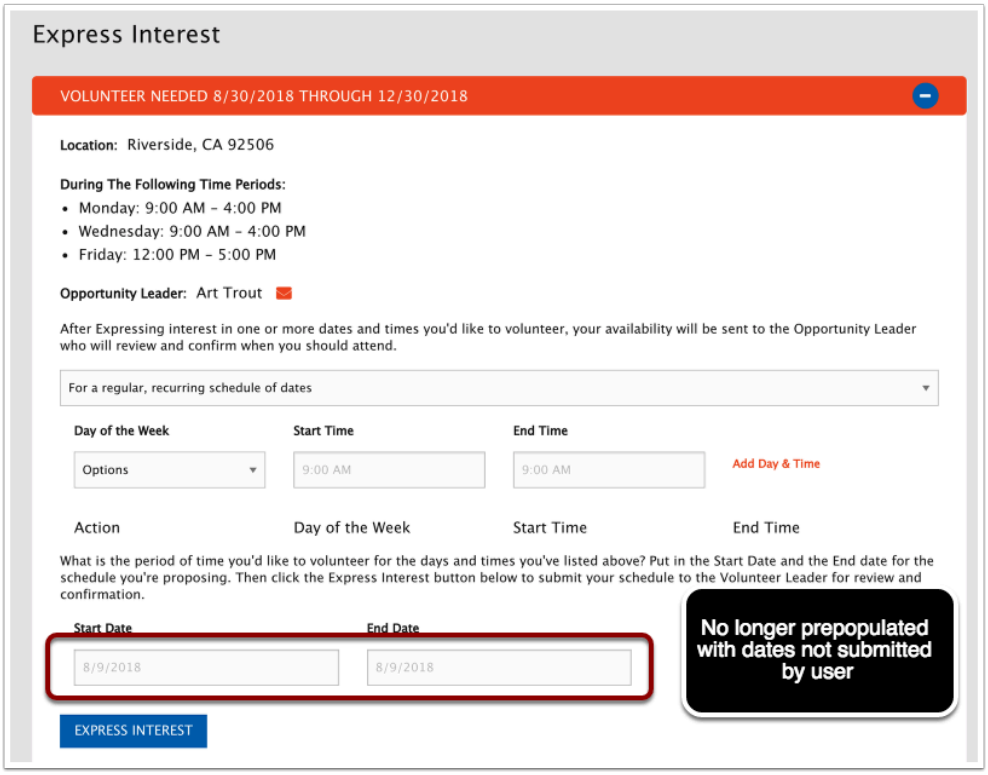
This release has the usual under-the-hood improvements to performance, along with some simple but welcome improvements to the user experience on the public site and in the sharing portal.

Public Site: Improvement to form for submitting Recurring series of dates for Individually Scheduled Opportunities (ISO) with Schedule. (HOC3-7051)

When expressing interest for multiple connections to an ISO with schedule on the public site, the user first enters the days of the week and times they wish to volunteer - and then the Start Date / End Date of the recurrence.

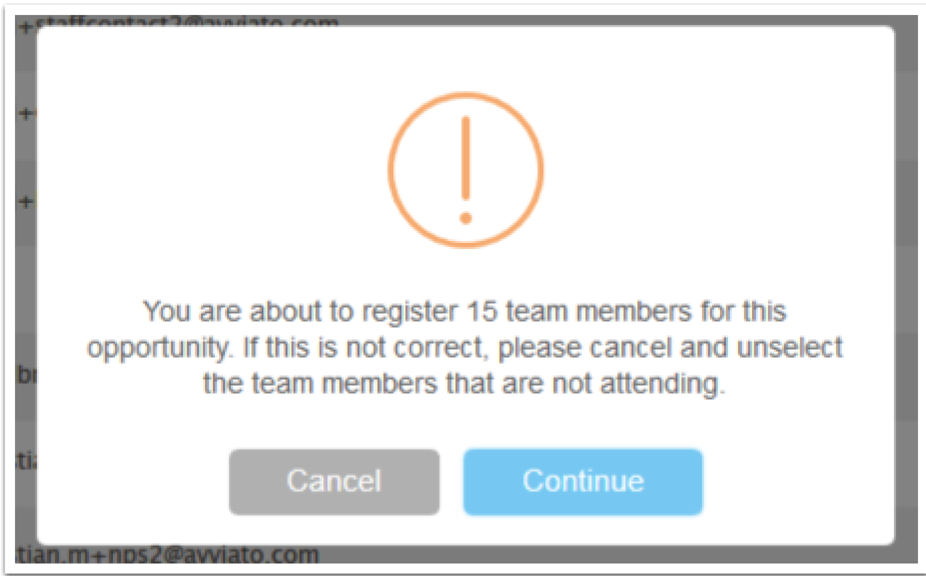
Previously, the Start Date and End Date fields were pre-populated with Today's Date (as the start), and the Occurrence End Date (as the end) and people often submitted the form not realizing they were using these broad, pre-populated dates. Additionally troubling was, that if the opportunity didn't actually start allowing signups until a later date -- entering today's date.

To make sure that volunteers actually CHOOSE which dates they'd like to start and end - these fields are now left blank, requiring the user to fill them in in order to submit the form. (today's date appears as a formatting tip in both the start date and end date)



Public Site: Improvement to process of signing up team members for an opportunity (HOC3-7340)

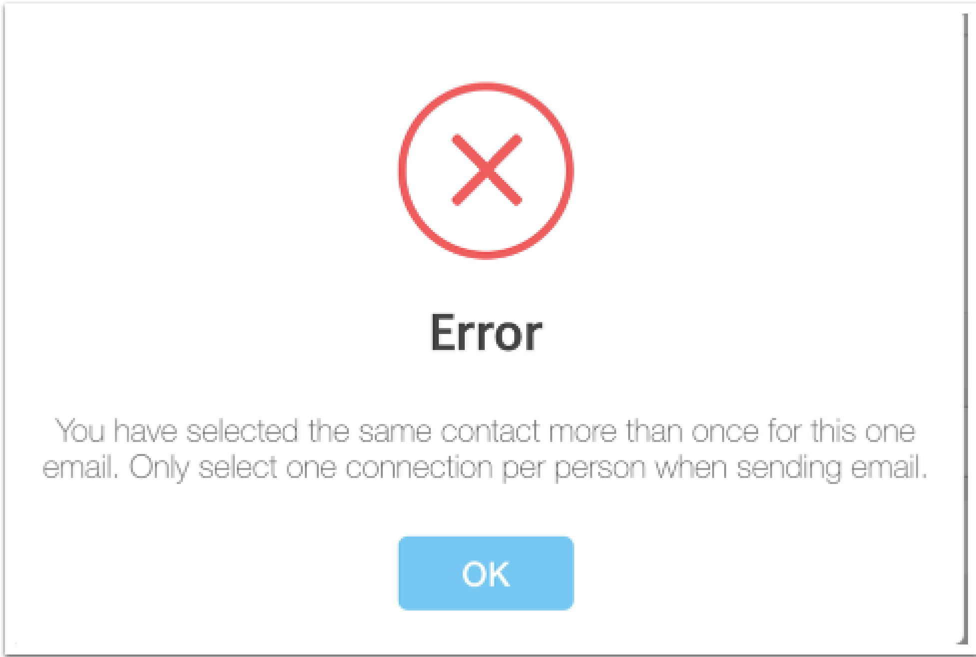
Sometimes, when a team captain is signing his team up for an opportunity, they might click the 'all' button and selert all the team members, and be unaware of just how many team members they are actually signing up. To alert the team captain of exactly how many team members they are signing up, a new confirmation screen is presented to have the captain confirm exactly how many team members they are registering for the opportunity.



Sharing Portal: Corrected problem of accidentally sending multiple emails to one person (HOC3-1419)

Because one person can have multiple connections in the connections grid of a volunteer opportunity - a user sending email from the grid might accidentally select the same user multiple times. Obviously you don't want to send the same email to the user more than once, but previously you could easily, accidentally do this :-(

This is now prevented, and an error message clearly explains what you need to do to correct the situation.



You can then clean up your selection of who to email to - and send the email without risking sending duplicates to one person.

Sharing Portal: Bug fix: When creating locations the 'special directions' field was being required (HOC3-7559)

A number of customers reported that after recent enhancements to the creation and editing of locations in the sharing portal, that the 'special directions' field had suddenly become required when creating locations. This requirement has been turned off for all HOC Sharing portal users (it was accidently activated for some customers). IF your organization, for some reason, does wants to require partners to include special directions as part of creating a location - please open a help ticket and we will turn this requirement on for you if you wish. (Not all locations DO have special directions, so the requirement was unexpected and confusing to many).

(By the way - if you've not yet requested that the field allowing each location to have a clear "Name" be activated for locations created in the sharing portal - we highly recommend this quick improvement. (IT allows you to name locations by more than an address, such as "Sylvan Park" or "YMCA Building".   Just open a help ticket to request that the name field be activated in your sharing portal.   See details about the benefits of enabling the 'name' field for locations here:

Bug Fix: "You must be 13 or older. Why?" popup remained popped up (HOC3-7678)

During registration, if a user clicked on the pop-up that explained the age requirements for registering on the site - the pop-up would not go away unless you refreshed the page. This has been fixed.

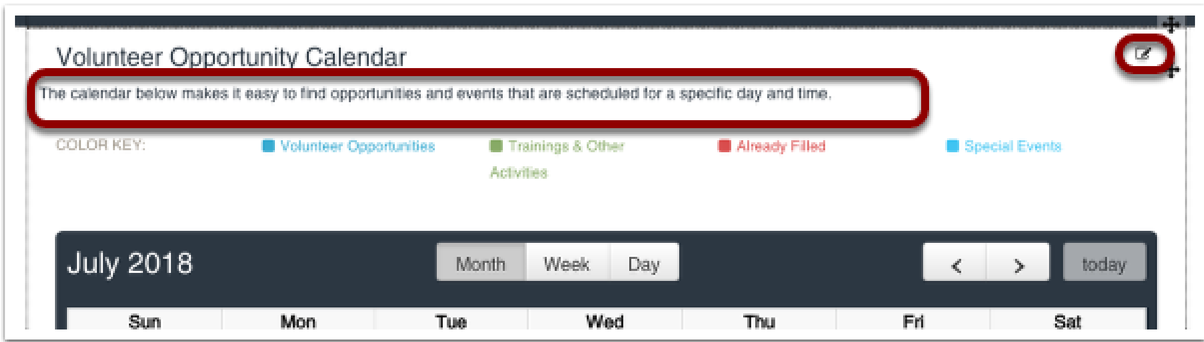
HOC 3 Release Notes 3.0.6.12 (July 26, 2018)

This release has a number of under-the-hood performance improvements and reliability enhancements. It also includes improvements to the Linked In login/registration Beta,

CMS: Intro text on calendar page can now be edited (HOC3-7562)

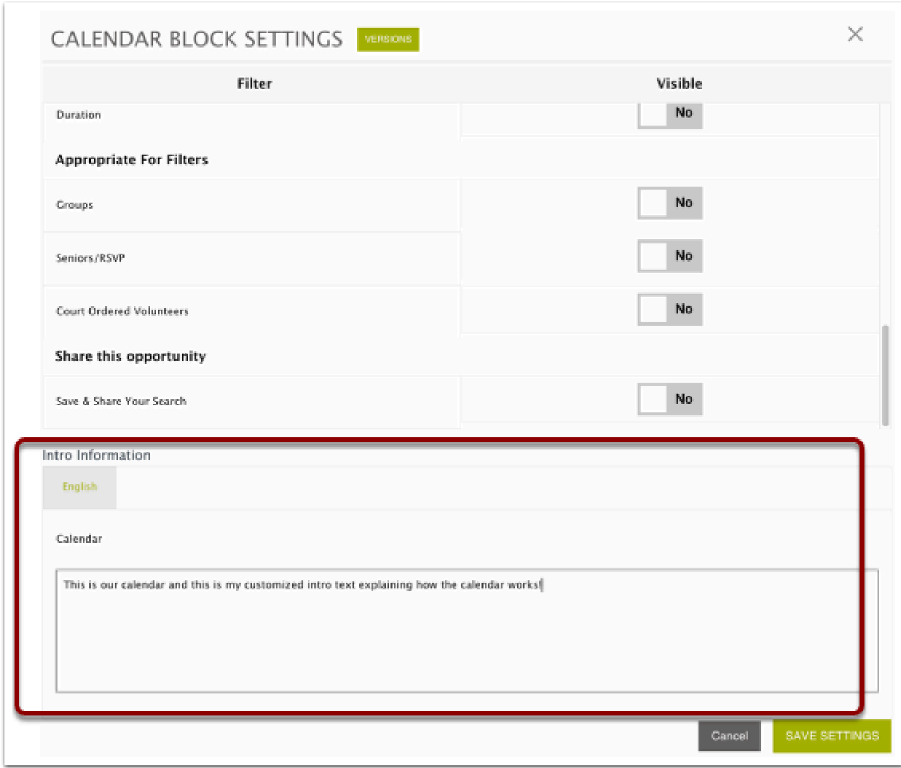
In response to the continued requests we get to allow modification of text on system pages - we've added yet another page that can have introductory text customized in the CMS: The /Calendar Page and the /Search page.

By default, the following text appears on the /Calendar page:



To change the text, click on the edit icon for the block which opens the Calendar Block Settings page.

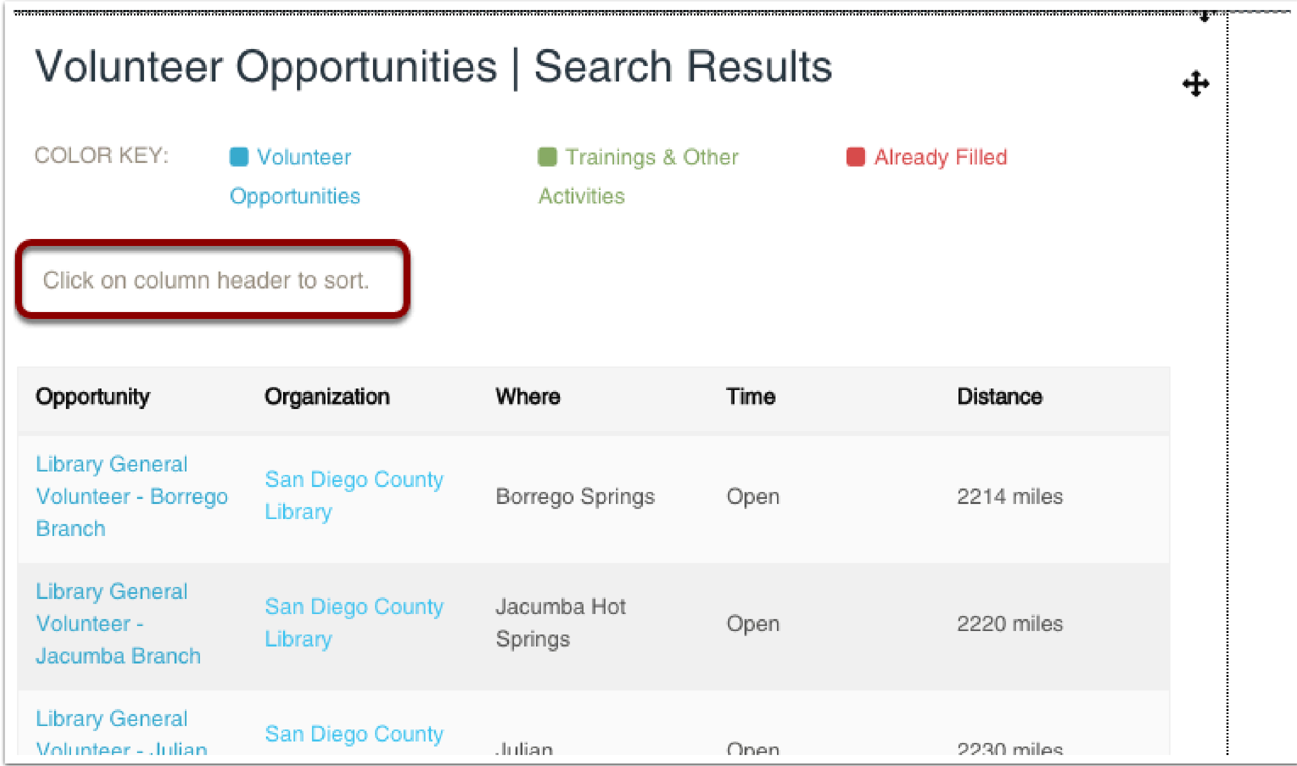
On this page, you can set which filters do or don't appear on the page, and NOW, in addition, you can enter your own text which will replace the default text.



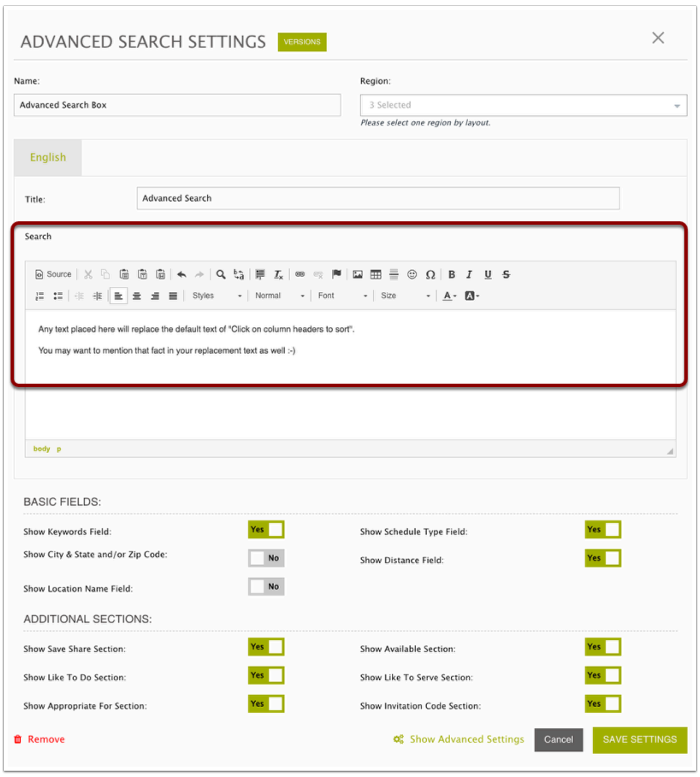
To return to the default text - delete any content put into the intro information box.

CMS: Intro text can be edited on the Advanced Search Page (HOC3-7563)

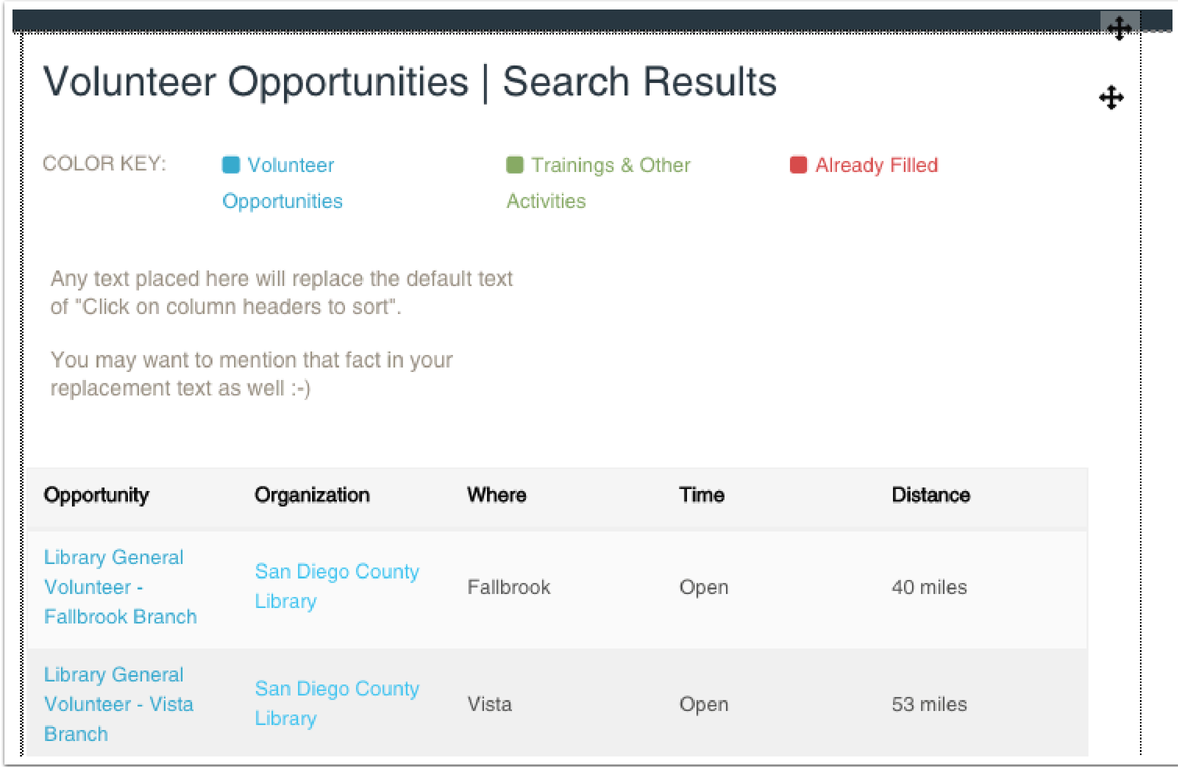
The Advanced Search Block (the page /search) has the introductory text "Click on column header to sort." This text can now be replaced if desired.



When editing this block (by going to Blocks / Advanced Search / Advanced Search / Advanced Search Block) and in addition to setting the filters, you can add introductory text will be inserted on the page.



Note: Currently the replacement text only appears on the left half of the page. This is a current limitation of the page template. In a future release we'll see if we can make the replacement text span the page width.



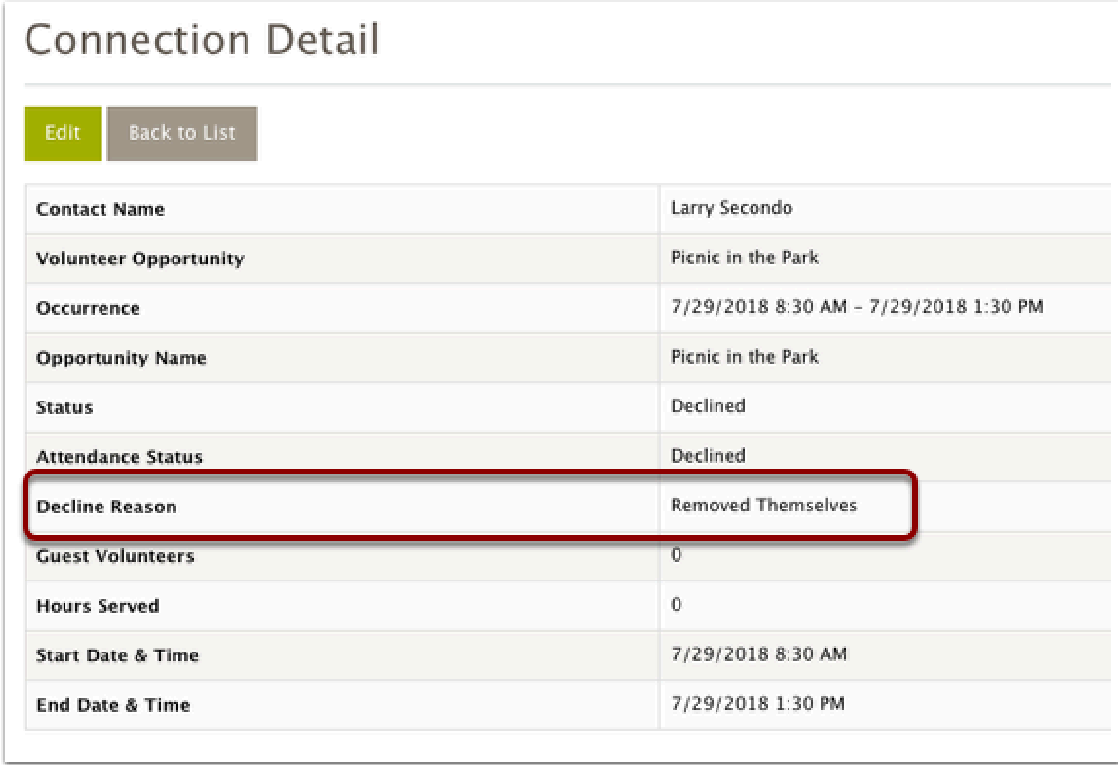
Sharing Portal: Duplicate Opportunity Coordinators will no longer appear in list of eligible coordinators (HOC3-7650)

When selecting an opportunity coordinator for an opportunity or occurrence, some names appeared on the list twice. The logic has been improved so that no contact will appear in the drop down list twice.

Sharing Portal: Decline Reason now visible in connections view (HOC3-7553)

In the connections grid, its possible to see the Status of a connection, but if its a declined connection you cannot see the reason that the connection was declined.   (There is only room enough in the connection grid to show a certain number of columns easily).

Now - if you need to see the decline reason, you can click on "View" or "Edit" for the connection, and the Decline Reason will be visible in the connection record.



Connection Detail

Edit | Back to List

Contact Name	Larry Secondo
Volunteer Opportunity	Picnic in the Park
Occurrence	7/29/2018 8:30 AM - 7/29/2018 1:30 PM
Opportunity Name	Picnic in the Park
Status	Declined
Attendance Status	Declined
Decline Reason	Removed Themselves
Guest Volunteers	0
Hours Served	0
Start Date & Time	7/29/2018 8:30 AM
End Date & Time	7/29/2018 1:30 PM

Forms now support pulling data as read-only fields (HOC3-7608)

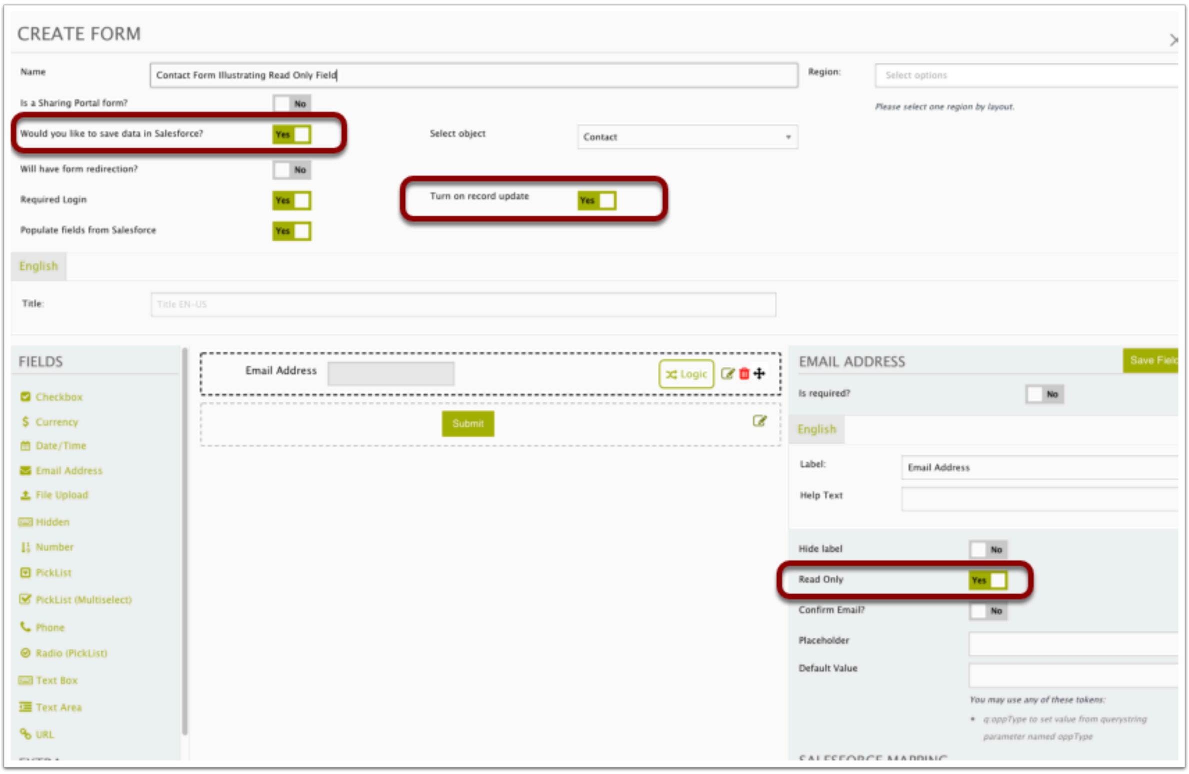
Forms have previously had the ability to update existing records in Salesforce by mapping fields directly to Salesforce.   But it wasn't possible to bring in an existing value from a record without giving the user the ability to edit that field.

Now - Forms submit adding 'read-only' fields to a form. That way the user can see existing information about themselves, but not edit it.

To use this feature the form should be set to:

- Would you like to save data in Salesforce = Yes
- Turn on Record Update = Yes

Then, when you add a field and map it to salesforce, you'll have the option to set it to "Read Only". This will bring in the value to the form, but the user will not be able to edit it!



Improvement to Business Pages (HOC3-7601)

If a user is logged in, and their contact record is associated with the Business Account associated with a Business Page, then the user will no longer have to enter the company invitation code to see the opportunities.

Bug Fix: Volunteers with declined connections can now join waiting lists (HOC3-7226)

In a past release we made it possible for a person who had declined a connection to an opportunity, to sign up for it in the future. (The existing connection is just converted to confirmed). However, it was still the case that if you have a declined connection, you cannot sign up to be added to the waiting list. This has been fixed. A person who removes themselves from an opportunity at some point, can now either sign up (if space is available) or Join the Waiting List (if the opportunity is full).

HOC 3 Release Notes 3.0.6.11 (July 12, 2018)

This release includes a number of under-the-hood improvements for site stability as well as improvement to the mobile layouts for mini-sites and subsites, improvements to the display of the featured opportunity block, and various minor typos in the CMS were corrected. Here's the highlights of this release:

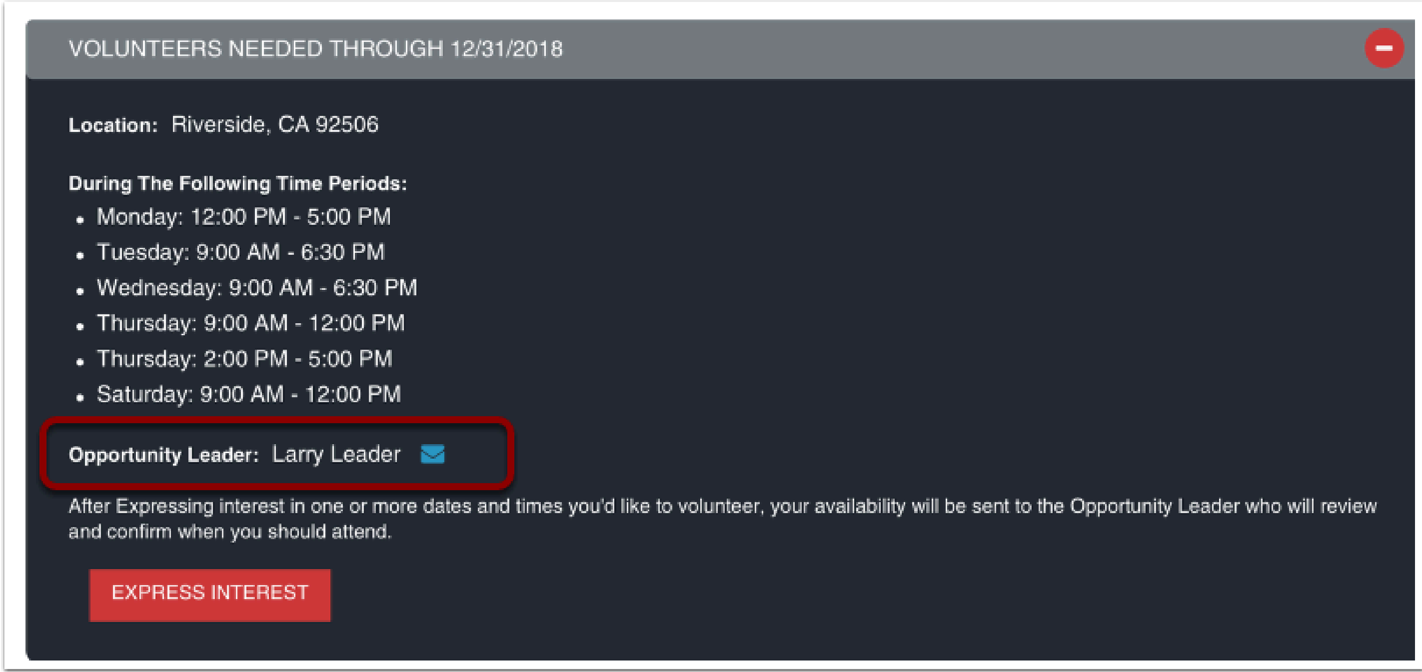
Improvements to Navigation when editing object in Sharing Portal (HOC3-7561 and 7570)

A number of improvements have been made to improve navigation when editing records in the sharing portal. Previously, various edits left you on the edit page, and you had to use the left menu or back buttons to get back to where you wanted to be. Now:

- After editing a volunteer opportunity, you'll be returned to the opportunity detail page
- After editing an occurrence you'll be returned to the opportunity detail page.
- After creating or editing a connection, you'll be returned to the opportunity detail page the connection was associated with.

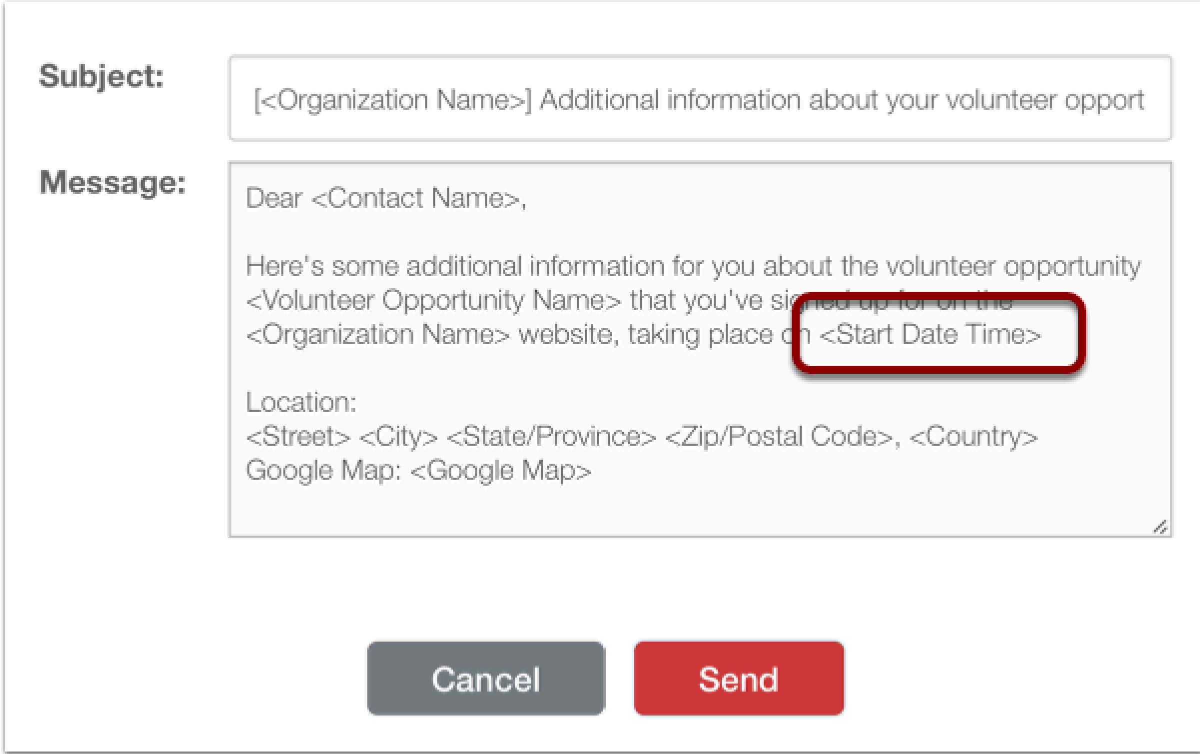
Bug Fix: Volunteer Leader name and link to email not appearing on opportunity detail pages (HOC3-7564)

Some sites reported the absence of the Opportunity Leader name as well as the email icon that allowed one to email the leader from the public site. This has been returned to the occurrence detail blocks on each volunteer opportunity detail page.



Bug Fix: Sharing Portal: Merge fields for 'start time' 'end time' fixed for emails sent from sharing portal (HOC3-7550)

When sending email to volunteers from the sharing portal, there is default text available that includes merge fields. The merge field <Start Date Time> was pulling the occurrence start date and time, instead of the connection start date and time. While the merge field worked correctly for date and time specific opportunities, it was sending the wrong start date & Time for Individually Scheduled Opportunities (where each volunteer is scheduled for a different date and time). This has been fixed. When this merge field is used, the connection start date and time will be sent in the email.



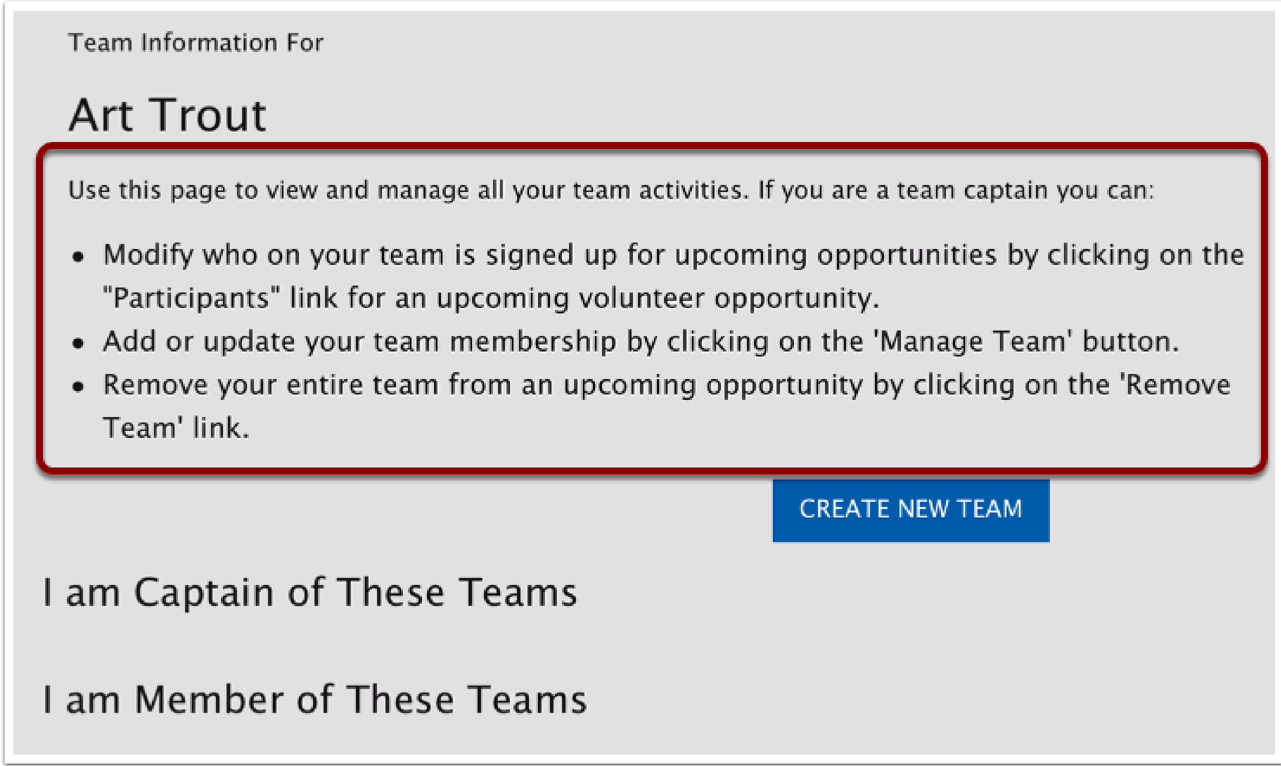
Bug Fix: Email sent to volunteer for Individually Scheduled Express Interest with Schedule missing merge fields (HOC3-0241)

On some sites, the email sent to a volunteer when they expressed interest in an ISO -EI with Schedule opportunity, did not have its merge fields filled out. This has been corrected.

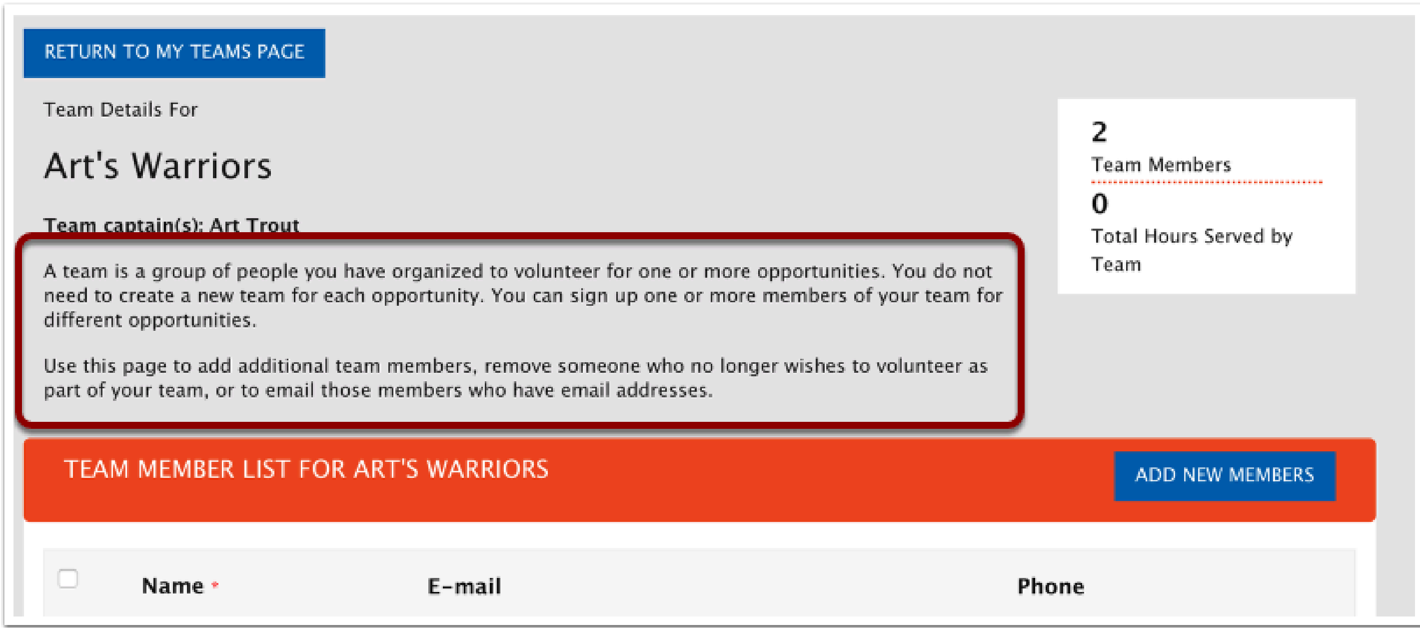
(Beta) Text on Team Pages can now be updated by support staff (HOC3-7337)

Some users, that have particular rules or use cases for teams - have requested if it would be possible to edit and/or add content to the default text appearing on these three pages in the public site:

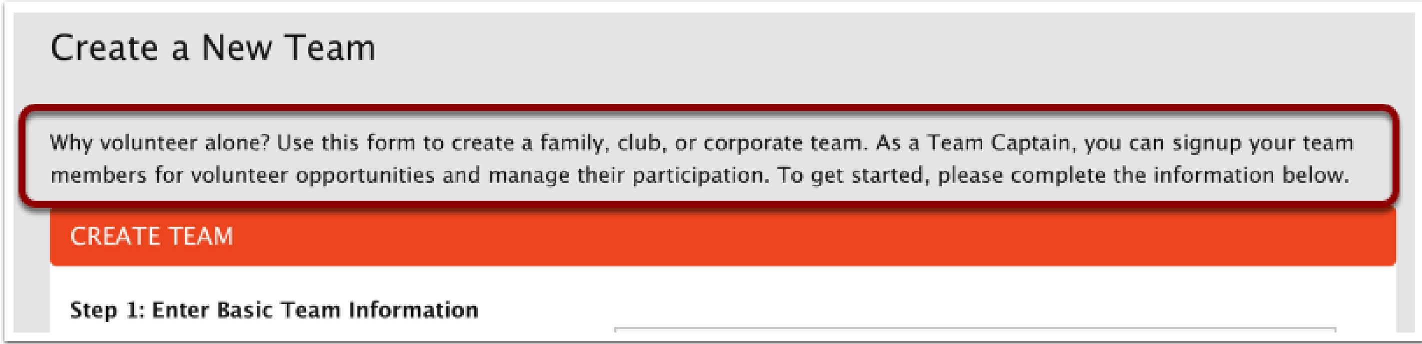
- /my-teams



- /my-teams/details



- /my-teams/create



While these pages are not yet accessible to you in the CMS - the support team now has access to edit the text for you if your business needs require it. Please open a Zendesk ticket if you need this text edited on your site, and indicate which page(s) and the content you wish to have to replace the editable content on these pages.

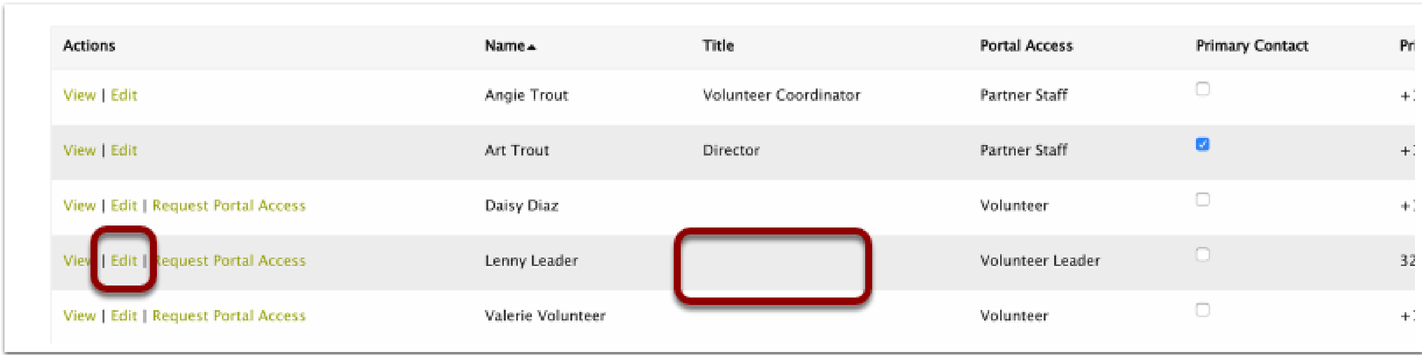
⚠ This capability is still in Beta - and may not be available for all site designs.

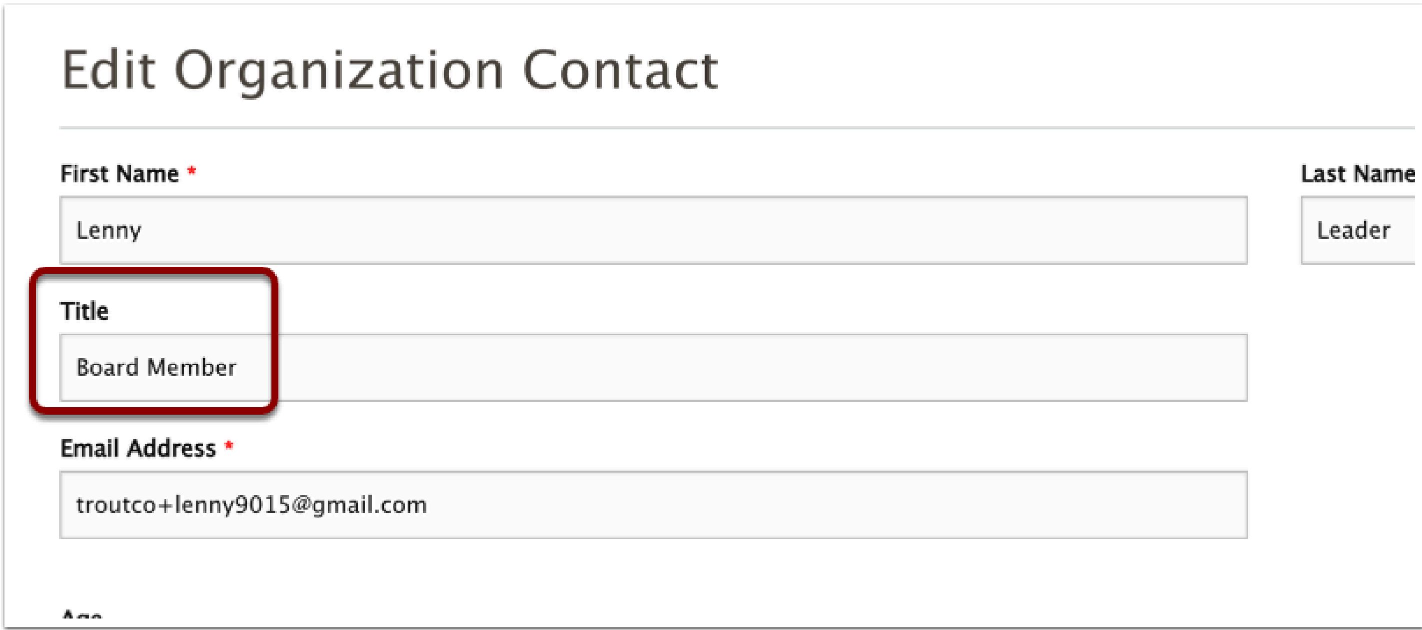
HOC 3 Release Notes 3.0.6.10 (July 5, 2018)

This release brings more under-the-hood improvements making it possible to provide more flexibility in the sharing portal,. Improvements were also made to provide greater speed to public sites.

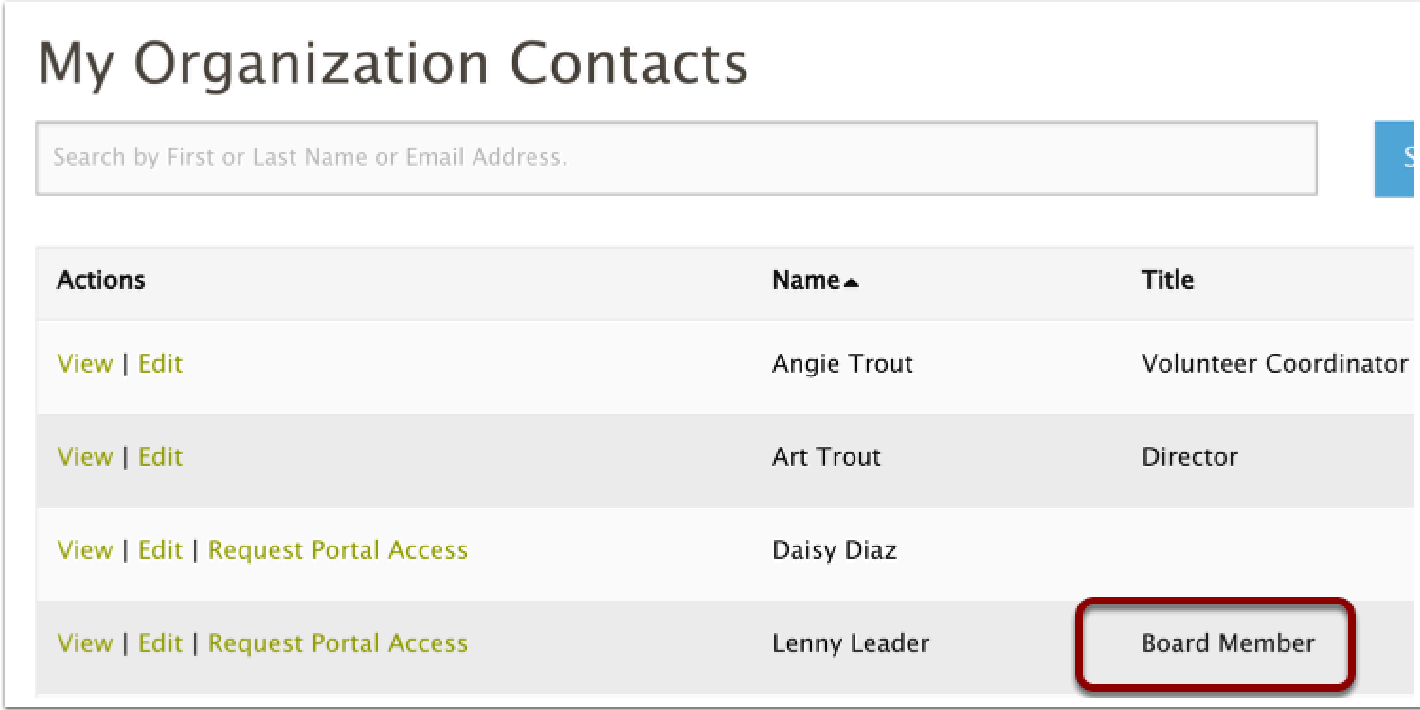
Sharing Portal: Ability for Partner Staff to edit the Title of an organizational contact (HOC3-7281)

Here's a popular feature request added in this release. When creating or editing your organization's contacts in the Sharing Portal's My Organization / My Organization Contacts page, you can now edit or add a title for the contaact! This will make it possible for your partners to keep you up to date on the job title for their contacts.





Voila!   Title is now updated!



Improvements to Advanced Registration Signup (ARS)

The Advanced Registration system is a power-user tool, but for those organizations using it, we continue to improve its capabilities. Some of the features are used by our team to make it possible to create more and more powerful processes for Volunteer Registration and Opportunity Signup.

- When using ARS for Opportunity Signup, its now possible to bring in field values from the contact record in Salesforce to the form. New check field "Populate from SF" (HOC3-7149)
- Explanatory text added to clarify which success page an Opportunity Signup will be directed to at the end of the Flow (HOC3-7227)
- Fixed bug where ARS was not being triggered for opportunity signups initiated through one-step-signup. (Where a volunteer isn't logged in and is prompted to either register or logs in to complete the signup process. (HOC3-7476)
- Some typos/grammar were fixed in the configuration picklists for branching logic in forms and ARS (HOC3-7472)

HOC 3 Release Notes 3.0.6.9 (June 28, 2018)

This release contains a number of improvements including improved functionality for HOC clients employing mini-sites, improvements to CMS versioning, and improvements to ARS, Forms and certain HOC configurations. Here's highlights of this release:

Improvements to "Do not display Full Occurrence" configuration (HOC3-5002)

By default, HandsOn Connect normally displays full occurrences in opportunity detail pages, search, calendar etc so that even if an occurrence is full, the volunteer can choose to join the waiting list for the full occurrence.

An optional setting for HandsOn Connect (which can be requested via a help ticket), is to NOT display full occurrences. In this configuration, any occurrence that is full no longer appears in search results, or, as improved in the May 31 release notes, in the opportunity detail page. The last improvement is now in place. If configuration is to 'not display full occurrences" - full occurrences will no longer appear on the opportunity calendar page!

What configuration works best for you?

Display Full Occurrences - default setting for HOC. Full occurrences are shown, though volunteers cannot sign up or express interest in them. An 'add to waiting list' button appears instead. Useful if you want volunteers to be aware of all occurrences available - even if they are full - and allows them to join the waiting list for full occurrences.

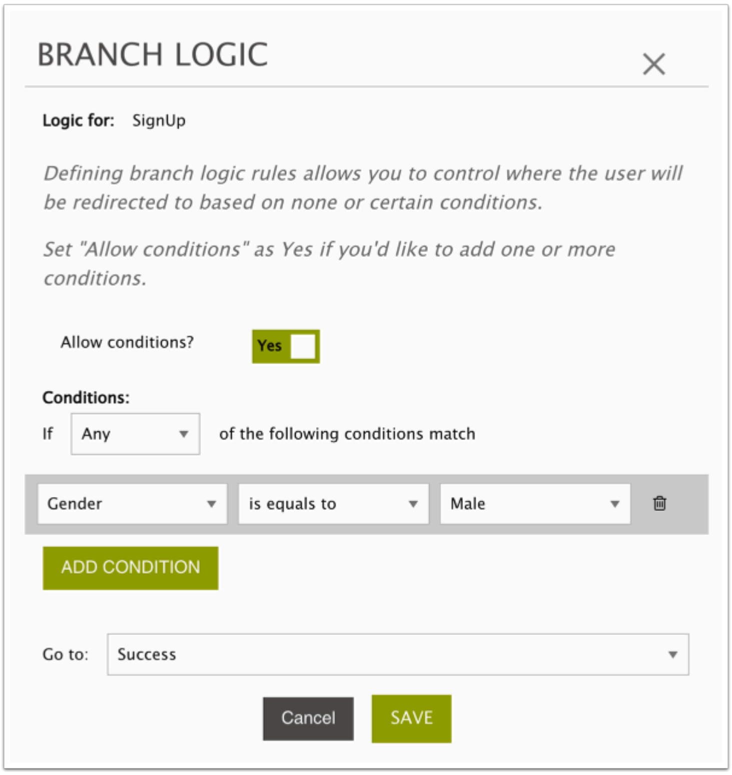
Do not Display Full Occurrences: Can be turned on by request. Useful if you want volunteers to focus solely on the occurrences where volunteers are still needed and space is available. They are not distracted by full occurrences and opportunities, and instead of joining a waiting list, they focus entirely on the occurrences that ARE available and have slots available.

Improvements to Advanced Registration System (ARS)

For HOC Customers using the ARS add-on a number of improvements have been made in the ARS.

Improvements have been made to the branch logic available when the ARS is used for **Opportunity Sign-Up.** Branch logic can now be set based on any of the following field types used in the contact record: (HOC3-7148)

- Picklist
- Checklist
- Date
- Number



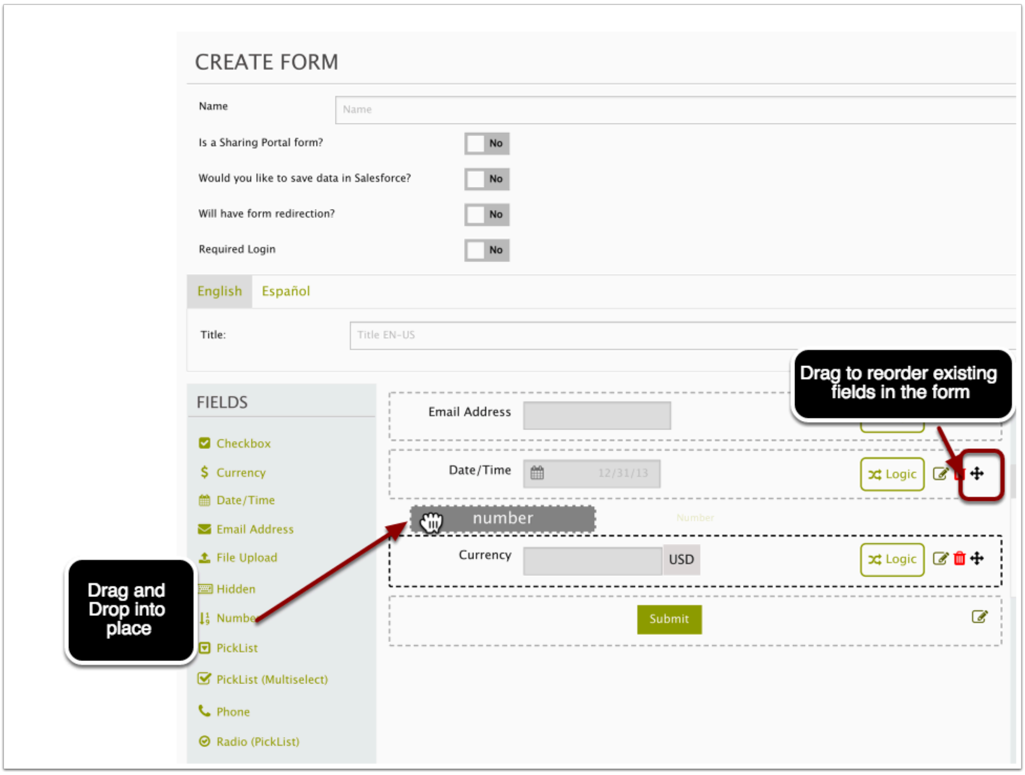
Additionally, the ARS for Registration now supports:

- Branch Logic based on whether the user has registered on the site via social media in. (Facebook, or Linked In depending on which you have activated in your org). (HOC3-7268

Improvements to Forms (HOC3-6932)

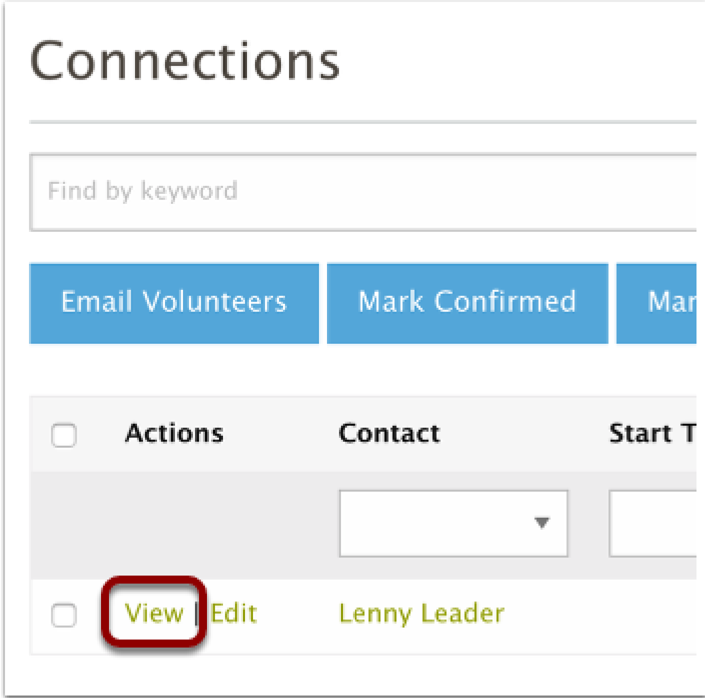
When adding a field to a long form, the field is automatically added to the end of the form. It wasn't possible to place a field exactly where you needed it, and It was sometimes awkward and difficult to drag a field to the position you wanted it in the form.

- Fields can now be added by either click (adding it to the end of the form), or you can Drag and Drop a field wherever you want in the form!
- Forms now support improved drag and drop, making it easier to reorder the fields in a form by dragging via the icon on the right.



Sharing Portal: Detail view mode now available for connections: (HOC3-7437)

Previously, for sharing portal users with permission to view and edit connections, only an edit link was available. A 'view' action has been added to the grid so that someone merely wanting to see additional information about the connection can 'view' it without having to edit and hit cancel.



Bug Fix: Volunteers can express interest again in ISO with Schedule opportunity, even if declined previously (HOC3-7350)

When a volunteer expresses interest creating one or more connections (in pending status) for an ISO with Schedule opportunity, it was discovered that ia a partner declines any connection for that volunteer. (because they don't want to approve one of several dates), then the volunteer was unable to express interest in additional dates in the future.

This has been fixed. Volunteers we no longer get a message saying they cannot sign up because they were previously declined for that opportunity.

Volunteers are NOT able to sign up or express interest in a date and time specific opportunity that the opportunity coordinator has declined them for (for any reason other than 'removed themselves". But this logic is no longer being carried over to ISO with Schedule opportunities. (since you may confirm volunteers for some dates, and decline them for others).

Bug Fix: Sharing Portal: Inability to create more than two non-recurring occurrences. (HOC3-7353)

A bug that prevented created more than two non-recurring occurrences at once for a single volunteer opportunity has been fixed. It is now possible to create more than two occurrences when using the "Add Occurrence" button.

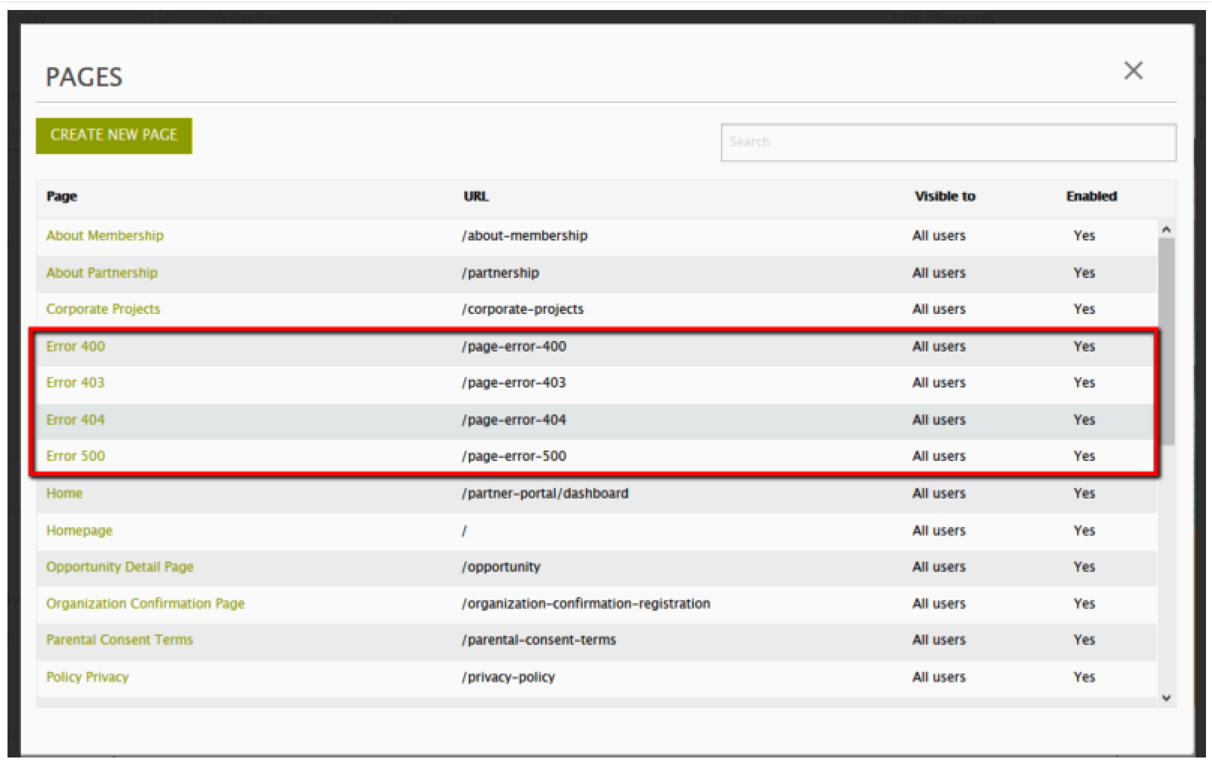
Bug Fix: When creating multiple new occurrences, maximum attendance was not correctly updated. (HOC3-7382)

Fixed a bug where in some cases, when adding multiple non-recurring occurrences to an opportunity, the maximum attendance for each new occurrence was not being correctly populated.

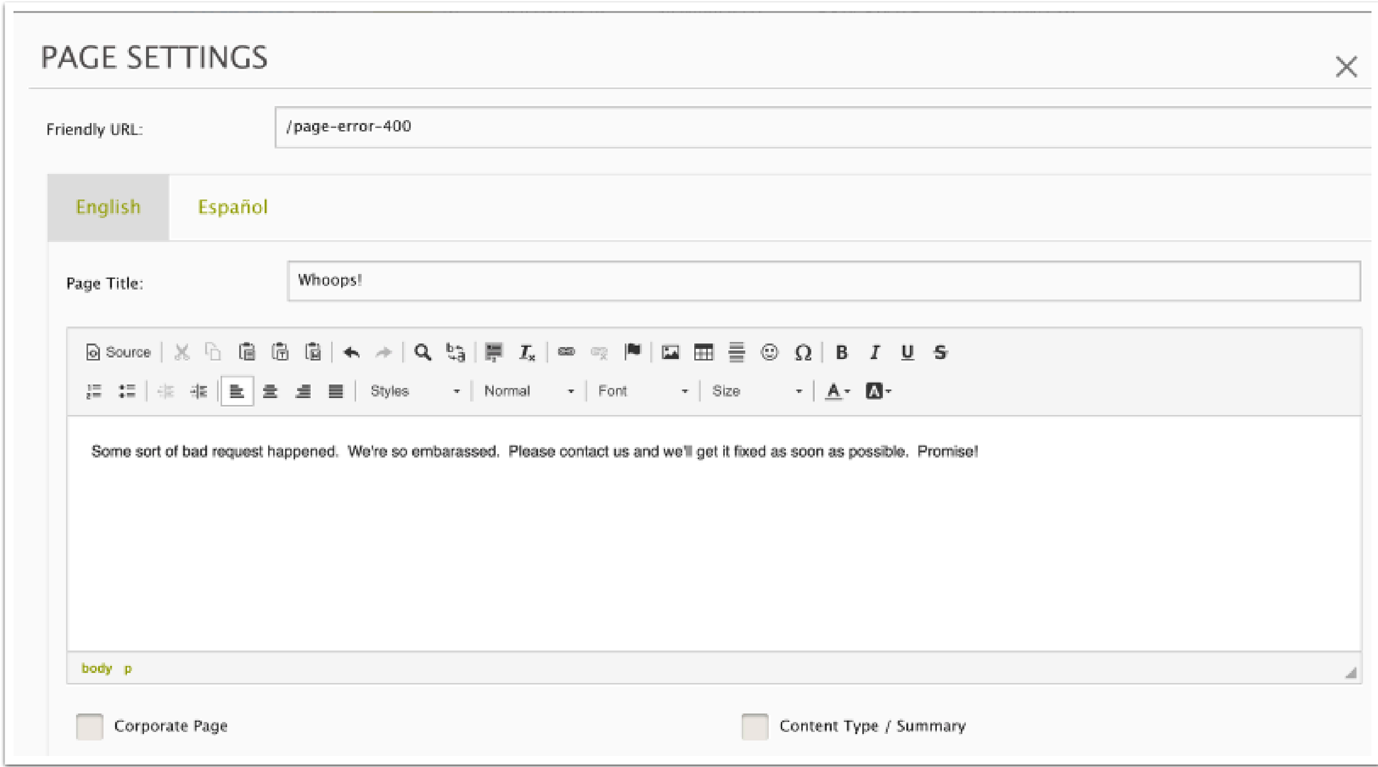
Ability to create custom error pages for 400, 403, 404 and 500 errors.

Users of the HOC Universal Template can now customize the generic error pages that are presented for 400, 403, 404 and 500 errors.

To do so, just add a new page to the Content / Pages section and give it the appropriate friendly URL:



Page	URL	Visible to	Enabled
About Membership	/about-membership	All users	Yes
About Partnership	/partnership	All users	Yes
Corporate Projects	/corporate-projects	All users	Yes
Error 400	/page-error-400	All users	Yes
Error 403	/page-error-403	All users	Yes
Error 404	/page-error-404	All users	Yes
Error 500	/page-error-500	All users	Yes
Home	/partner-portal/dashboard	All users	Yes
Homepage	/	All users	Yes
Opportunity Detail Page	/opportunity	All users	Yes
Organization Confirmation Page	/organization-confirmation-registration	All users	Yes
Parental Consent Terms	/parental-consent-terms	All users	Yes
Policy Privacy	/privacy-policy	All users	Yes


PAGE SETTINGS
Friendly URL:
/page-error-400
English
Español
Page Title:
Whoops!
Source
Styles
Normal
Font
Size
Some sort of bad request happened. We're so embarassed. Please contact us and we'll get it fixed as soon as possible. Promise!
body p
Corporate Page
Content Type / Summary

HOC3 Release Notes 3.0.6.8 (June 14, 2018)

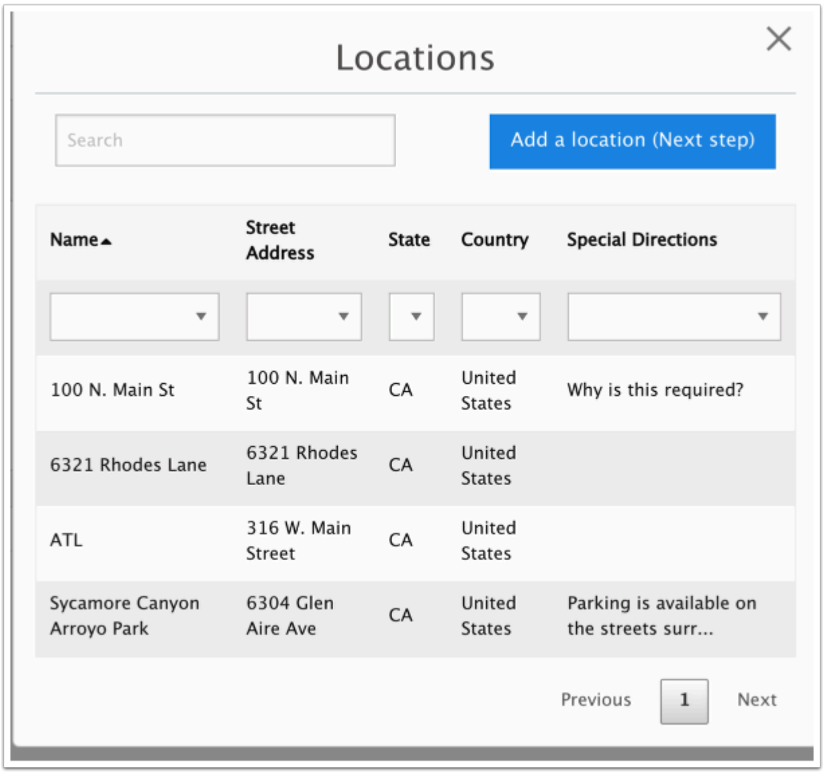
This release features much requested improvements to locations in HandsOn Connect, along with information of beta pilots of new location functionality in the sharing portal. Additionally there have been improvements in Search Engine Optimization, to the Advanced Registration System and forms, site display on the Edge browser, and other under the hood performance improvements. Here's some of the most significant fixes and features in this week's release, along with an announcement of new Beta features for those who wish to enter a testing pilot as we fine-tune upcoming new features.

Location Selection improvement in sharing portal (HOC3-3319)(HOC3-1857)

A welcome boon for organizations that have a lot of location records. Previously, when creating a volunteer opportunity a picklist of existing locations created by the partner were shown, along with an option to 'add location (next step)'. If you had a lot of locations though, it was difficult to find the location you wanted to use due to the very long picklist.

In this release, the picklist has been replaced by the same sort of search mechanism used for selecting a contact when you administratively create a connection. When you click in the Location field when creating a volunteer opportunity, a pop-up appears which allows you to SEARCH through your existing locations and select the one you want. You can enter the location name, street address, state, or even the special directions and it will find matching location(s). Or you can use the filters to to find just the locations in a given state, etc. Just select the location you want from the results below to use and the location field will be filled in.

If the location does not already exist, click on the button "Add a Location (Next Step)" and you'll be able to create a new location in the next step of creating a volunteer opportunity as before.



Another nice improvement here is the fact that the old picklist did not show the special directions at all, so you didn't know if your location did or didn't have special directions. Now, you can see the first characters of a special direction so that you if you have two locations with the same name/address but DIFFERENT special directions, you'll be able to choose which one you really want!)

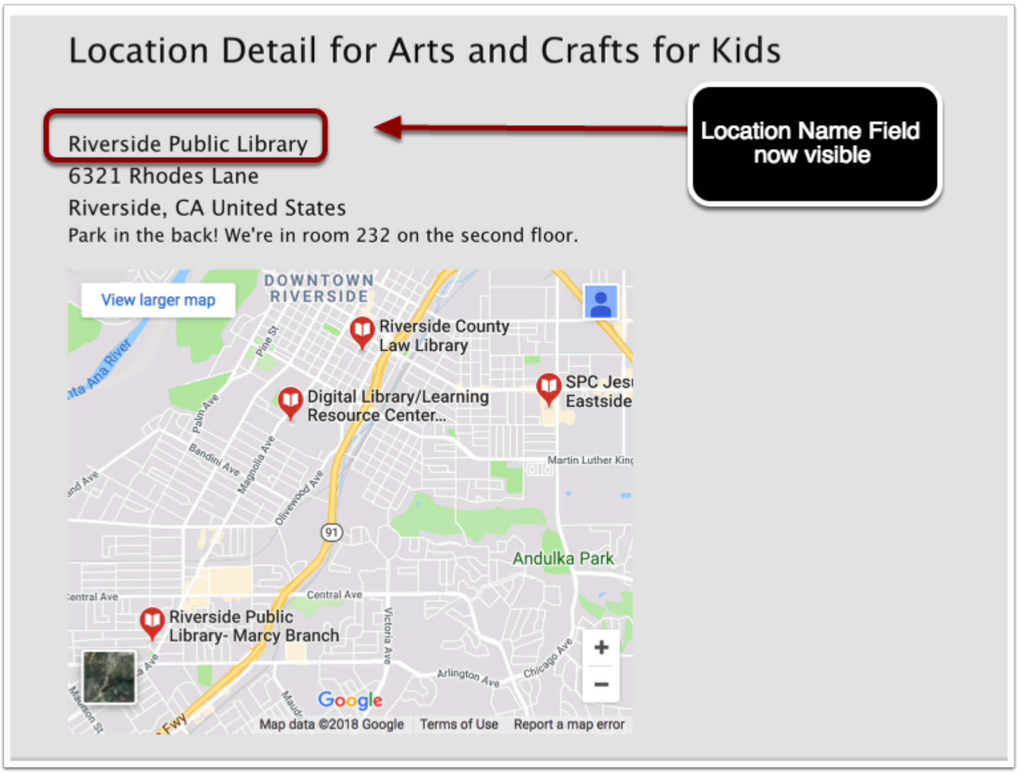
Location Name now visible on Public Site (HOC3-5953)

We have had a number of feature requests concerning the Locations object in HandsOn Connect and in this release we begin to implement a number of improvements to Locations.

The largest request has been the ability to give a name to a location.   The 'name' field does exist in Salesforce for a location record, but its never been visible externally. That means even if you created a location named "Riverside Public Library" and given its address, a volunteer clicking on the "Location" link in their account overview, would only see the address, not the location name.

This has been updated with this release, and now the location name is visible on the location detail page.

This now makes it possible for you to name buildings, or just a common 'label' for a location such as "Troutco Warehouse".



NOTE: If in Salesforce you've been somewhat random in naming your locations -- you may want to clean up the location name for locations as it will now be visible to others. For most, this will be a welcome boon, but we want you to be aware that this wasn't previously visible and now is.

NOTE 2: Any locations created up until now in the sharing portal had the location name set to be identical to the street address. (this was intended to make things easier for partners). So, the address may show up twice on the public site until you edit their locations and give them a different name. (This is not required at all -- and you can choose the street address or ANY name you wish for a location record -- but for now, locations created by partners will have the name and the street address, both the same.).

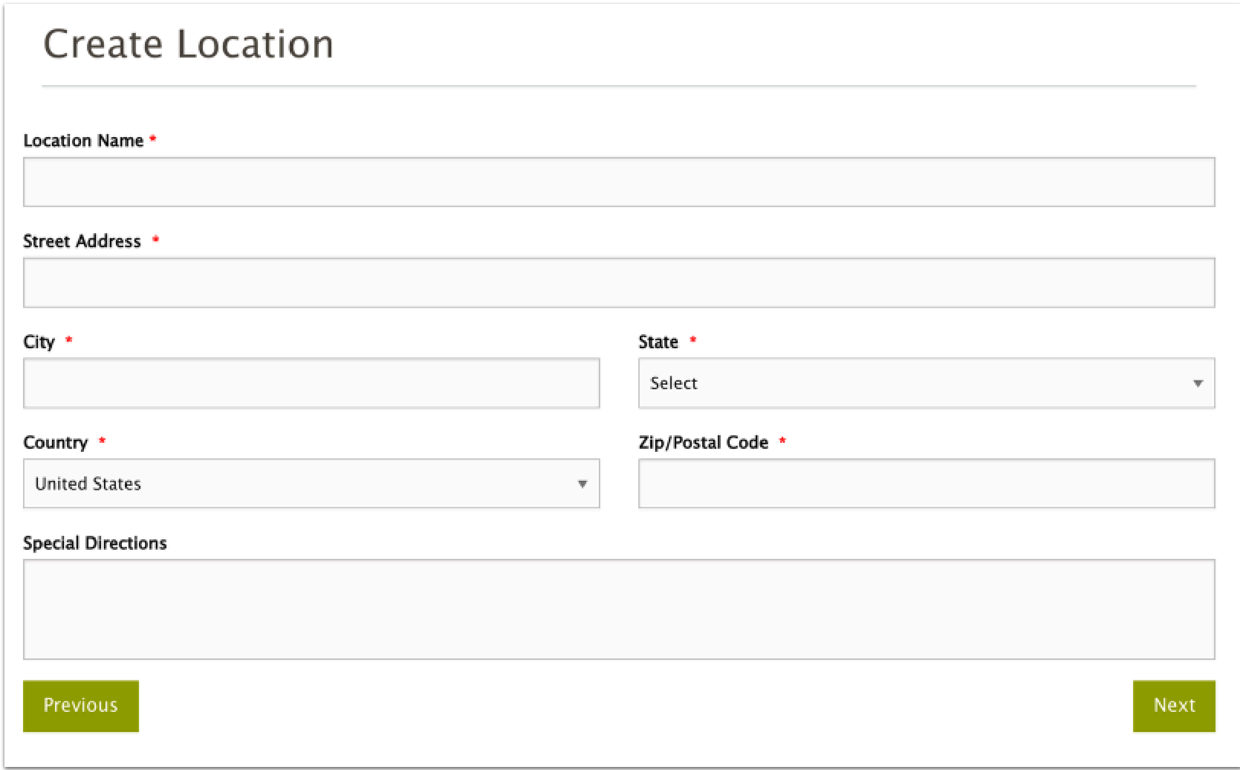
But wait! That's going to change -- because coming soon, and now in Beta, will be the opportunity for partners to enter location names, as well as edit their existing locations! That will extend the ability to give a location a 'name' to all your partners! (See below)

Pilot: Sharing Portal Location Name BETA : Give access to the location name field to partners when creating volunteer opportunity. (HOC3-5012)

Want to make it possible for your partners to give their location a name (other than the street address)? Open a zendesk ticket and request to be entered in the Location Name Beta - and we will make this field available to your partners when they create a volunteer opportunity.

When enabled, if a partner creates an opportunity and adds a location, they will see both the field "Location Name" and "Street Address". The availability of this field allows the partner to give a location a name (rather than having it automatically filled in with the street address).

Another customization that is available through this beta, is, if desired, the Special Directions field can be made required. (We don't recommend this, but it IS now possible to do this if you want every location to have special directions filled in).



If you wish to be part of the pilot for allowing partners to name their locations, please open a help desk ticket and request being added to "Sharing Portal Location Name Beta".

In your request say "Make Location Name visible when creating opportunities" (and if you want to make special directions required, make that request as well... Keep in mind though that this will force partners to put SOMETHING in that field in order to create an opportunity).

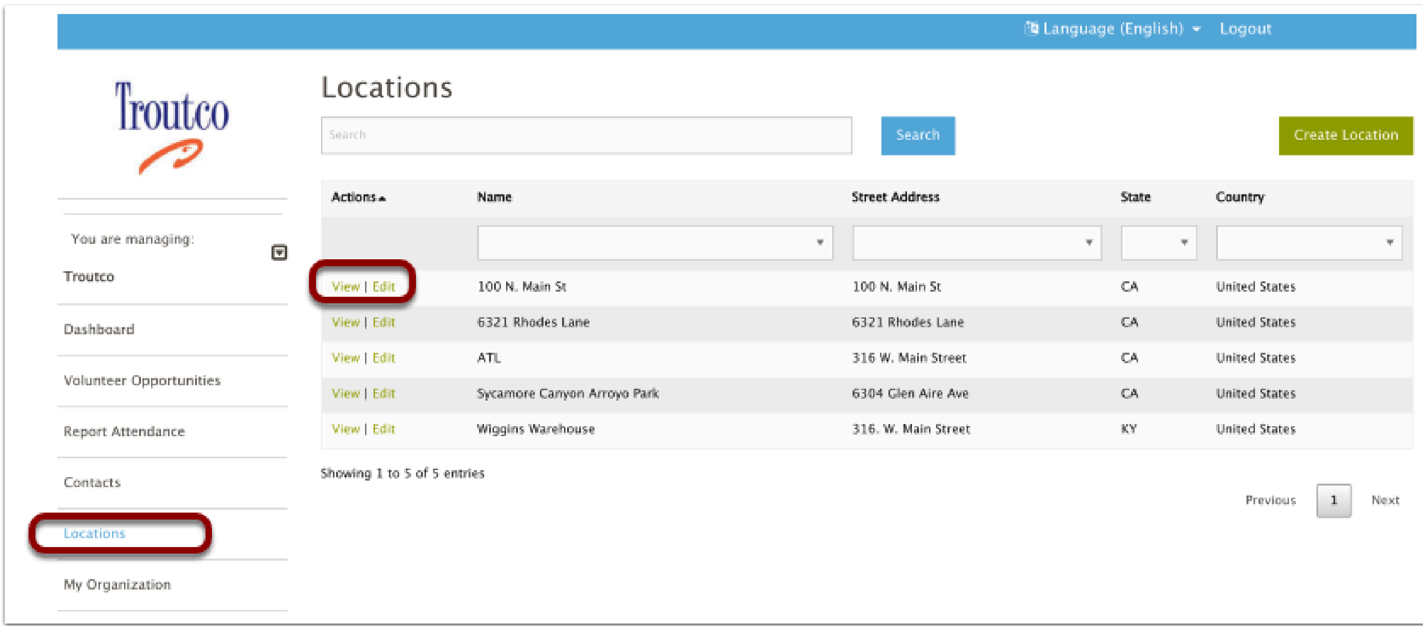
Pilot: Sharing Portal Location Editing BETA: Ability for partners to edit existing locations in sharing portal. (HOC3-1135)

This is the biggie everyone's been waiting for. Right now, partners can create locations as part of opportunity creation, but if they make a typo, or wish to add special directions to an existing location, they can't. In this pilot - we're adding the ability for partners to edit their existing locations.

The tricky part of this has been the fact that since a single location may be used for multiple volunteer opportunities / locations -- a partner may not realize that editing an existing location will change not just their current volunteer opportunity, but all opportunities and occurrences using that location. So how to warn them? Here's how things will work for those who opt into this beta:

A new menu item will be available to partners, labeled "Locations"

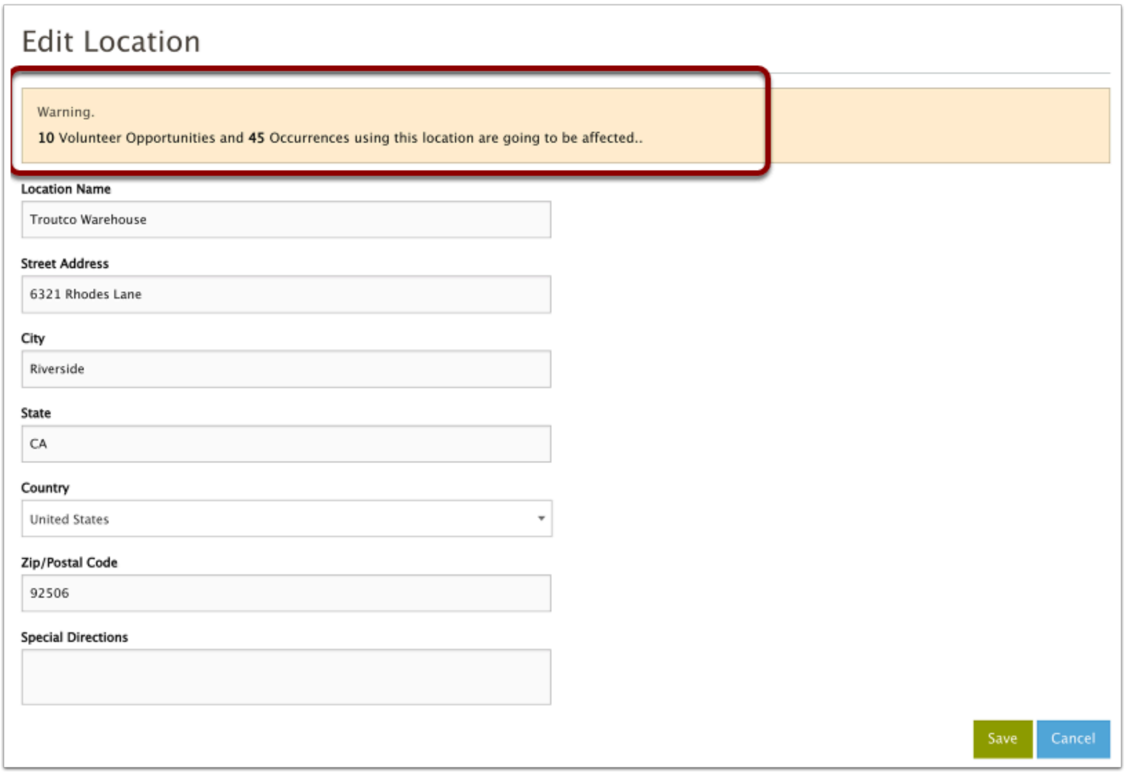
clicking on it will bring up a searchable, filterable list of all existing locations, and the option to view or edit them. The interface to search and/or filter is the same as the Volunteer Opportunity page.



Edit page for locations:

here you can edit the Location Name (which allows partners to take their existing locations and give them a Name instead the street address).

Note the warning at the top of the page. This alerts the partner that they are going to being changing the location information for more than just one opportunity.

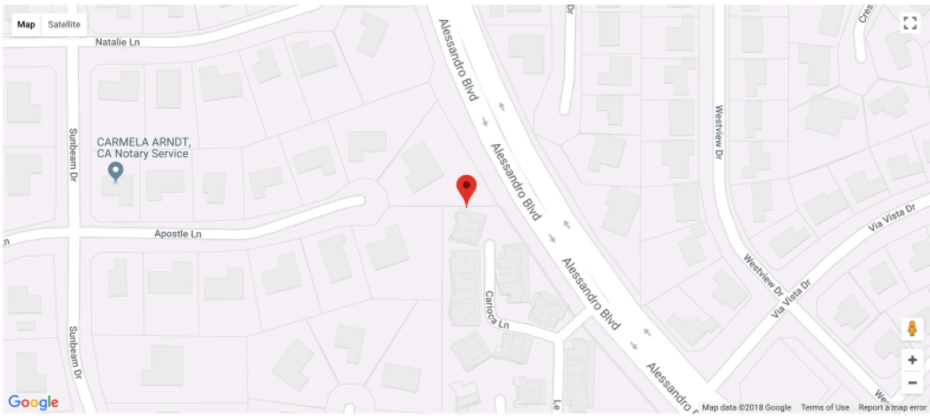


View Location: presents the location detail page.   If Edit permission is granted, an edit button appears when viewing. Otherwise, you can just VIEW the location.detail.

Location detail

Edit | Back to List

Location Name	ATL
Street Address	316 W. Main Street
City	Louisville
State	CA
Country	United States
Zip/Postal Code	92506
Special Directions	



At this time, its not possible to show which opportunities and occurrences are using this location. That may be implemented in the future, but for now the warning at least warns partners they will updating any and all occurrences that have used this location record before.

If you think this will be confusing to your partners, we don't recommend your enabling the edit locations feature for your partner staff.

Note -- locations can be enabled with one, two or three permissions.   View, Create and/or Edit.

View: The menu item appears, but they will only be able to view the location.

Create: Adds the Create Location button at the top right of the page, which means they can create a location at any time, even when not creating an opportunity. This is useful if you want to create a new location for an existing opportunity (rather than editing an existing location which will affect all occurrences using the existing location).

Edit: Allows editing of existing opportunities.

f you wish to be part of the pilot for allowing partners to view, create or edit their locations, please open a help desk ticket and request being added to "Sharing Portal Location Editing Beta".

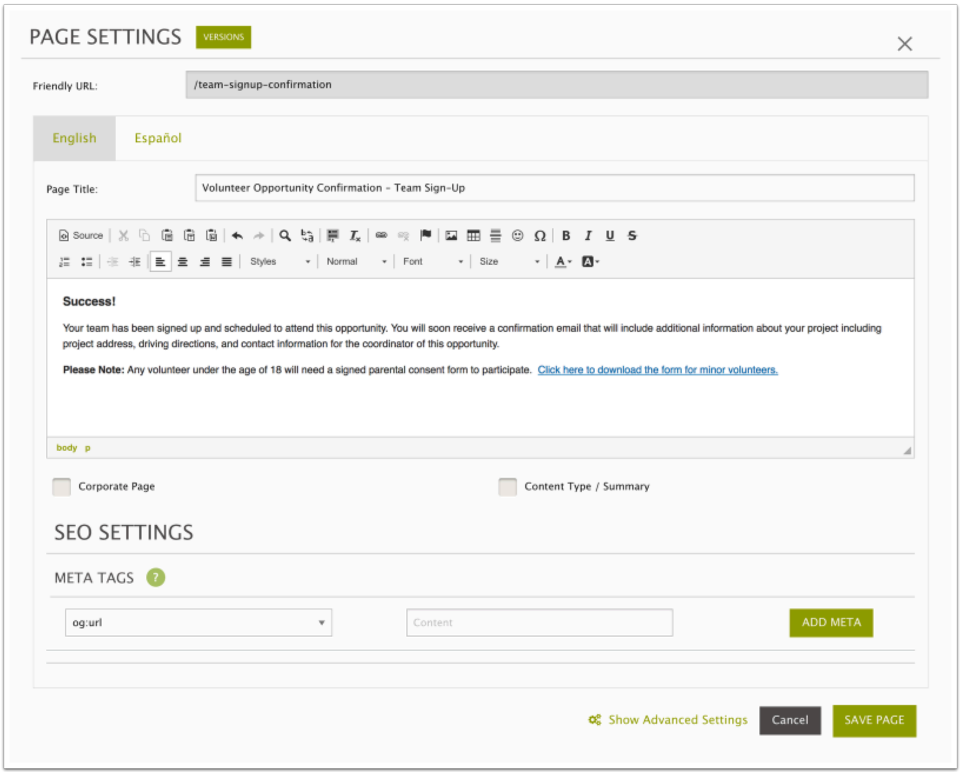
In your request say which permissions you want partners to have. "View, Create, and/or Edit".

By the way - if a location is edited - it is updated on the public site, generally within 15 minutes. No automated notification is sent to volunteers if a location is edited -- so the partner may wish to email the volunteers manually to let them know the location has changed. (if for example you change the address, or add special directions, etc.). Probably no need to tell them the location name has been changed (as they've never seen a location name until now :-)

Ability to edit Success page when a team signs up for an opportunity (HOC3-7125)

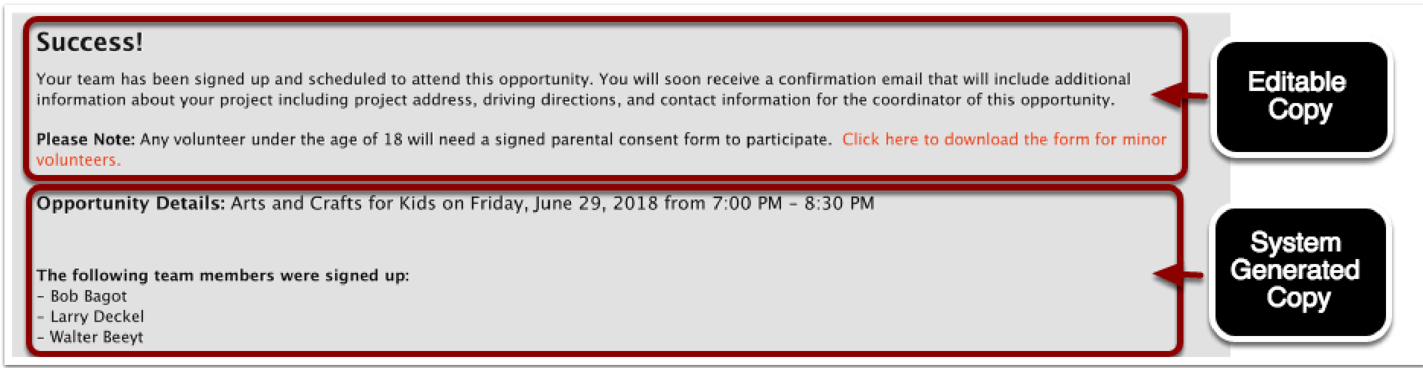
When a team signs up for a volunteer opportunity, they reach a success page which has a certain amount of system generated content. In order to make it possible however, for you to customize the content on this page, we've added the ability to edit the non-system-generated content on that success page.

The page can be found in the CMS under Content/Pages and is called "Volunteer Opportunity Confirmation - Team Sign-Up. You can now edit the default message that appears there.



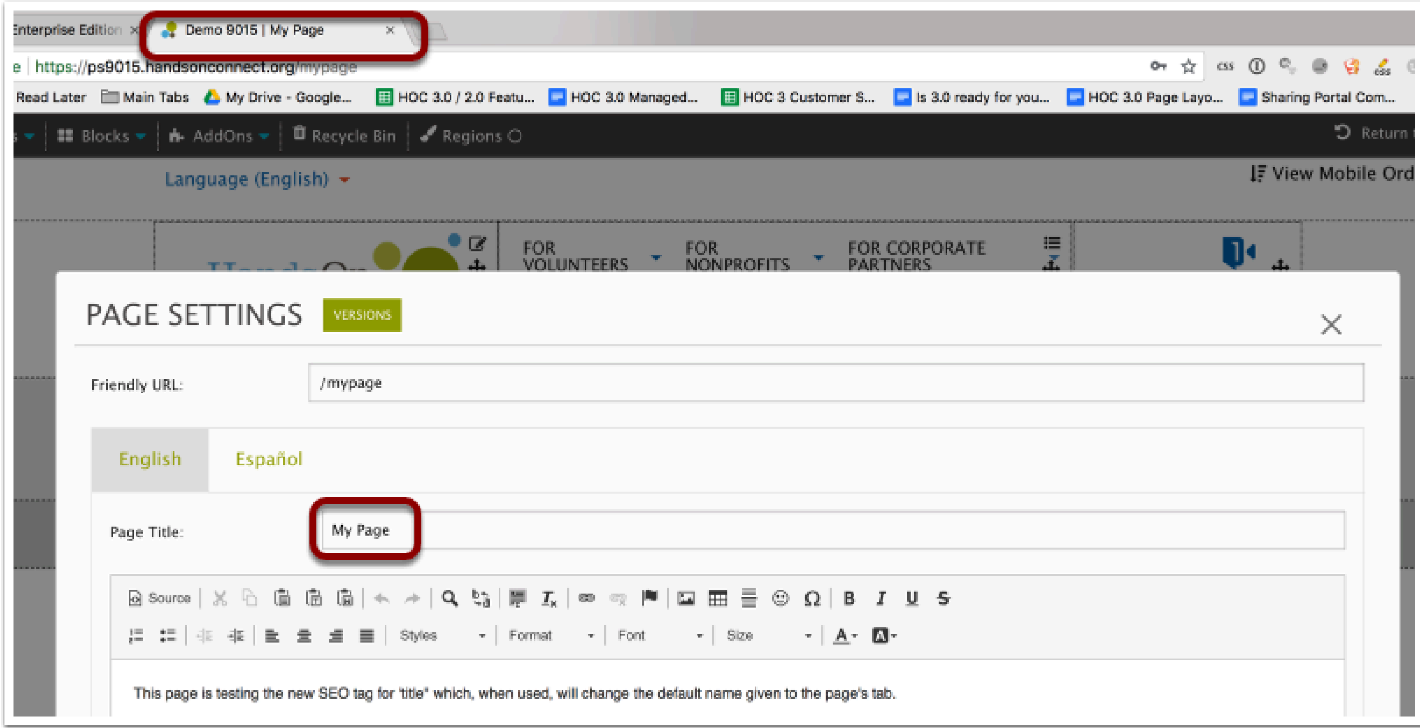
In the example above, I've added a link to download a minor waive form for volunteers. You can change the messaging here however you wish.

Here's how the page will appear along with the system-generated content that you can't edit:



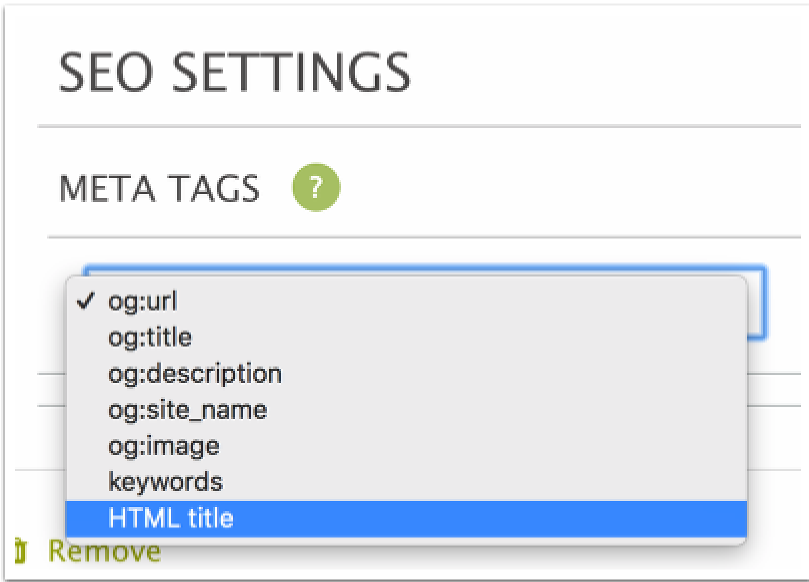
Ability to change the HTML title of a page (HOC3-7067)

By default, browser tabs are labeled with your site name, a vertical | and then the page title you defined when you created the page.

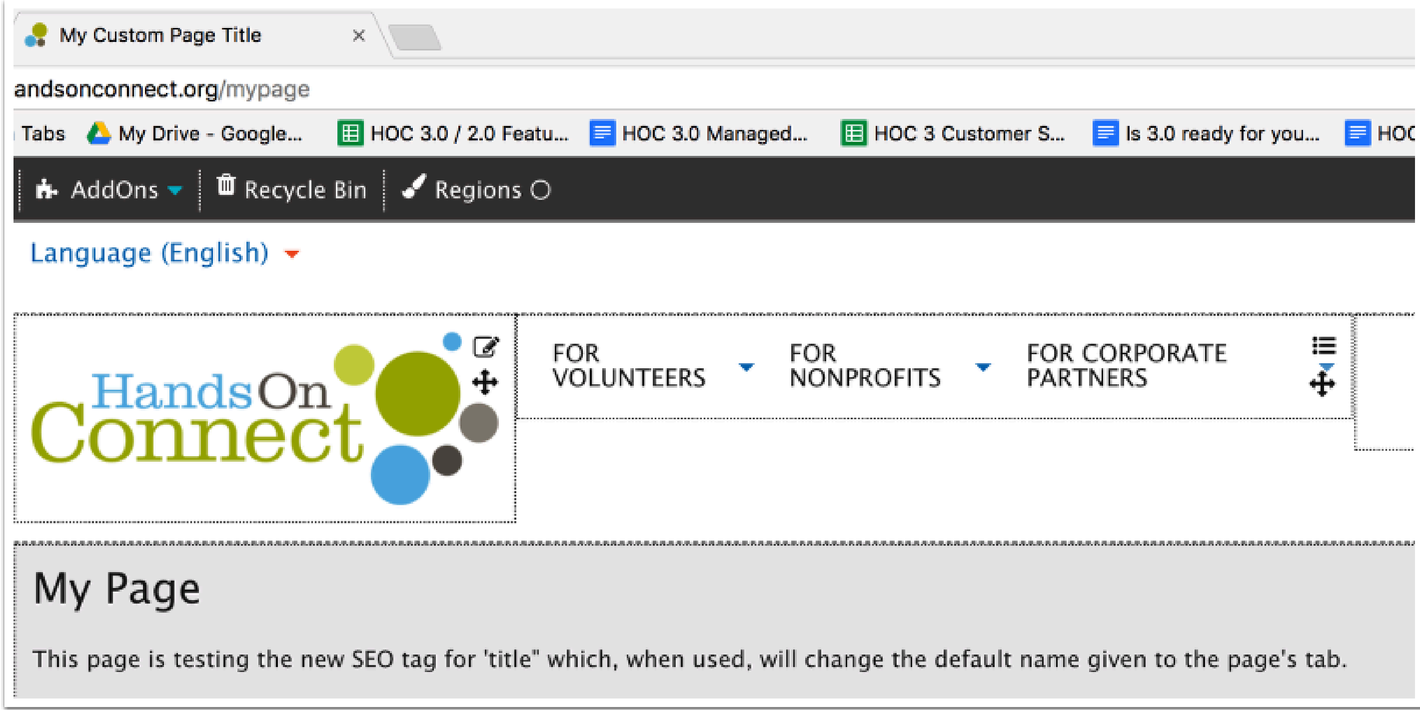


For those users who wish to override the default title of the page as it appears in browser tabs, its now possible to do so.

In the SEO Settings section of the page, there is a new meta tag "HTML title".



Here, we renamed the title to: "My Custom page Title" and you can the change reflected in the tab in the browser.



Setting this will change the title of the tab and search engines will be aware of the custom title of the page.   If no custom HTML title is entered, the default behavior will be in effect as described above.

BETA: Alternate Team Creation Rules BETA (HOC3-6661 and HOC3-7260)

The requirements for creating teams in HandsOn Connect has always been this:

When creating a team the field's Team Name, Description, First name and Last name are required. Also required are EITHER a unique email address OR a phone number for each team member UNLESS a value is put in the field Company/Group Affiliation, in which case you do not have to supply an email OR a phone number for the team members.

The rule about bypassing the Email or Phone number requirement by entering a value in Company/Group Affiliation is not specifically called out - by provided a way for organizations that wanted corporate teams to be easily created by entering just first and last name could be explained when it was useful.

This approach provides flexibility to users, so that if they didn't have email addresses for all the team members (as is often the case with family teams with younger children) or corporations who didn't want to disclose personal information about their team members, there was a way to do so and still create a team.

This remains the default settings for creating a team.

Some HandsOn Connect users however, have requested the ability to restrict team creation by always requiring, for example, an email address for each team member, so that all team members could be contacted by someone other than the team captain. So, effective with this release, we are making available a pilot program in which you can request that the default rules be turned off, and the team creation page and its rules can be changed in the following way(s):

1. One or more of the following fields can be **hidden** from the team creation page if desired:

For The Team Information:

- Team Description
- Company/Group Affiliation

For Team Members

- Email Address
- Phone
- Age
- Team Captain (this would prevent the captain creating the team from making anyone else on the team a team captain)

2. Any or All of the following fields can be made **required**:

For The Team Information:

- Company/'Group Affiliation

For Team Members

- Email Address
- Phone

Any organization wishing to change the default team creation rules in one or more of the ways listed above, should open a support ticket titled "Team Creation Rules BETA" and specify which fields they wish to have hidden, and if they wish either or both email address and phone required.

Making any of these changes override the previous default behavior, and it will no longer be possible to create a team with just first and last names of a team member.

Be aware, that changing the default team creation rules by requiring either email address (which must be unique for each team member), and/or phone number - will have the overall effect of making it harder to create teams. (while providing you with more information than team members may have had in the past).

Existing teams will not be able to edit their team membership without conforming to the new requirements you have active.

April, 2018 Release

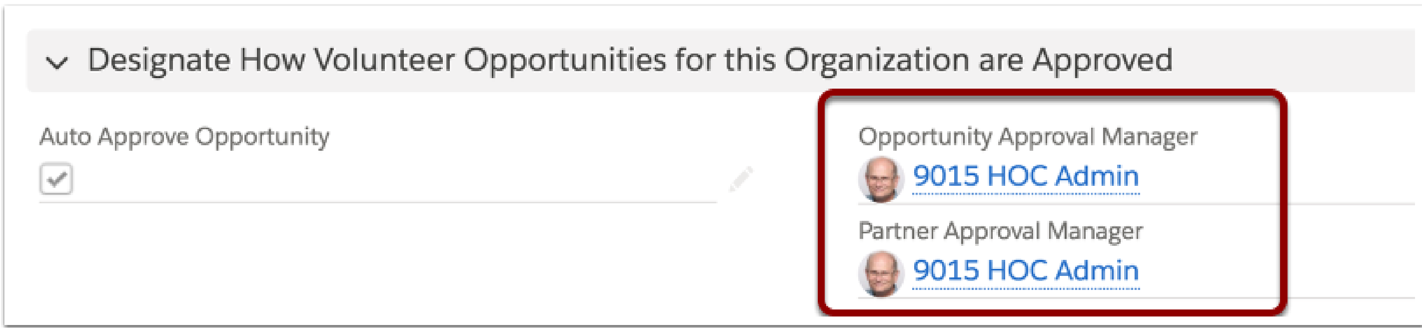
The April 2018 Spring Release of HandsOn Connect fixes a few bugs and improvements to the Volunteer Opportunity Wizard for any organization using the new Flex Configuration of HandsOn Connect. Here's the two most notable items in this release.

Bug Fix: Opportunity Approval Manager and Partner Approval Manager for organization records. (HOCAVV-1140)

In the control panel, you define the SF user who will serve as the Partner Approval Manager (when new organizations register to become partners on the public site), and Opportunity Approval Manager (who approves and published volunteer opportunities for each of your partner organization).   Once those values have been set, HandsOn Connect automatically had set these default approval managers in every new nonprofit organization record for you.

In the last release, due to changes in internal sharing rules, that automation had stopped working, which meant that in order to grant someone partner staff access, you. had to manually go to the organization record and specify who those two approval managers were.

The bug has been fixed and now once again the fields "Opportunity Approval Manager" and "Partner Approval Manager" will be automatically filled in for you based on these defaults.



Note: For any organizations that may have registered in the last few weeks while the bug was in effect... Simply manually populate the two fields "Opportunity Approval

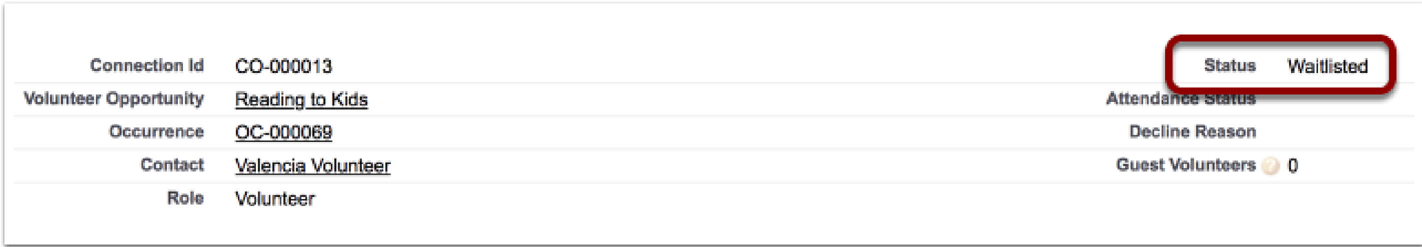
Manager" and "Partner Approval Manager"in the organization record, This will be necessary before you'll be able to grant someone partner staff access to that organization.

Wait List email notification Improvement (HOCAVV-608)

Over the years, we've seen repeated requests in the feature request forum to stop sending emails to team captains who are not on the waitlist, when space opens for a 'full' project. Past practice in HandsOn Connect was to send these emails to all waitlisted connections but ALSO to team captains who had signed up team members for a project.

Since we continue to get reports that team captains receiving these emails were confused as to why they were receiving these notifications (since they weren't really on the waiting list), we have now updated the trigger that manages this notifications - and the email "Waitlisted Opportunity Now Open" will now be sent ONLY to connections in status = waitlisted.

We've heard you - and are happy to grant this long-requested feature improvement.



HOC3 Release Notes 3.0.6.7 (May 31, 2018)

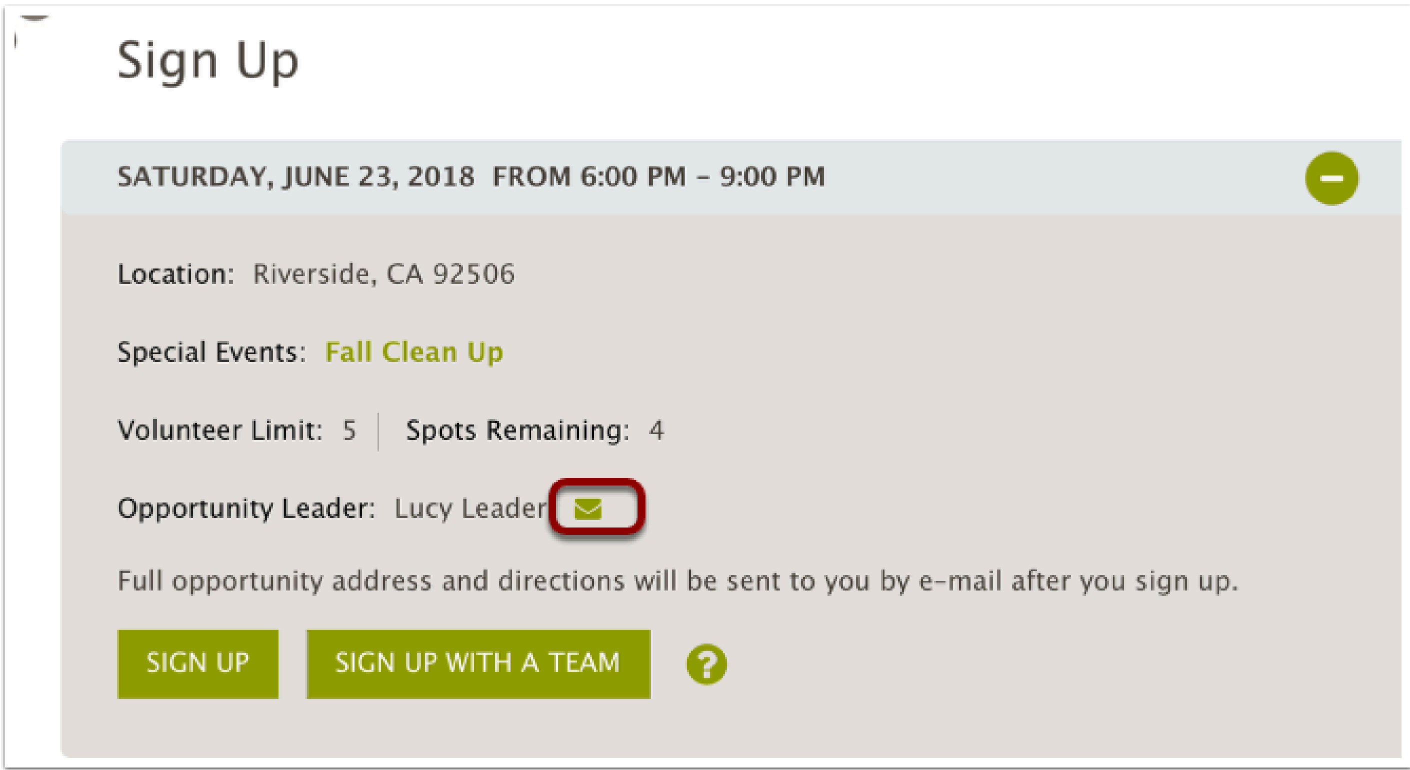
Fear not, you haven't missed any release notes. There were no published release notes for HOC 3.0.6.5 and 3.0.6.6. But today's release has a number of bug fixes, improvements to subsite infrastructure and behind the scenes improvements, as well as a number of new features we want to highlight and share with you!

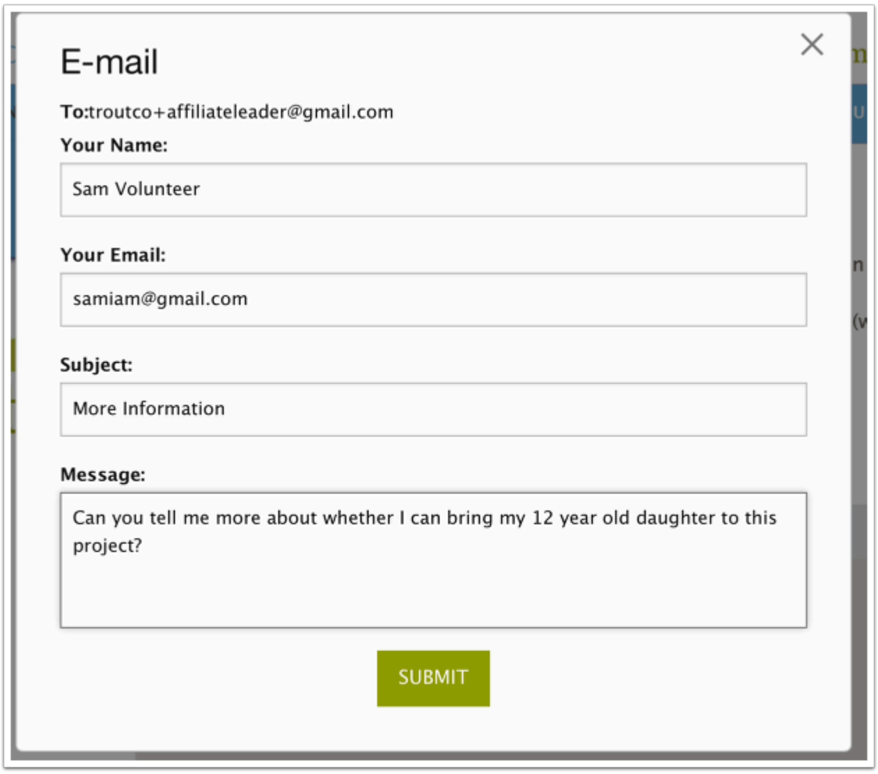
Security: Improved method for emailing Opportunity Leaders from public site (HOC3-7060)

In the last release we improved security when emailing volunteer leaders from the public site, by using code to scramble the ability for bots to see the mailto: link used to send the email to the leader.

Several users reported difficulty using the new link, and after some consideration we've revamped the feature altogether to make it more secure and easier to use.

Now, when you click on the email icon to send an email to the Volunteer Leader, a secure form will be opened and the email will be sent internally instead of using the user's default email client.

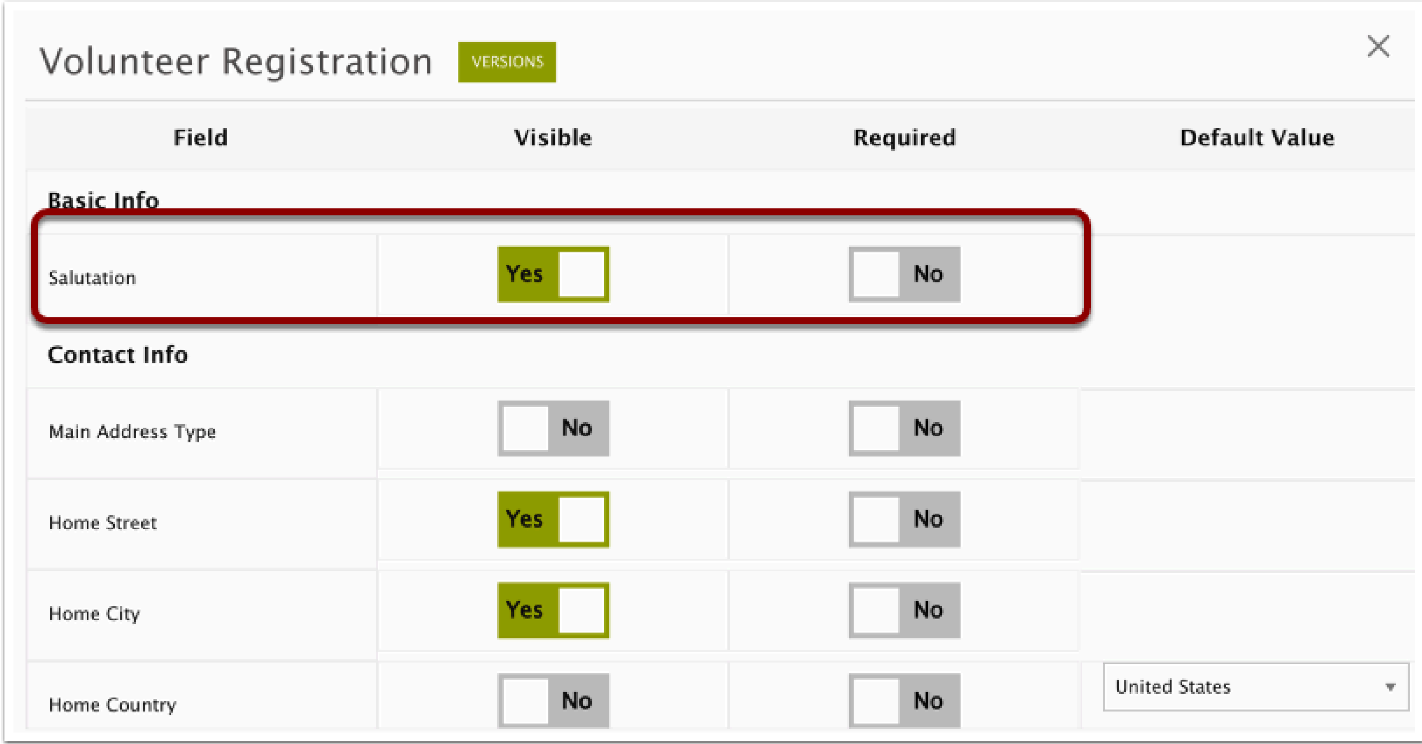




After submitting, the email will be sent directly to the volunteer leader. The Volunteer leader (opportunity coordinator) will be able to hit REPLY to the email they receive, and the email will be sent back to the sender with their reply.

CMS: Volunteer Registration Form now has Salutation option (HOC3-6926)

For those of you wanting to capture more info about a contact during registration, we've added the field "Salutation" to the fields you can display if desired. To enable, go to Blocks / System Blocks / Volunteer Registration and choose whether to make the salutation field visible and/or required.



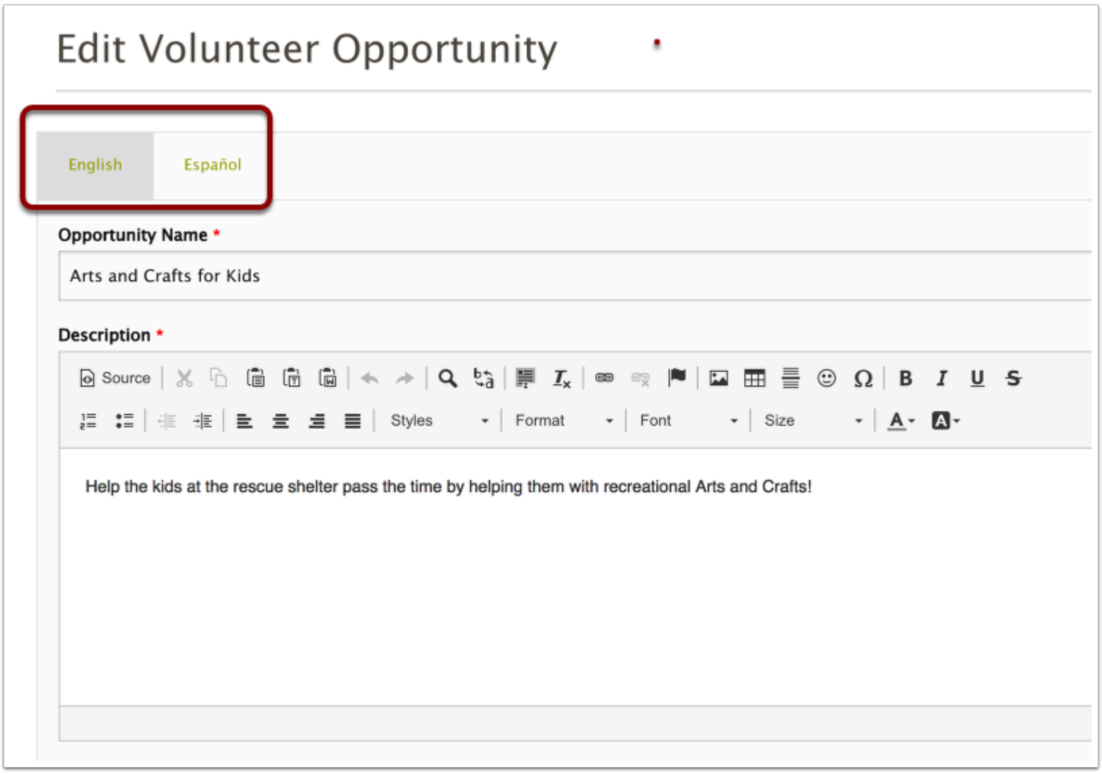
The Salutation field is also available for the Personal Information form, so that it can be updated by existing volunteers or changed in the future if wedding bells ring :-

> This field will NOT be enabled by default. So if you wish to use it, edit your existing volunteer registration and personal information forms.

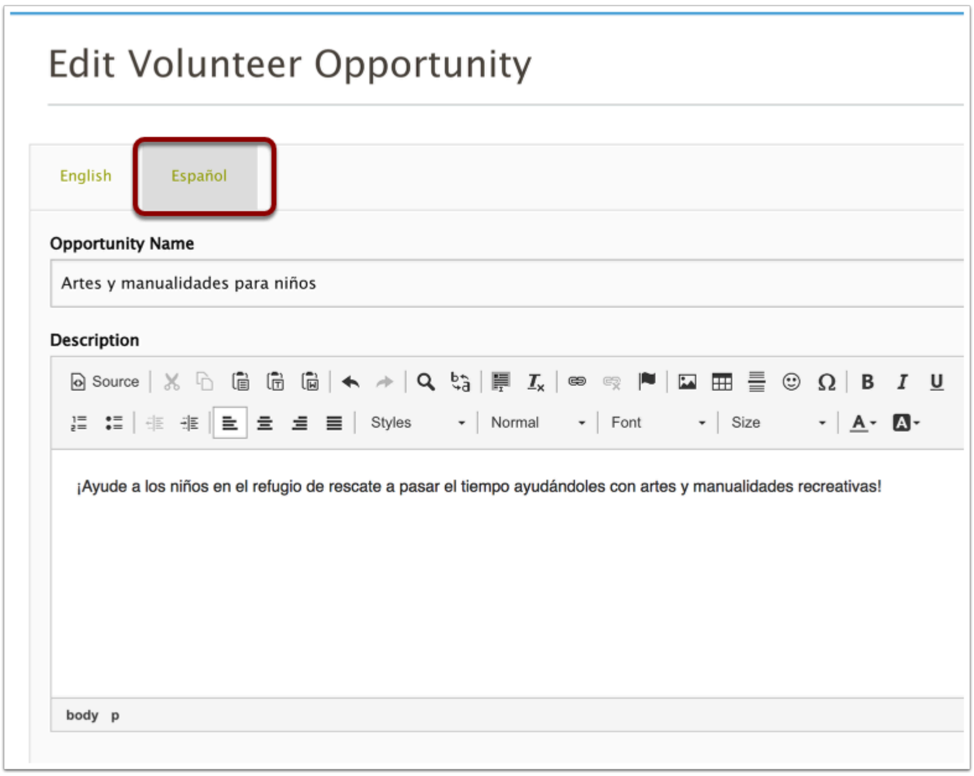
Sharing Portal now supports creation and editing of Multi-Lingual Opportunities (HOC3-6908)

For HandsOn Connect sites that feature multi-lingual capabilities, we've now made it possible for partners in the sharing portal to easily post translations of their volunteer opportunities.

When creating or editing a volunteer opportunity, a site with more than one language will now have Tabs for each available language:



To offer a translation, just click on the language tab, and enter a translation for both the Opportunity Name and the Description. Then continue creating or editing the opportunity., and click save when done. Both the English (required) and second language will be available on the public site when published. dddkiiiife



There is no requirement for a partner to offer a translation. If no translation is made available, then the opportunity will not appear in search for volunteers who select that language for the public site.

Improvements to 'Do not display full occurrences" configuration (HOC3-5003)(HOC3-6189)

By default, HandsOn Connect search displays upcoming opportunities, even if they are full. This way, people can easily join a waiting list for a full occurrence if desired.

One of the configuration options for HandsOn Connect is to NOT display volunteer opportunities in search if there are no occurrences with space available. (This is used when you want people to only see occurrences/opportunities where volunteers are still needed).

However - despite this setting, if you went to the opportunity detail page (for a date WITH space available), the full occurrences were still visible.

We've improved things so that if you opt to NOT display full occurrences, they will also not appear on the opportunity detail page. Only the occurrences with space available will be displayed. (This prevents people from joining the waiting list for full occurrences, and focuses people solely on occurrences / opportunities that have space available.)

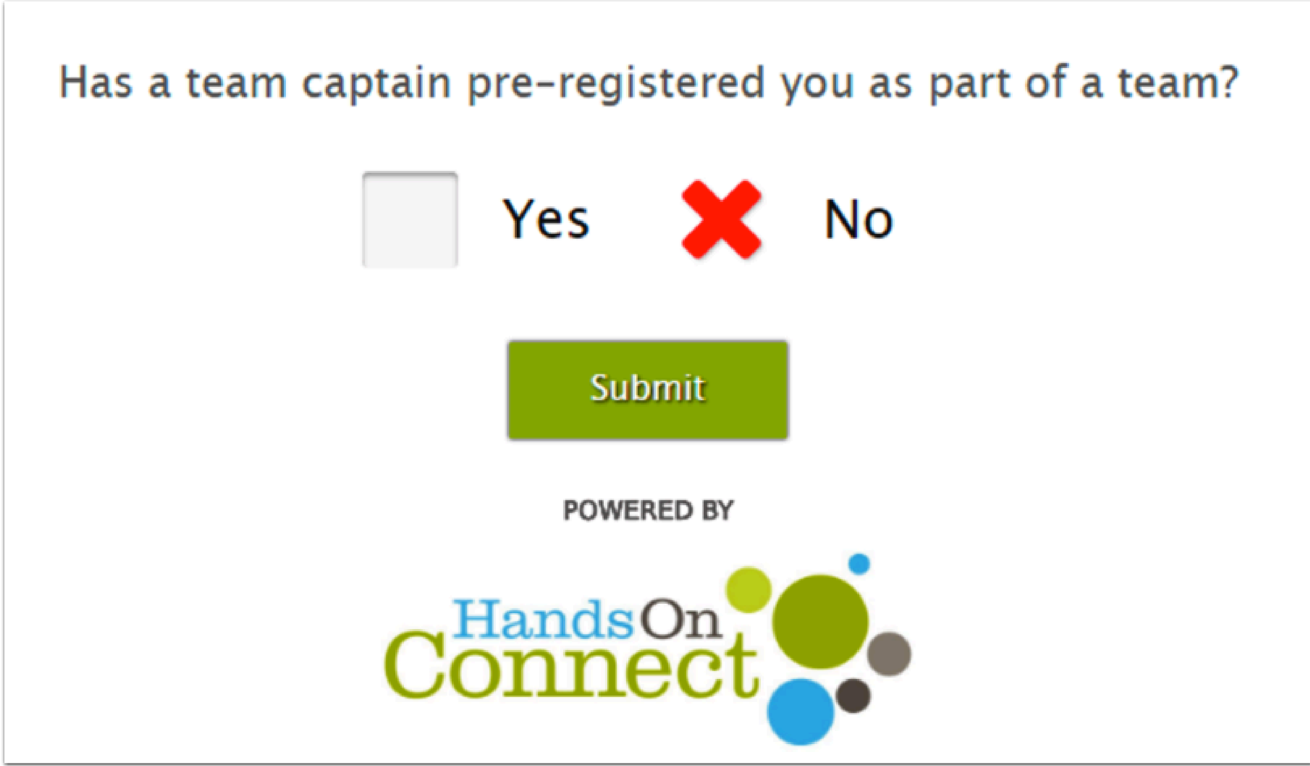
Additionally, the featured Opportunity Block will no longer display full occurrences.

On our roadmap for the future are additional improvements to 'do not display full occurrences" which will ensure that full occurrences are not displayed on the calendar page either.

If you currently DO have full occurrences showing in search, and you do not want full occurrences shown, please open a support ticket and we can update this setting for you.

Improvement to Check-In Kiosk. (HOC3-6662)

Some kiosk users report that the "Are you part of a team" prompt in the check-in kiosk leads people who are with a group to say yes, even though they are not pre-registered as team members.   To improve the clarity of this prompt, it's been updated to "Has a team captain pre-registered you as part of a team".   This way - only people who know they were pre-registered by a team captain will respond "yes' and be prompted to select their team and search for their name.



Forms improvement: Account Contact Relationships now supported (HOC3-6999)

We've continued to add to the use cases for custom forms by adding access to map data to the Salesforce native object Account Contact Relationship. You'll now find this object available for use in forms:

BETA: Social network: Ability to login or register using LinkedIn

Facebook login and registration has been available in HandsOn Connect for quite a while, and when it was implemented we indicated we would be working to include other options for social login and registration.

We are now opening a pilot to any HOC client that wishes to enable LinkedIn as a social login/ registration option. For more details on the LinkedIn Beta - see the documentation here:

To opt-in to the pilot and start using LinkedIn, please open a support ticket and request that LinkedIn be enabled for your site.

HOC3 Release Notes 3.0.6.4 (May 2, 2018), 3.0.6.5 (May 10, 2018)

People have asked - "What's the different between a monthly release (like May, 2018) and the HOC3 release notes with names like 3.0.6.4. Well here's the scoop:

The HOC3 release notes are changes made on the front end and sharing portal of HOC. And the 'month-based' releases that update the icon in SF - are changes made to the HOC package in Salesforce. For some things, changes have to be made in both parts of the system before a new feature or improvement is fully implemented. Got it? :-)

Included in this release are additional improvements to the reliability of the check-in kiosk, improvements to the image block and image slider block, improvements to the management of images in HOC, improved display when using search results block, and improvements to opportunity detail page display in Universal Template, and improvements in performance in supported versions of Internet Explorer. Also addressed were issues affecting International customers.

Here are some of the goodies in this month's release for the public site and sharing portal - including two new, much requested improvements for teams and partners using the sharing portal!

Public Site: Ability for team captain to update team member information (HOC3-6995)

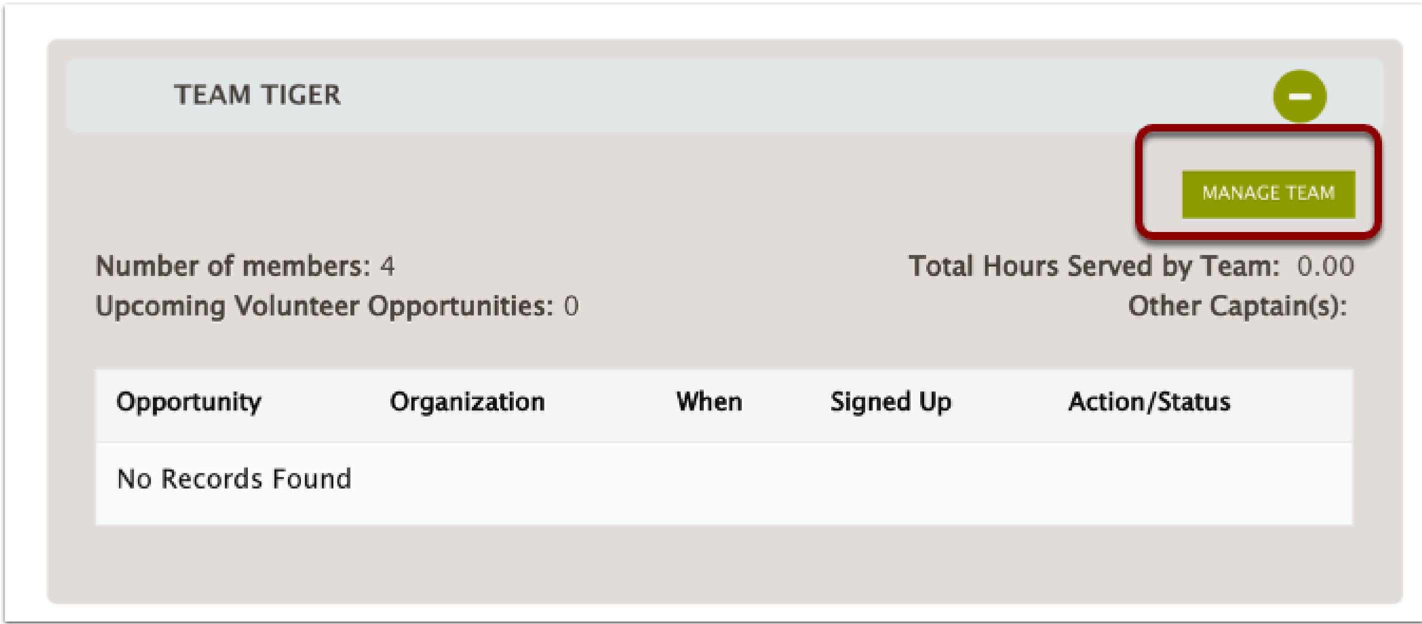
Team Captain's have been able to add team members, but not been able to update information about their team members subsequently. That meant, that if they wanted to add (or edit) an email address or phone number for an existing team member, it was not possible. Also, in cases where a team was created but the names of the team members weren't known - a team with with team members like "Volunteer One" "Volunteer Two" - could not be updated to reflect the actual names of the team members.

With these release we've added the long-requested ability for a team captain to edit info on their existing team members.

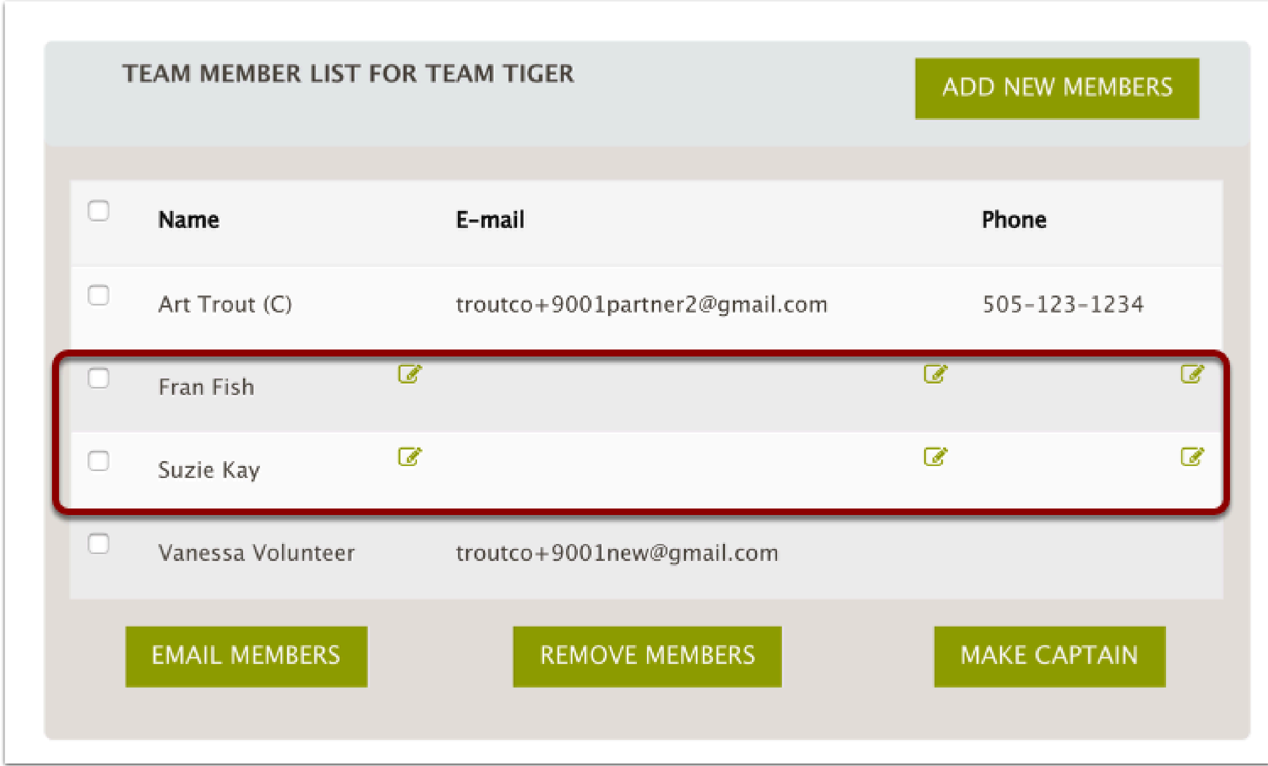
You can edit the name, email address or phone number of a team member, as long as that contact has not already registered and created an account in HandsOn Connect. (i.e. if the contact is in status "Pending (team Registration)" they can be edited.

If the team member's contact is in status "Registered" - the team captain CANNOT edit the team members info. (This is so that a team captain doesn't accidentally lock a registered volunteer out of their account by changing their email address / user name / (login). Was a team member has their own account in HOC - only that person can edit their own personal information.

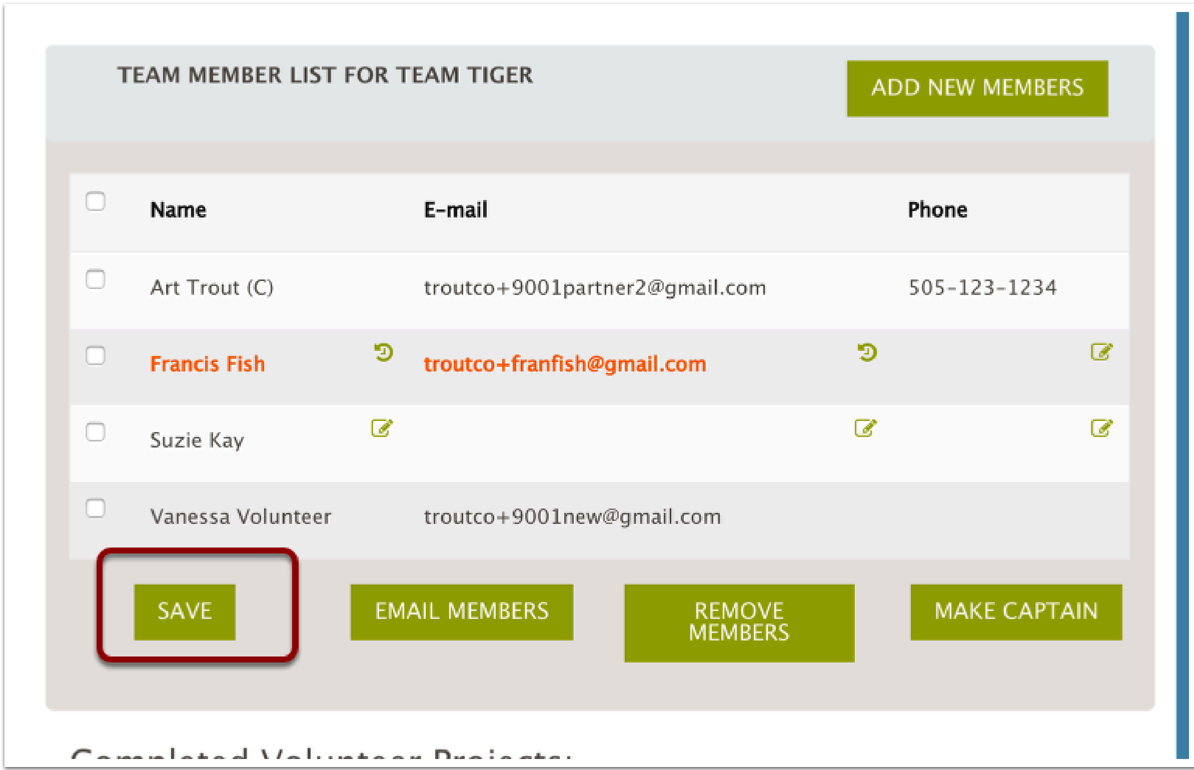
To edit members or your existing teams, go to My Account / My teams and choose your team. Click on the "Manage Team" button:



You will see 'edit' icons in the Name, Email and Phone columns for any team members who are still in Pending (team registration) status. No icons will be available to edit team members who have already registered and have an active log in. In this example, we can edit info for Fran Fish and Suzie Kay, but not Vanessa Volunteer who already has an active account in HandsOn Connect.



After editing info on the page --- click the SAVE button to save your changes!



This now makes it possible for team captains who created teams with anonymous names like "Volunteer 1" and "Volunteer 2" to eventually give real names to those anonymous team members, and enter their email and/or phone number as well!

Sharing Portal: Partners granted Auto-Approve rights now have all occurrences automatically published. (HOC3-6280)

Previously, if a partner organization was set for 'auto-approve' the volunteer opportunity was automatically placed in active status, however the partner then had to go to each created occurrence, and click on a "publish' link to publish that specific occurrence.

We've had many, many requests saying that they simply want to grant some of their partners the right to create an opportunity and its occurrence(s) and have them all immediately published.   And that's what's been done!

No need to click on 'publish' for each occurrence. If partner has auto-approval on - any opportunity they create is published, and any/all occurrences are automatically in posting status: "This is approved and published for volunteers to sign-up."

Auto approve is now truly 'auto-approve' -- rather than 'permission to self-publish". :-)

Occurrences

Find by keyword

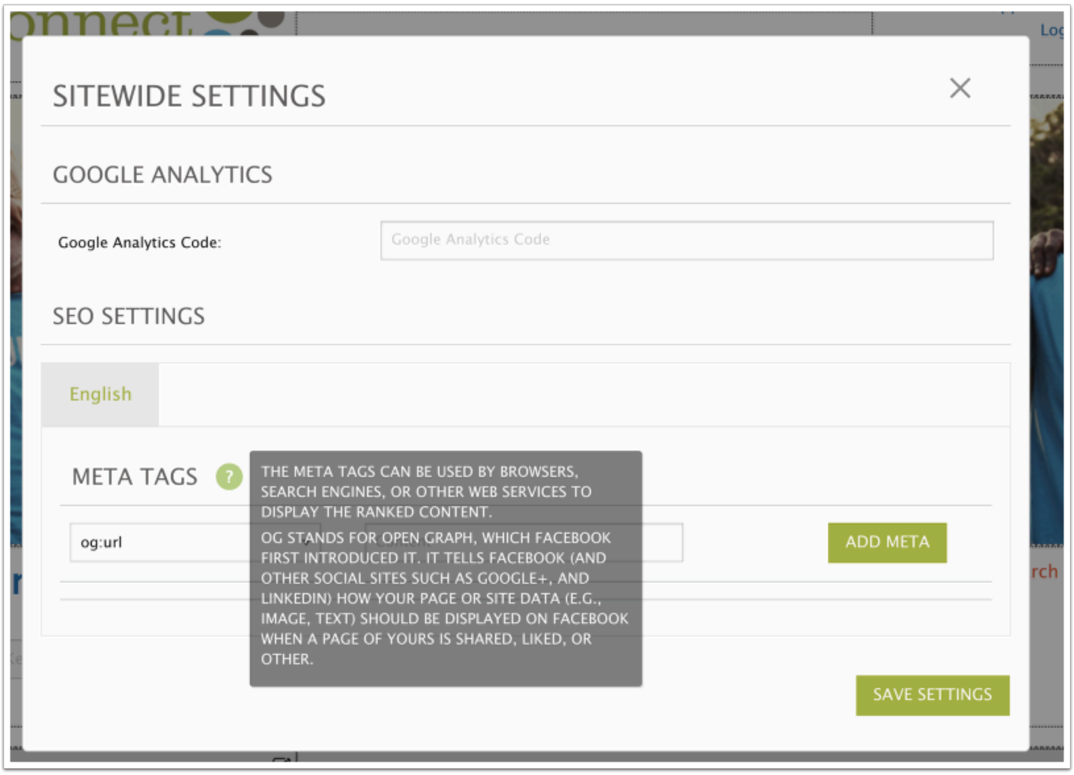
Actions	Start Date & Time	End Date & Time	Posting Status ▲
Edit | Cancel | Print Check-In Sheet	5/10/2018 7:00 PM	5/10/2018 8:30 PM	This is approved and published for volunteers to sign-up.
Edit | Cancel | Print Check-In Sheet	5/17/2018 7:00 PM	5/17/2018 8:30 PM	This is approved and published for volunteers to sign-up.
Edit | Cancel | Print Check-In Sheet	5/24/2018 7:00 PM	5/24/2018 8:30 PM	This is approved and published for volunteers to sign-up.

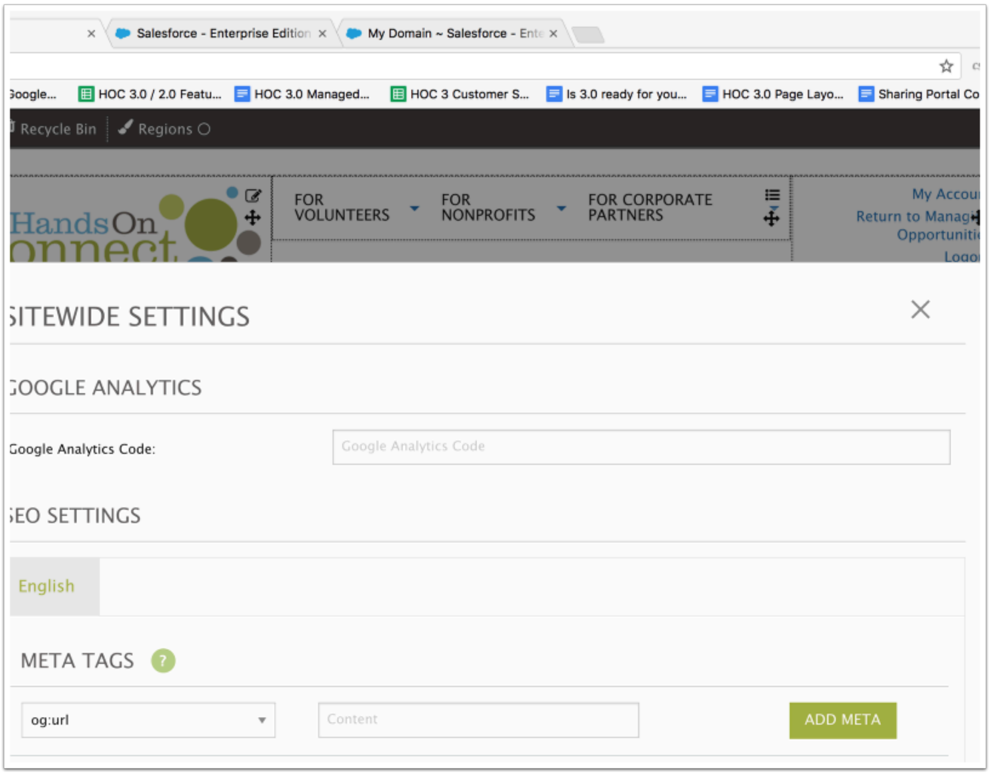
> To allow partners to auto-approve - just go to their organization record and place a check-mark on "Auto-Approve Opportunity".
>
> If you want to continue to review all new opportunities and 'approve' them in SF before publishing -- leave Auto Approve Opportunity turned off.

Expanded availability of meta-tags: Sitewide Settings and Opportunity Detail Page metatags now available (HOC3-6572)

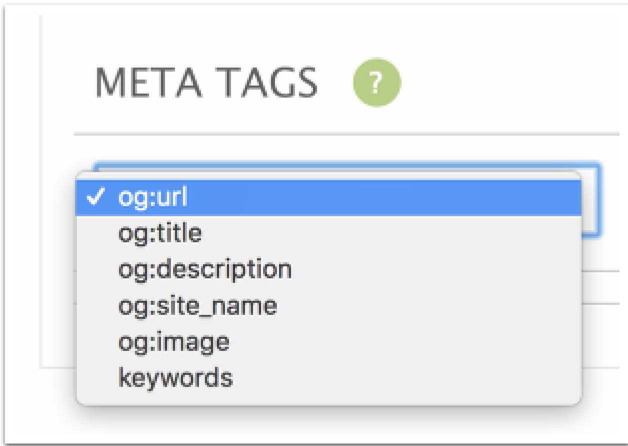
The CMS menu item in the AddOns section that had been named "Google Analytics" has been renamed to "Sitewide Settings". You can still set your google analytics code here. (and it will appear if you previously set it), but you now can set MetaTags that will be applied to all the system pages that previously you weren't able to set MetaTags for.

If you don't know what MetaTags are for, don't worry. You can leave these blank. But for those with a desire to more deeply leverage Facebook's Open Graph metatags, and work on Search Engine Optimization in detail, there are now additional ways to set metatags in places you previously couldn't!



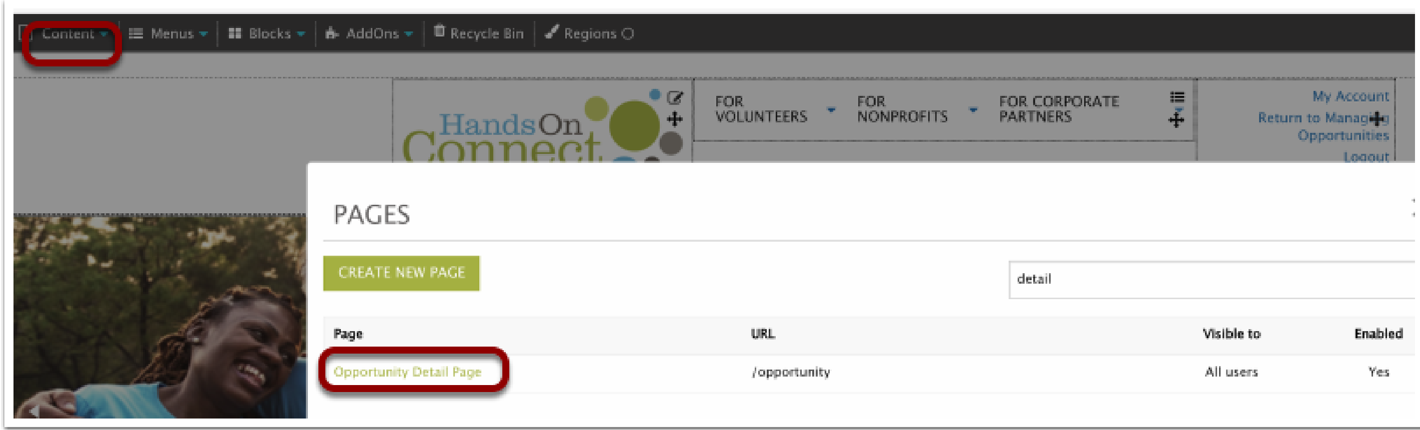


You can set site-wide settings for any of the following tags:



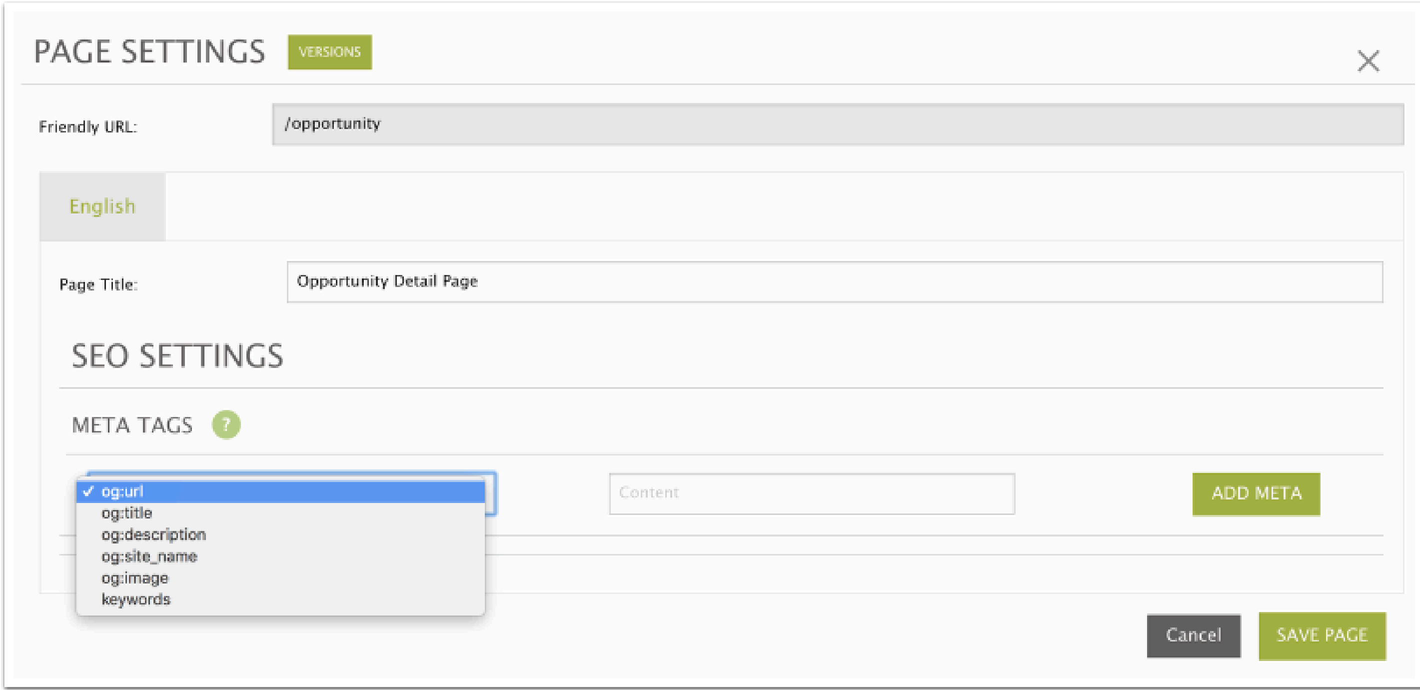
These tags will be used on any page on the site that you have NOT set tags for previously. (If you've set tags for individual pages, then the individual page tags will be used instead of the site-wide tags.

Furthermore -- you can now set tags that are applied to all the Opportunity Detail Pages. (the ones that have the 'share' link on them., To access this go to the CMS Content Menu - Select Pages - and search for "Opportunity Detail Page"



While you cannot edit the opportunity detail page content itself -- you CAN assign metatags that will be applied to these pages.

SO... for example, if you want YOUR logo image to be accessed when clicking on the "Share to Facebook" link on the opportunity detail page, set the metatag for og:image to the URL of your logo.



In /searchresults block, number of available slots no longer displayed for ISO opportunities (HOC3-6892)

For customers using the /searchresults block for search, the number of available slots was being displayed for ISO and legacy TBS opportunities. Because this number is automatically set to be quite high (its really the number of allowed express interest connections) - it was confusing to volunteers. Slots available is not a relevant piece of info in the case of ISO or TBS opportunities.   So now 'slots available' will only be displayed for Date and Time Specific Opportunities as it is elsewhere in standard search.

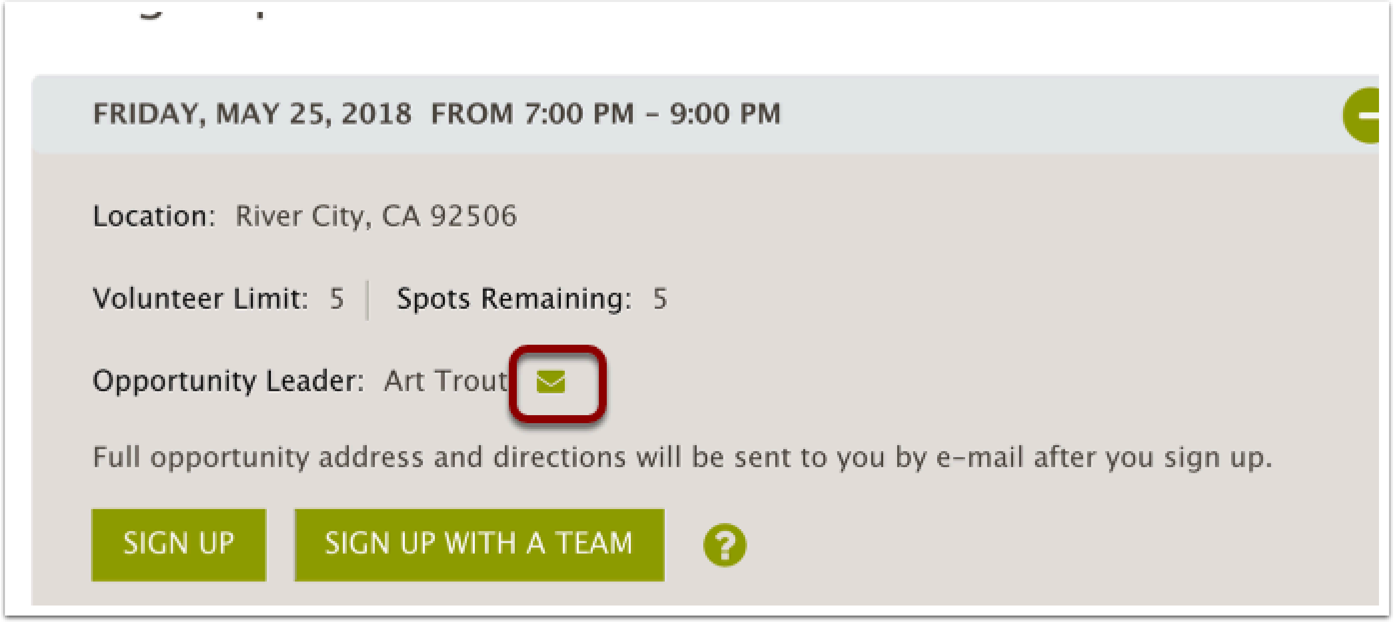
Kiosk: Added a button on success page to immediately start a new check-in. (HOC3-6576)

Even though the Kiosk automatically resets after a few seconds to the home page after a person checks in, sometimes people mistakenly use the 'back' button in their browser to get back to the home page to check-in. This can reveal the email address of the last person checking in.

So, we've added to the success page, a button labeled "Start new Check-In" which will quickly take you back to the kiosk home page.

Security Improvement: Emailing Opportunity Leader from opportunity detail page (HOC3-2696)

The code used to create an email to send to an opportunity leader from the opportunity detail page - made it possible for spambots to 'scrape' the site and get the email address of the opportunity leader.   The code has been updated for this icon so that the email address itself can not be found in the source code of the page - thereby protecting the email addresses from spam bots.


FRIDAY, MAY 25, 2018 FROM 7:00 PM – 9:00 PM
Location: River City, CA 92506
Volunteer Limit: 5
Spots Remaining: 5
Opportunity Leader: Art Trout
Full opportunity address and directions will be sent to you by e-mail after you sign up.
SIGN UP
SIGN UP WITH A TEAM

HOC3 Release Notes 3.0.6.3 (April 18, 2018)

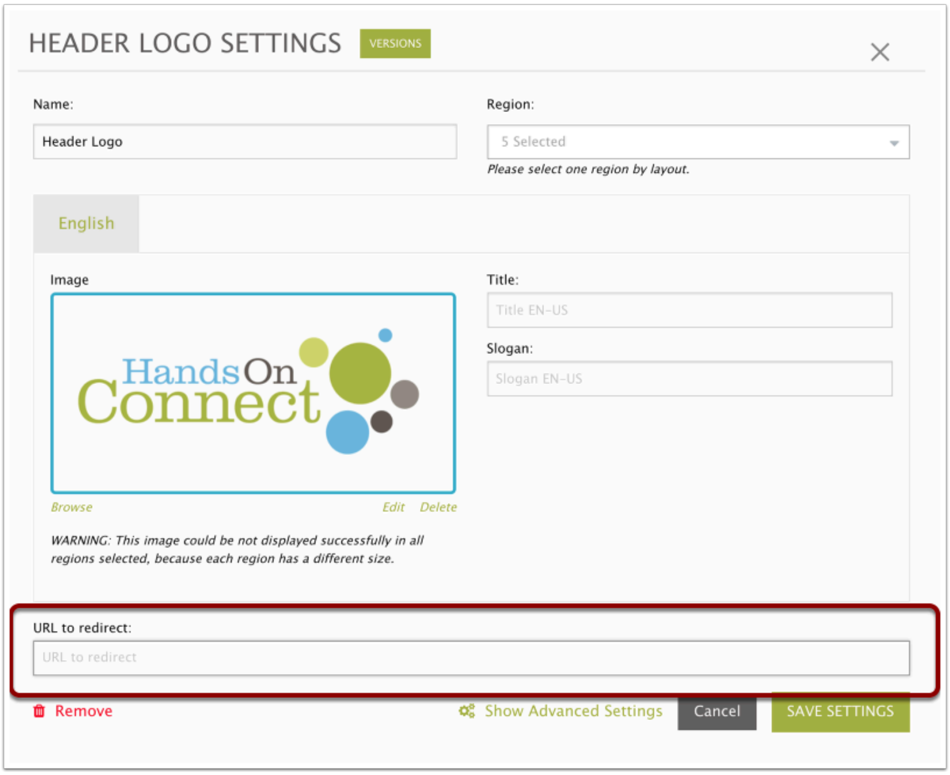
This release brings internal improvements to expand the functionality and ease of use of managing and maintaining HandsOn Connect mini-sites (HOC instances where there are more than one public site), along with a few features and improvements.

Ability to set Header Block redirect URL (HOC3-6650)

By default, Clicking on the public site's "Header Logo". (generally your site logo), brings the user back to the site home page. (This is page "/")

For HOC clients employing mini-sites, they may be using multiple header blocks on different pages, and therefore you may wish the header block to go to a different page than the site's root home page. The new field "URL to redirect" makes it possible for the logo to link to a different page that the site's main root.

Left blank, the logo will simply link to the site's home page "/" as it has done in the past.



Ability to create URL to go to a specific week on the opportunity calendar (HOC3-6691)

About a year ago we added the ability to [create URLs that go to a specific month or to a specific day (day view) on the Calendar.](#) We've now also added a parameter that makes it possible to create a URL that goes directly to a week view.

If you specify week=true in the url, calendar will display the week which belong the requested day.

i.e.:

To open week Apr 1 — 7 2018, the url is:

/calendar?year=2018&month=04&day=01&week=true

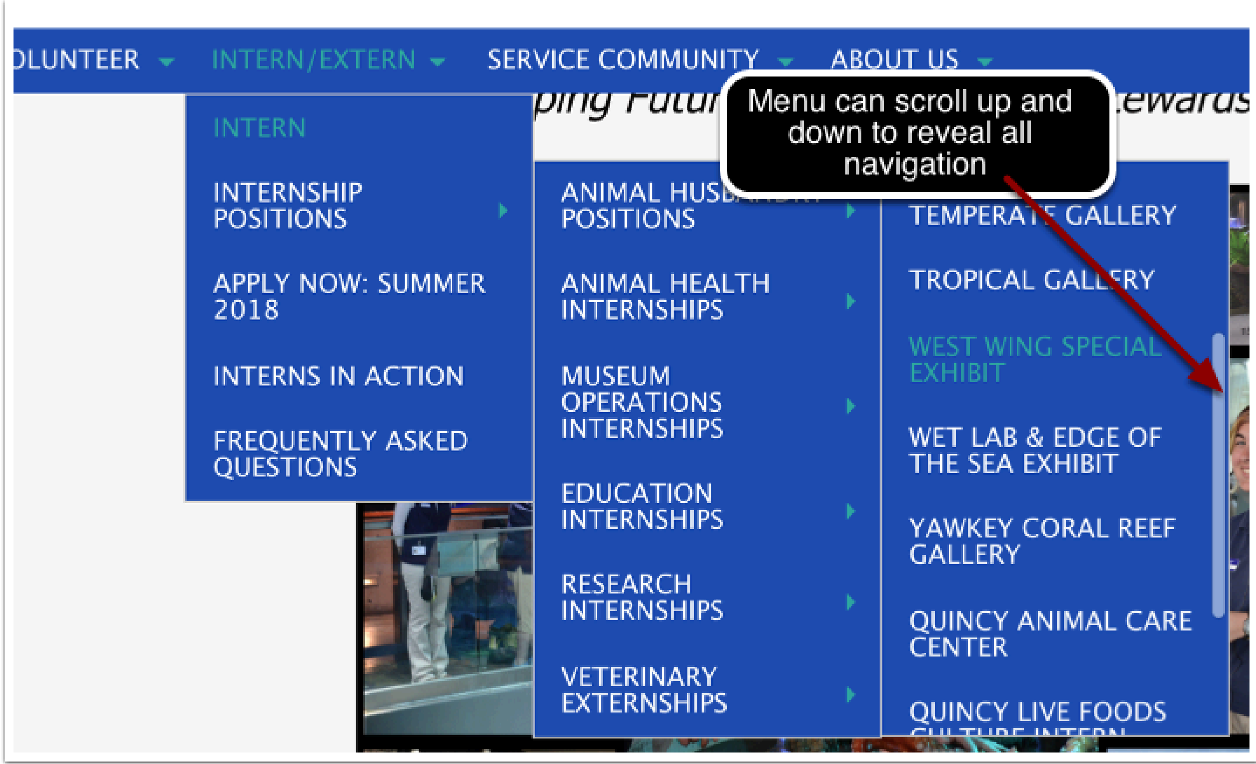
(This week can be displayed by other url like /calendar?year=2018&month=04&day=02&week=true because that day belongs to that week, too.)

Other considerations:

- If it's not specified year, month and day, but week is true (/calendar?week=true) it will display the current week.
- If it's not specified month and day, but week is true (/calendar?year=2018&week=true) it will display the first week of the requested year.
- If it's not specified day, but week is true (/calendar?year=2018&month=03&week=true) it will display the first week of the requested month.

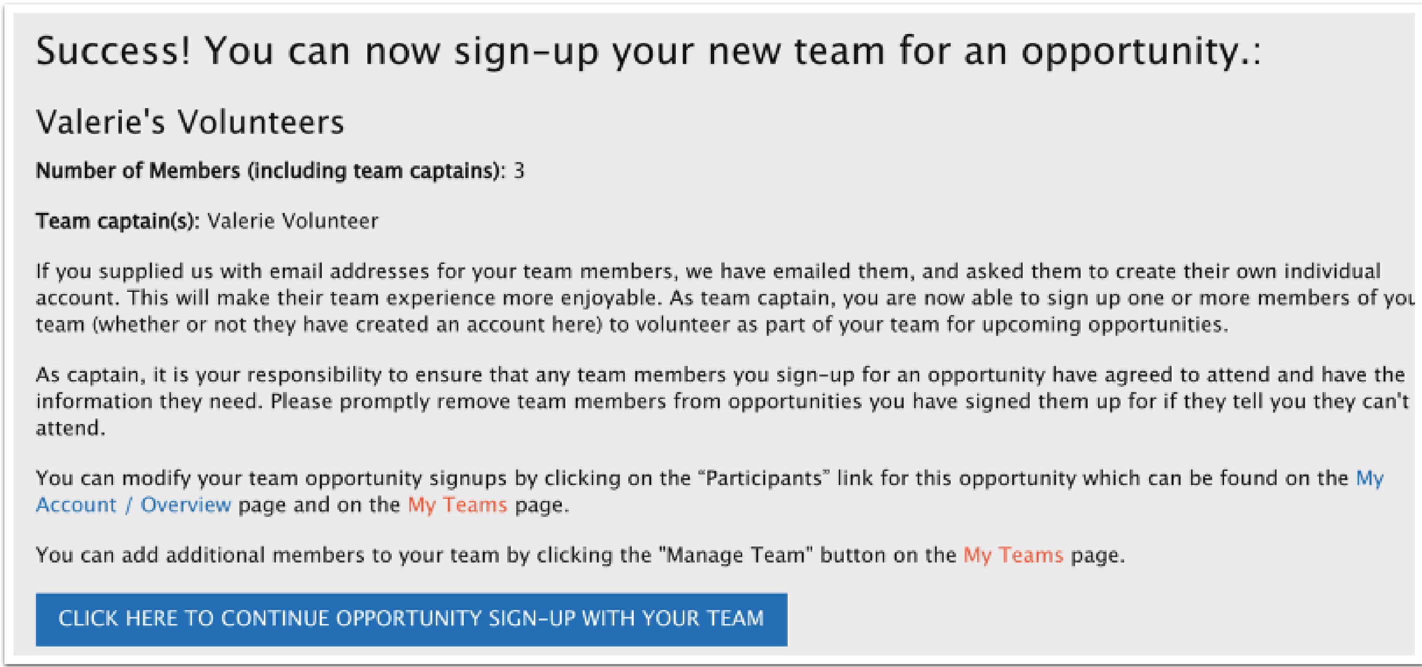
CMS Improvement: Scrolling added to navigation for long lists (HOC3-6808)

For organizations using deep levels of navigation at the fourth level of navigation, there were problems in that not all navigation items were accessible. We've added a scrolling feature so that users can scroll and see all navigation items, no matter hos many are added.



Further improvement to team creation / signup dialog (HOC3-6833)

In the last release we improved the team creation / signup user interface by making "Click here to continue opportunity sign-up with your team" a visible button rather than a link. We've improved this page even more by changing the heading "Success! You've created the team" to "Sucess! You can now sign-=up your new team for an opportunity"



HOC3 Release Notes 3.0.6.2 (April 5, 2018)

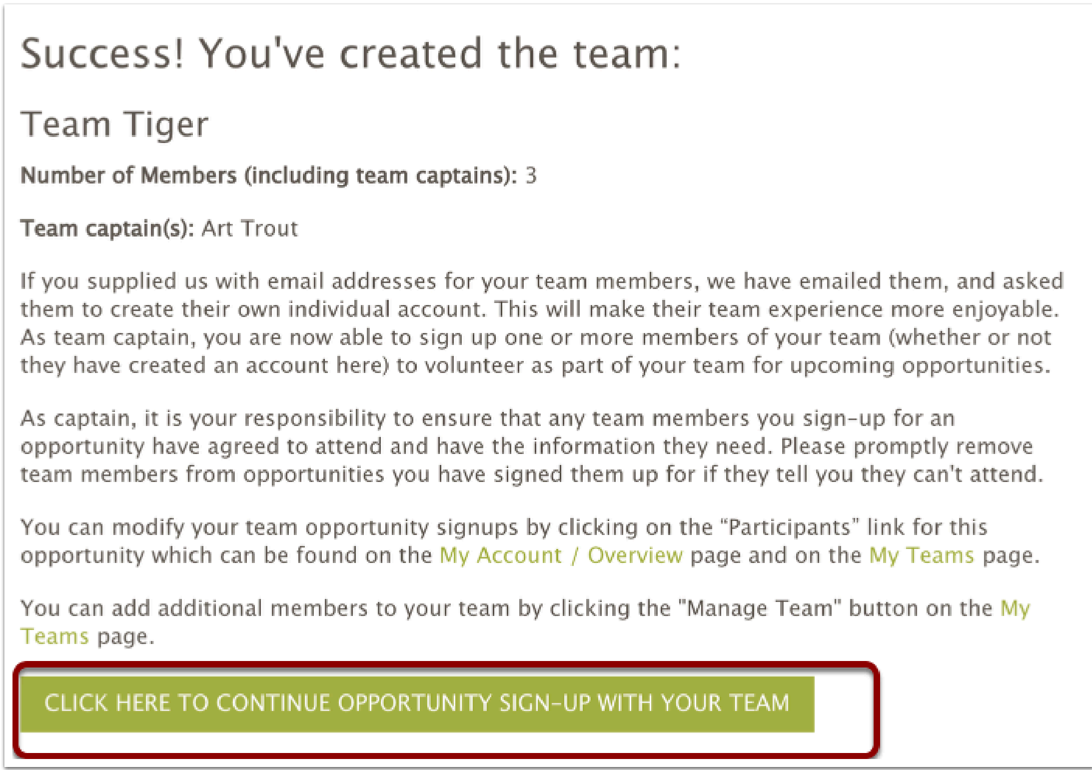
A number of bug fixes and performance improvements were applied to the CMS in this release. This release also addresses a number of improvements to add to the stability and performance of HandOn Connect. Also included are improvements to the Check-In Kiosk when issuing access passes for Individually Scheduled Opportunities, and bug fixes to ARS workflows.

There's also one nice little improvement to the user interface on the public site (see below).

Improvement to Team Creation / Signup user interface (HOC3-6455)

A number of clients have remarked that when a user creates a new team during the "Sign up with a Team" process -- people often miss the link on the "Success! You've create the team" page that tells them to now continue with opportunity sign-up with their team.

We've replaced the hyperlink with a much more visible button - so that users will more clearly understand that now that they've created the team - they should click and now sign the new team up for the Volunteer Opportunity.



March, 2018 Release (March 2018)

The March, 2018 - Spring Release has been slowly rolling out to HandsOn Connect clients during the last two weeks and will continue to be rolled out in the coming week. This release required us to make some behind the scenes speed ups to your instance of Salesforce, and so we rolled it out to customers at a rate of about 5 customers a day.   You'll know you've received the March 2018 release when you see the shiny March 18 Spring Logo in the upper left of your screen (in SF classic mode).

What's in the March 2018 release?

The March 18 release is a maintenance release that addresses keeping HandsOn Connect compatible with recent changes in the Salesforce Platform. Salesforce is finally retiring the old licenses that HandsOn Connect 2.0 used, and is no longer supporting Salesforce 'sites' which were the platform HOC 2.0 used for the public site. The older, SF partner and VL portals have also been retired. HandsOn Connect, March 18 updates and cleans up HOC to remove dependencies on these deprecated SF resources. We've also removed triggers that managed the old 2.0 sharing portal.

So what has changed for you?

Nothing :-)

This release just ensures that HandsOn Connect will continue to perform all its normal functions and features. It completes the migration of everyone to the HandsOn Connect 3.0 platform. In HOC 3.0, your public site, your sharing portal, and the licenses for your volunteers, volunteer leaders and partners are all managed outside of Salesforce in our .net platform, so we've removed HOC components that were previously created for the original version of HOC.

Everything will continue to work in Salesforce for you as before. And this release sets the stage for our plans to continue to stabilize and streamline HOC in the months to come.

What's in the future?

HandsOn Connect, March 2018 has configuration options that can make it more flexible for organizations using Salesforce with other applications or business needs. It can now accommodate managing volunteers and partners for organizations that wish to be 100% in the NonProfit Success Pack's Household model, or those who use Salesforce's Higher Education

Data Architecture (HEDA). HOC now has far greater flexibility that will make it possible to work with existing and future clients who wish to expand their organizational use of Salesforce beyond volunteer management. Contact us as support@handsonconnect.org if you'd like to work with us to broaden your organization's Salesforce needs.

System Administrator FYI:

As part of the March release, we've simplified the process for organizations that wish to allow a single contact to log into the sharing portal and manage opportunities and volunteers for more than one organization. To do this, we've activated for you the account setting that allows users to relate a contact to multiple accounts, and installed the custom field "HOC Access" to this native SF object.

If you do not have an immediate need tor a sharing portal user to manage multiple accounts - there's no action you need to take. This new object can remain quietly off your radar :-)

If you do however, have a need in the future to have partner contacts manage multiple organizations, there's a short speed-up you'll need to do. Simplified instructions for this speed-up needed to use this feature can be found here.

HOC3 Release Notes 3.0.5 (Mar 1) and 3.0.6.0 (Mar 8) and 3.0.6.1(Mar 22)

The 3.0.5. release addresses infrastructure improvements that make it possible to have multiple, branded, public sites all connected to the same instance of HandsOn Connect. This functionality makes it possible for you to offer partners, corporations or others, a stand-alone public site with its own unique branding, search, and CMS.

For more information on pricing for 'mini-sites' please contact melissa@handsonconnect.org

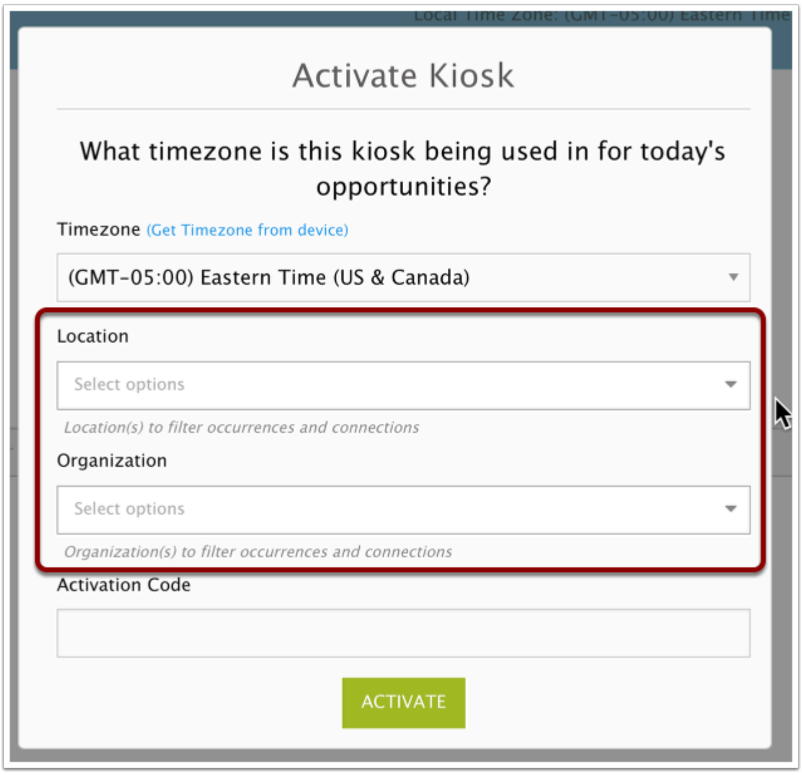
The 3.0.6.0 release addressed improvements in the Check-In Kiosk QR code functionality, and CMS improvements. It also addressed internal changes necessary to support the upcoming March, 2017 release to the Salesforce back-end of HandsOn Connect.

The 3.0.6.1 brings a number of improvements to the functioning of the CMS, and also brings some small but helpful improvements as well as two popularly-requested new features!

New Feature: Check-In Kiosk supports filtering by Location and/or Organization. (HOC3-5626)

A much requested enhancement to the Check-In Kiosk has been added. Previously, when using the check-in kiosk and configured to allow guests, the Kiosk listed ALL occurrences taking place on the current date as opportunities that could be checked in for.

When activating the kiosk now, the activation process includes the ability to select filters and limit the opportunities displayed based on the Location the kiosk is being used in, or limited the check-ins based on the organization that is managing the opportunity.

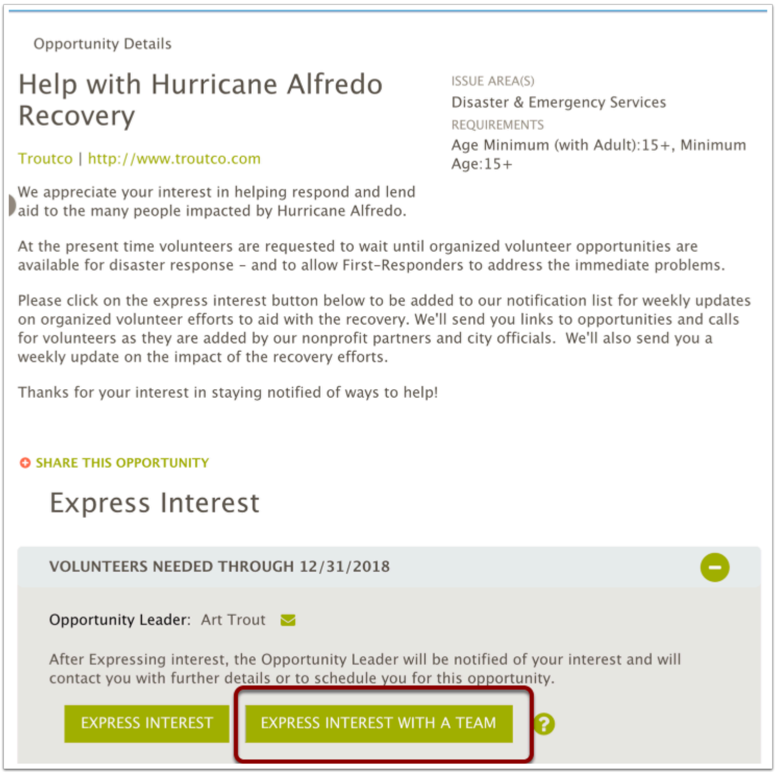


If the Location and Organization filters are left blank - then all the day's occurrences will be listed as available to check-in. However you can select a single location or a single organization if you wish to limit the list of available opportunities for check-in on the device your are activating for check-in.

New Feature: Team signup is now available for Individually Scheduled - Express Interest Only opportunities (HOC3-5541)

A much requested feature has been added. Previously, team signups were only possible for date and time specific opportunities.

Now the ability to express interest for multiple team members has been added to ISO - EIO opportunities!



Note: Team Signups are not possible for Individually Scheduled - Express Interest with Schedule Opportunities. The reason is that with this opportunity type, an individual can create up to. 50 connections in a recurring schedule. If a team of 20 people attempted to do this it would require creating 1000 connections at once which is beyond the limits of Salesforce.

But now all other opportunity types can permit teams to sign up / express interest.

Teams will now be active for all your ISO - EIO opportunities in any organization that permits team. If you do not wish teams to be able to sign up for any of your ISO-EIO opportunities, use the advanced occurrence functionality to turn off teams in the occurrence record.

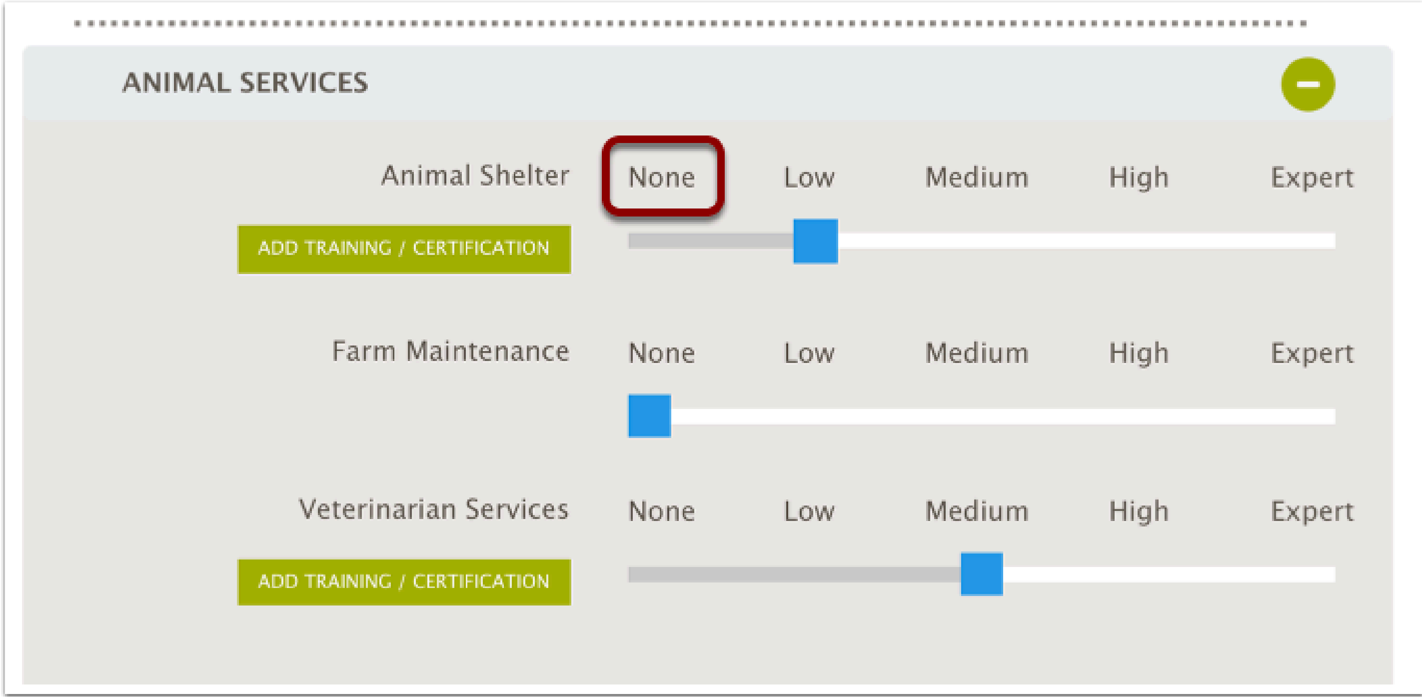
Improvement to email links to sharing portal pages. (HOC3-4348)

Previously, when a user received an email (such as a partner receiving an email with a link to the Report Attendance page), and they were not already logged into the site, clicking on the link, and then logging in would just take them to the dashboard page.

Now, email links are persistent, and after a partner logs in, they will be taken to the linked page that brought them to the site initially.

Improvement to Skills Profile Page (HOC3-6476)

It was reported that some volunteers found the skills profile page confusing because the only options for skill levels were low, medium, high and expert.   To make it clearer that not moving the slider indicated that you did not have a particular skill, the column header above the left-most position has been labeled "None"



Bug Fix: Total hours served by team wasn't updating on Team Detail Page (HOC3-6379)

The team details page for teams has a field "Total Hours Served by Team" that was not accurately reflecting the verified hours of the team.   This has been fixed.

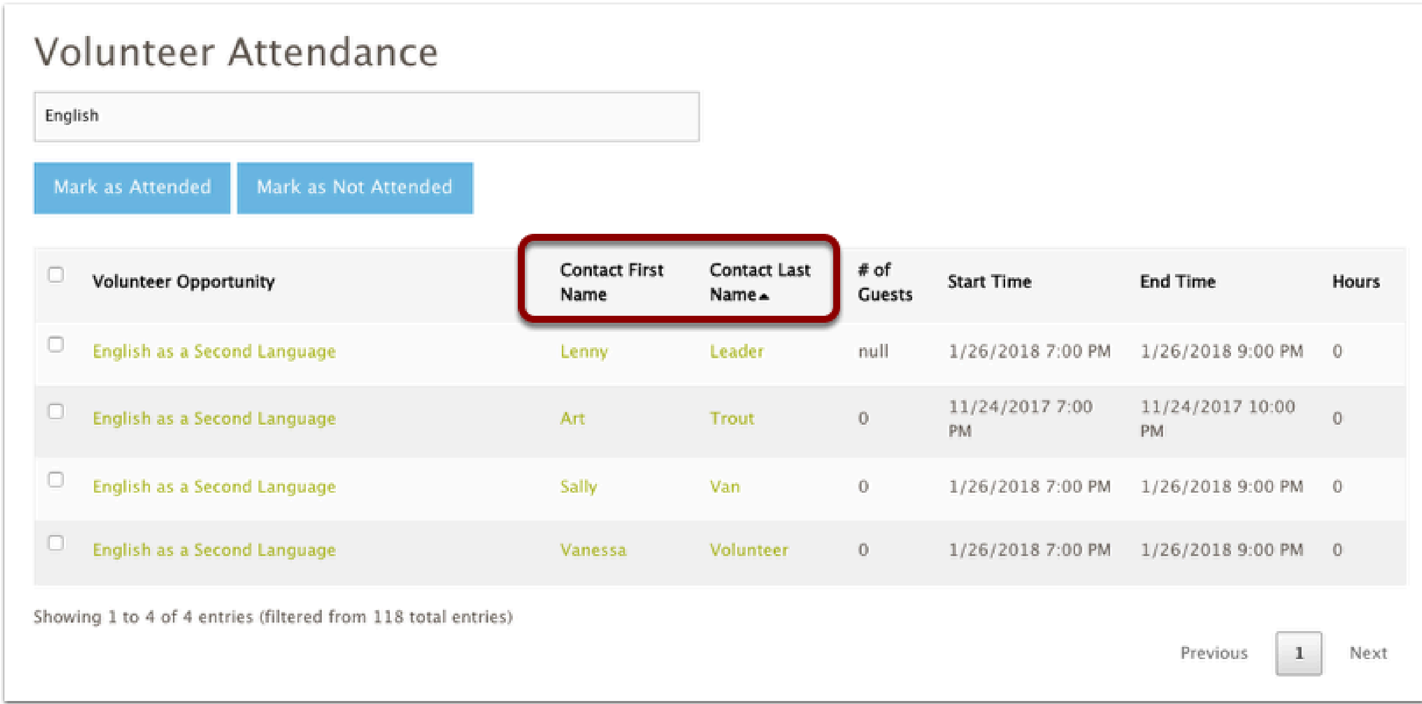
HOC 3 Release Notes 3.0.4.15 (Feb 22, 2018)

This release contains the usual performance improvements, bug fixes, and ease of use improvements. Here's the highlights of this release!

Sharing Portal: Report Attendance now supports sorting of contact names by last name! (HOC3-5637)

The report attendance feature used to place contact names alphabetically by first name. However, if you are using the check-in sheet (which sorts alphabetically by last name), it was tough to quickly visually report attendance.

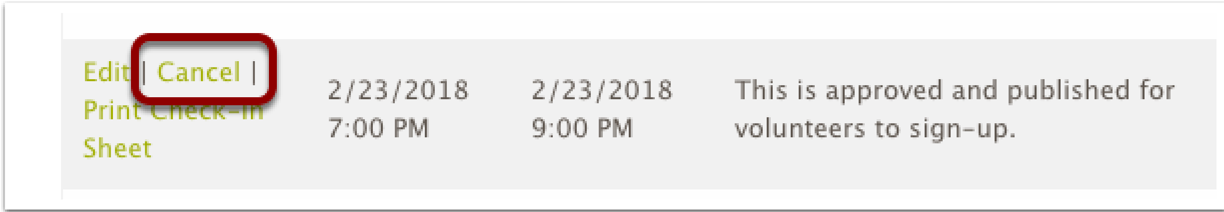
Now the report attendance table allows you to sort by First Name OR Last Name. You can also reverse the order alphabetically by clicking on the header.



Tip: Use the Search box to limit the list to one volunteer opportunity, or to one occurrence (You can search by Opportunity Name or by Start Time).   Then alphabetize as you like!

Sharing Portal: Ability to cancel an occurrence on the day it takes place (HOC3-6104)

The option to 'cancel' an occurrence was not available on the day an occurrence takes place. This has been corrected. An opportunity coordinator can now use the cancel button to cancel an occurrence up until the time it is scheduled to end. This allows for last-minute cancellations.



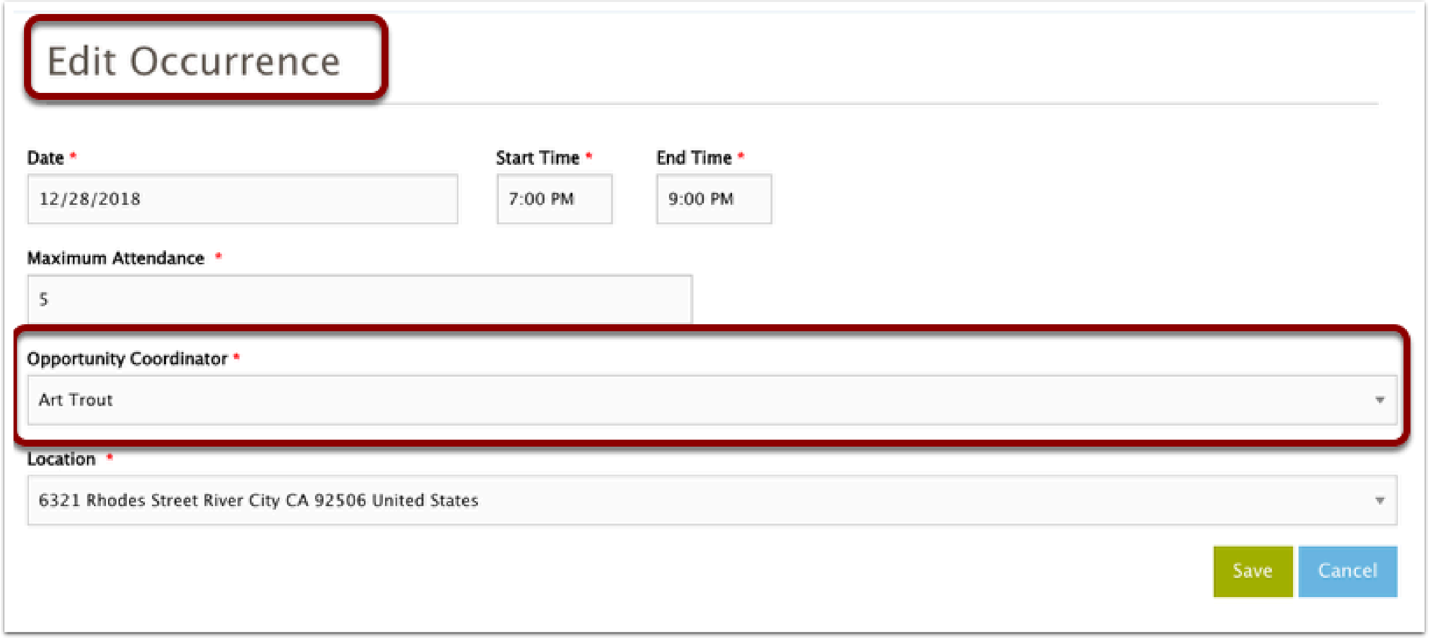
When cancelling at the last minute - its best to call your volunteers who may not have time to see the email notifying them that the project has been cancelled.

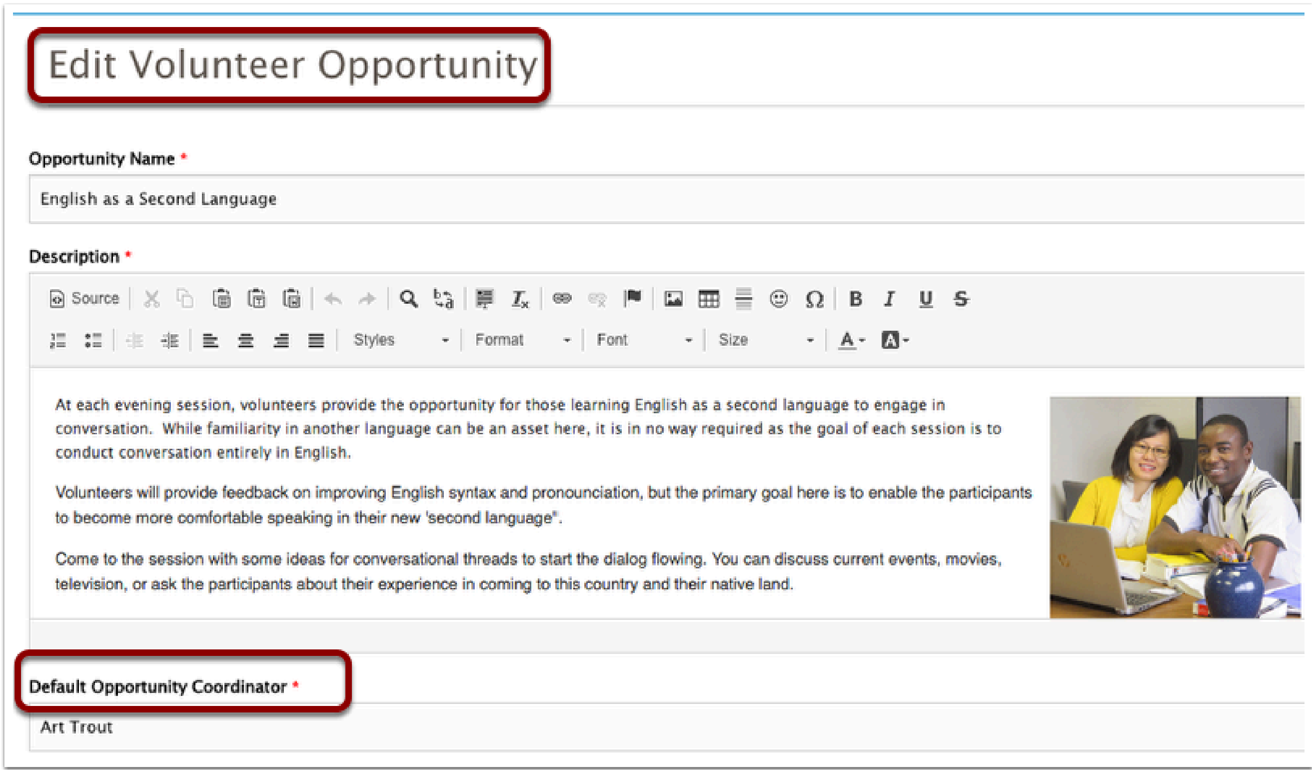
Sharing Portal: Ability to edit the Opportunity Coordinator at the Occurrence Level (HOC3-6234)

Previously, A partner staff, with permission to edit occurrences, did not have access to change the opportunity coordinator for that occurrence. This is sometimes necessary if someone else on their staff who has partner staff access is going to take over as opportunity coordinator.

Now it will be possible to edit the Opportunity Coordinator and select a different one when editing an occurrence.

There was also confusion about the fact that you could edit the opportunity coordinator when editing the Volunteer Opportunity. However, that doesn't change or update existing coordinators (who could be different for each occurrence). The 'opportunity coordinator" in the Volunteer Opportunity view is actually the DEFAULT opportunity coordinator (the one that shows up by default when you create new occurrences). To make this clearer, this field is now labeled "Default Opportunity Coordinator"

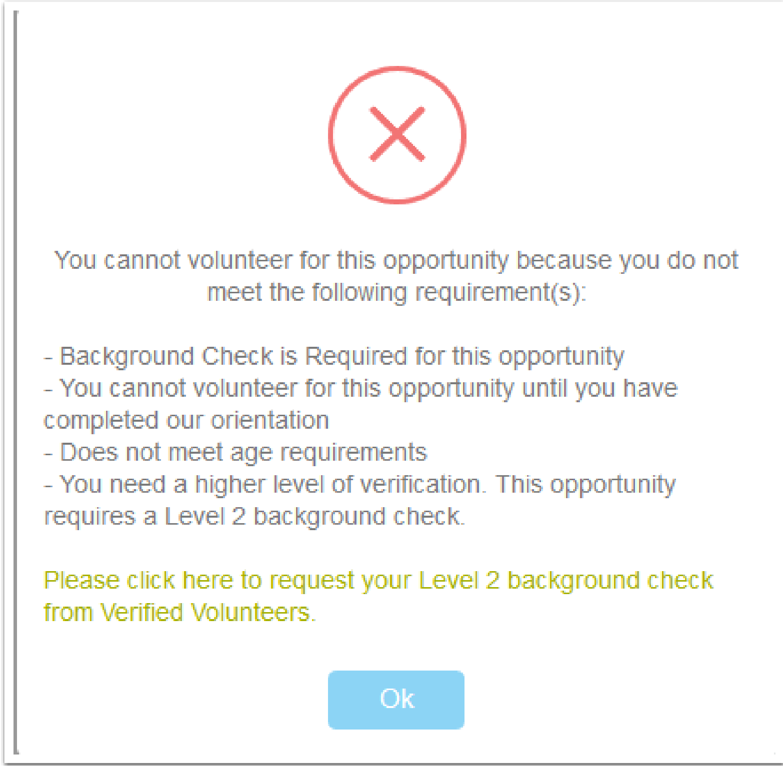




Error Message Improvement: Explanation of why a volunteer cannot sign up (HOC3-6187)

When a volunteer does not meet one or more requirements for signing up for a volunteer opportunity, a message is displayed telling them they can't sign up. Previously, this listed the first 'unmet condition' for signing up, and they might not see other requirements that prevented signup.

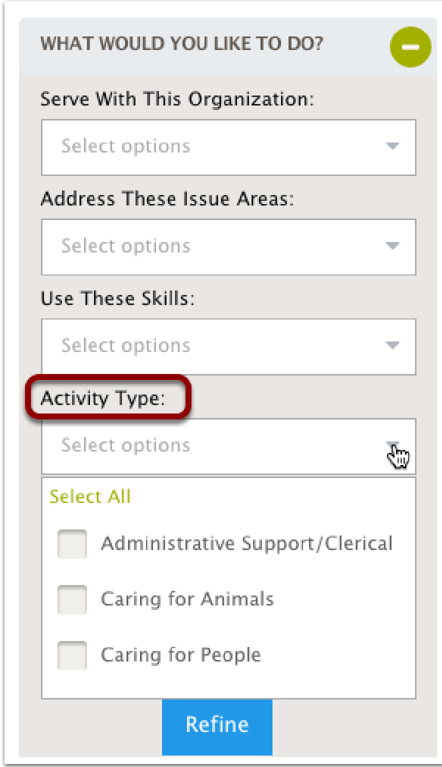
The improved error message will alert an individual signing up of ALL the conditions that must be met before they can sign up!

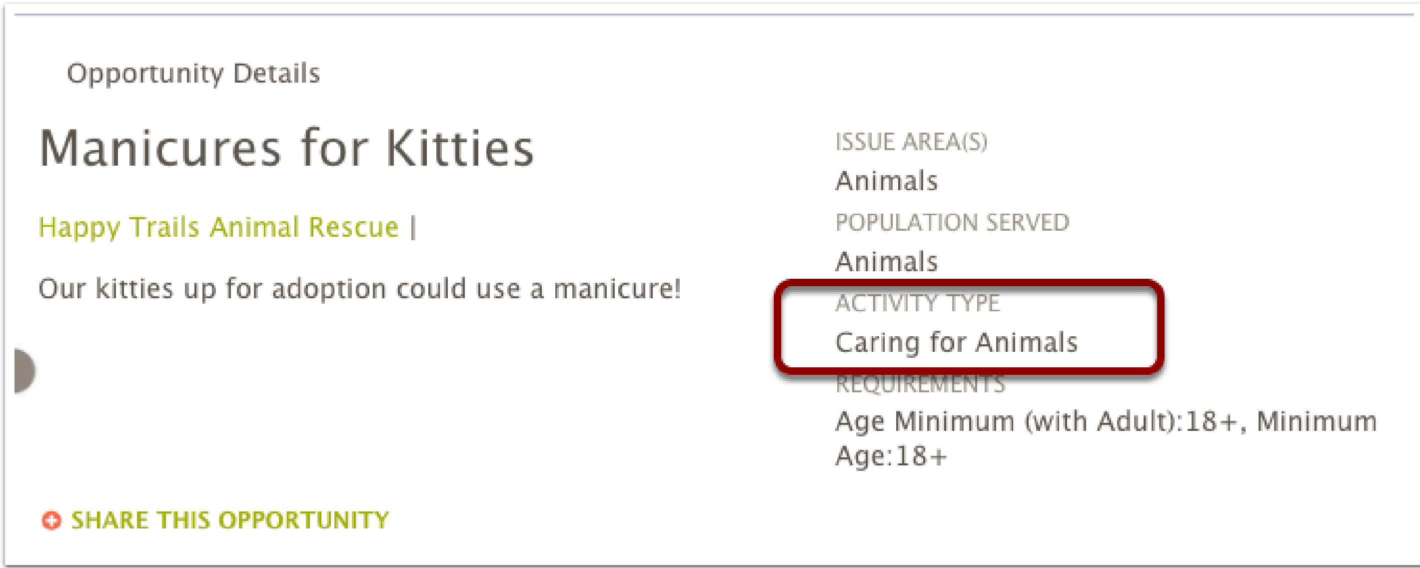


Bug Fix: Search filter "Activity Type" now brings in correct values (HOC3-5976)

When creating a volunteer opportunity, there is an optional search characteristic called "Activity Type" that describes the sort of activity a volunteer will be doing, This field value also is presented on the opportunity detail page.

The activity types, if used, were not being correctly displayed in search or on the opportunity detail page. This has been corrected.





Page Content Improvement: Team Creation Success Page (HOC3-5924)

The text that appears after a team has been created included this slightly misleading text:

"You can modify your team opportunity signups by clicking "Modify Participation" on the My Teams page. You can add additional members to your team by clicking the "Manage Team" button on the My Teams page."

It has been corrected to accurately reflect the names of the buttons and links. It now reads:

"You can modify your team opportunity signups by clicking on the “Participants” link for this opportunity which can be found on the My Account / Overview page and on the My Teams page.

You can add additional members to your team by clicking the "Manage Team" button on the My Teams page."

HOC3 Release Notes 3.0.4.13 and 3.0.4.14 (Jan 25, Feb 8, 2018)

The majority of items in 3.0.4.13 were internal improvements. 3.0.4.14 includes a number of other internal improvements and some user visible improvements including visual improvements to the optional "search Result block" being used by some customers,

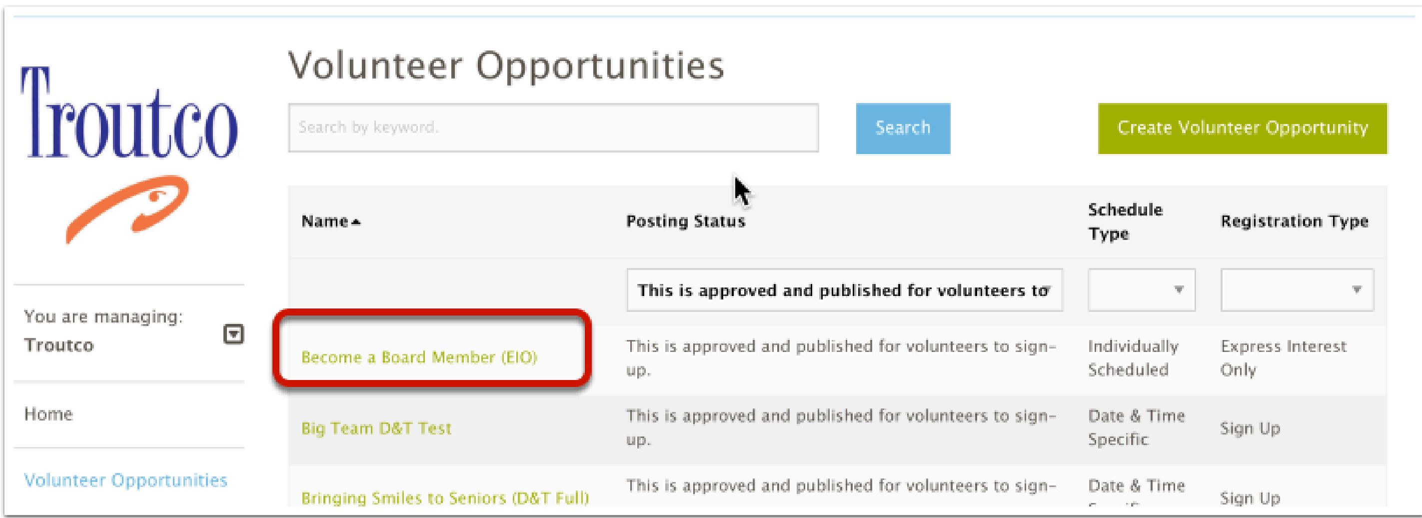
Sharing Portal: Volunteer Opportunity List Page User Interface Improvement (HOC3-3571)

Based on feedback from many partners using the sharing portal, and requests from many of you, we've made an update to the Volunteer Opportunity listing page (used to choose which Volunteer Opportunity you wish to view and/or edit) to make it less confusing for partners.

Previously, on this page were two actions for a volunteer opportunity: View and Edit.   But the majority of actions one wants to take with a volunteer opportunity (see the connections, confirm connections, add or edit occurrences) all take place when **viewing** the opportunity detail page. The need to 'edit' the volunteer opportunity is quite limited. And yet, people kept clicking on the edit button when they really needed to view the opportunity detail page.

Now, the action buttons are gone - and the name of the Volunteer Opportunity is a hyperlink which will take you directly to the volunteer opportunity detail page.

From there you can either view the volunteer opportunity, edit the opportunity description itself, or work with any of the related lists of occurrences and connections.



Improvement for HOC clients not using Self-Reporting (HOC3-6115)

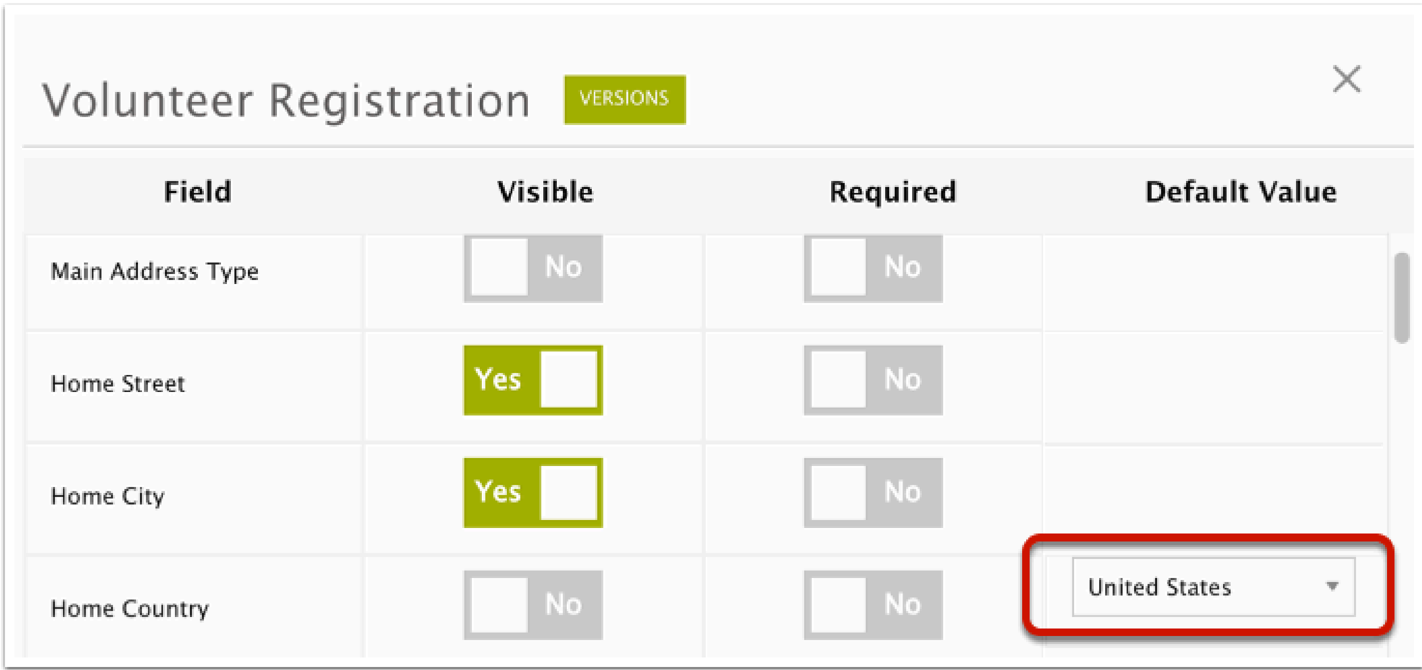
HandsOn Connect automatically creates 'self reported volunteer opportunities' for partner organizations, which are used when self-reporting is turned on in a HOC instance.

However, this was confusing to partners of organizations that are not allowing volunteers to self-report service.

To clear up this confusion for partners, the Self-Reported Volunteer Opportunity for an organization will no longer be visible to partners in the sharing portal, if Self-Reporting is not active on your public site.

CMS - Volunteer Registration - Ability to set default country (HOC-5869)

The CMS now allows you to make the County field visible and/or required, and to set a default value. If you are only working in one country, don't make this field visible, and choose the default country you wish all volunteer contact addresses to be populated with.



Bug Fixes

A number of bugs were addressed and fixed. Among these:

- **Deleting Pages:** Fixed an issue where problems resulted when two CMS pages were given the same friendly URL and you tried to delete one of them (HOC3-5751)

- **Forms:** For advanced users of forms who are using the form requirement that a user needs to log in, the user was being redirected to the my account page after logging in. Now, when logging in via a form, the user will remain on the form page. (HOC3-5891)
- **My Account Page -** When someone had a connection in pending status -- the connection was listed as both "Pending" and "Pending Approval". The duplication has been removed. (HOC3-5947)
- **Check-In Kiosk QR Code URLs --** an issue where some sites were experiencing non-working URLs for QR codes (Access Passes) has been fixed. (HOC3-6070)
- **Team Captains were able to sign up more team members than available slots: (HOC3-5749)** In some public site templates, it was possible for a team member, when editing the team signups for an occurrence, to sign up more team members than the number of available slots. This has been fixed.
- **Minor Waiver on File Required:** The rarely used opportunity sign-up restriction "Minor Waiver on File Required" - was requiring ALL contacts to have the 'minor waiver on file" checkbox on the contact record. This has been fixed, so that only minors who do not have this checkbox checked will be prevented from signing up for the opportunity.

Note: The "Minor Waiver on File Required" restriction is generally only used if your organization requires any minor to have a parental waiver turned in, and on file in your office, before you will allow a minor to sign up. The restriction is only useful if you are going to require this paperwork to be turned in for minors (before signing up for the project), AND you will update their contacts to indicate that you do in fact, have their minor waiver on file.

Do not use this restriction if you are not doing the administrative work on the back end of the system to indicate which minors do and don't have a minor waiver on file.

HOC Release Notes 3.0.4.12 (Jan 15, 2018)

There are no release notes for 3.0.4.11 as it was mostly a release dealing with issues affecting specific clients.

This release features a number of 'under the hood' improvements to increase speed and efficiency, and continue to streamline the number of API calls made between the public site and sharing portal, and the Salesforce back end.

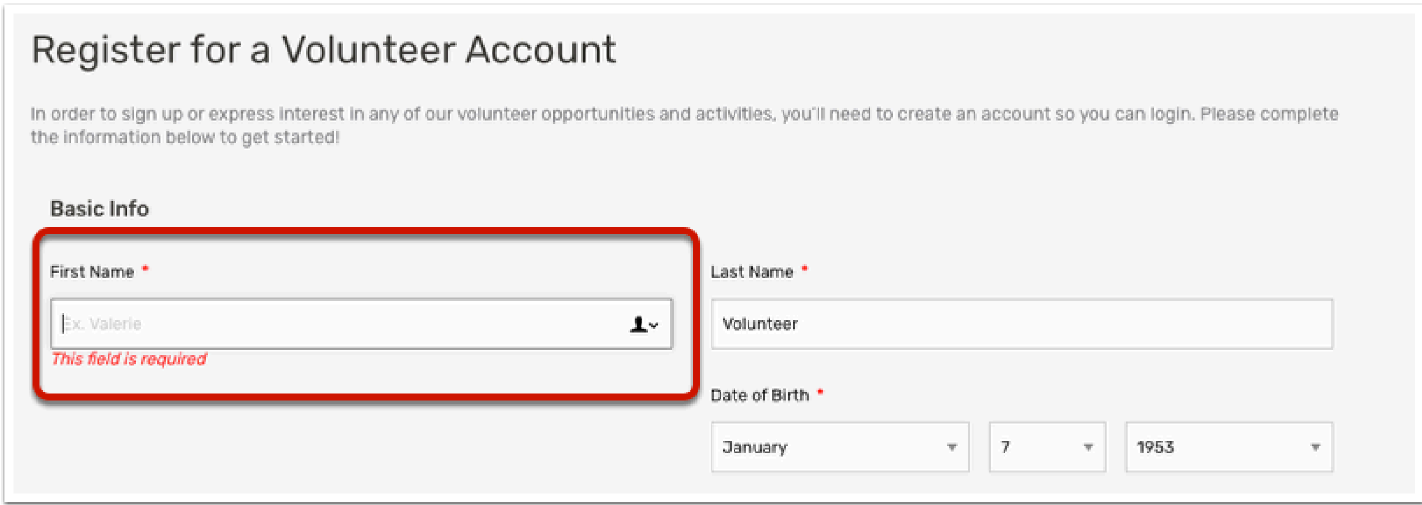
This release also mitigates some of the vulnerabilities related to the Meltdown and Spectre vulnerabilities that have been widely reported.

HOC 3.0.4.12 has the following bug fixes and features that affect all HOC Customers.

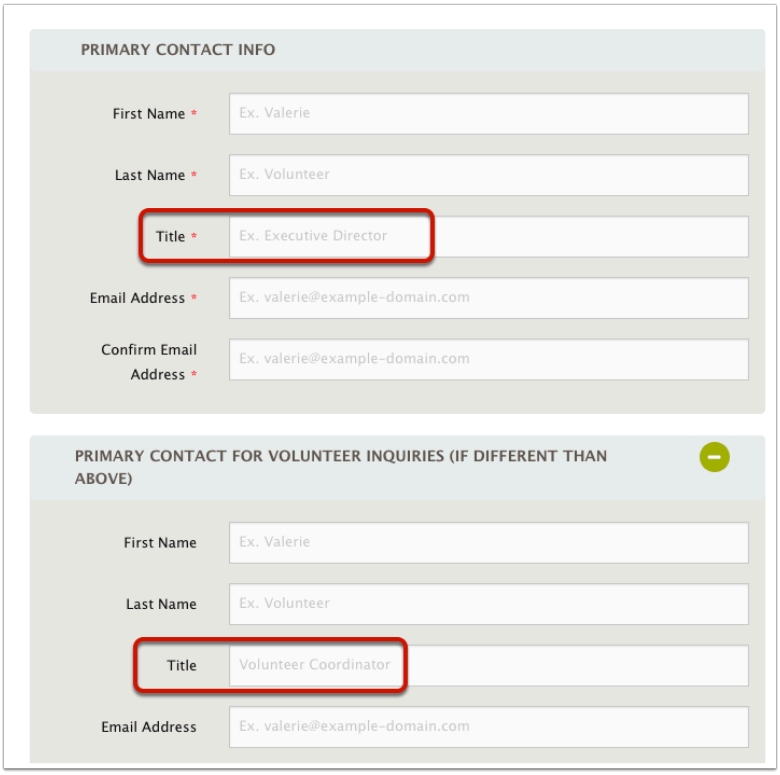
Improvements to error messages on Forms (HOC3-5592)

When a user submitted a form that had an error of some kind (i.e. a required field was missing, an illegal value was entered), users could not easily find the error. They would have to scroll on the page to hunt for the error, and it wasn't always clear which field the validation message was referencing.

Now, in HOC forms, when validation messages appear, the form is scrolled so that the first validation (error) message on the page is clearly in view - and its clear which field the message relates to.



Placeholder improvement on Organization Registration Form (HOC3-5779)



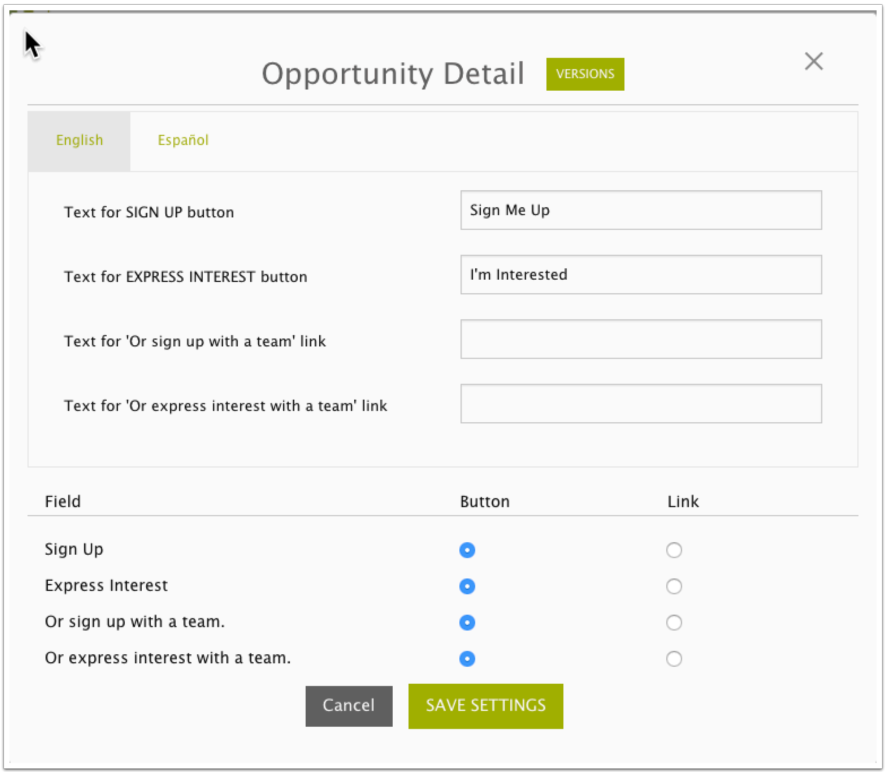
On the organization registration form - the placeholder (suggested text) for the field "Title" was inaccurate and misleading. It had said "Ex: Mr."   --   but what the title field was supposed to prompt was for the Title of the employee (i.e. job title)

The form now gives placeholder text of "Executive Director" for the primary contact, and "Volunteer Coordinator" for the secondary contact.

Ability to Customize Volunteer Opportunity Detail Page Buttons / Links (HOC3 - 5593)

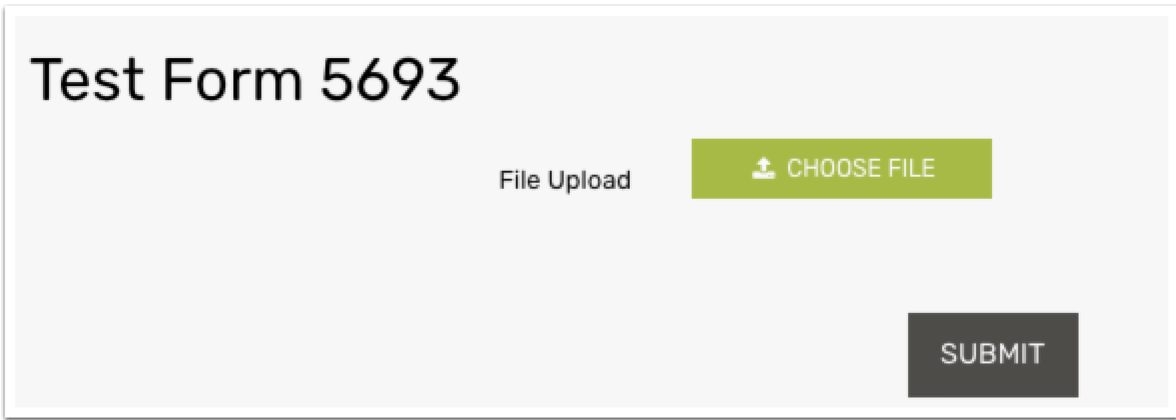
Currently, the SIGN UP and EXPRESS Interest options on the volunteer opportunity detail page appear as buttons, and the "Sign up with a team" and "Express Interest with a Team" appear as links.

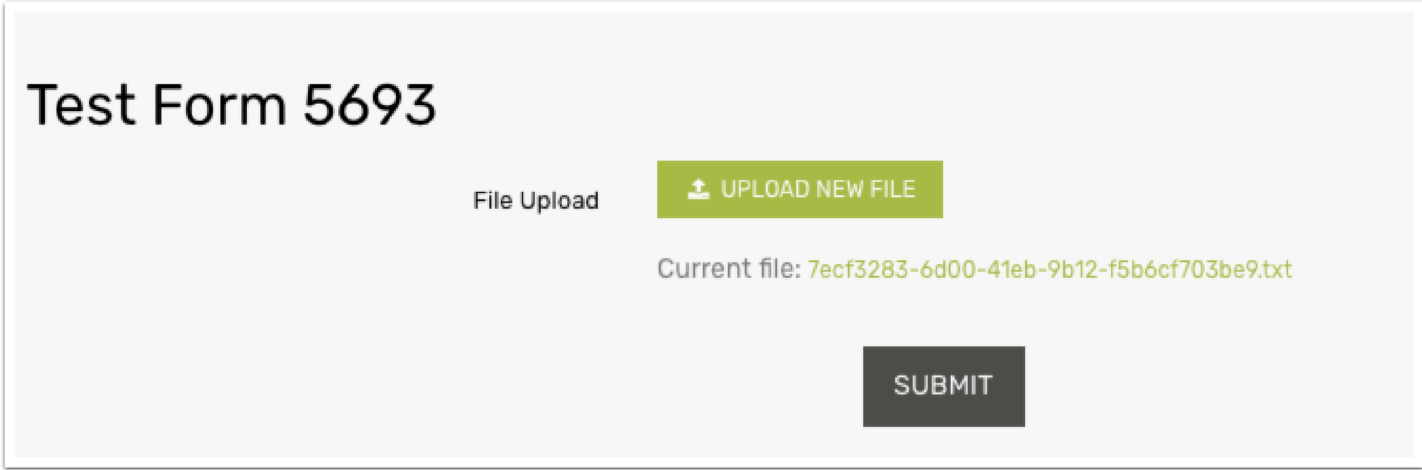
The new CMS block, "Opportunity detail page" (in the Blocks / System forms menu) - allows you to customize whether you want each to appear as links or buttons, and allows you to edit the text of the button or link if desired.



Improvements to uploading / downloading files in compliance module and forms (HOC 3-5693)

If a file has already been uploaded, the form will indicate this and give the option to 'upload new file". The button instructions will vary depending on whether a file has or hasn't already been uploaded.





Bug Fix: Problems with Invitation Codes (HOC3-5853)

Some customers were experiencing issues where invitation codes were not properly filtering and showing all opportunities instead of invitation code projects. This has been corrected.

Improved public site display in Internet Explorer and Chrome for the Mac (HOC3-5830)

Issues with public site display, home page image, and logos that were occurring in some versions of Internet Explorer and with Chrome for the Mac have been corrected.

Release Notes 2017

HOC3 Release Notes 3.0.4.10

In this release, major under the hood improvements were made. A second server was added to HandsOn Connect (There is now an East Coast server and a West Coast Server. This will allow redundancy, and greater reliability if either server temporarily gets backed up or becomes unavailable.

There are also a number of improvements behind the scene to improve performance and resolve bugs related to the Check-in Kiosk (Cookie management, screen refreshes, etc.)

There are also improvements to site functionality and appearance on mobile devices.

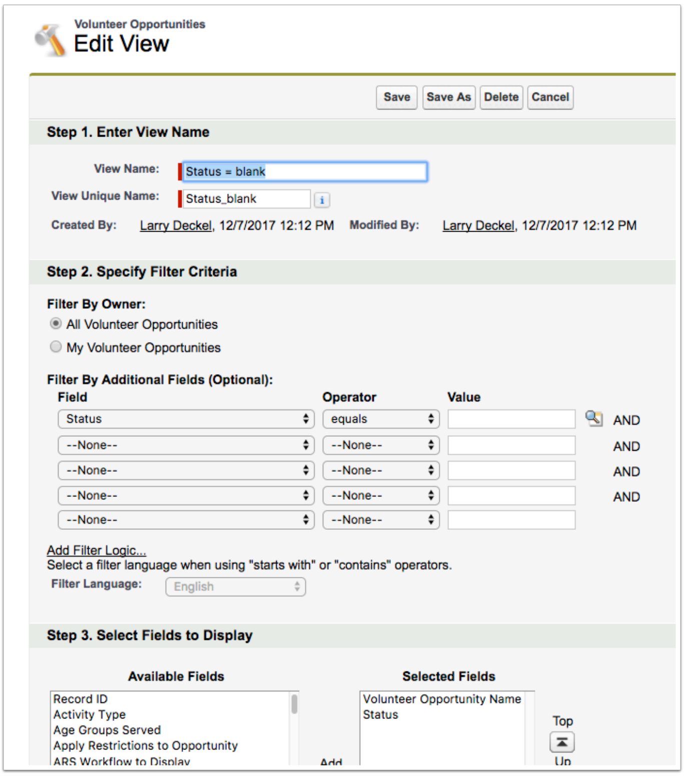
Here are highlights of this release.

Administrative Recommended Action: Check for Volunteer Opportunities that may have become unpublished due to a short-term bug. Quick fix to correct and republish.

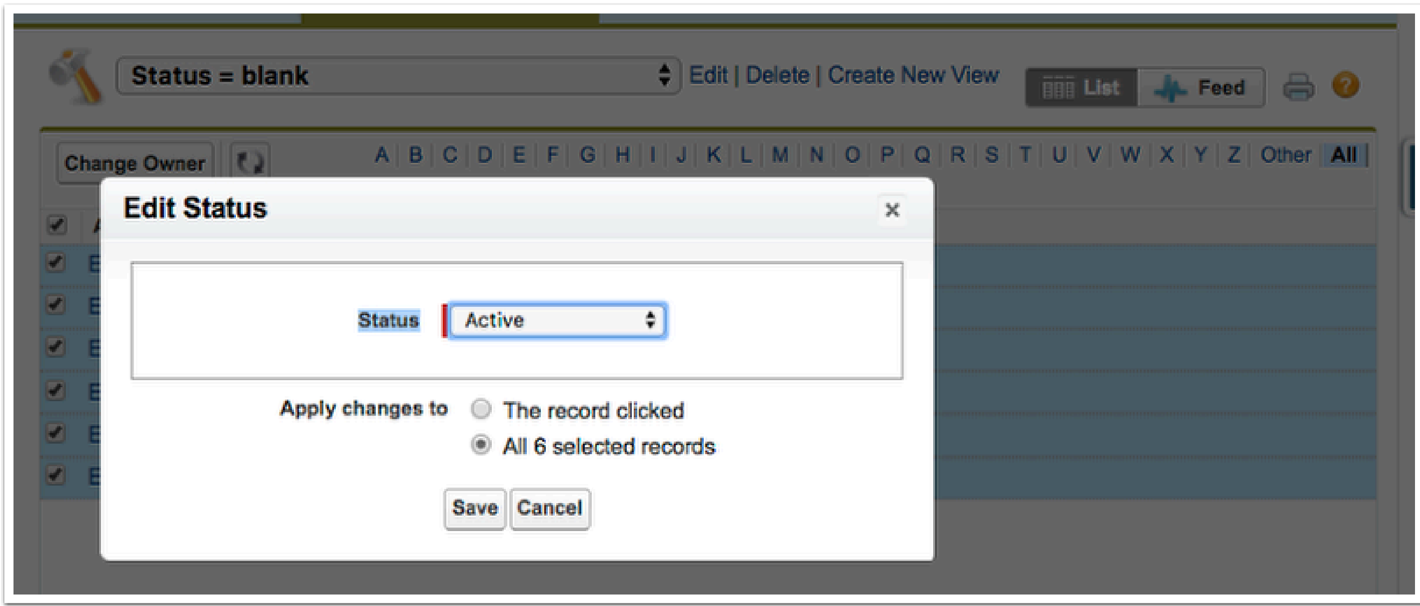
There was a temporary bug that affected the sharing portal during the first week in December. In some cases, when partners edited an opportunity description, it also unpublished the volunteer opportunity by changing its status from "active" to a blank, 'null' value.

In most cases, people have discovered and corrected these on their own.... but if you want to check and make sure none of your partner opportunities were inadvertently effected, here's a quick way to check and correct the issue:

1. Go to the Volunteer Opportunity object and create a view to show any volunteer opportunities where the field status = (blank).   This will show you if you have any opportunities that 'lost their status' during the brief period when the bug was in effect.



2. Select all the Volunteer Opportunities you find (if any), and then update the status on all of them to active. This will get them republished again. (Be sure these are all opportunities that you DO wish to have published :-)



That's it. Any opportunities that accidentally lost their 'active' status will be restored and republished.

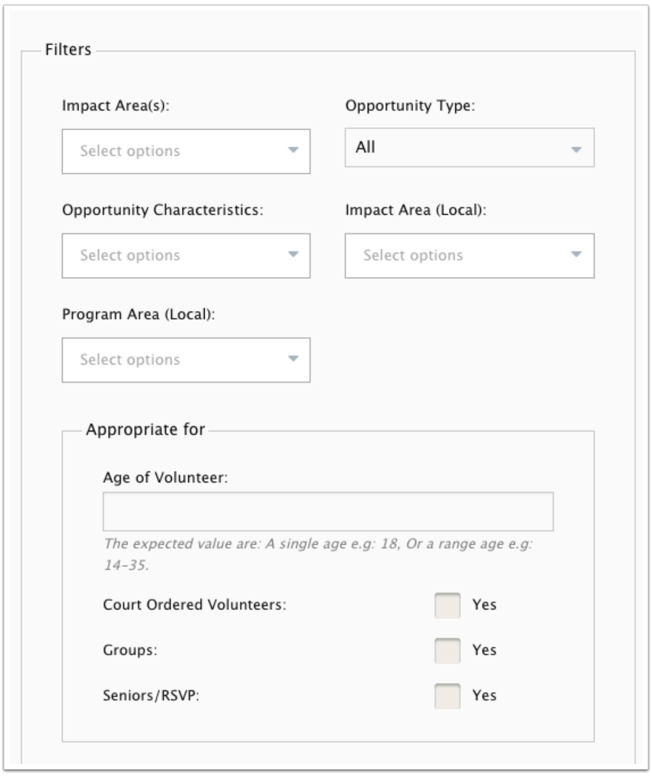
Featured Opportunity Block Improvements: HOC3-5176

The Featured Opportunity Block has gained a number of improvements to allow you to filter the opportunities shown, and determine the order those opportunities appear in.

The following new filters are now available:

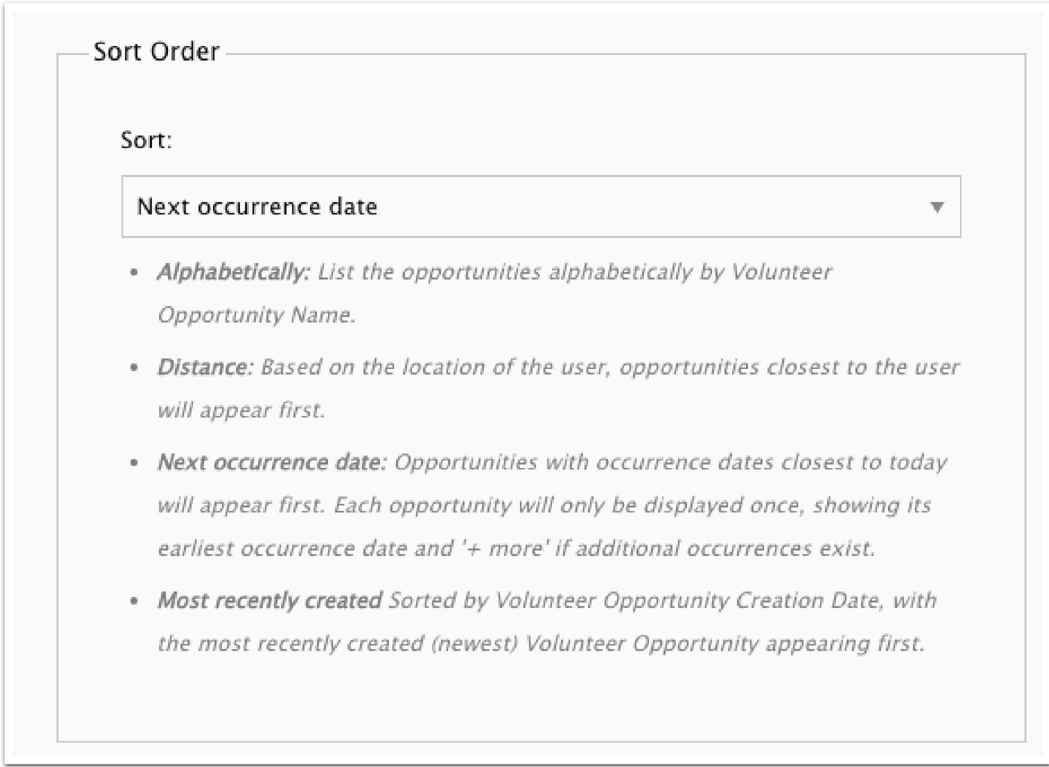
- Opportunity Characteristics -- (this is now a picklist that corresponds to this custom field in the volunteer opportunity record. There is no longer a need to look up the picklist items, and put quote marks around the characteristic you want to use (as was required in earlier versions of this block)
- Impact Area (Local) -- This field can be populated with picklist items you choose (and these terms are also accessed via keyword search on the search page).
- Program Area (Local): This field can be populated with picklist items you choose (and these terms are also accessed via keyword search on the search page).

In the Appropriate for section of the filters, the "Age of Volunteer" field has been updated to match the way this filter works on the search page. Specify an age, and only opportunities that are appropriate for that age (based on 'minimum age (with adult)" will be shown.



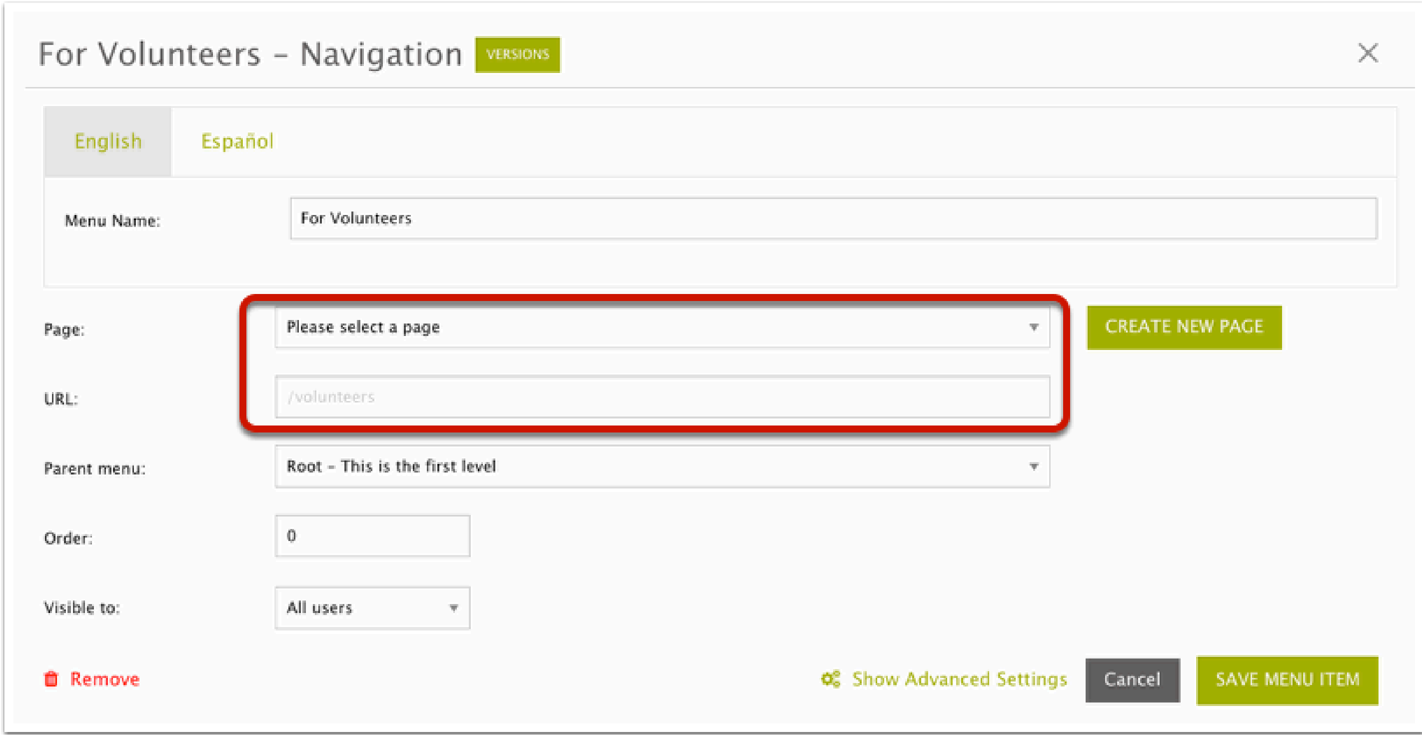
If you have a featured opportunity block that used the earlier version of "Appropriate for "Age of volunteer" -- you should update the block and enter the minimum age you want to use. The old filter settings ("adult" "children and youth" etc will no longer be in effect).

The following sort options are now available:



CMS Improvement: Menu items can be created that do not go to a page or URL (HOC3-4089)

If you wish to create a 'root' menu item that does not go to a page, but simply opens submenu root items, its now possible.   Previously you had to select a Page or URL for each menu item. Now you can leave these blank which will create a menu item that does not go anywhere (but serves as a section label with sub-navigation under it.



Check-In Kiosk - General Performance Improvements

A number of improvements and bug fixes have been added to the check-in kiosk add-on. Among these:

- Fixed issues where screen did not return to welcome screen
- Fixed certain issues in which kiosk freezes and does not go to next screen
- Improvement management of session cookies
- Improved Email Validation - resolves entering invalid email addresses into kiosk (HOC3-5573)

Check-In Kiosk: Ability to check in for Individually Scheduled Opportunities (Beta) HOC3-616

In this release we are updating the Check-in Kiosk to make it possible for a volunteer to check-in for Individually Scheduled Opportunities. Here are the current limits to how this works at this time:

1. If a volunteer has an existing connection for an "Individually Scheduled / With Schedule" opportunity for TODAY, in either Active or Pending status - they will be able to check-in for it via the kiosk.
2. If a volunteer has an existing connection for an "Individually Scheduled / Express Interest Only" opportunity in confirmed status, (scheduled to take place TODAY)... they will be able to check-in for it.

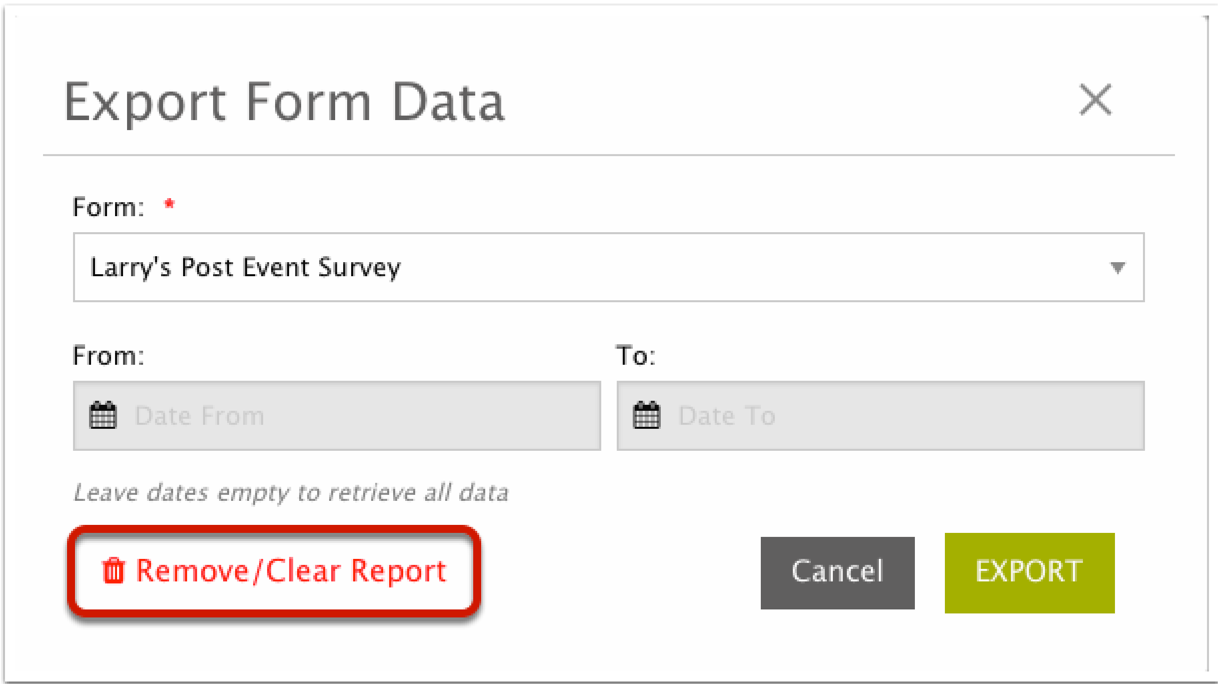
3. Guests will not be able to check in for Individually Scheduled Opportunities at this time. (That is on the roadmap for future functionality).

As this is a BETA release - please feel free to test this in your check-in kiosk, and report any issues or errors you might find. It is available and active for all kiosks -- so give it a try with a few Individually Scheduled Opportunity connections and let us know how it works for you!

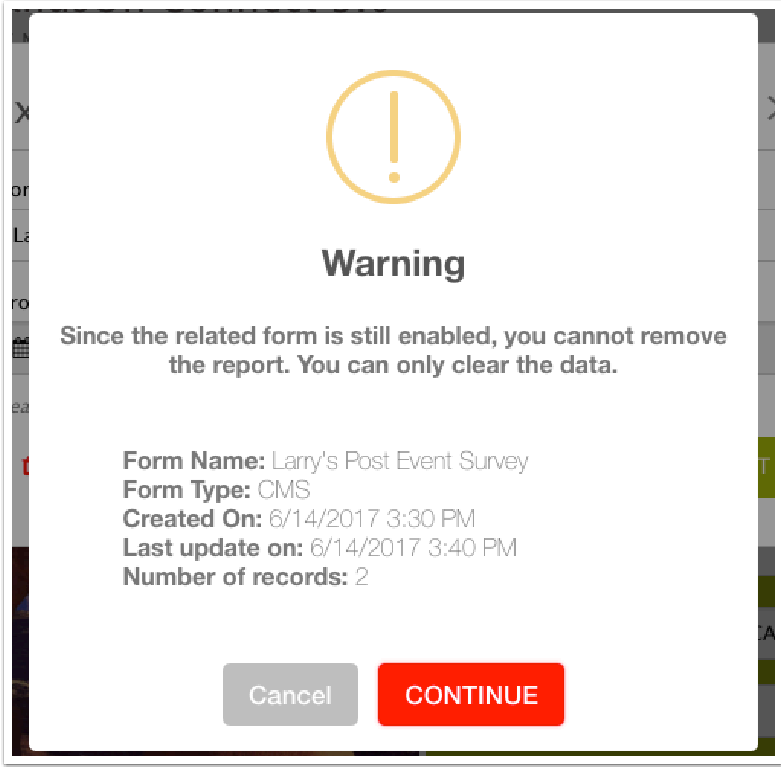
Forms Improvement: It's now possible to remove form data from forms, and delete forms no longer in use. (HOC3-4760)

Previously - all submissions for forms were exportable via the 'export form data" menu ... but if you no longer needed that data, and no longer used the form -- you weren't able to get rid of that from the picklists of form data.

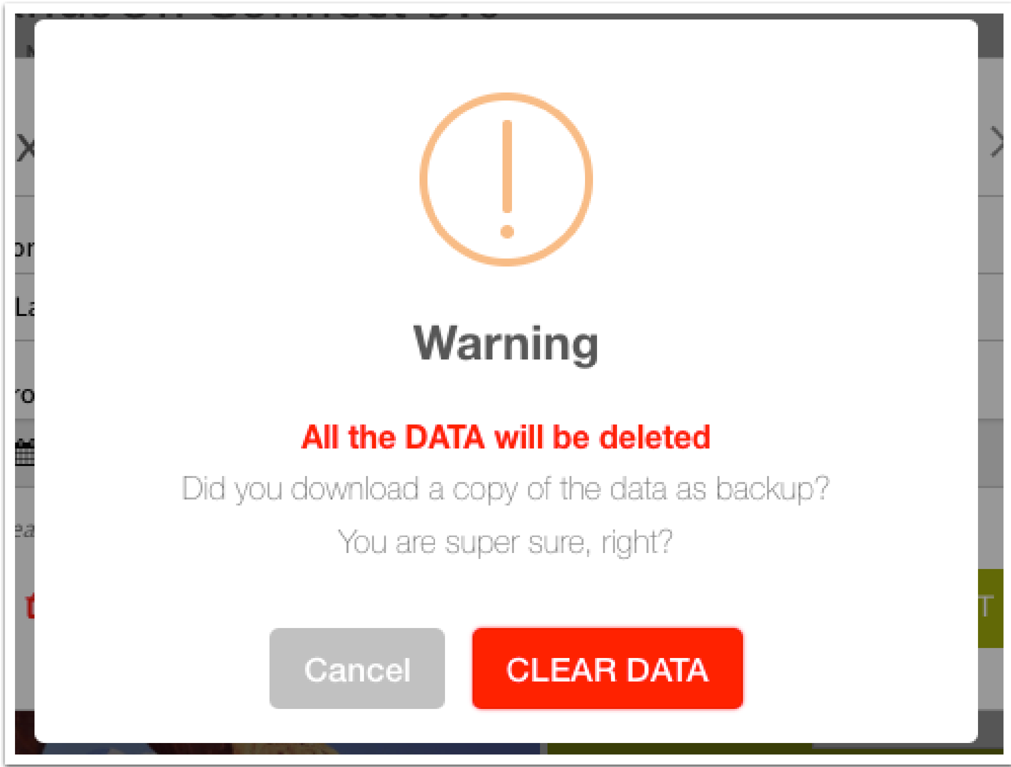
Now, if you no longer need the form data - you can remove the report's data permanently by clicking on the "Remove / Clear Report" link:



You will not be able to remove the form itself from the picklist if it is still enabled.



You can however delete the forms data by proceeding:



If the form is not enabled - you'll be able to delete both the form and all its data!   Be sure you export your form data (as a backup) before deleting it, as there is no undo once you clear the data.

Donation Form Improvements (HOC3-5512)

The following improvements have been made to donation forms:

1 - Removed validation to force to include donation amounts when checkbox **Allow other amount** is enabled.

2 - Included new checkbox to hide the title **Donation Amounts** if desired.

3 - Included new field to manage the text of the button **Donate** and allow include custom text in multiple languages.

HOC3 Release Notes 3.0.4.9

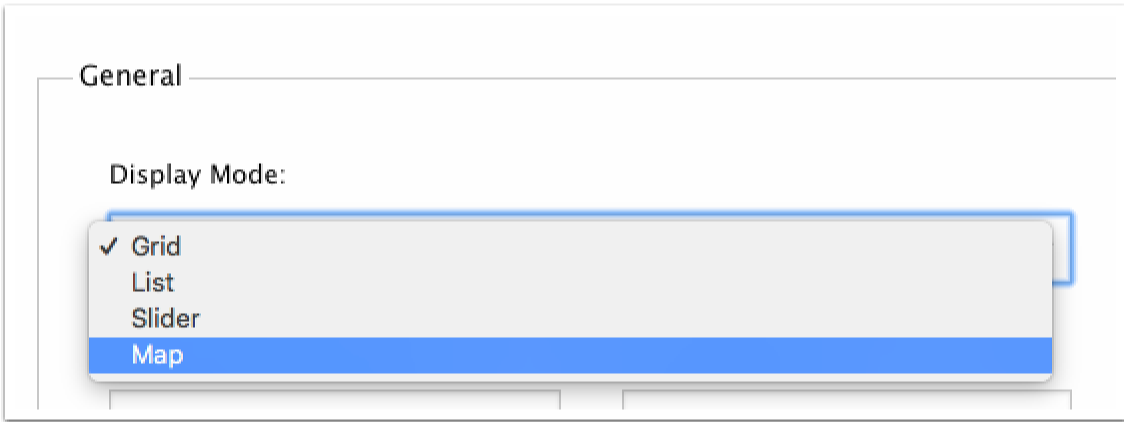
This release contains additional improvements to the ARS (Advanced Registration System) and Forms, as well as internal improvements to the operation of the check-in kiosk. A number of improvements to the APIs between the public site, sharing portal and the SF back end were implemented as well. This will improve the efficiency of the number of necessary API calls, as well as provide better options for customization of sites and sharing portals in the future.   Also corrected in this release were some errors associated with using Verified Volunteers in the Sharing Portal. Here are the primary features and fixes in this release.

New display mode for Featured Opportunity Block: Map Option (BETA) (HOC3-4753)

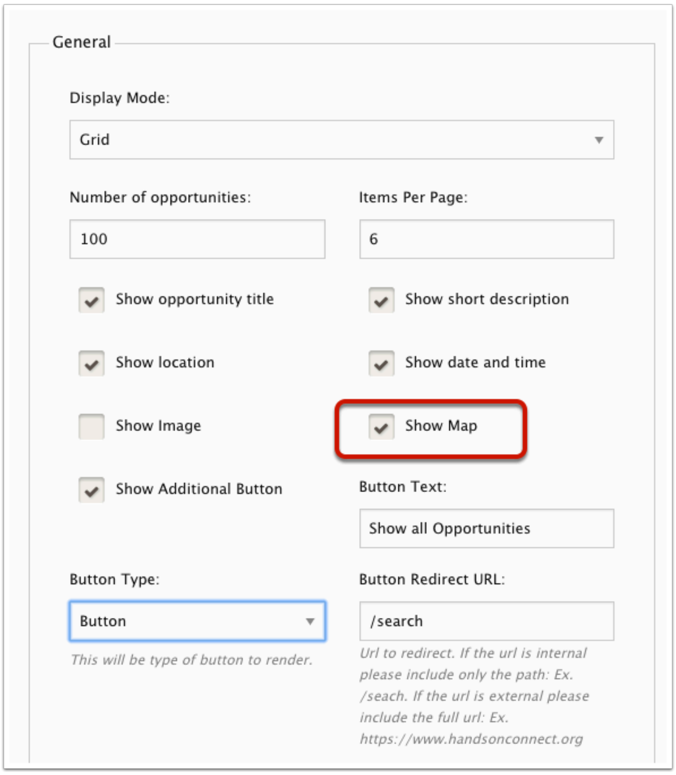
The feature described here is in beta mode and still has some known issues and limitations. Please note: that when first activating the map feature - it may take up to 24 hours for the map to start showing locations. (Before it synchs up to google - it may show a map of the pacific ocean with no opportunities appearing).

The featured opportunity block allows you to set criteria to display certain opportunities you wish to feature on the home page (or any selected page or pages in your CMS). The option to display the locations of these featured opportunities as a map, or adding a map to an existing grid, slider, or list display mode is now available in the featured opportunity block.

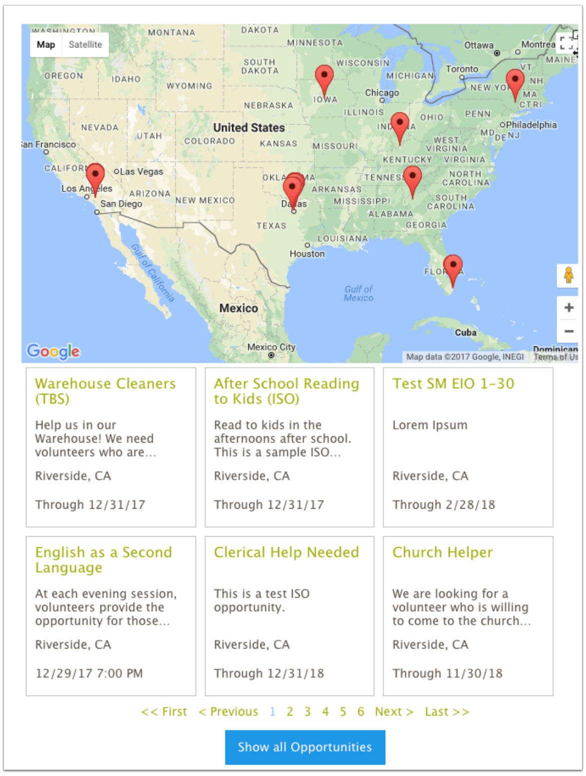
An additional display mode "Map" has been added to the Display Modes available. Choosing this displays the featured opportunities strictly in a map view.



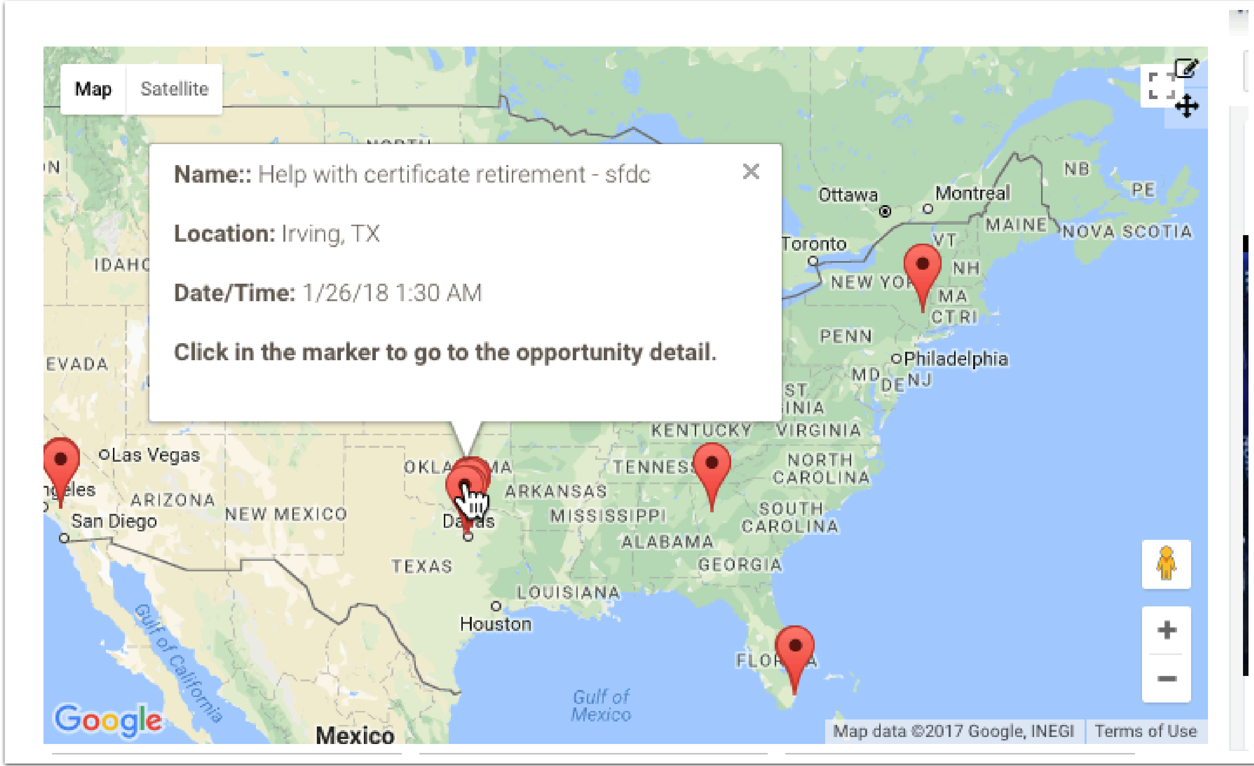
If you wish to add a map to the grid, list, or slider display mode, just check the 'show map" option in the General Section of the Featured Opportunity Block Settings:



The resulting map will appear in the block. (The map will scale itself based on how geographically spread out the opportunities you've chosen to feature are.



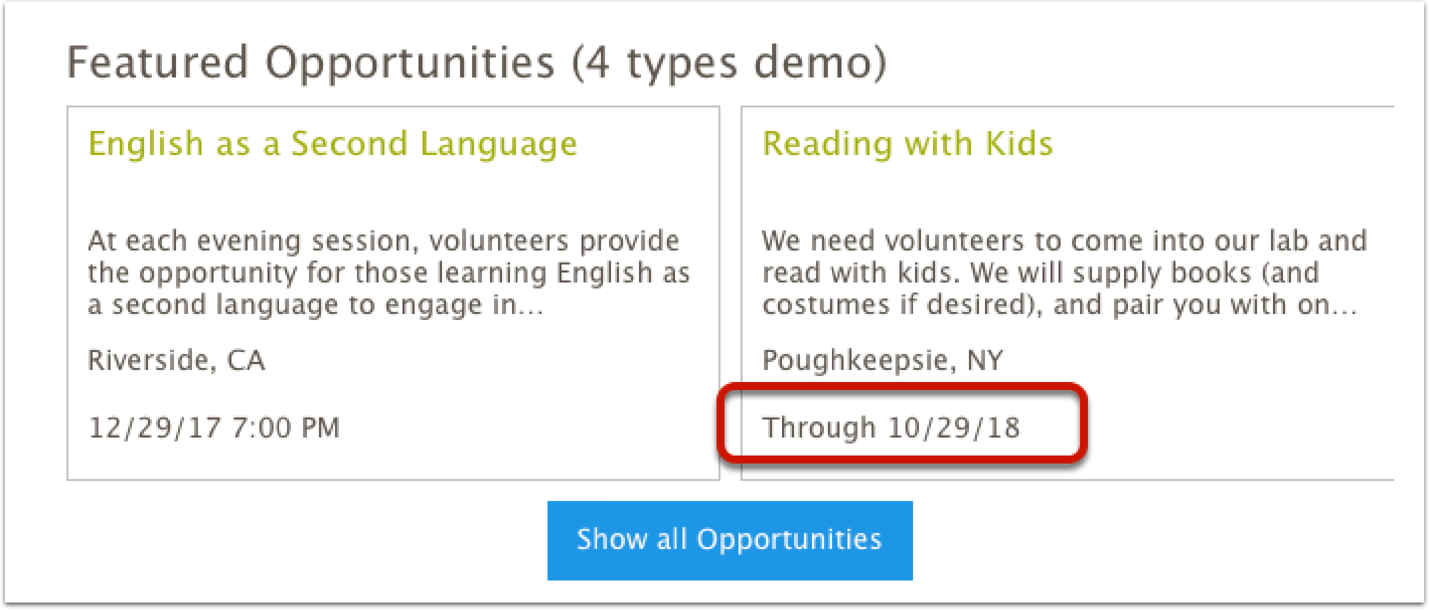
Clicking on the markers in the map will pop-up some opportunity detail and provide the option to go directly to the opportunity detail page for that opportunity.



> ⚠ If your organization does not want the exact locations of volunteer opportunities to be available to volunteers unless they have a confirmed connection to it -- do not turn on the map option. If significantly magnified, the exact location of the opportunity will be shown on the map.
>
> Some organizations do not want exact locations displayed to prevent volunteers from just 'showing up' without making a connection. Some organizations want locations kept confidential, such as battered women shelters, etc.
>
> So only turn on the map functionality if you don't have any issue with web surfers being able to find all your opportunity locations, even if they are not registered or signed up for the opportunity.

Bug Fix: Featured Opportunity Block: display of dates: (HOC3-4005)

When ISO opportunities were shown in the Featured Opportunity Block - the date shown had the start date (irrelevant) until end date. This has been corrected and now the date shown will say simply "Through (end date)"



Bug Fix: URLs to files uploaded via forms will now work in Salesforce (HOC3-5350)

There had been a security issue where the URLs for uploaded files, which appeared in Salesforce, could not be accessed. This has been fixed, When you define the file upload field in the form, and synch to a field in Salesforce, the URL that links to the file (as seen in the SF record) will now correctly access the file.

Forms Improvement: Rich Text fields (HOC3-5356)

A new field type: "Rich Text" is available for forms. This field type, when mapped to SF must be mapped to a 'rich text' field in SF. This allows a form field to allow basic rich text field characteristics similar to the HOC html editor, such as:

- Basic styles: p, h1 through h6, preformatted
- Bold
- Italics
- underline
- unordered and ordered lists
- source

Check-In Kiosk Improvement: QR Codes for check-out (HOC3-4621)

For those using QR codes in conjunction with the Check-In Kiosk - the QR code that is used for checking in to an opportunity will now be scannable for check-out as well.

Bug Fix: Registration Page - Distance Willing to Travel (HOC3-5337, HOC3-5420

For those clients displaying "Distance willing to travel" on the Registration page -- a fix has been made so that the correct distances are displayed (previously two values were displayed as "10 miles"

While its an option to display the field "Distance willing to travel" on the registration page - it may or may not make sense to display this in the context of the registration process. The value of "Distance willing to travel" is primarily used in conjunction with skilled volunteer search, and is automatically displayed on the page where a volunteer fills out their skills profile. It will appear on the skills profile page whether or not you display it on the registration form.

HOC3 Release Notes 3.0.4.8 (Nov 16 2017)

This release includes a number of improvements to performance and speed of HandsOn Connect, as well as improvements to the presentation of content in a number of HOC templates (the appearance of white lettering on a white background). Improvements to search on mobile devices were also made.

Posting Statuses: Admin Speedup Required - If you have posting statuses with dates included.

About Volunteer Opportunity Posting Statuses:

The field "Posting Status" in the volunteer opportunity record is the easiest way to filter and find volunteer opportunities in the sharing portal. The Posting Statuses that may be available for volunteer opportunities include:

- This is approved and published for volunteers to sign-up.
- This is approved and published for volunteers to sign-up with an invitation code
- This is not published. There are no upcoming, active occurrences.
- This is not published and has been submitted for approval.
- This is not published (admin only)
- This has been archived. Please contact your system administrator

The issue some HOC clients are facing:

In some instances of HOC, other posting statuses are showing up that make filtering to see published Volunteer Opportunities difficult. **Examples of posting statuses that should no longer be used:**

- We have approved your record and it was posted on (**Date**)
- Your posting expired and was moved on (**Date**)

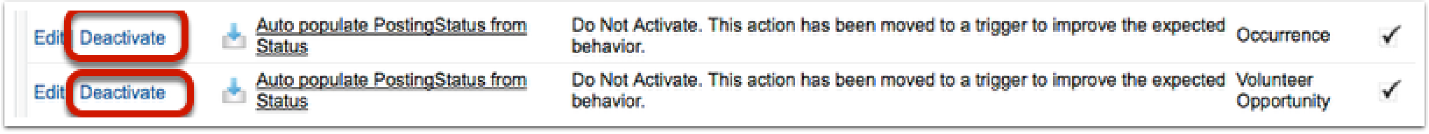
These statuses make it very hard to filter volunteer opportunities in the sharing portal. So:

If you are seeing any posting statuses with dates, please make the following admin update to prevent this from happening in the future:

1. Go to Setup / Workflows

2. Check the **two** workflows named "Auto Populate PostingStatus from Status" (There is one for occurrences and one for Volunteer Opportunties.

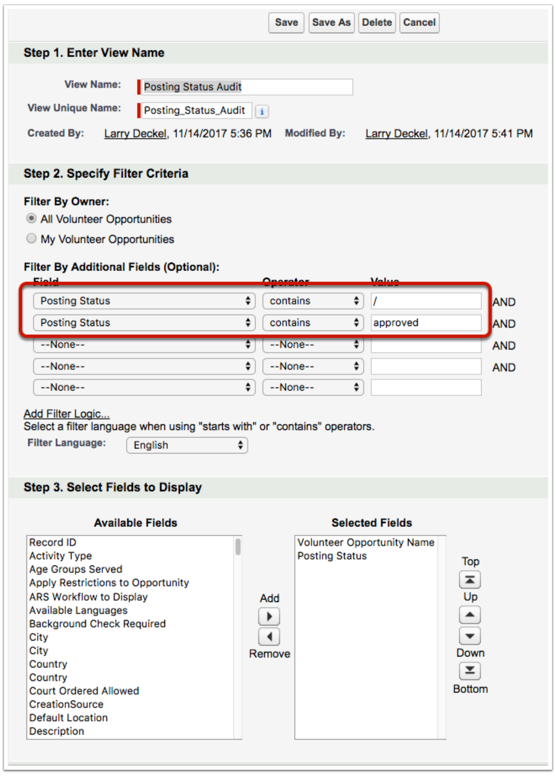
3. These two workflows should **NOT** be active. If you see the word "Deactivate" that tells you they are currently active. Click on the Deactivate button to deactivate these workflows. (They will then read "Activate" which means they are not currently active"



4. (Optional) Update your existing posting statuses to remove the 'dated' ones.

(You don't have to do this - but if you want to 'clean up' existing posting statuses for your partners to remove those with dates and replace with a standard posting status, here's what to do:

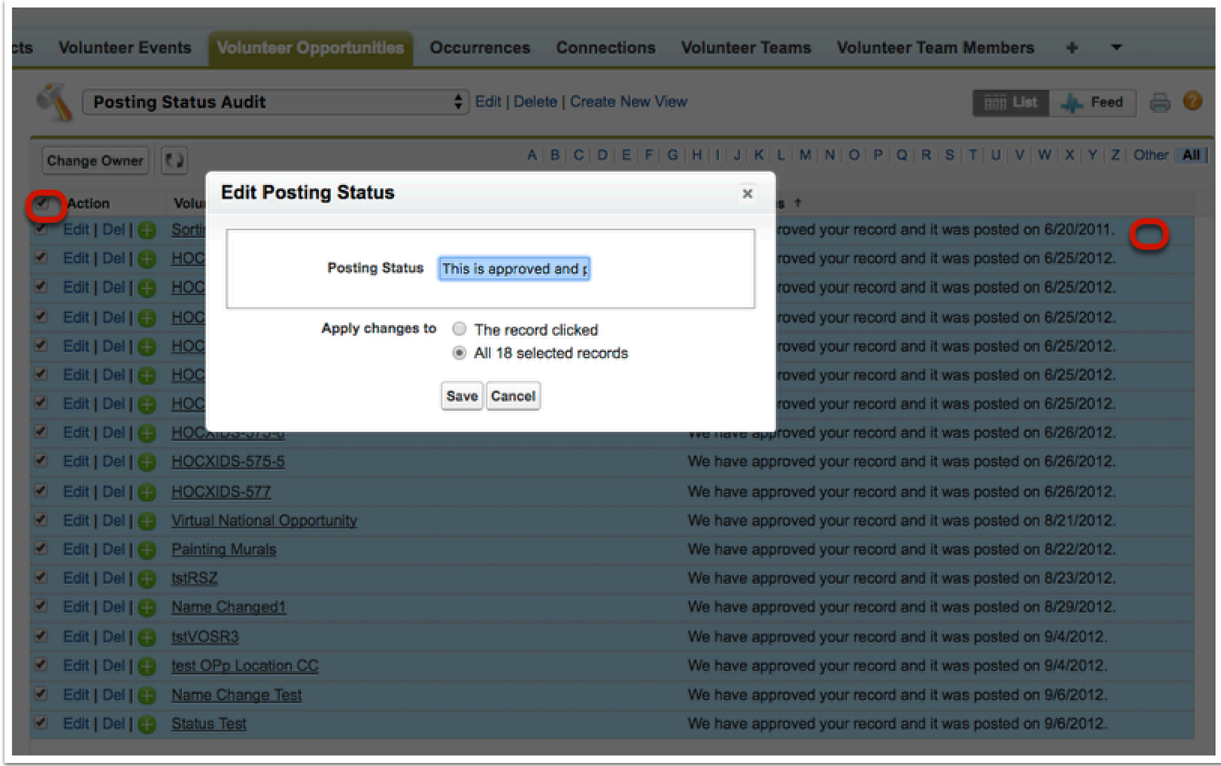
4a: To do a bulk update of existing posting statuses, create a list view to find all the Posting statuses that contain a date and the word approved. To do this create the following list view:`



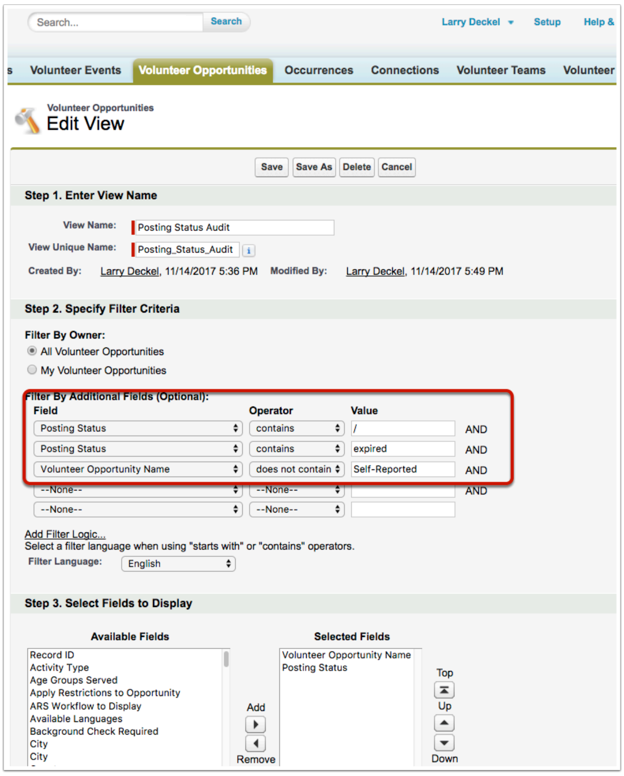
This returns a list of any volunteer opportunities that have the posting status we wish to update.

4b: Select all of these opportunities, and click on edit in the Posting Status column. Set the posting status for all the selected records to "This is approved and published for volunteers to sign-up." (Get the words exactly correct, as this is the default filter used in the sharing portal, which indicates which opportunities are published on the public site")

```
This is approved and published for volunteers to sign up."
```



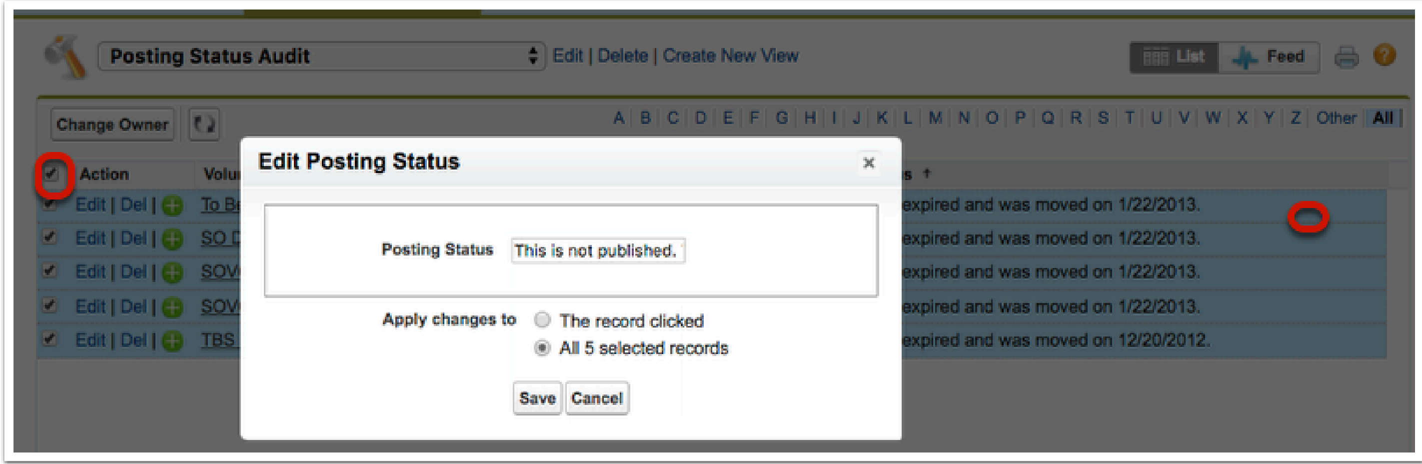
4c: Now edit your view, and look for the opportunities with posting statuses that contain the word"expired" and whose Volunteer Opportunity name does not contain "Self-Reported" (because self-reported opportunities cannot be edited)



This will give you all the dated "expired" opportunities that you can edit.

Update all the records to change the posting status to "This is not published. There are no upcoming, active occurrences."

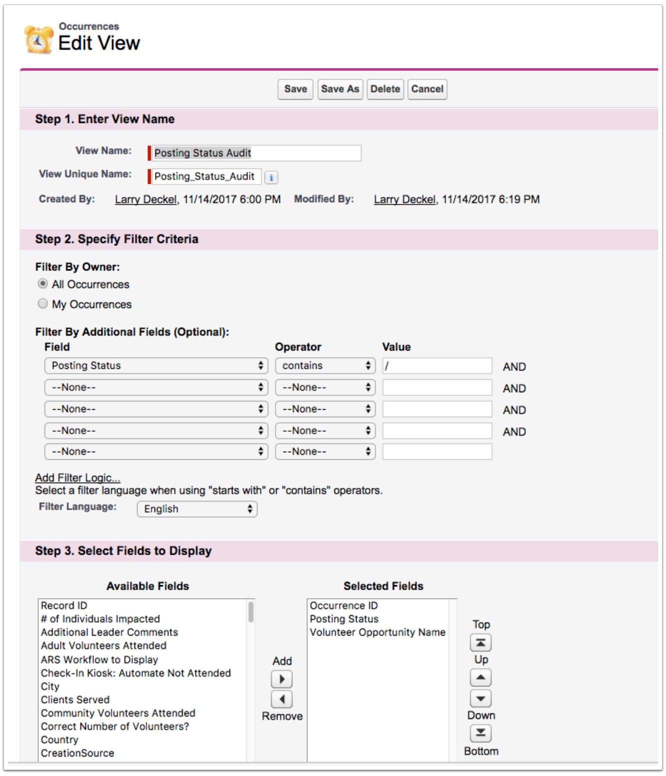
```
This is not published. There are no upcoming, active occurrences.
```



Now you will no longer have these 'dated' published and expired posting statuses cluttering up your filter in the sharing portal.

5. (optional) update the posting statuses of your occurrences if you like in the same way. This will make filtering in the occurrence related list in the portal easier.

Go to the occurrence tab, create a new view to filter on any dated posted statuses in the occurrence records.



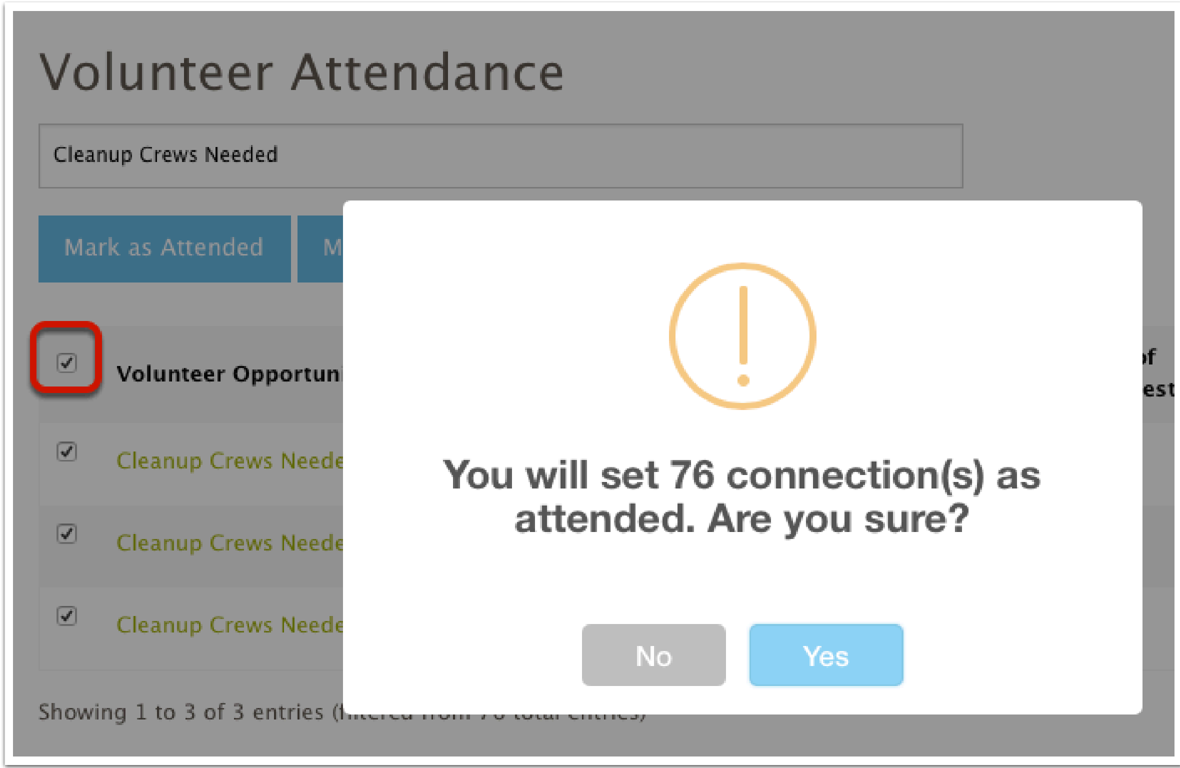
Replace all occurrences with the posting status "Your posting expired and was moved on (Date" with the posting status: "This is not published. The Date & Time is in the past."

Bug Fix: Sharing Portal: Report Attendance (HOC3-4359)

Some HOC partners, when filtering or doing a search for connections on the "Report Attendance" screen, found that when they checked the 'select all' box - they were warned that ALL connections were going to be updated, not just those that displayed by the current search criteria.

This has been fixed, and now if you search, and 'select all' - you'll only be updating the found connections. (The number of connections you are warned you will be updating will match the number of connections found in the search"

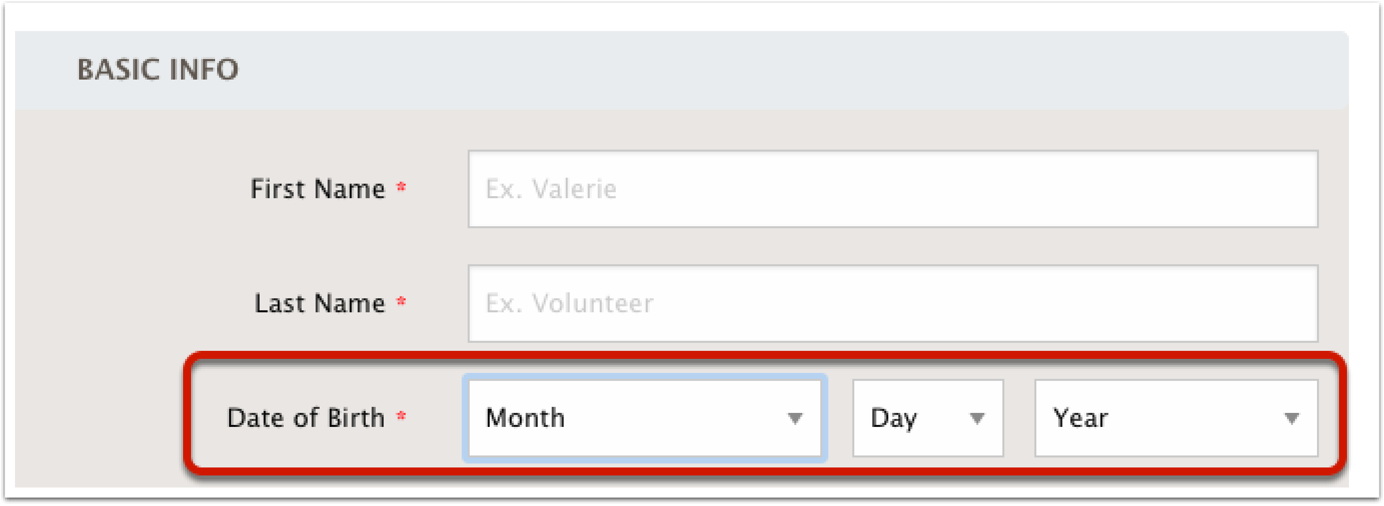
Here's a screenshot of the bug as it appeared for some. Even though only 3 connections are returned. When selecting the "all" checkbox - a warning tells you that 76 connections will be updated. The select all should only update the 3 connections shown via the search. This is now fixed.



U/I Improvement: Volunteer Registration Form - Date of Birth (HOC3-5110)

Filling in the date of birth field on the volunteer registration form is now required. The default age that had been shown previously (which was the minimum age for a volunteer), has been replaced with helper text: Month, Day, Year.

A registering volunteer must fill in these fields in order to register.

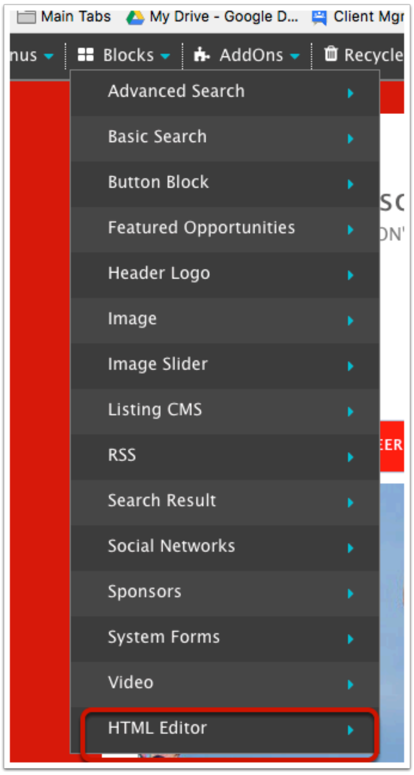


WYSIWYG block and editor more accurately renamed to "HTML Editor" (HOC3-5199)

The editor used for creating content in HandsOn Connect's CMS is actually an HTML editor, and not a true "What You See Is What You Get" display. This is because HOC allows you to add .css and other content into the source code of your content, and your site design itself actually controls the actual color, size and fonts that your content will assume once published. So the editor can only 'show you' what you're doing in the editor directly, and does not reflect how the content will actually appear on your site.

Nonetheless, the editor gives you good tools for quickly creating content and manage it without knowing any knowledge of html, css or other code. What you are doing in the editor is creating html -- but the actual 'appearance' on the site will look different than what you see in the editor. Hence its not truly a 'What you see is what you get" editor.

When the content is saved and shown in the CMS - you'll see exactly how it will look!


Main Tabs
My Drive - Google D...
Client Mgr
nus
Blocks
AddOns
Recycle
Advanced Search
Basic Search
Button Block
Featured Opportunities
Header Logo
Image
Image Slider
Listing CMS
RSS
Search Result
Social Networks
Sponsors
System Forms
Video
HTML Editor

November 2017 Release Notes

The November release has a number of small improvements that will make the transition to Salesforce Lightning easier in the future. Here are the most important 'fixes' in this release:

Administrative Update Required: Update Email Template "Volunteer Status has been declined for Individually Scheduled" (HOCAVV-878)

A bad merge field exists in the email template "Volunteer Status has been declined for Individually Scheduled".   System admins are encouraged to update their email template to ensure that the merge field is properly populated:

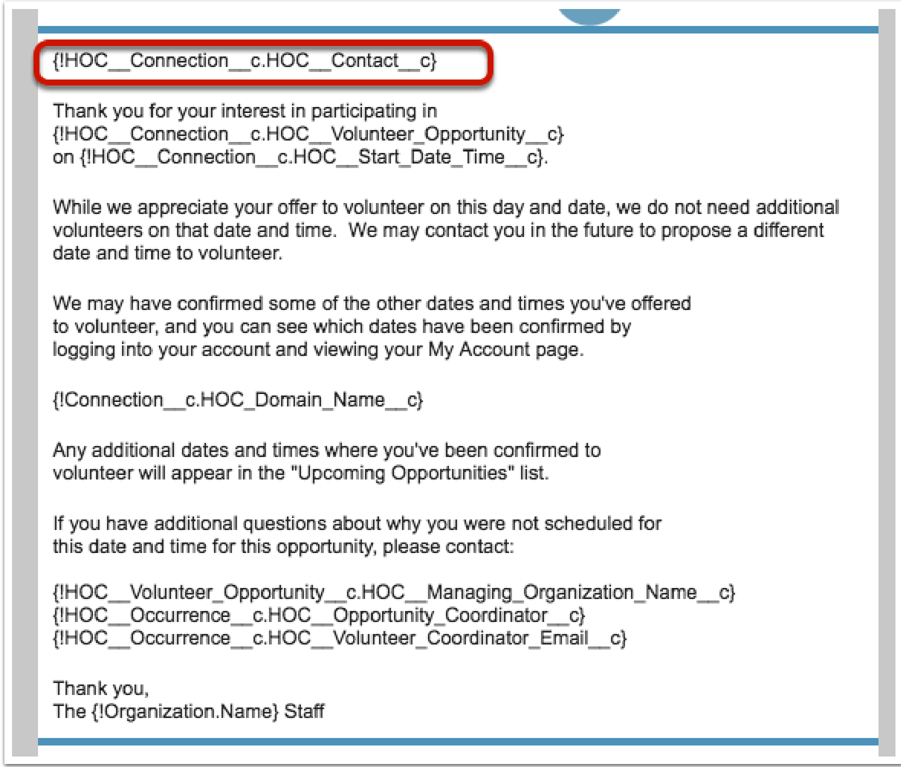
To perform this quick update do the following:

1. In Salesforce, go to Setup > Administer > Communication Templates > Email Templates
2. Search "Volunteer Status has been declined for Individually Scheduled" click on label
3. Click over "Edit HTML Version"
4. The merge field at the top of the email: {!Contact.Name} Must be replaced with:

```
{!HOC__Connection__c.HOC__Contact__c}
```

Save. And then select "edit Text Version' and use the "Copy text from HTML Version button". Save again.

Corrected template will look like this:



{!HOC__Connection__c.HOC__Contact__c}

Thank you for your interest in participating in
{!HOC__Connection__c.HOC__Volunteer_Opportunity__c}
on {!HOC__Connection__c.HOC__Start_Date_Time__c}.

While we appreciate your offer to volunteer on this day and date, we do not need additional volunteers on that date and time. We may contact you in the future to propose a different date and time to volunteer.

We may have confirmed some of the other dates and times you've offered to volunteer, and you can see which dates have been confirmed by logging into your account and viewing your My Account page.

{!Connection__c.HOC_Domain_Name__c}

Any additional dates and times where you've been confirmed to volunteer will appear in the "Upcoming Opportunities" list.

If you have additional questions about why you were not scheduled for this date and time for this opportunity, please contact:

{!HOC__Volunteer_Opportunity__c.HOC__Managing_Organization_Name__c}
{!HOC__Occurrence__c.HOC__Opportunity_Coordinator__c}
{!HOC__Occurrence__c.HOC__Volunteer_Coordinator_Email__c}

Thank you,
The {!Organization.Name} Staff

Bug Fix for 2.0 premium portal users - Print Check-in Sheet and Answers Report fixed.

Some users of the HOC 2.0 partner and volunteer leader portals were experiencing 'page not found' errors when clicking on the occurrence record "Print Check-In Sheet" and "Run Answer Report" buttons.   This has been fixed and check-in sheets and answer reports will run as expected.

Bug Fix: Unable to edit volunteer opportunity description (HOCAVV-1047)

Some HOC 2 and 3 customers customers were experiencing a "URL No Longer Exists" error when attempting to edit Volunteer Opportunity Descriptions. This has been fixed.

Bug Fix for 3.0 users: New Team Contacts no longer receiving incorrect email (HOCAVV-1042)

In HOC 3.0 -- when team members were added to a team - they were receiving an email saying they had been registered on the public site. This email will no longer be sent. They will instead receive an email notifying them that they have been added to a team and that if they are not already registered, they can register on the site.

HOC3 Release Notes: 3.0.4.7 (Nov 1, 2017)

This release includes a number of 'under the hood' improvements and bug fixes including:

- Improvements in the CMS menu interface
- Improvements in Forms for handling Hidden Fields
- Improvements to new Universal Public Site Template (Beta)
- Improvements to speed and efficiency in communications from sharing portal and public site to Salesforce back end
- Improvements to functionality of multi-lingual sites
- Improvements to HOC Mobile pages.

There are no new features or user-visible bug fixes in this release - but these important architectural improvements will make for a faster, more responsive HandsOn Connect!

HOC3 Release Notes: 3.0.4.6 (Oct 30, 2017)

This release contains a number of bug fixes and performance improvements including

- improvements to the Advanced Registration System,
- improvements to PayPal integration for ARS
- Improvements to Click & Pledge integration for ARS
- improvements to uploading thumbnail images for featured opportunity block via the sharing portal,
- Improvements to public site templates and layouts

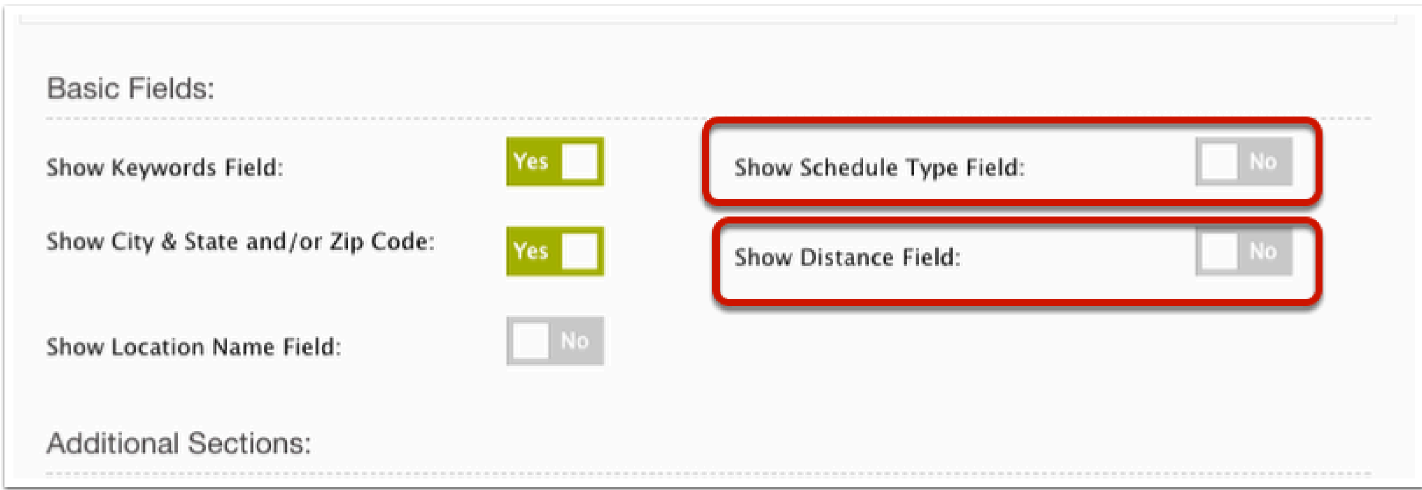
Here are the highlights in this release:

Ability to control which filters are displayed in top section of Advanced Search Box (HOC3-5021)

The Advanced Search block now has additional configurations making it possible to turn off fields in the upper section ("Basic Fields" of the advanced search block that are not relevant to your organization such as "Schedule Type", or 'Distance".

If not displayed - these fields will receive their default value (i.e. - Distance will be set to "Any". The City & State will be calculated based on the users geo-location which the user must 'allow' when using the site.

We do recommend that you enable EITHER "Show City & State and/or Zip Code" or "Show Location Name Field" .(See 3.045 release notes here about the function and limitations for the "Location Name Field".



> It is not possible to remove the filters "Date From" "Date To" - though the content is automatically populated based on today's date (as the from) and an open ended "To" date.

Bug Fix: EIN Field now supports dashes in addition to numbers (HOC3-5112)

The field "Federal EIN" on the organization registration page /organization-sign-up has been fixed to allow more than numbers when entering an EIN number (which typically has a dash in it).

Bug Fix: Featured Opportunity Block date display (HOC3-5134)

For organizations featured Individually Scheduled Opportunities in the featured opportunity block - the date of the opportunity was confusing (since it had the occurrence start date (which is in the past). Now ISOs in the featured opportunity block will have the date listed as "Ongoing" - same as the date appears in search.

Bug Fix: Emails related to ISO opportunities were not being sent (HOC3-5228)

For a short period of time, it was found that emails sent to volunteers and to Opportunity Coordinators were not being sent when volunteer signed up for Individually Scheduled Opportunities (with schedule and/or Express Interest Only). This has been corrected and email notifications are once again being sent.

HOC3 Release Notes 3.0.4.5 (October 19, 2017)

This release features a number of improvements to the visual settings possible in the new HandsOn Connect public site template, some email improvements to automated emails, and additional capabilities for the CMS. Additionally, some identified spelling / grammar issues on the public site and in error messages were fixed, and additional improvements for customers using multiple languages. Here's the highlights in this release:

Email improvement: Automated emails notifying OC's of new connections will not be sent for administratively created connections by the Opportunity Coordinator (HOC3-4228)

When volunteers sign up or express interest, opportunity coordinators are usually sent notifications that a connection has been created (unless these emails are configured to NOT be sent system-wide, OR at the occurrence level they are turned off).

Nonetheless, when these notifications are generally turned on (as is standard configuration), Opportunity Coordinators were receiving these notices even when they administratively created connections themselves in the sharing portal.

Since the person creating the connection administratively is aware they've done so - receiving an email telling you that a new connection had been made seemed unnecessary and even a bit irritating :-)

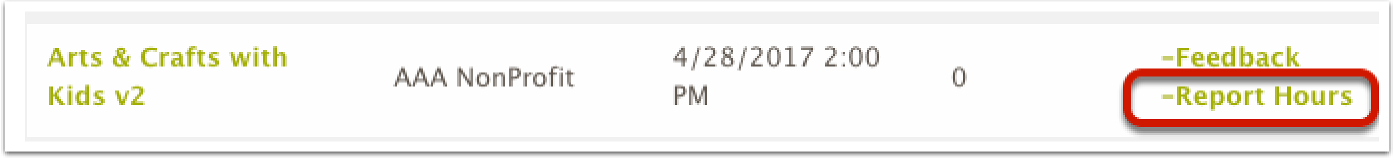
HOC has been updated so that when an OC administratively creates a connection - they are not bothered with an email notification telling them a new connection has been created.

Ahhh -- a few fewer emails to worry about :-)

Issue resolved: Multiple emails sent to Opportunity Coordinators asking them to report attendance (HOC3-3716)

A few users reported that Opportunity Coordinators were getting frequent emails asking them to verify service hours on opportunities where attendance was not yet marked. They got them the day after the project, but often got them months after the project was completed.

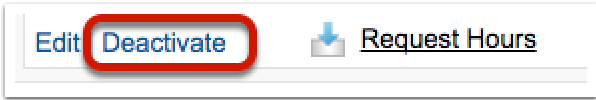
The reason for this turns out to be the fact that while a reminder is sent the day after an opportunity by one workflow (unless disabled), an email continues to be sent anytime a volunteer manually submits unverified hours using the "Report Hours" link in the account overview.



This generally is a good practice, because if a volunteer wants to report their hours, they'd obviously like the Opportunity Coordinator to verify them, even if they do this months after the opportunity took place. Volunteers tend to want their service verified by the Opportunity Coordinator.

Nonetheless - some people prefer NOT to have this extra email sent to their Opportunity Coordinators.

The email is controlled by a workflow called "Request Hours" which can be found in Setup / Workflow Rules/
If you do NOT wish this email to be sent, just deactivate the workflow.



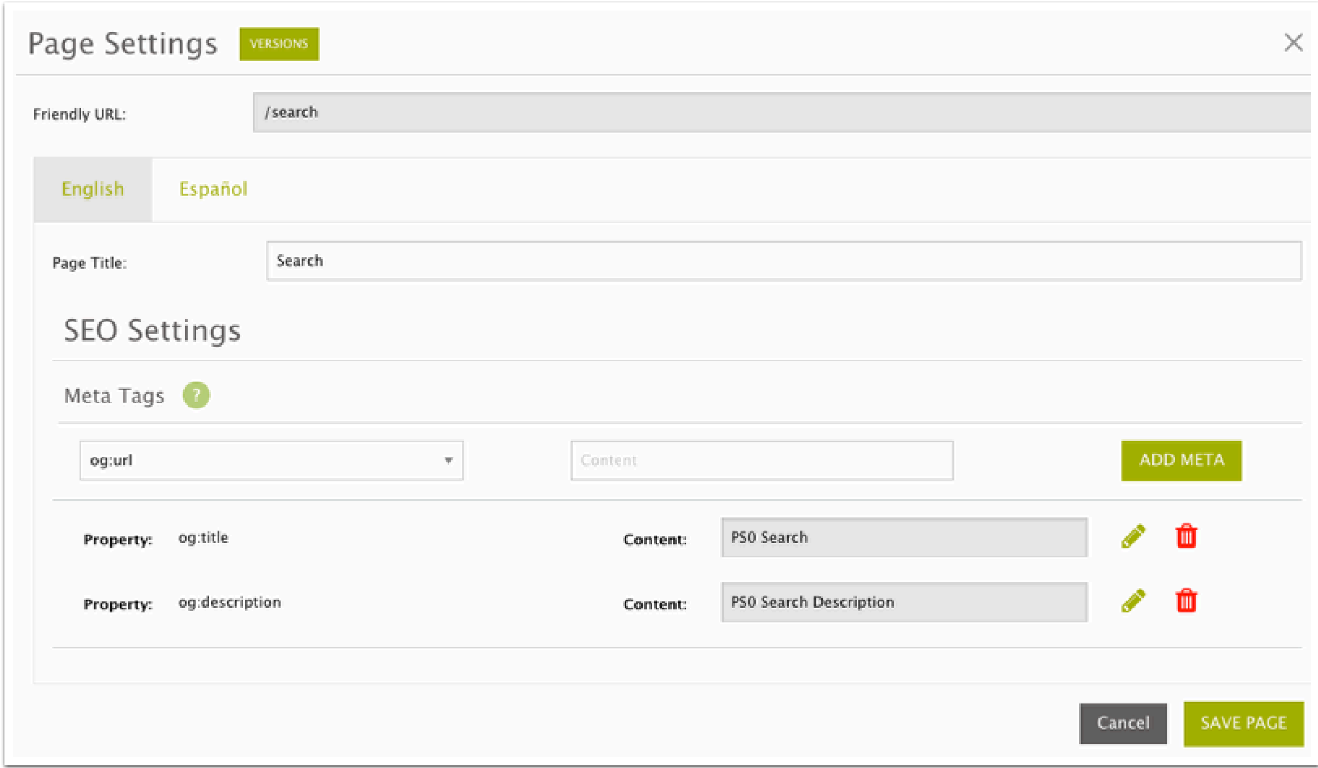
It turns out however, than in HOC 3.0 - even in instances where the workflow was deactivated, the email was STILL being sent. (And if the workflow was active, TWO emails were being sent). This bug has been corrected and HOC 3 will not send ANY email when a volunteer clicks on "report hours" if the workflow is deactivated... (and will only send one email if it is activated and the normal practice in HOC.)

Public Site Improvement: Hours served limited to two decimal places (HOC3-5030)

In some cases, volunteers were seeing their 'hours served' with many decimal points (e.g. 4.3333333) . Now all hours served (in 'My Account" - and in the exportable report of service, will be rounded to two decimal points. (e.g. 4.33)

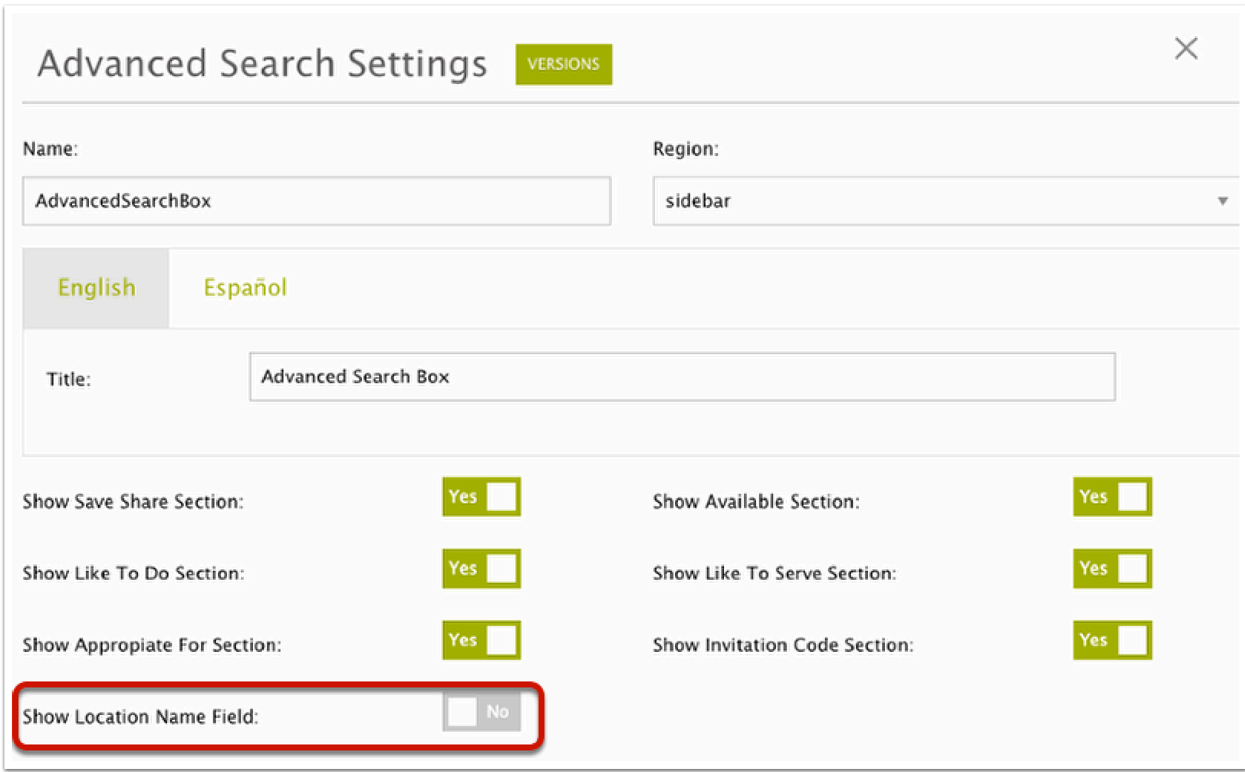
CMS: Ability to set Meta Tags for Search Engine Optimization for Home and /Search pages in HOC (HOC3-4179)

For those organizations doing Search Engine Optimization, it is now possible to set meta tags for the public site Home Page "Home" (location at /) and the search listing results page "Search" (located at /search). You'll find both of these pages listed in the CMS under Content / Pages. Choosing either page will allow you to set the meta tags.

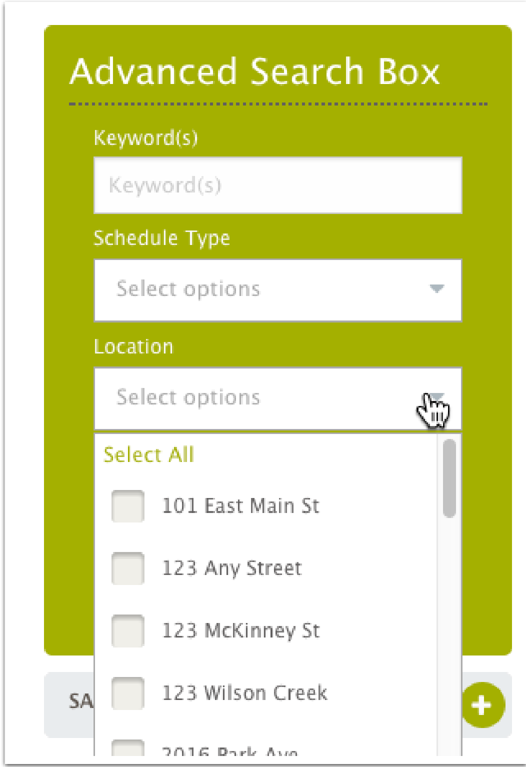


Location Name Field now available as option for Advanced Search Block (HOC3-4023)

To support a very specific use for some HOC clients, it is now possible to enable an additional advanced search parameter for the Advanced Search Block - Location Name.



Enabling this filter will REPLACE the fields "City & State and/or Zip Code" and "Distance" from the advanced search block with a single field "Location". This field will allow users to search based on the Location Name (usually the street address) associated with volunteer opportunities, instead of by its distance from a given zip code.



We do not recommend that the majority of HOC users enable this search filter, as its unlikely that volunteers will be searching for a location based on the street address. This feature is intended primarily for those organizations that have a limited number of locations for their projects, and the location names are created or edited (in Salesforce - rather than the sharing portal) with names of facilities (i.e. Los Angeles Warehouse, San Francisco Warehouse, etc.)

Please be aware that for organizations where the location name IS a street address, enabling this filter bypasses the standard practice of HOC to NOT reveal exact project locations until a volunteer has signed up and been confirmed for a volunteer opportunity.

ARS Improvement: Tracking of Volunteer Opportunity and/or Occurrence during opportunity sign-up (HOC3-4419)

For organizations using the ARS to add forms to Volunteer Opportunity signup - the IDs of the volunteer opportunity and Occurrence are automatically tracked with the form data., and available in the .csv file that can be downloaded for the form.

October, 2017 Release Notes

Monthly releases are changes and improvements to the HOC managed package (which controls functionality on the Salesforce side of things). This package was not released earlier in the month, so that any adjustments needed to ensure compatibility with Salesforce's Winter '18 release could be factored in.

A variety of updates were made to HandsOn Connect to improve performance in SF Lightning for those who decide to migrate to the lightning experience in the future. We'll have more info on HandsOn Connect for Lightning in the coming year.

Here are highlights in this release - including recommended admin updates to email templates.

Administrative Update Recommended - update email template "Teams: New Team Member" (HOCAVV-1036)

A typo and a merge field error that produces a bad URL has been discovered in the email template "Teams: New Team Member". This can be quickly corrected by editing the email template. Here's how:

1. Go to setup / email templates, click on the letter "T" and then select the email template "Teams: New Team Member"

2. Click on "Edit HTML version" button, and edit the email template as follows:

Wherever you see the merge field:

{!Volunteer_Team_Member__c.Domain_Name__c}

Replace it with:

{!HOC__Volunteer_Team_Member__c.Domain_Name__c}

Also:

in some templates: you'll see the word 'of' instead of 'on' in the sentence
"After signing up, you'll find your team membership on the "My Teams" page.

(Make sure it says 'on' and not "**of** the "My Team" Page.

3. Save

4. Click on Edit Text Version, and click the button "copy text from HTML version". Agree to the popup and then click Save.

Here is the complete text for this email template when corrected. (Feel free to copy the code below and paste it directly into the email template if that's easier than correcting one merge field at a time.

```
Dear{!HOC__Volunteer_Team_Member__c.HOC__Contact__c},

You have received this message because a Team Captain of
the{!HOC__Volunteer_Team_Member__c.HOC__Volunteer_Team__c}teamhas added you as a member
of their volunteer team on the{!Organization.Name}web site.

Team Name: {!HOC__Volunteer_Team_Member__c.HOC__Volunteer_Team__c}

Team Description:{!HOC__Volunteer_Team__c.HOC__Description__c}

If you already have an active volunteer account at
{!Organization.Name}, you'll find the team on your "My Teams" page.
{!HOC__Volunteer_Team_Member__c.Domain_Name__c}my-teams

If you are not currently a registered volunteer at the website for {!Organization.
Name}, click here to register for a volunteer account so you can manage your own
signups as part of this team. Be sure to register using the same email address that
this invitation was sent to:
{!HOC__Volunteer_Team_Member__c.Domain_Name__c}volunteer-sign-up

After signing up, you'll find your team membership on the "My Teams" page.
{!HOC__Volunteer_Team_Member__c.Domain_Name__c}my-teams

As a member of the team, you are allowing the team captain(s) to act in your behalf and
sign you up for volunteer opportunities as part of the team.

Thanks for being part of this volunteer team on the website of {!Organization.Name}
```

Check-In Kiosk: Administrative Update recommended for organizations using QR codes (HOCAVV-1007)

For Kiosk customers who have requested enablement of QR code scanning functionality for their kiosk, checking the box "Enable QR check-in" in the occurrence record shows a link to download the QR code on both the success page, and on the my accounts page.

If you wish to ALSO have a link to the QR code sent in the confirmation email for occurrences that will allow check-in via QR code, there is a small edit that needs to be done to your confirmation email template(s) in HandsOn Connect:

This is 'conditional code" that will display the QR link only IF the occurrence being signed up for has had the "Enable QR check-in" box checked.

This code can be added to any of the following email templates (depending on the type of volunteer opportunities you will be using the QR code with):

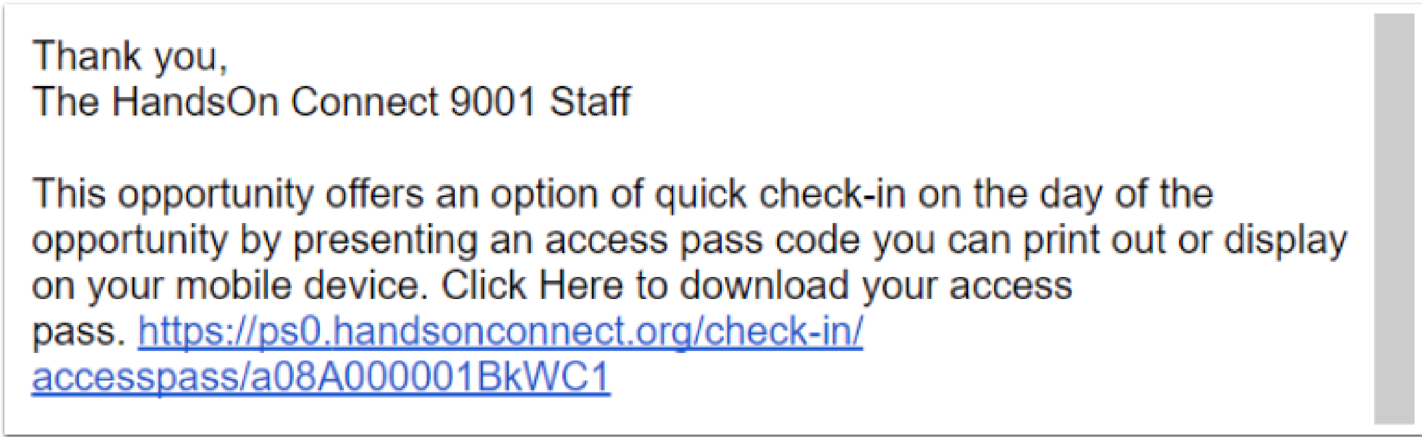
Opportunity Sign-up Confirmation - Affiliate Managed
Opportunity Sign-up Confirmation - Partner calendar full sign-up
Volunteer Status has been confirmed

Opportunity Reminder - Affiliated Managed
Opportunity Reminder - Partner Managed

Add the following code to the bottom of the desired email templates above:

```
{!IF(HOC__Connection__c.HOC__Enable_QR_Check_In__c='FALSE','','This opportunity offers an option of quick check-in on the day of the opportunity by presenting an access pass code you can print out or display on your mobile device. Click Here to download your access pass.')} {!IF(HOC__Connection__c.HOC__Enable_QR_Check_In__c='FALSE',"",HOC__Occurrence__c.HOC__HOC_Domain_Name__c+"check-in/accesspass/"+HOC__Connection__c.Id)}
```

This will add a message and a link to the QR code IF the occurrence has Enable QR code active.


Thank you,
The HandsOn Connect 9001 Staff

This opportunity offers an option of quick check-in on the day of the opportunity by presenting an access pass code you can print out or display on your mobile device. Click Here to download your access pass. https://ps0.handsonconnect.org/check-in/accesspass/a08A000001BkWC1

When copying the code above and pasting it into the email template, don't use the normal 'paste' function. Instead, right-click before pasting and choose "Paste text without formatting' to avoid unwanted html from going into the template.

Email improvement: Confirmation emails not sent for dates in the past (HOCAVV-1038)

HOC administrators and opportunity coordinators often choose to add connections administratively for dates in the past. The managed workflows that send out confirmation emails have been updated so that volunteers will not receive a confirmation email if a connection is administratively added for a date and time < NOW.

Support for use of Salesforce's native State and Country/ Territory Picklists (HOCAVV-805)

Salesforce, for many years, used text fields in its native address forms for Country and State.

In it's Winter '17 release, Salesforce introduced standardized, predefined picklists for Countries and States. HandsOn Connect has now been updated so that depending on an organization configuration - HandsOn Connect can support the new SF global picklists IF your organization wishes to enable them in SF.

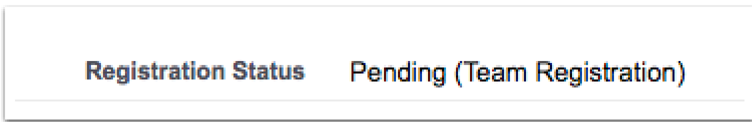
> Note: If your organization has a need to enable Global State and Country/Territory picklists in Salesforce -- please open a support ticket and we can configure HOC to work with this configuration.
>
> Enabling State and Country/Territory picklists in Salesforce DOES require converting your existing address data in all your SF records. So we do not recommend doing this unless you have a very specific need for this change.

Bug Fix: Contacts created by team captains were put in wrong registration status (HOCAVV-1027)

A regression in functionality was discovered, in which contacts created by team captains were put in status 'not registered' rather than the usual "pending (Team registration) status.

The bug has been fixed, and going forward contacts created by team captains will be put in the status pending (Team Registration) again.

There is no functional impact to the contacts that were created with status 'not registered' so there is no need to update your data.



> For those who found the status "pending (team registration)' useful for reports or to quickly see that a contact was created by a team captain -- you CAN create a report to see any team members in 'not registerd' status, and then do a bulk update to place

them in pending (team registration) status if you like. There is no need to do this however.

Bug Fix: Grouped Occurrences now send correct email template after a volunteer signs up (HOCAVV-1026)

The wrong email template was being sent when a volunteer signed up for a grouped occurrence of a date and time specific, express interest opportunity. This has been corrected.

One of the following four email templates will be sent depending on whether the project is affiliate or partner managed, and whether it is full sign-up or express interest:

HOC3 Release Notes: 3.0.4.4 (Oct 12, 2017)

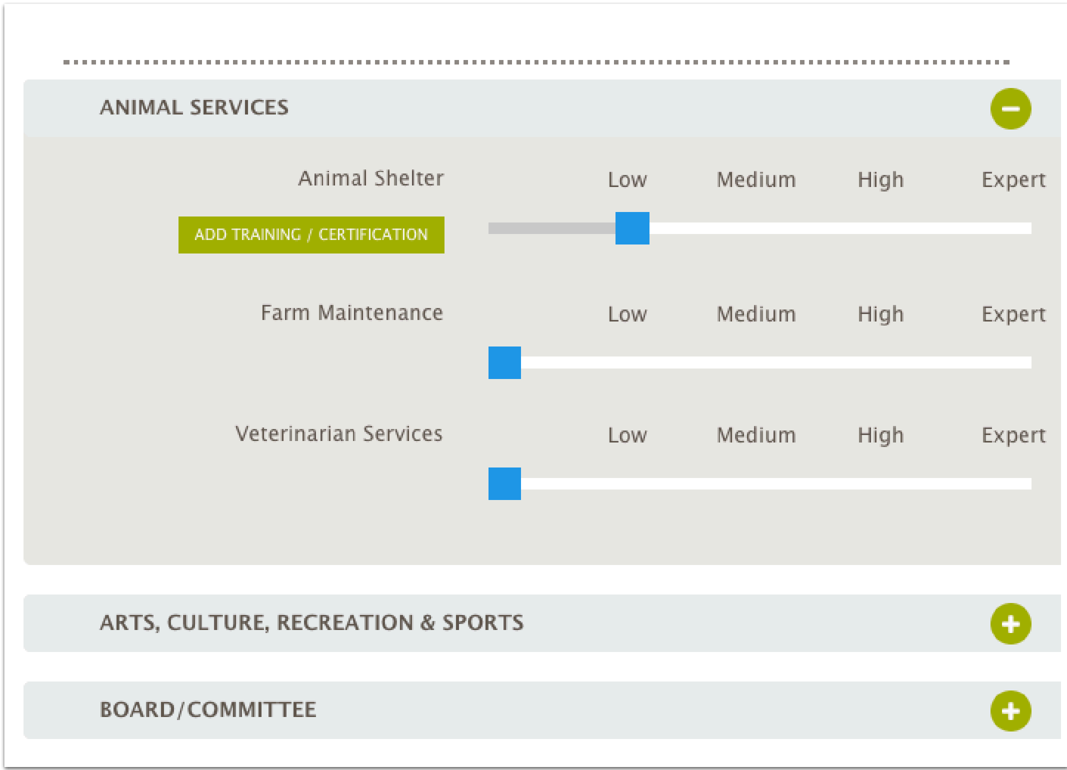
This week's release brings additional improvements to the display of images on mobile devices. Other fixes in this release include:

- Internationalization of the date of birth field on the volunteer registration form (HOC3-4912)
- Work on the beta release of new modes of displaying search results (code name: Search Results Block). We'll have more info for everyone on this as this feature continues development.

Release highlights include Improvements to CMS, Form Builder, and a much-requested change to how skills are searched for and displayed in relation to Volunteer Opportunities.

Improvement to skills on Public Site (HOC3-4063)

In HOC Skills are grouped into Skill categories as a matter of convenience for organizations with a lot of skills. This makes it easier for volunteers to update their skill profile, and find individual skills.



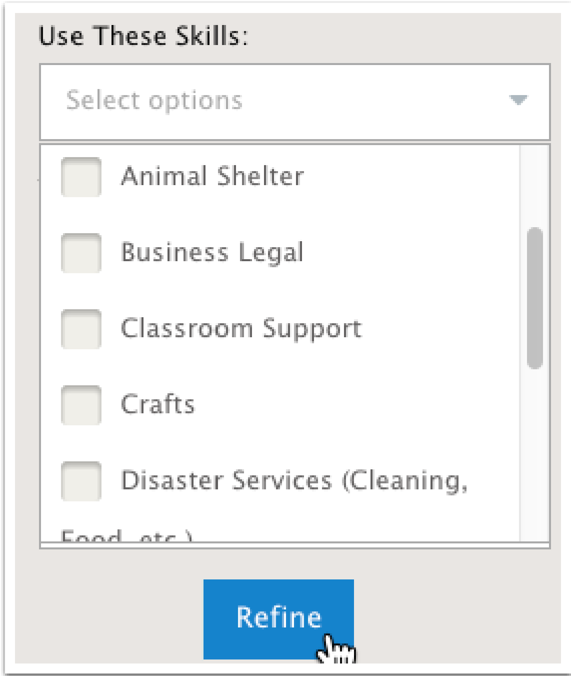
However -- Volunteers searching for opportunities that used specific skills was not really possible in HOC Search. Why? Because the 'skills' listed in the search filter were actually the 'skill categories" and not the individual skills themselves.

So if you had a skill category of "Languages" - and had three languages listed as skills, you couldn't search for opportunities that were associated with the skill "Spanish". You could only search for those opportunities that had the skill category "Language". Not as helpful.

Also: Volunteer Opportunity Detail pages listed skill categories in the requirements section, and not the skills themselves. And if a skill was required to sign up for an opportunity and you didn't have that skill in your skill profile - the message saying to check your skill profile and see if you had the needed skill wasn't very helpful - because you wouldn't know which skill was required (just the general skill category :-(

We're happy to announce that with this release, HOC will provide more specific information about skills, so that the skills themselves, rather than their associated categories will be searchable via the public site, and appear in the Requirements section of the Opportunity Detail Page.

Searching for Skills: the "Use these Skills" page will now list Skills (rather than skill categories)



Volunteer Opportunity Detail Pages: Will now list skills, rather than skill categories -- so you know exactly what skill is associated with the opportunity.

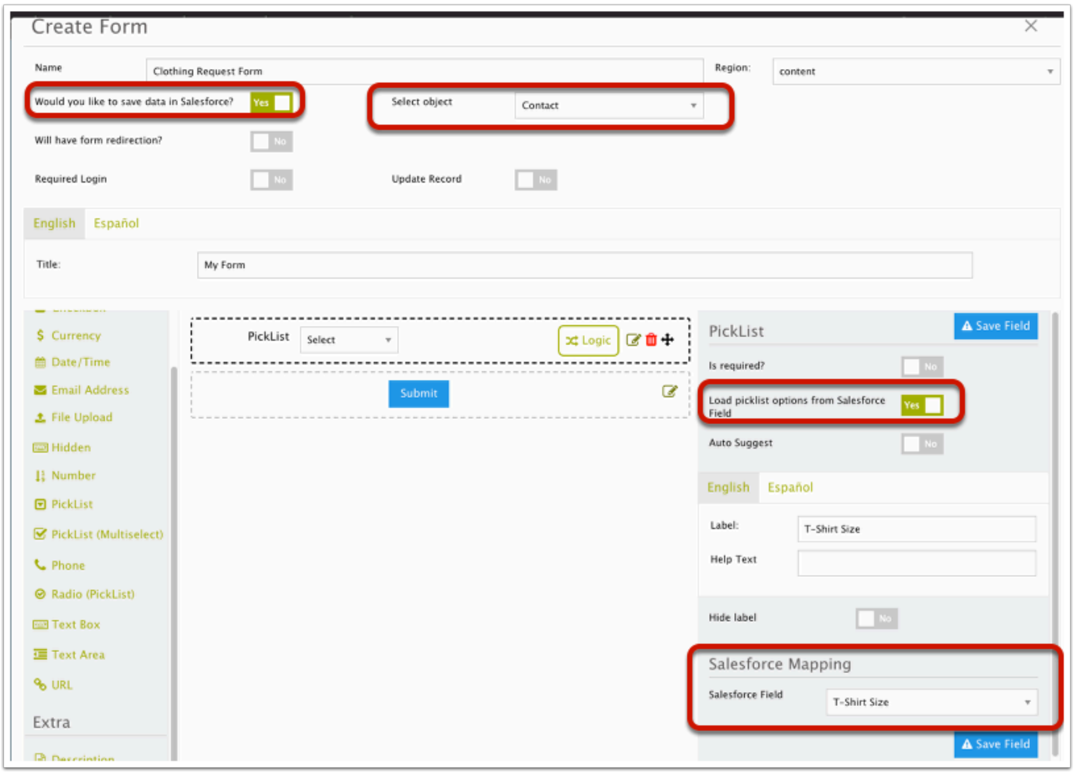
Improvements to Form Builder

Bug Fix: Folks who have been using the HOC Form Builder in the CMS have noted that the order of fields sometimes shifts after you save and then reopen the form. The form builder has been improved so that fields will be saved in the order defined. (HOC3-3873)

Support for URL fields. Its now possible to create fields of type "URL" and to map these form builder fields to Salesforce URL fields. (HOC3-3874)

Ability to populate a form builder picklist field with the values of a picklist in Salesforce. (HOC3-3920) Now included in the form builder for fields of type Picklist, Picklist (Multiple), and Radio (Picklist) are new picklist options:

- **Load Picklist options from Salesforce Field** - allows you to bring in the picklist items from a field in Salesforce and have them automatically populated in your form. This saves you the trouble of manually inputting a picklist and eases the synching of your form builder field to the mapped SF field.



Hidden Fields - can now be mapped to any field in SF. (HOC3-4088)

Forms with Redirection - will no longer display the form's standard Success Page. (HOC3-4094)

Text Encrypted Field option - its now possible to create a text encrypted field when mapping to Salesforce is turned on. The encrypted text submitted in this field, will not be available via the form data export, but will only be available in Salesforce. (HOC3-4114)

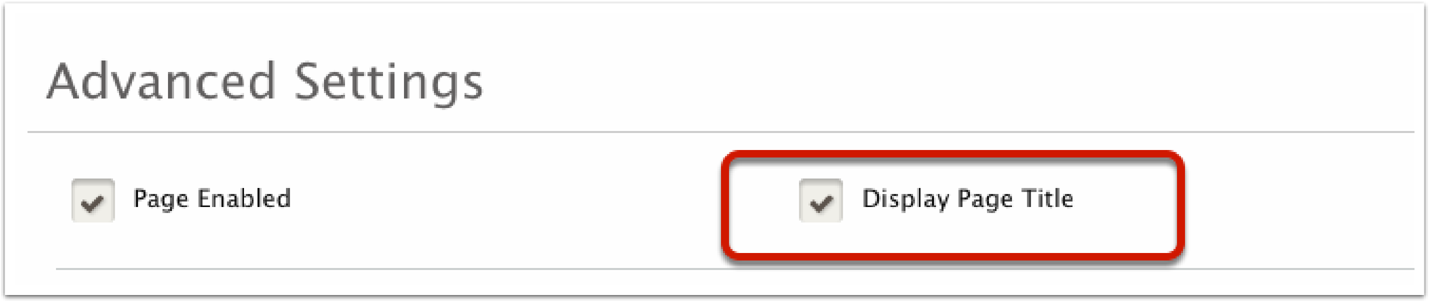
Ability to pre-populate form with data from SF Record - when creating a form with the settings, update record, required login, and save to in Salesforce, its possible to pre-populate the form with the existing data from Salesforce. Use the toggle "Popular Fields from Salesforce" on a field where you want the current SF data displayed in the form. (HOC3-4304)

Additionally, a number of smaller error messages have been addressed and fixed.

CMS Improvements

Page Title: When creating a page - the field formerly known as "Page Name" is now called "Page Title". The Page Title can be Displayed as a header to the page by checking the box "Display Page Title" in the advanced settings.

This means you no longer have to put the heading for the page in the page content itself and figure out how to style it.   This will ensure consistent looking page titles for your pages!



Home Page Image Slider - Images displayed on home page in the slider will load in a smoother manner, and not display artifacts when first rendering.

HOC3 Release Notes: 3.0.4.3 (Oct 5, 2017)

In this release we continue to develop our new CMS template system which will allow greater customizability of Public Sites in the future. Security fixes have been added to protect public site forms from malicious requests. The release also includes bug fixes for Verified Volunteer users, ARS and Parental Consent users, and improvement to mobile versions of the public site. Also improved was password validation. Highlights of this release include:

Sharing Portal: Partner Reporting Bugs Fixed: (HOC3-4484)

A number of clients using reporting in the partner portal received error messages when they tried to run certain reports. The issue has been fixed and addressed in this release.

Please be aware of the following in regards to what reports will or won't run in the partner portal:

- All reports shared in the partner portal **must** contain at least one of these objects: Volunteer Opportunity, Occurrence, or Connection. (These three records identify the"Managing Organization" which is used to determine which records to share with each partner in the sharing portal.
- Be sure that the 'report type' you choose for a report is a type that will ensure that all records that would be returned will contain one of those objects.
- Avoid creating reports that would return a large number of records in one report. Reports are limited to returning 2000 records. They will still run, but only 2000 records can be returned through the SF API. and the larger the number of records that have to be returned, the longer it takes for the report to load, filter, etc.

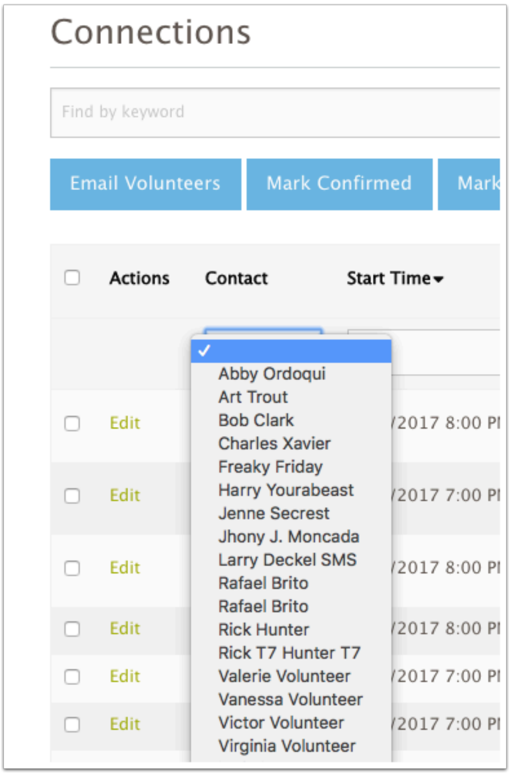
What does this mean? A report of type Volunteer Opportunities, with Occurrences, with Connections will work fine. But a report of type Contacts with or without connections will not run. (Because it would try to return contacts without connections, and each record must have an associated Volunteer Opportunity, Occurrence or Connection).

Consider creating (or using) existing custom Report Types (as opposed to the automatically generated ones by SF) to have more control over your reports. See this article on creating and managing custom report types.

Sharing Portal: Connections grid improvement (HOC3-2950)

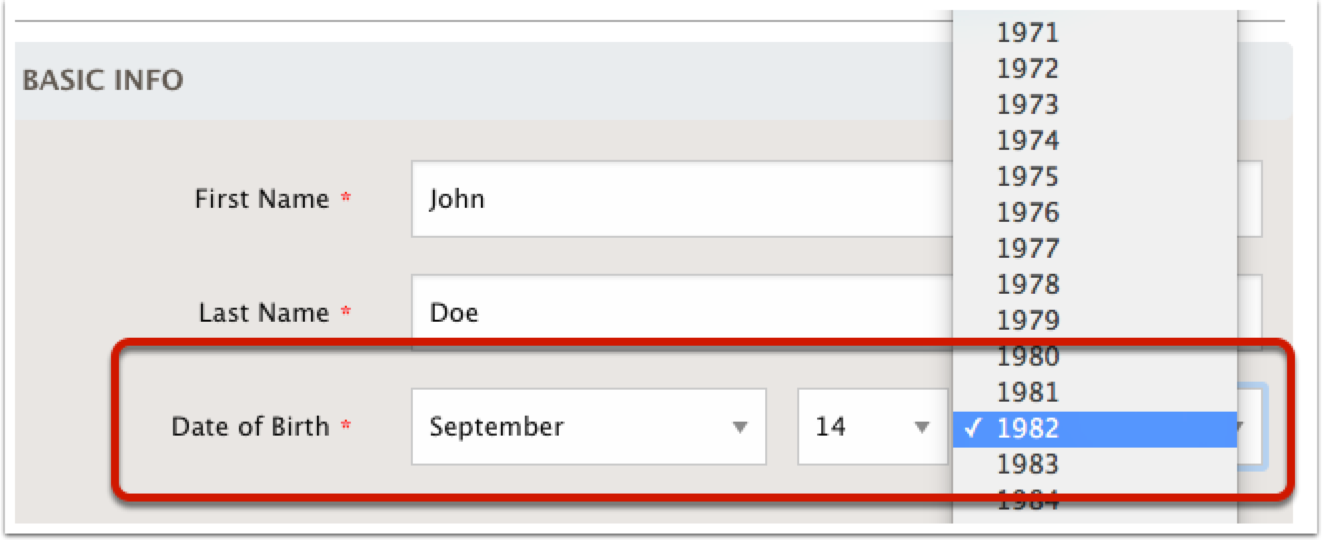
When using the contact filter in the connections grid of a volunteer opportunity, contacts are now listed alphabetically (by first name), which makes it easier to find a specific contacct.

(Note: You can also quickly filter by typing a name in the Search box ("find by keyword") at the top of the page. But for those who use the drop down filters, this makes finding a contact much easier than previously where the contacts were listed in a seemingly random order.)



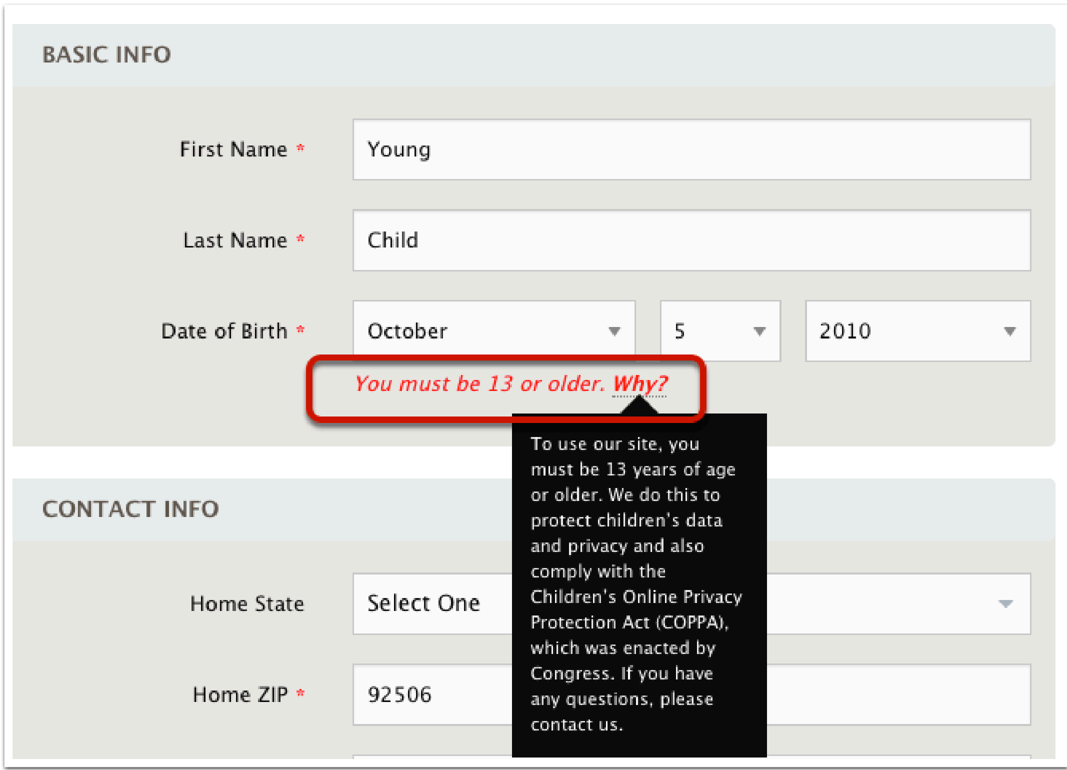
Public Site Registration: Improvement in setting Date of Birth (HOC3-4576)

When registering to create an account on the public site, the 'date-picker' used to indicate your date of birth was awkward to use. The calendar format was not well suited to easily setting your year of birth, and it took a lot of clicks to get the right year, month and date. To make registration quicker and easier, the 'date picker' has been replaced by three easy to use picklists, so that you can select your Month, Date, and Year quickly and easily.



CMS: Registration Page Configuration (Minimum Age) (HOC3-3392)

Under U.S. COPPA law, it is a violation to allow minors under the age of 13 to create their own account on an Internet website. By default, HandsOn Connect has always prevented anyone under the age of 13 from creating an account. If someone under the age of 13 tries to create an account they are blocked from doing so and the following message is displayed, along with a "Why" link that explains this:

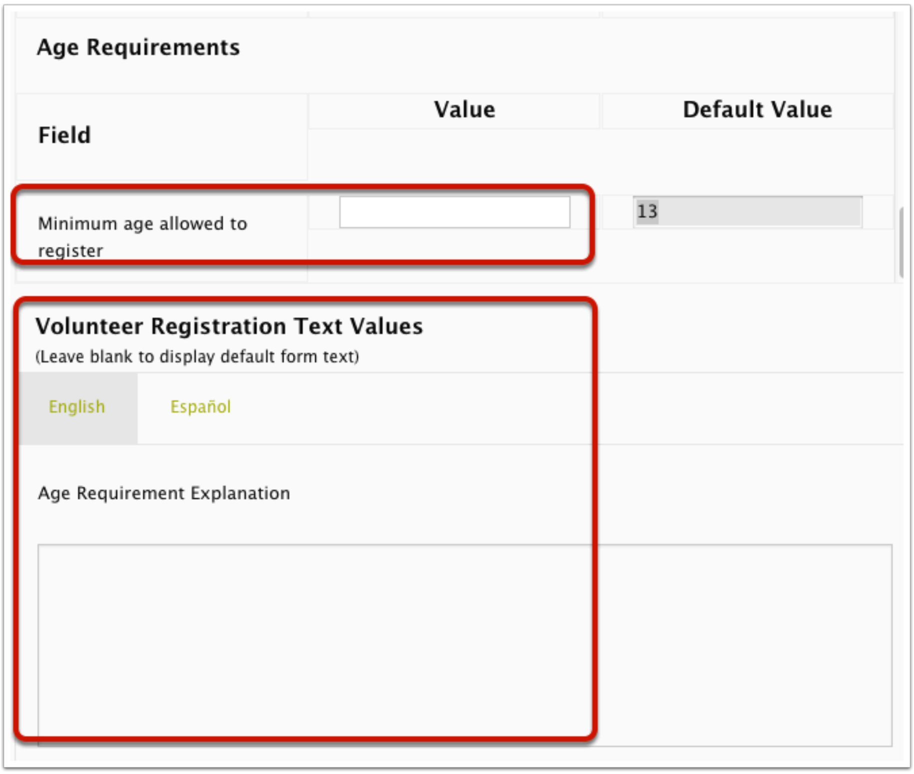


However, some organizations using HandsOn Connect are in countries not subject to the >13 years of age U.S. COPPA law. And some organizations using HandsOn Connect, may wish to restrict people from registering unless they are some other minimum age (18, for example).

In this release we've added configurations in the CMS that allow you to change the minimum age for registering and creating an account on the site from 13 (Making it younger or older). To do this, edit the Volunteer Registration Form in the CMS and you will see two new settings:

Minimum age allowed to register: (the default is 13 as required by U.S. law.... and U.S. users are warned that setting the value to an age <13 may make them subject to prosecution under COPPA. If you wish to change to a higher age, there is no restriction not to do so.

Age Requirement Explanation: If you leave the default age set to 13 (i.e. don't set a new value), the current "Why?" help tip will remain active. If however you change the age, then compose your own "Why" that explains the new minimum age, by populating this "Age Requirement Explanation" field, with the text you wish to appear if they hover on the "Why" for your new minimum age. (]If you are using multiple languages, you can translate your age requirement explanation for each language.



Public Site Bug Fix: Team captains unable to sign up team member younger than the minimum age with adult. (HOC3-4459)

It was reported that in some cases, a team captain (who was over the age of 18) was unable to sign up members of his team who met the 'minimum age with adult' qualifications, even though an 18 year old would be present. This has been fixed.

HOC3 Release Notes 3.0.4.2 (Sept 21, 2017)

This release incorporates a number of under the hood improvements to our new CMS architecture. A number of improvements in the display of HOC on mobile and tablets have been deployed.

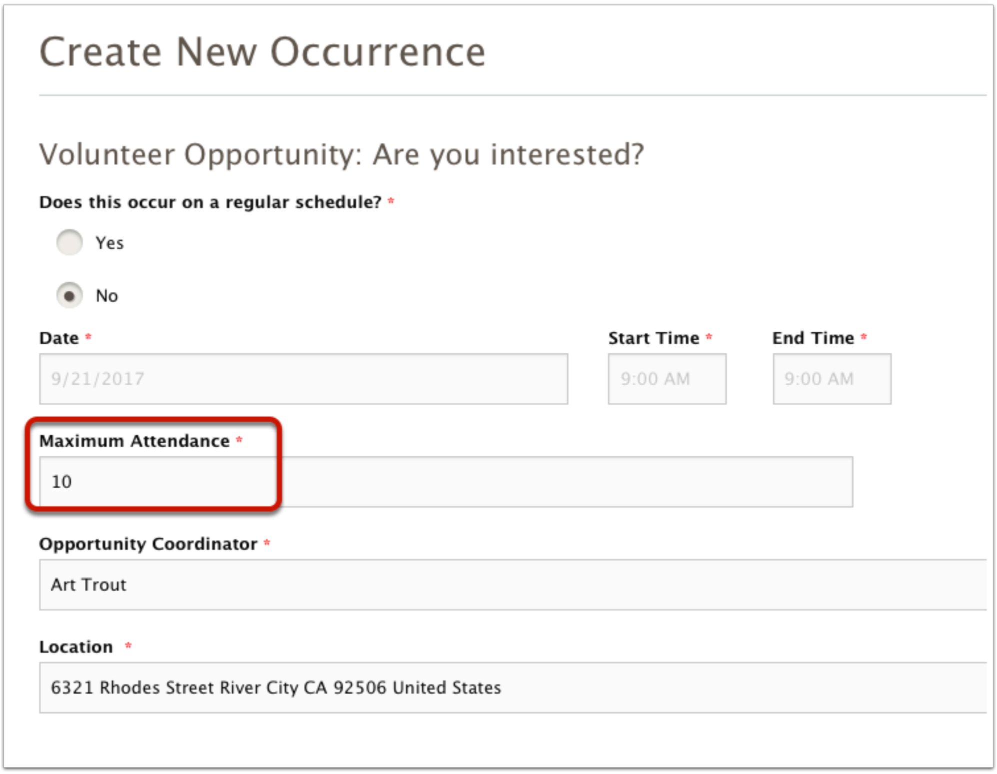
Sharing Portal: Ability to set maximum attendance when creating new occurrences, and ability to edit opportunity coordinator (HOC3-4468)

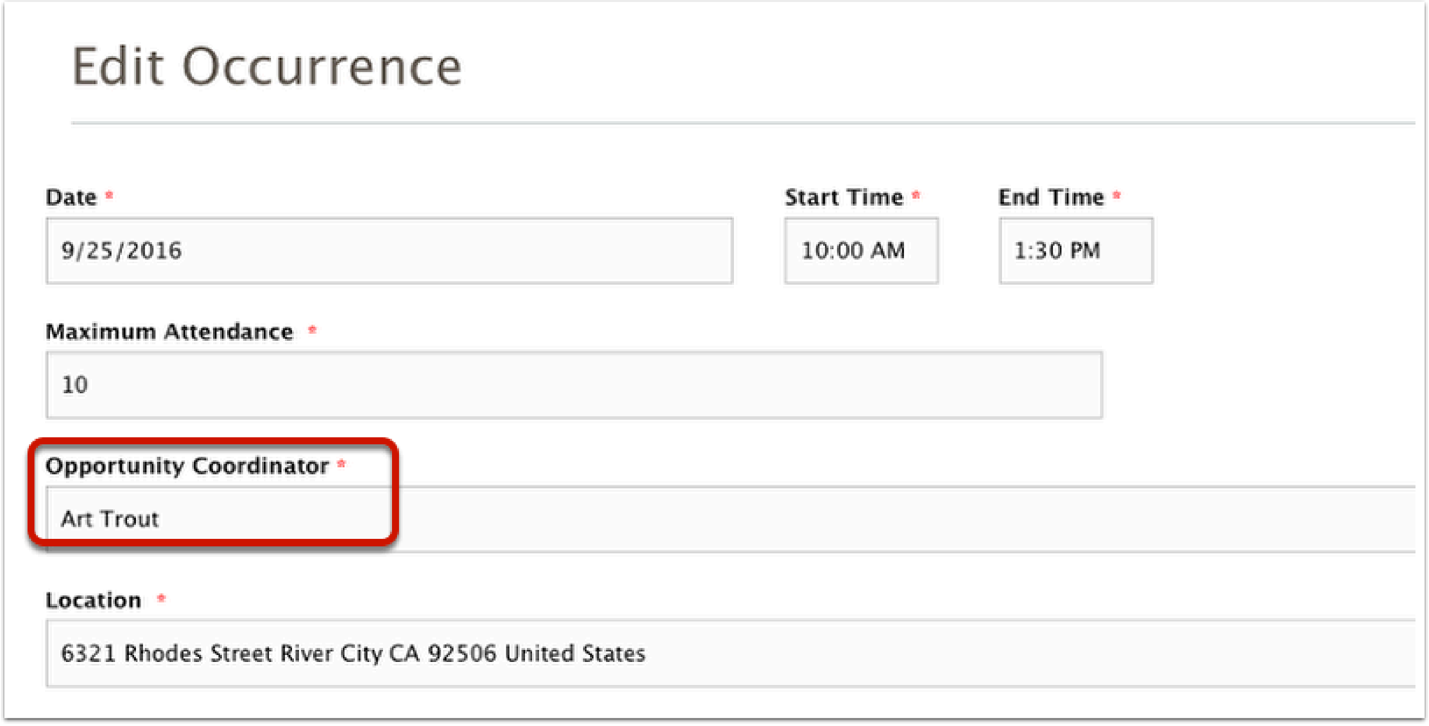
Improvements have been made to creating new occurrences and editing existing ones.

Its now possible to set the 'maximum attendance' for each new occurrence you create for a date and time specific opportunity. (Previously the default value was being used when creating the opportunity and you had to edit each one to change the value).

The ability to change the opportunity coordinator has been added to editing existing occurrences.

The maximum attendance will be pre-populated with the default setting, but this can be changed to any value when creating new occurrence(s)

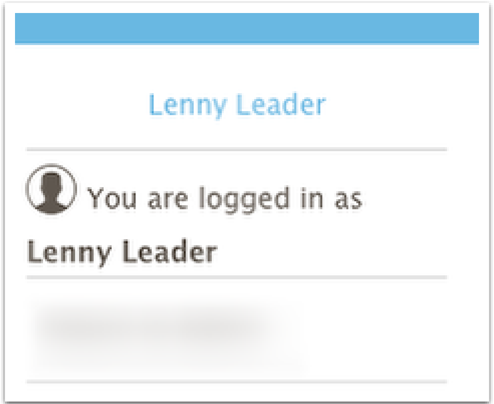




Sharing Portal: Volunteer Leaders now see their name (rather than their organization) in the sharing portal (HOC3-3898)

In a recent release we made a partner organizations logo visible in the upper left when they are logged into the partner portal. If no logo was available, then the 'name' of that partner appears.

However, this made no sense for Volunteer Leaders using the portal - as their organization might be "Jones Household" or "Individual". Now, Volunteer Leaders will see their name, rather than their organization when they log into the sharing portal.



Sharing Portal: Correct email now being sent to volunteers when Individually Scheduled Opportunities / Express Interest Only are created in sharing portal (HOC3-4230)

When a volunteer signs up for an ISO from the **public site** they are sent one of these two email templates:

- Opportunity Sign-up Acknowledgement for Individually Scheduled
- (This is sent for ISO - with schedule)
- Opportunity Sign-Up Acknowledgement for Express Interest Only

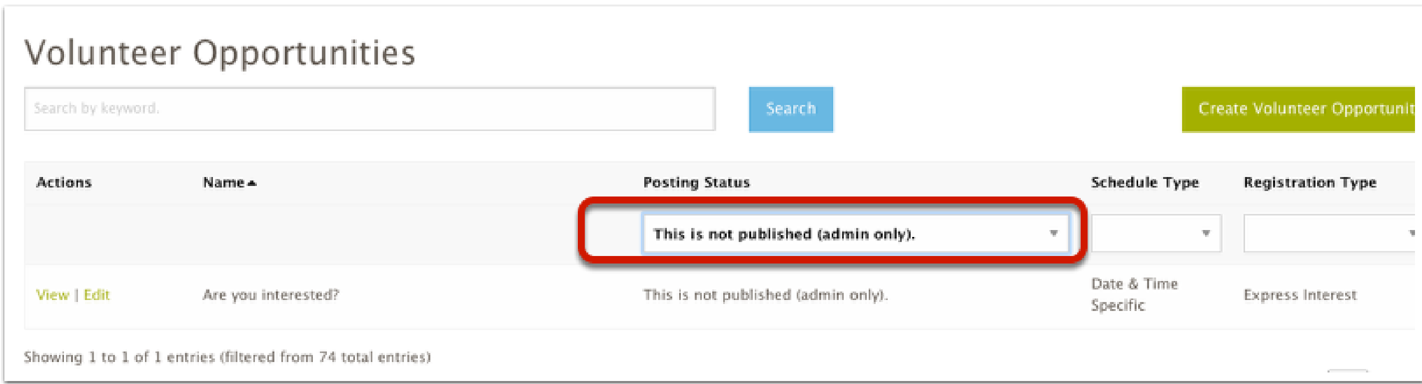
However when connections are created administratively in the sharing portal, the wrong email was being sent in some cases. Going forward , when a connection is created administratively in the sharing portal:

- Opportunity Type: Individually Scheduled, Connection Status: Confirmed, Email Template: Volunteer Status has been confirmed for Individually Scheduled (Email sent to the Volunteer)
- Opportunity Type: Express Interest Only, Connection Status: Confirmed, Email Template: Volunteer Status has been confirmed for Express Interest Only (Email sent to the volunteer)

This is because when you administratively create a connection in the sharing portal, the status is always automatically sent to 'confirmed".

Sharing Portal: Bug fix. Posting status "This is not published (admin only)" now filters correctly (HOC3-4381)

For organizations that give partner volunteer opportunities a status of "Admin" instead of "Active" - its now possible for partners to access these via the filters in the sharing portal. A volunteer opportunity with a status of 'admin' has a posting status of "This is not published (admin only)"



Grouped Occurrences now suport date and time specific - express interest opportunities (HOC3-4113)

Grouped Occurrences, an advanced functionality used by some organizations, has previously only worked for date and time specific opportunities that were full sign up. That functionality has been extended so that occurrences of date and time specific - express interest opportunities can also be grouped and behave properly on the public site.

Minor Waiver Restriction now supported in HOC 3.0 (HOC3-4564)

Though its rarely used - the opportunity sign-up restriction "Minor Waiver on File" is now supported on the public site.

When used as a restriction to opportunity sign-up - a minor cannot sign up for an opportunity unless the affiliate has indicated in the contact record that they have a minor waiver on file for that volunteer. This is for organizations that wish parents to grant permission for a minor to participate for all projects - and any minor without a waiver on file cannot sign up for an opportunity.

HOC3 Release Notes 3.0.4.1 (Sept 9 - 13, 2017)

This release brings some improvements to using the sharing portal, the 3.0 public site, and the start of a pilot for QR code check-in for those using the HOC Check-In Kiosk add on. And oh boy! A nice new block for easily creating buttons in the CMS!

This release also includes improvements to forms and the Advanced Registration system when mapped to Salesforce, and improvements to search functionality on mobile platforms. Additionally there have been small corrections made on typos and grammar in help screens and error messages.

Sharing Portal: Improvement to Navigation (HOC3-3912)

The left menu in the sharing portal has been reordered to bring the most frequently accessed items closer to the top. This small change (you probably didn't even notice!) will make it faster for portal users to find the menu items they are most likely to want to access. The new order (depending on which functions you have enabled for Partner staff and Volunteer Leader) is:

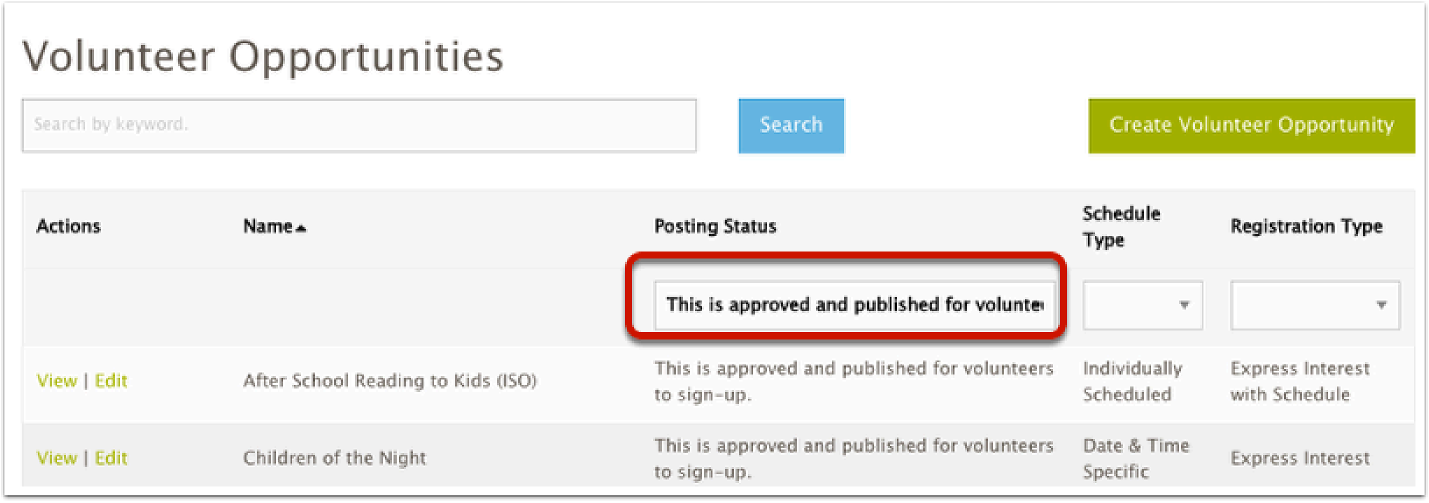
- Home (the portal landing page)
- Volunteer Opportunities
- Report Attendance
- Contacts
- My Organization
- Reports
- Return to Volunteer Portal

Sharing Portal: Improvement to Volunteer Opportunity Listing page - most relevant opportunities displayed by default. (HOC3-4373)

When clicking on the "Volunteer Opportunities" menu item, you are taken to a list of all volunteer opportunities. They were appearing in alphabetical order, and often the opportunities you were seeing included inactive, archived opportunities, etc. which required you to do an additional step to see the opportunities you were most interested in looking at.

To speed up relevant results, the default setting for the page when you arrive will be that the filter "Posting Status" will be set to "This is approved and published for volunteers to sign-up". That way - actively published opportunities will be the default view for this page.

Users can then use the search box or reset the filters to find other opportunities as needed.



Finding specific opportunities is easy once you get used to using the filters and search

You can filter by three different criteria:

- **Posting Status - Q**uickly find published, archived, inactive, or invitation code opportunities)
- **Schedule Type -** Quickly see only Date *& Time Specific or Individually Scheduled Opportunities
- **Registration Type -** Quickly find opportunities based on their registration type.

To filter further if you have lots of opportunities of a given type use Search.

- **Search -** type in any word in the opportunity name and it will narrow the list to find that opportunity (based on whatever filters are currently in place.) Remove All filters if you wish to search all opportunities by name.

Sharing Portal: Volunteer Opportunity Location clarified (HOC3-3542)

The "Location" that is specified when first creating a Volunteer Opportunity may not be the only location that the volunteer opportunity takes place at. New occurrences can be created to take place at other locations. To avoid confusion, the "Location" listed in the volunteer opportunity detail page has been relabeled "Default Location" to clarify that this is the location that will be selected by default when you create new occurrences. But you always have the option of picking a different location each time you create a new occurrence.

Default Location

Street Address	6321 Rhodes Street
City	River City
State	CA
Zip/Postal Code	92506
Country	United States

Public Site: Opportunity Detail Page improvement (HOC3-4297)

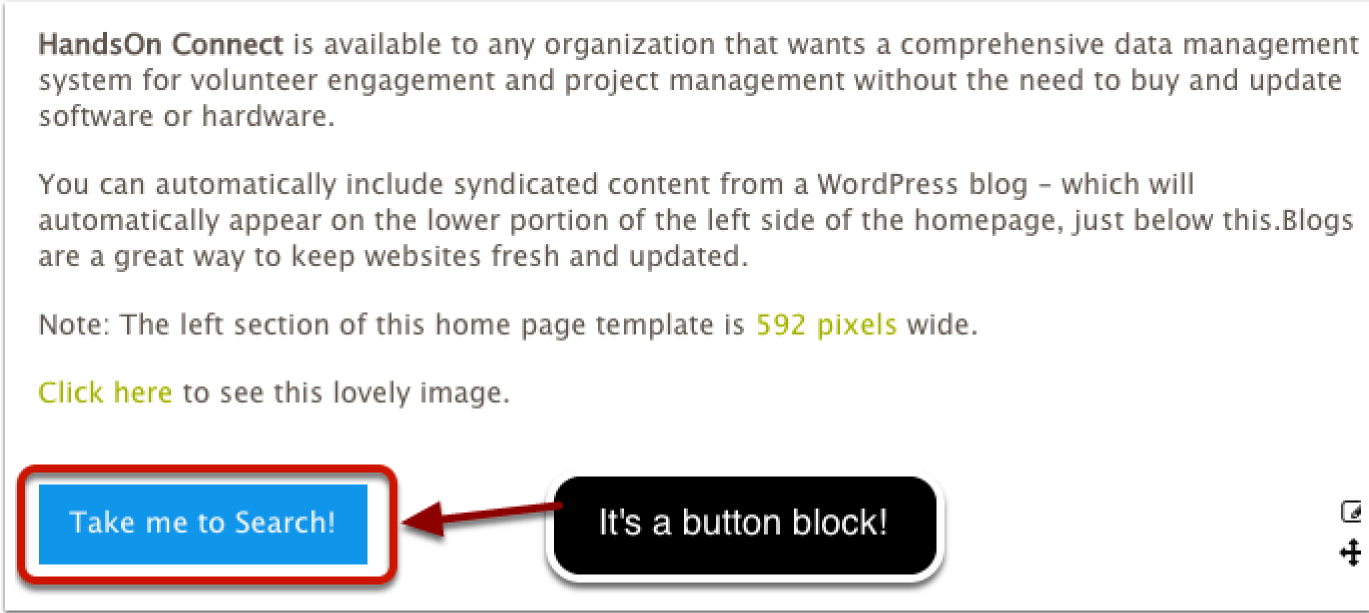
The "Requirements" section of the volunteer opportunity detail page was not displaying all the possible restrictions that an admin can add to an opportunity. The following restrictions (if used) will now appear in the requirements section of the page:

- Orientation required
- Background Check required (if not using Verified volunteers which shows this via a badge)
- Minor Waiver on File required
- Court Ordered Volunteer - Allowed"

CMS: New Block Type available: Button Block

Want to add a button in your CMS content but don't have a custom button image available or know the .css to produce a button via the source code? Tired of losing buttons that don't show up in a WYSIWYG block but are hidden in the source code?   Well, guess what! We've made it easy now to add a button on a page -- Just add a Button Block!   See this article on how to add a button block.

Have fun with our easy button-creation tool!



Button added to Featured Opportunity Block

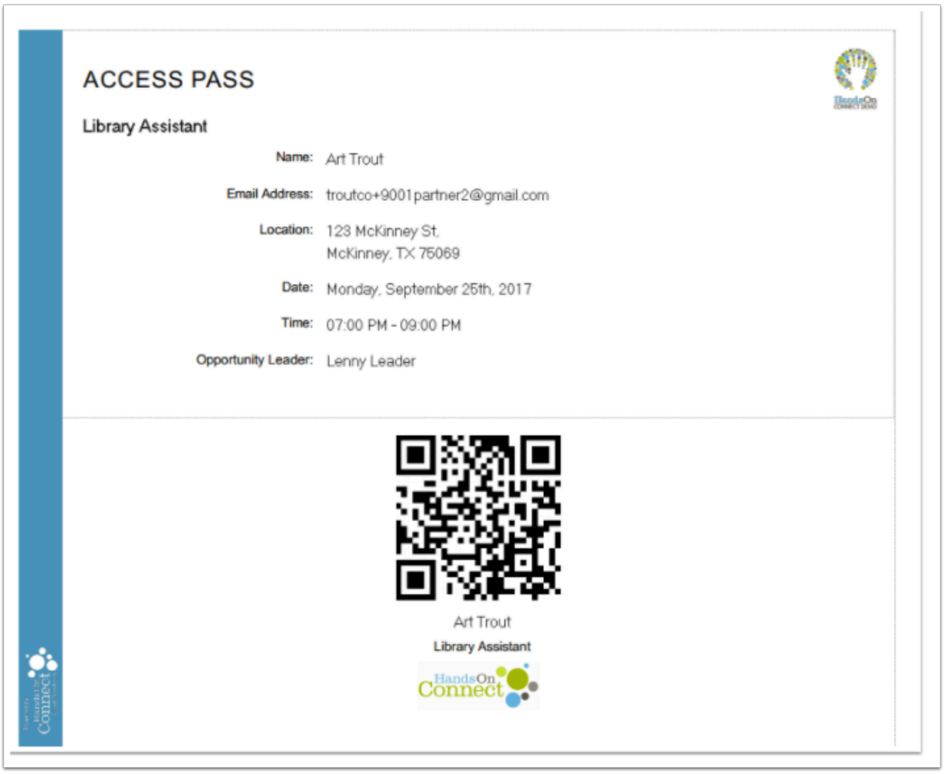
For those of you using the featured opportunity block, we added a new feature -- the ability to add a button as part of your featured opportunity block! [See this article for details on adding a button the featured opportunity block.]

(Pilot) Check-in Kiosk now offers QR Code (scanning) as a check-in option

We are now piloting the ability for volunteers to print out a HandsOn Connect Access Pass with a QR code that will allow them to check-in via the HOC Check-In Kiosk by having their pass scanned by the kiosk.

If you're a current user of the Check-In Kiosk add-on, and you're interested in participating in the pilot, please open a ticket in the support site requesting that we enable QR check-in for your kiosk.

For more information on how the Access Pass functionality works, see this article in the help center.


ACCESS PASS
Library Assistant
Name: Art Trout
Email Address: troutco+9001partner2@gmail.com
Location: 123 McKinney St, McKinney, TX 75069
Date: Monday, September 25th, 2017
Time: 07:00 PM - 09:00 PM
Opportunity Leader: Lenny Leader
Art Trout
Library Assistant
HandsOn Connect

HOC3 Release Notes 3.0.4.0 (August 31 - Sept 5 2017)

HandsOn Connect 3.0 has graduated to version 3.0.4 with this release that ushers in the start of significant improvements to our CMS system. A new, improved, universal template will now serve as the architecture which will eventually bring even greater flexibility to what's possible to do with your HandsOn Connect Public Site.

The new architecture will also enable us to provide optimal experiences across desktop, laptop, and mobile platforms.

Nearly 200 issues were tackled in this release! We won't bore you with the details, but we will keep you posted in future release notes as new CMS functionality becomes available to you. Our goal is to make the CMS more powerful and yet simpler to use. And for advanced users with web design experience, we will be able to eventually unlock powerful tools to meet your needs. So Stay tuned!

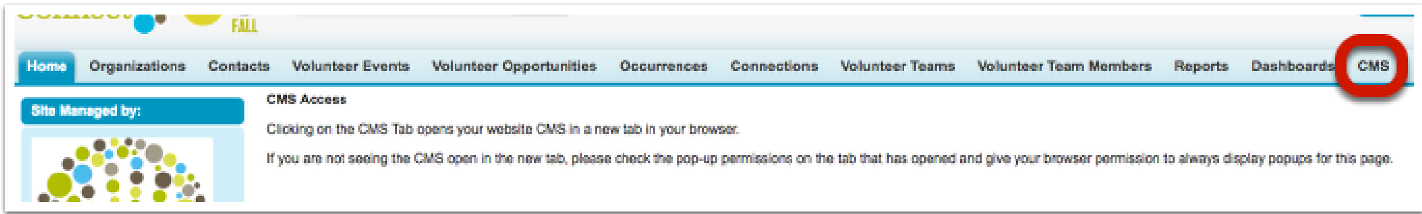
Sept, 2017 Release Notes

This month's release has a number of behind the scenes improvements to make it easier for future development of the HandsOn Connect platform. We've improved the process for migrating to HOC 3.0 and are paving the way to make HandsOn Connect fully lightning compatible.

Admin Alert: CMS tab (for HOC 3.0 users) now opens CMS in a separate tab. One time action needed!

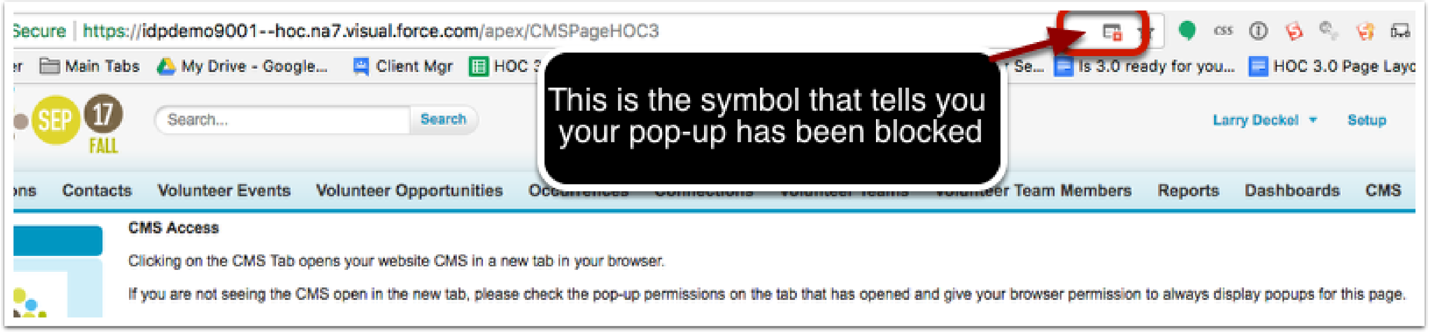
In order to make the HOC 3.0 CMS compatible with the Salesforce lightning interface - and as a general improvement -- clicking on the CMS tab in Salesforce will now open the CMS in a separate tab.

You'll see the following message when you click on the CMS tab:



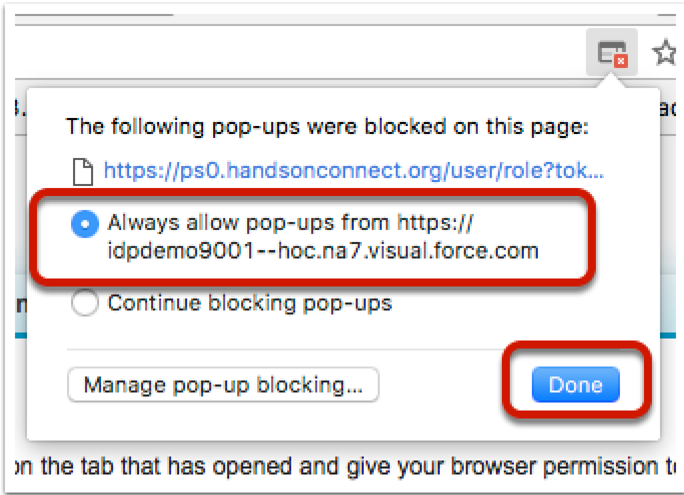
Depending on the browser you are using and its settings - you may have to grant your browser permission to always display the content of the pop-up page. Here's how to do that in Chrome:

You'll briefly see a message in the URL field in your browser saying "Pop-Up Blocked" and then you'll see a little icon with a red dot on it:



Click on the icon to get the details of the blocking.

Select: "Allow allow pop-ups from ...." and click "Done". Then click on the CMS tab again. This time the CMS will open in a separate tab in your browser!



Once you've allowed the pop-ups for your Salesforce site - the CMS will always open in a new tab, making it easy for you to access both the CMS and the Salesforce back end at the same time. To leave the CMS, just close the tab its opened in (since you'll already have the admin site open in its original tab!)

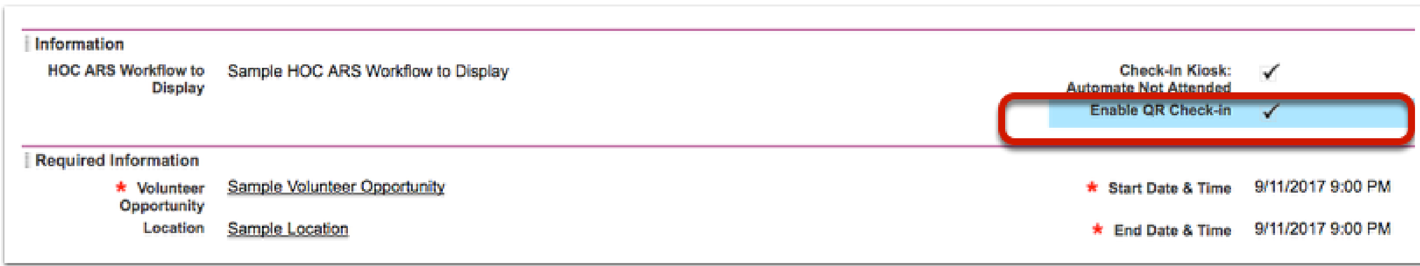
Bug Fix: Error when clicking on name of an organization in the Volunteer Opportunity (HOCAVV-1004)

HOC 2.0 users were getting an 'authorization required' page when clicking on a partner organization's name on the Volunteer Opportunity Page. This has been corrected. Clicking on the organization link will take the user to the organization's partner detail page on the public site.

(Pilot) Check-In Kiosk support for QR code check-in (HOC3AVV-992)

Users of the Check-In Kiosk will be able to optionally enable the printing of a check-in Access Pass"which will include a QR code that can be scanned as an alternate method of checking in volunteers.

A new field, "Enable QR check-in" is now available for the occurrence object. If you're using the check-in kiosk, and wish to enable QR check-ins for an occurrence, add the field "Enable QR Check-in to your occurrence page layout as shown here:



When you check this field in an occurrence - volunteers will be able to print out a QR code that can be scanned as a way of checking in volunteers in conjunction with the Check-In Kiosk. Full details on working with the 'Access Pass' and its QR code will be published in the coming week. Documentation on using the QR code will be published here.

HOC3 Release Notes: 3.0.34 (Aug 23, 2017)

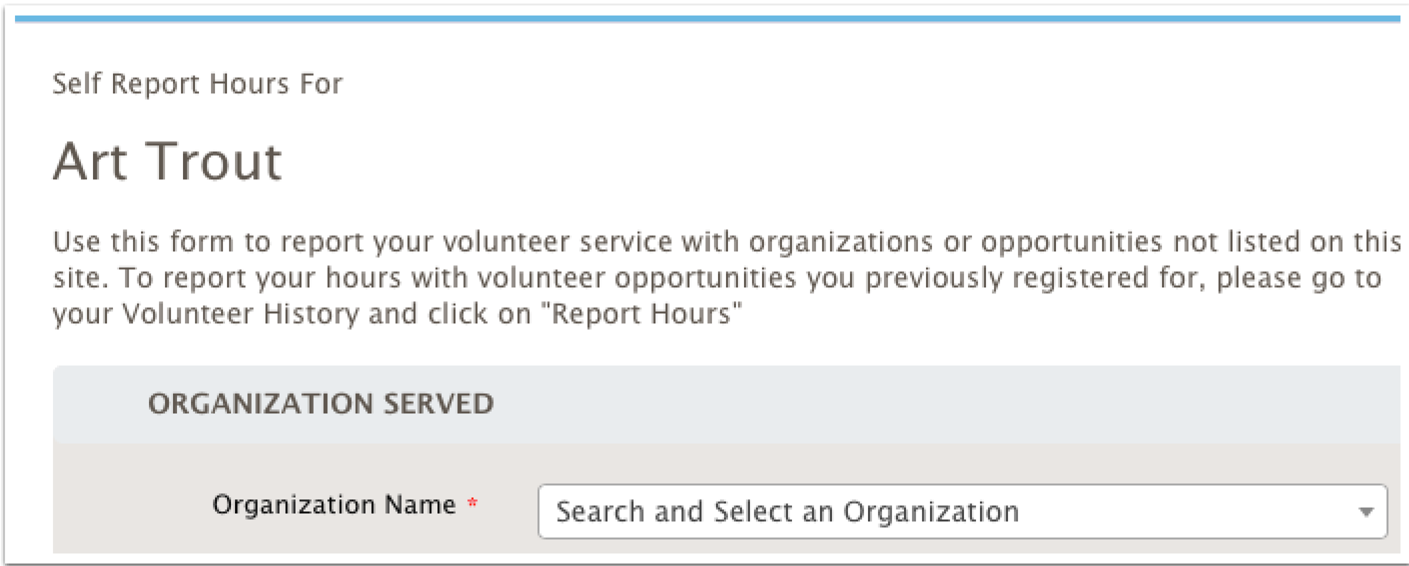
Our developer team has been working overtime fine-tuning new features, erradicating bugs, and making more 'under the hood' improvements. Somehow or another they knocked out another release this week! Here's the latest goodies!

Self-Reporting Improvement (HOC3-4218)

In the recent update to self-reporting, wherein users could search for the organization they volunteered with rather than scroll through a long picklist, a small bug was uncovered.   It was possible to type in the name (i.e. search) for the organization, but then neglect to select the organization.   When the organization was not selected, the first name of all the partner organizations was assumed to have been selected, resulting in the wrong organization being chosen.

This has been improved in the following ways:

1) The prompt to "search" for an organization has been updated to "Search and Select an Organization"



2. If you search but do not select an organization, it will not automatically choose the first of your partner organizations, but display a message saying "Organization Name is required"

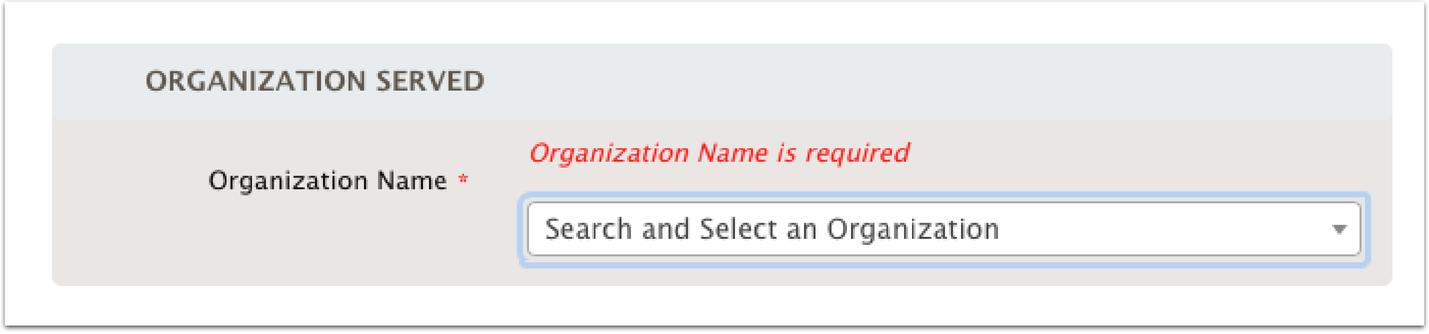


Image Management Improvement (HOC3-4245)

It's now possible to do the following when working with images in the new image picker:

- Delete Images
- Delete Folders
- Rename an Image
- Move an image to another Folder

This will make it easier for you to organize your images.

Be careful if you choose to delete an image. If the image was being used on your site anywhere in the CMS or in opportunity description pages, you will see a broken image link on that page.

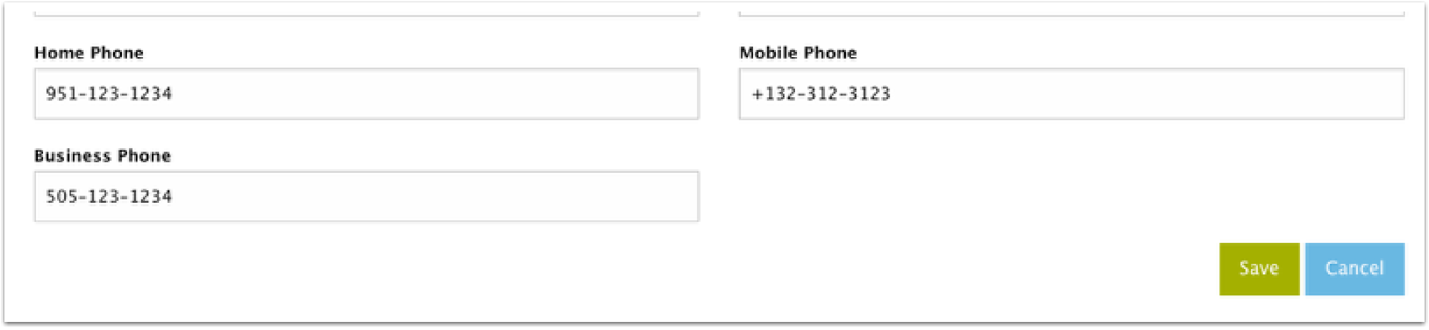
A better practice might be to create a folder called 'archived images' and MOVE your image there, just to be safe. (There's no way for the image picker to know if you're actively using an image on the site. So delete at your own risk)

And don't worry. Partners only have access to their own images. There is no way a partner can delete an image that is part of your public site CMS.

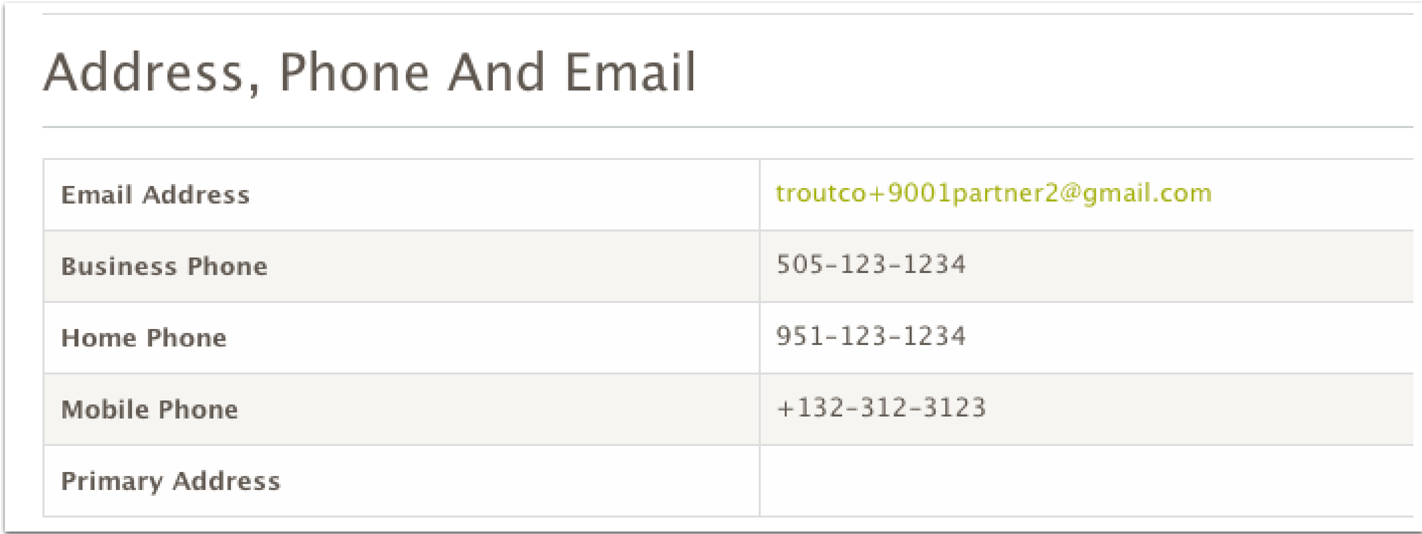
Sharing Portal: Business Phone now available and editable for "My Organization" contacts.

The new "My Organization Contacts" list makes it possible to add and edit contacts associated with your organization. We've added the field "Business Phone" to the contact record since that's more likely to be useful than the Home Phone. Now all three phone numbers are visible.

All three fields will also be visible when viewing other contact records in the portal.



The Business phone of an organization contact will always be set as the primary phone, and is required for all organization contacts.


Address, Phone And Email

Email Address	troutco+9001partner2@gmail.com
Business Phone	505-123-1234
Home Phone	951-123-1234
Mobile Phone	+132-312-3123
Primary Address	

Kiosk: Check in now possible for private Volunteer Opportunities (HOC3-2471)

If you have volunteers who have connections to Private (Inivitation Code) Volunteer Opportunities - they will now be able to check in via the kiosk.

If you have guests enabled, guests will not be able to check-in for private opportunities. Only those who previously signed up will be able to check-in.

Donation Processing: Improved Security (HOC3-4524)

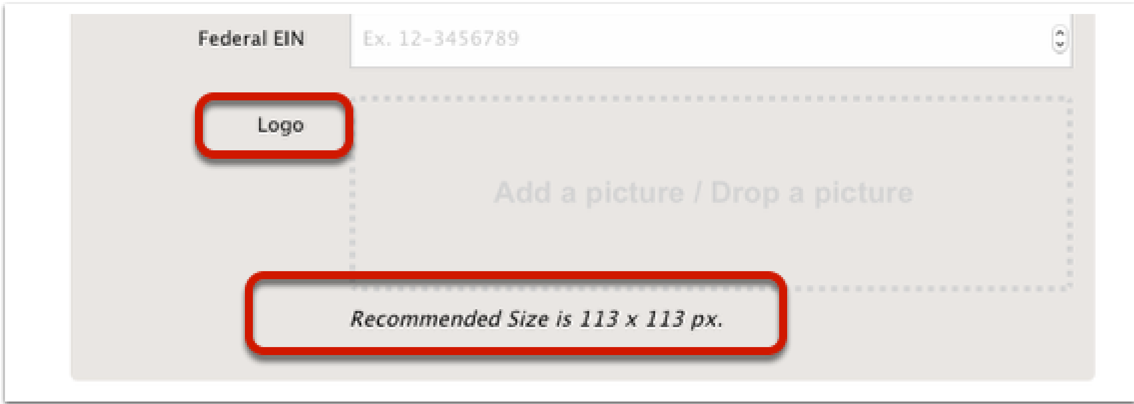
Behind the scenes improvements have been made to ensure that full information from credit cards is not saved or recorded in any logs after a donation has been processed.

Date Picker Component updated to support multiple languages (HOC3-3430)

The date picker component used throughout HandsOn Connect now will appear in the current language / translation of the site.

Bug Fix: Correct help Text for logo upload on Partner Registration Form (HOC3-4327)

The logo image loader on the Organization Sign-Up Page had the wrong help text. It has been corrected.



HOC 3 Release Notes 3.0.33 (Aug 17, 2017

A lot of the work in this release has been 'under-the-hood' improvements in the speed in which new features can be activated or deactivated upon client requests and to enable more detailed tracking on activity in the sharing portal.

There were also improvements to prevent validation errors associated with data entered on donation forms. A minor bug on a use case where teams could not be created on the public site has been fixed. Some additional fixes have been added to support date and time formats for International Customers.

A pilot has begun for our first partnership with a volunteer rewards program. See the article below for more information on this new program. This new program will be generally available to all HOC clients to opt into on or about August 31.

And thanks to United Way of Greater St. Louis for funding development for a new feature that will eventually become available as standard feature for all HandsOn Connect clients: Separate home pages for each profile in the sharing portal. For a sneak peek at this new feature now in pilot by St. Louis - see the articles below.

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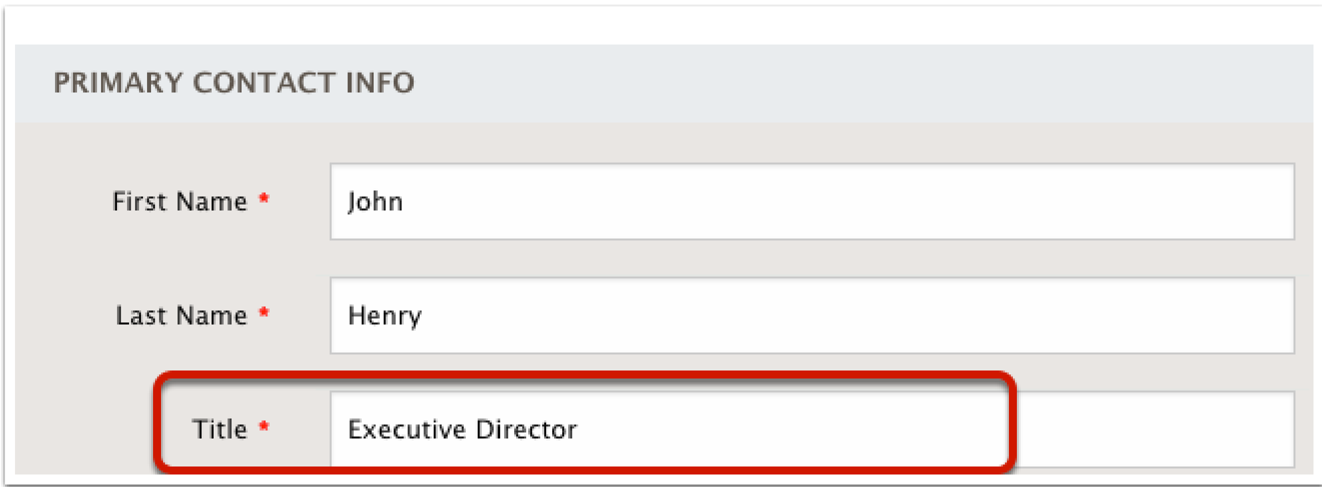

Pilot: Cabot Reward Volunteers Program

HandsOn Connect has formed a partnership with Cabot Creamery to allow your volunteers and the organizations they serve to earn rewards through Cabot's Reward Volunteers program. See this article for more details on the program and how to activate this on your site if you wish to participate. The access to opt-into the program will be generally available to all HOC clients starting on or about August 31. If you do not find the opt-in option on your volunteer registration form and personal information page by August 31st, open a help ticket and request that it be activated for your account.

Pilot: Sharing Portal: Separate Home Pages for each profile

Up until now, both Partner Staff and Volunteer Leaders have shared the same page content in the Home menu item visible when they first log into the sharing portal.

United Way of Greater St. Louis funded the development of the infrastructure to allow each profile to have its own home page, and is currently testing out its functionality, and some special use-case scenarios for their organization.

After the pilot period, the ability to have a separate home page in the sharing portal for Partner Staff and Volunteer Leader will be made generally available to all HOC clients. For a sneak peek at how this will work, see this article.

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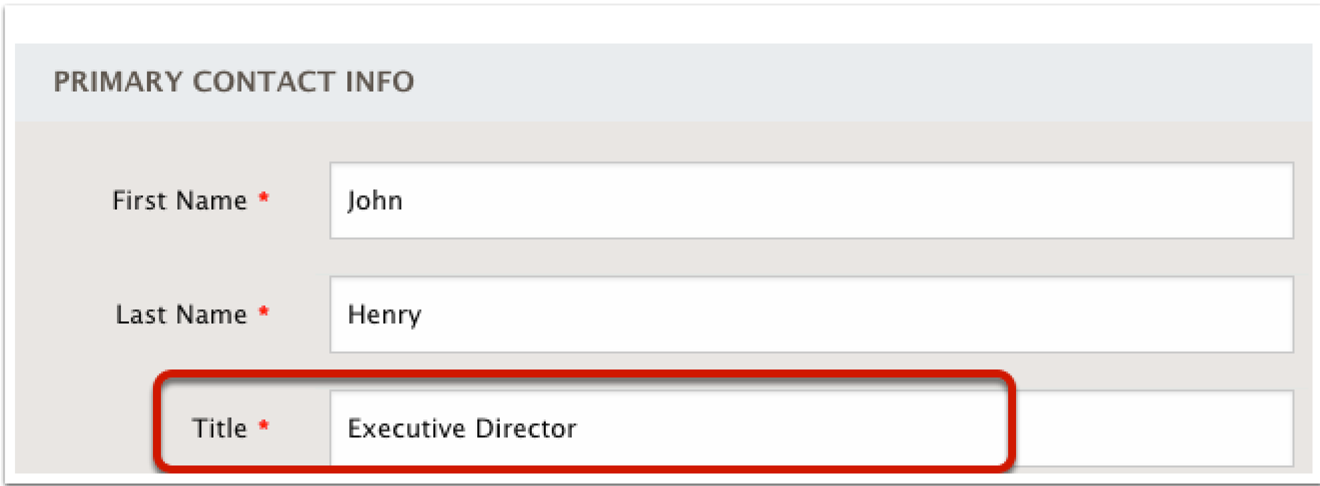

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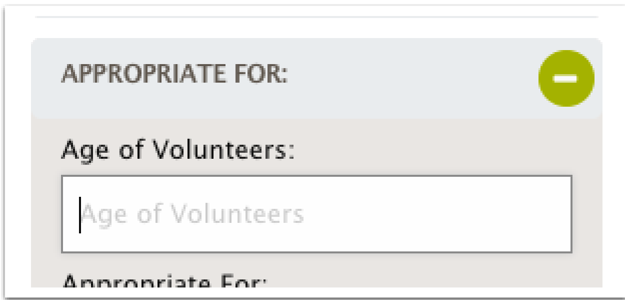
HOC3 Release Notes 3.0.32, Aug 10, 2017

A number of great useability improvements in the sharing portal and the public site are contained in this release. There were also additional improvements made to the mobile layouts for various HOC theme / templates, and to the Compliance Module add-on. Here are the highlights in this release.

Improved search filter for "Appropriate for: Age" (HOC3-1906)

The search filter for "Appropriate for: Age of Volunteer" previously was a blunt instrument that allowed you to select an age range. The search results were innacurate within some of the age ranges you could enter.

In response to a long time feature-request, this filter has been improved and now allows you to enter a specific age, and the search results will return volunteer opportunities where that age would be able to attend the project, based on the "minimum age with adult" and "maximum age" parameters set for the volunteer opportunity.



Volunteer Opportunity Questions now available for ISO - Express Interest Only (HOC3-1986)

The ability to administratively add 'custom questions' to a volunteer opportunity had previously been limited to date and time specific opportunities. It's now possible to add custom questions for Individually Scheduled Opportunties - Express Interest Only.   This gives additional strength to the use cases for ISO-EIO.

Note: It is not possible to add Custom Questions to ISO - Express Interest with Schedule. The reason for this is a volunteer can create many connections at once with this opportunity type - and you would wind up with far too many answers having to be created.   So custom questions are limited to Date & Time Specific (full sign up / express interest), and ISO - EIO)   (If this is critical - it IS potentially possible to use the Advanced Registration System add-on to add custom questions through a form - to any volunteer opportunity type.

Also: Custom Questions can only be created by an administrator on the back end. Custom questions are not available at this time in the sharing portal.

Sharing Portal improvement: The irrelevant and confusing start and end date of volunteer opportunities is no longer displayed (HOC3-2870)

Sharing portal users have been confused by the mismatch that often exists between the 'start date' of a volunteer opportunity - and the actual start date of its occurrences.   For this reason, we've removed the misleading 'start date and end date" in the volunteer opportunity detail page.

The correct place to see when an opportunity takes place (and the one used on the public site), is in the OCCURRENCE record.

The Start Date and End Date of a volunteer opportunity are hidden parameters that determine the range that occurrences can occur within. To lengthen the end date of an opportunity - you should always edit the end time of the occurrence (for ISOs) or add additional occurrences (for Date & Time Specific Opportunities).

Older HOC customers may still have the Start Date and End Date of a volunteer opportunity visible in Salesforce in the VO page layout. We recommend removing these from the page layouts as they are for system use only and do not return useful information to you. Always look to the occurrence(s) to see the date(s) of the volunteer opportunity.

Sharing Portal: Improved logic when administratively adding connections set in the past. (HOC3-3740)

Good news for sharing portal users who administratively add connections for past dates to Individually Scheduled Opportunities.

In the past, when you administratively added a connection, it was automatically set to 'confirmed' status, but then in order to report attendance, you had to find the connections you added, and then go to 'report attendance' and marked them as attended (which then recorded their hours).

Given that one would never be putting in connections for past dates to just mark them as 'not attended' -- we realize that the real reason people add connections in the past -- is that they didn't have those connections in the system - and now just want to administratively track who attended.

So now -- when you administratively add a connection iwth a past date -- the system will automatically create that connection in status = confirmed, attendance status = attended (and hours verified) - and calculate the hours!   This will make it much faster to administratively add connections that have already taken place.

(Adding connections for the future administratively, will still place them in status = confirmed, and attendance status = please verify).   Only connections in the past will be assumed to have attended.

Sharing Portal: Cancel action removed for Individually Scheduled Occurrences (HOC3-3802)

in the 'action' column, there has been a cancel link for ISO opportunities. However, ISOs cannot be cancelled and clicking on this link generated an error. We've removed the misleading link so portal users won't think they can cancel ISOs.

You can still cancel Date and Time Specific Occurrences.   Doing so updates all the connections to status = cancelled and notifies the connected volunteers that the occurrence has been cancelled.

The reason you can't and don't want to 'cancel' Individually Scheduled Opportunities - is that doing so would update every connection in the occurrence, including past connections where the volunteer had already been verified as attended. (All the connections are tied to one occurrence in ISOs)

You never want to 'cancel' an ISO opportunity. If you simply want it to no longer appear published on the public site, edit the occurrence record and change the end date to yesterday!   That'll unpublish it!

Sharing Portal Bug Fix: Organization primary population served can now be set to 'other' (HOC3-3900)

During partner registration, it was possible for a partnjer to select 'other' as their primary population served. However, when editing in the 'my organization' tab - the 'other value wasn't available, and if you had registered with it - it no longer appeared. This prevented you from saving the record. This has been fixed. Other is now available for those who require a value for "Primary Population Served".

Sharing Portal: Help text improved for 'image' if displayed on volunteer opportunity creation page (HOC3-3990)

On the create volunteer opportunity page, the 'image' field, which is displayed for users in the 'featured opportunity block' pilot, has had its help text updated. It explains what the image is for, and recommends a size of 350 x 350 pixels (square) in size.

See this article for more information on images used in the featured opportunity block.

Sharing Portal: My organization contacts improvement (HOC3-4085)

The "My Organizations Contacts" list was added to the "My Orgnaization" tab in the last release. This list of contacts now includes all staff members associated with your organization, and additionally now shows anyone from other organizations who has been granted the right to log into your sharing portal.

For more information on giving a contact access to more than one organization, see this article:

Sharing Portal: Reporting Improvement (HOC3-4197)

Some reports run via the sharing portal were not returning data as expected. Updates have been made to make a wider range of reports compatible for the sharing portal.

Tip: What report types work in the sharing portal?

Any report that is shared via the sharing portal must produce records that always include one of the following objects:

1. Volunteer Opportunity

2. Occurrence
3. Connection
4. Location
5. Recurrence

That's because in order to share the correct data with a partner - it must have a field that identifies the 'managing organization' associated with the record.

Here's an example of a report that can't be shared in the sharing portal.

Contacts Only (however you can run a report that is Contacts with Connections and it will run fine. On the other hand, Contacts, with or without connections will not run! (as it would attempt to show contacts where this isn't an associated connection), and wouldn't know which contacts to share.

Forms: Improved Click & Pledge integration (HOC3-3861)

The Donation Block available for forms has had improvements to increase its useability in conjunction with Click & Pledge. The fields Campaign ConnectCampaignAlias, SKU, and Tracker Info from Click & Pledge are now available for use with the HOC form.

August, 2017 Release Notes

The August 2017 release will begin rolling out to customers the week of August 7. The release adds a new email alert that system admins can enable if they wish Opportunity Coordinators to receive notification of the approach of the end date for an Individually Scheduled Opportunity. There are also improvements for HOC International customerrs, and a few other improvements. Here are the highlights.

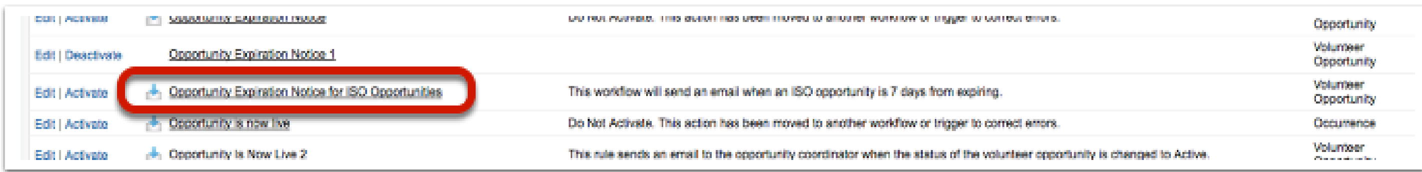
Optional Administrative Update: New workflow available to notify partners of expiration of ISO opportunities (HOCAVV-975)

A new workflow, email alert and email template have been added to HandsOn Connect making it possible to send an email notification to a Partner-Managed Opportunity Coordinator when an ongoing Individually Scheduled Opportunity is reaching its end date. This can serve as a reminder to OC's that they may wish to extend the end date of the occurrence of this opportunity so it will continue to be published and available for volunteers to express interest.

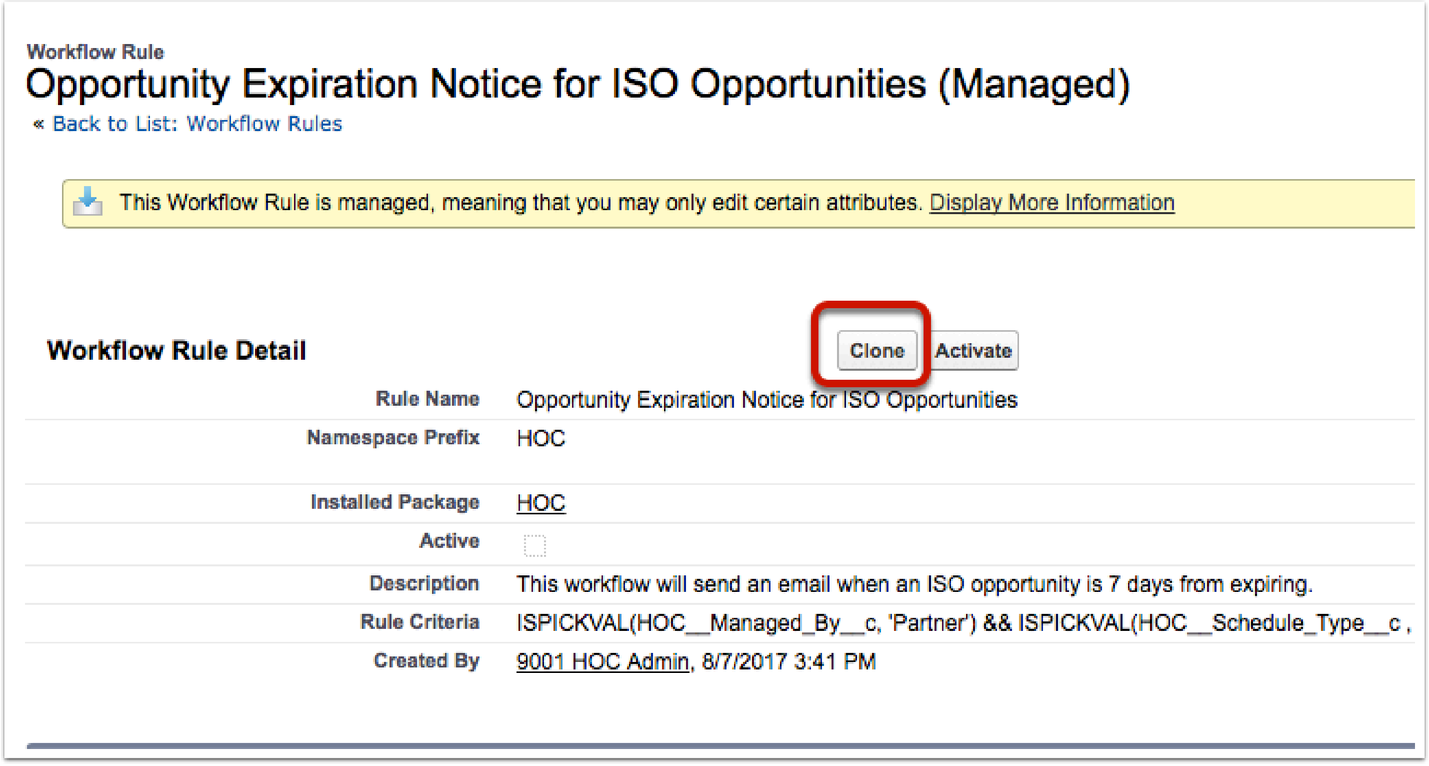
The new workflow is named "Opportunity Expiration Notice for ISO Opportunities"
The new email alert is named "Opportunity Expiration Notice for ISO"
The new email template is named "Opportunity Expiration Notice for Individually Scheduled Opportunities"

It is up to your organization if you'd like this new email notification to be part of your system workflows. If so, this workflow needs to be manually updated by a system administrator. Here are the simple steps involved (this will take less than 5 minutes!)

1. Go to Setup / Workflows and select the workflow "Opportunity Expiration Notice for ISO Opportunities.



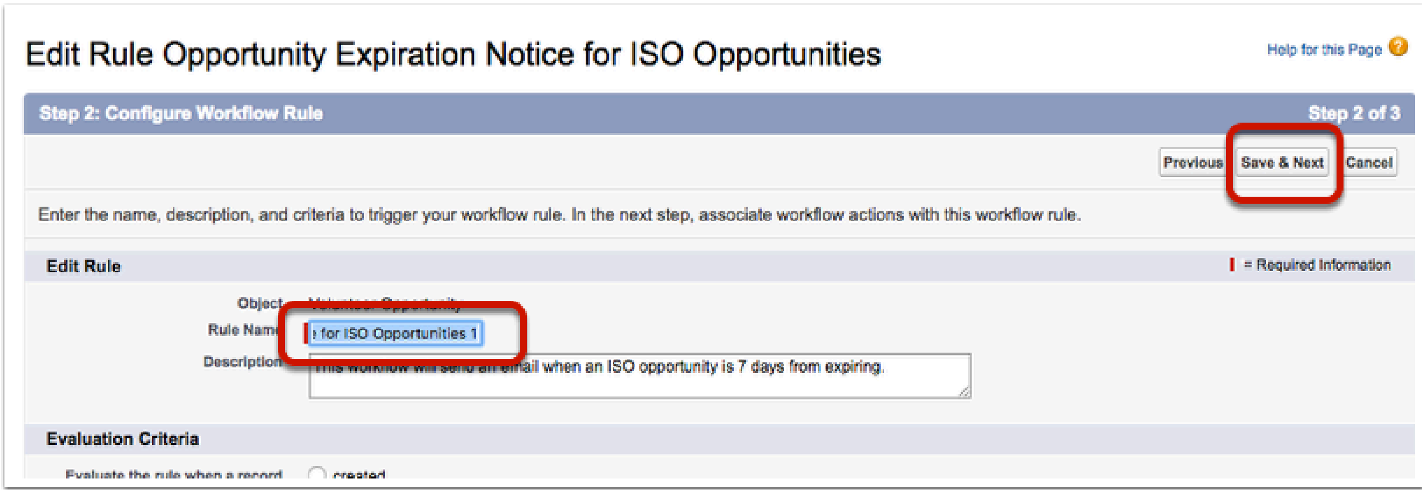
2. Click on the Clone Button



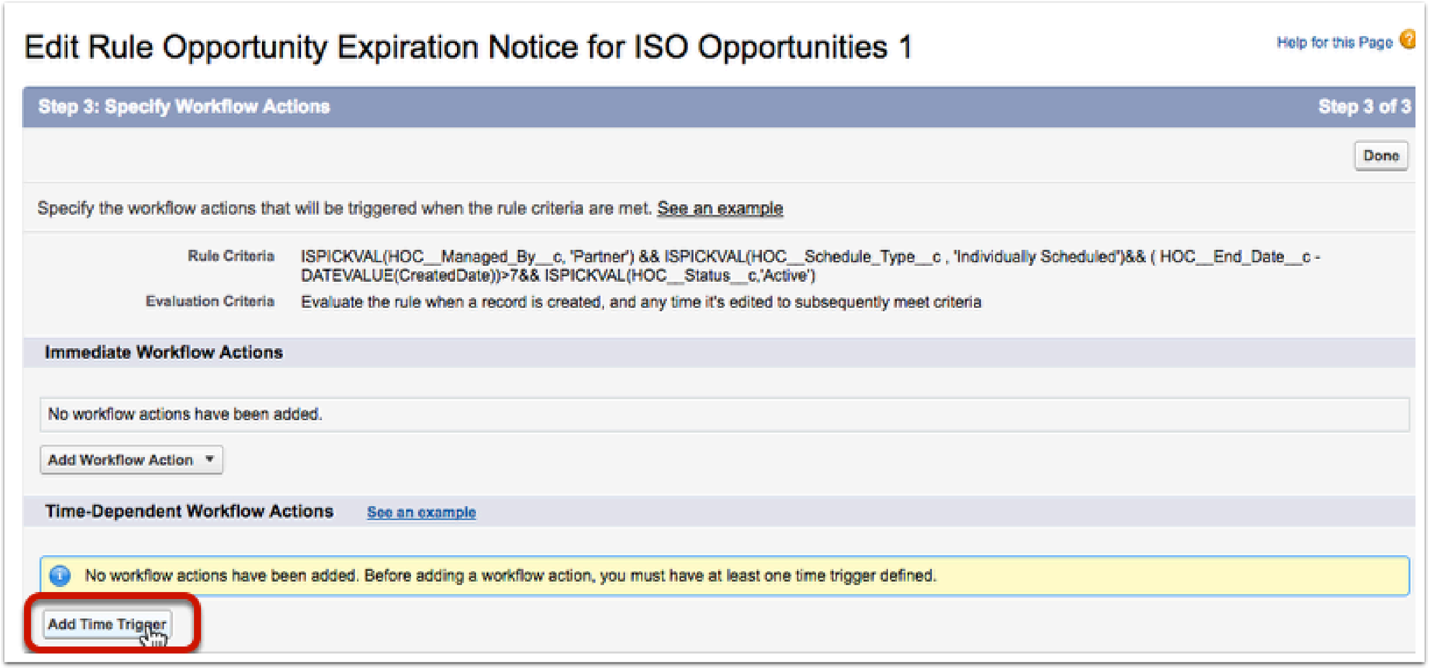
3. Add a '1' to the end of the rule name, so that your clone is now named "Opportunity Expiration Notice for ISO Opportun ities 1".

Do not change anything else on this page. This will create an unmanaged version of the workflow to which you can add a time based trigger.

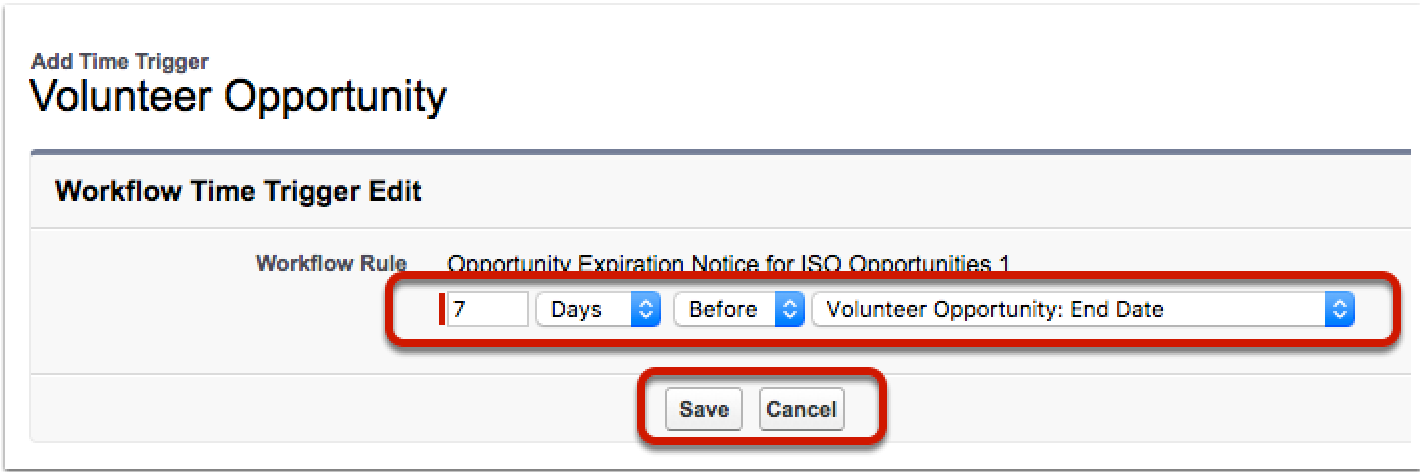
4. **Click on "Save & Next"**



5. In the 'Time-Dependent Workflow Actions' section click on 'Add Time Trigger'

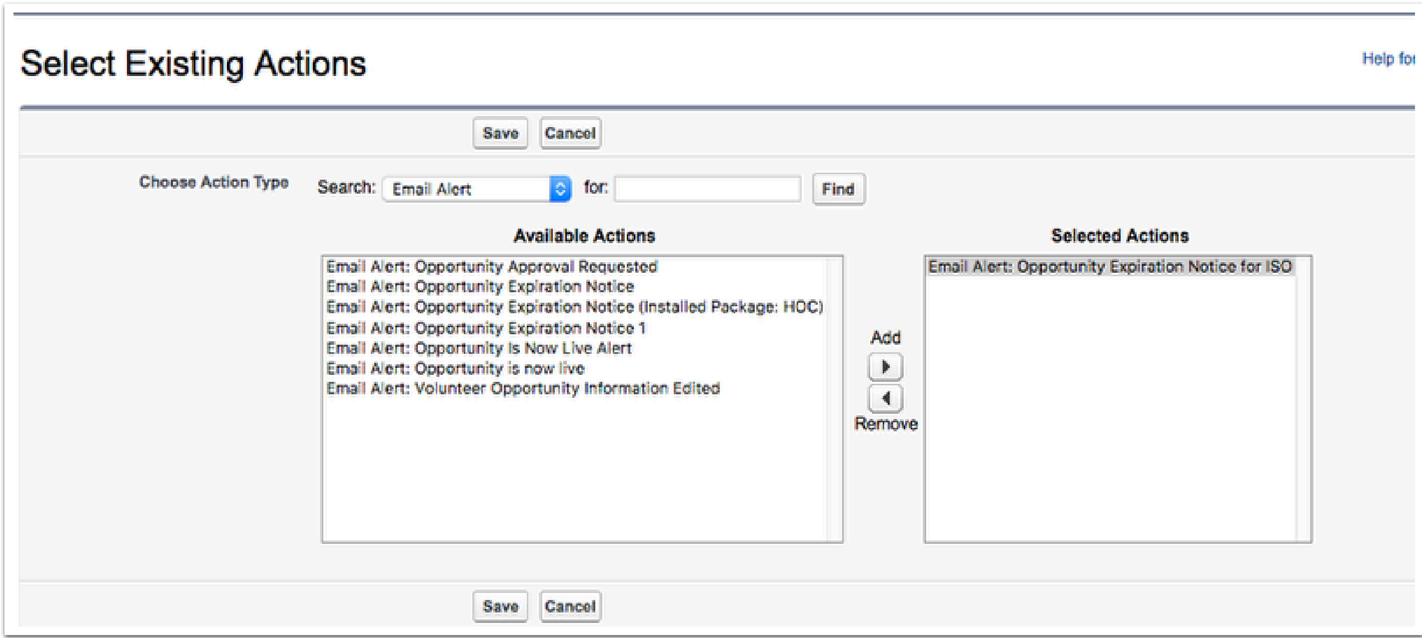


6. Set the workflow time trigger to activate "7 days before Volunteer Opportunity: End Date" and click save.



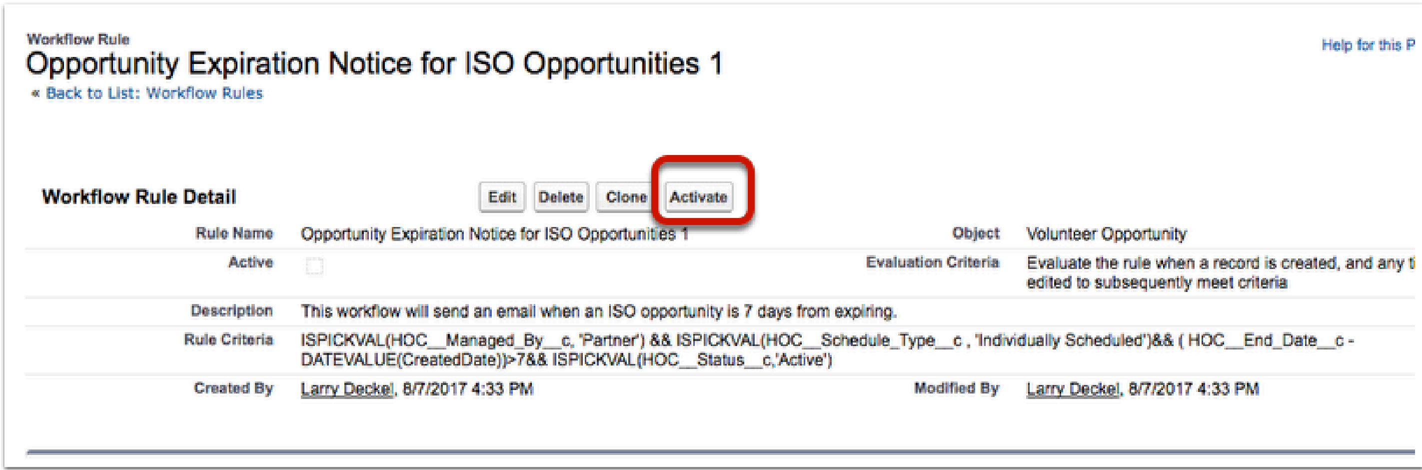
7. Inside the recently created time depend action click in "Add Workflow Action" and select 'Select Existing Action'

8. Choose Action Type "Email Alert" - and select the action "Email Alert: Opportunity Expiration Notice for ISO", move it to the selected action column and click save.



9. Click on 'Done"

10. Click on "Activate" to make the workflow active.



This workflow will automatically send an email to the Opportunity Coordinator 7 days before their opportunity reaches its end date.

The email has details on how to extend the listing, as well as best practices for working with Individually Scheduled Opportunities. The default email template text is shown below. (Note: You can edit the email template if you desire).

Dear {!HOC__Volunteer_Opportunity__c.HOC__Volunteer_Coordinator_Name__c},

The following volunteer opportunity will expire from our system on {!HOC__Volunteer_Opportunity__c.HOC__End_Date__c}:
{!HOC__Volunteer_Opportunity__c.Name}

Posting Date Range: {!HOC__Volunteer_Opportunity__c.HOC__Start_Date__c} to {!HOC__Volunteer_Opportunity__c.HOC__End_Date__c}

If you wish the volunteer opportunity to continue past the ending date, please log in to your account, review it for accuracy, and make any necessary edits.

Then, go to the occurrence record for this opportunity, click on edit, and extend the end date to a future date.

This will resubmit your opportunity for our review, and once approved, it will be reposted continuing through your new expiration date.

Please note however: Volunteer Opportunities with more than 1000 connections can become difficult for you to manage. If this expiring opportunity already has a lot of connections associated with it - you may find it more useful to create a new volunteer opportunity to replace this expiring one, rather than extending its date.

You can give the new opportunity the same name - or better yet distinguish it from the prior opportunity by putting a date in the title. (i.e. replace "Receptionist Needed" with a new opportunity called "Receptionist Needed 2017." This keeps the number of connections you need to filter through in each opportunity to a more manageable amount.

If you no longer wish to recruit volunteers for this opportunity, no action is needed on your part.

Thank you,

The {!Organization.Name}
Staff

Note. This workflow, once activated, will take effect for all newly created ISO opportunities. It will not retroactively schedule email notifications for existing ISOs. (To force it to apply to existing opportunties - change their status to inactive, and then republish the opportunity).

Additional Improvements made to nightly update of posting status (HOCAVV-976)

Organizations with a large number of occurrences / volunteer opportunities were finding that not all posting statuses were being updated as expected. Adjustments have been made that should correct performance so that each night the posting status of each occurrence / opportunity is brought up to date. (i.e. it would no longer be showed as published after the occurrence date is in the past.

The State of a location is only required for locations in the United States (HOCAVV-970)

For countries outside the United States, the requirement for a location to indicate the 'State" (in addition to the city), has been removed. State is only a required field if your default country is United States.

Check-in Sheet now supports Chinese characters (HOCAVV-944)

For International customers using chinese fonts / characters, the check-in sheet in the sharing portal will now display names that are in Chinese.

Featured Opportunity Block improvement (HOCAVV-983)

For those customers in the pilot for the new Featured Opportunity Block, the performance of 'tagging' opportunities to display in the block has been improved. Previously one had to wait 24 hours before a tagged opportunity showed up in the block. Now the block should update within 5 minutes of adding the tag.

HOC3 Release Notes: 3.0.31 (July 27, 2017)

This release includes a number of behind the scene improvements including greater security for files uploaded via the form builder and improvements to site templates. This release also features a long awaited new feature and a few other visible improvements.

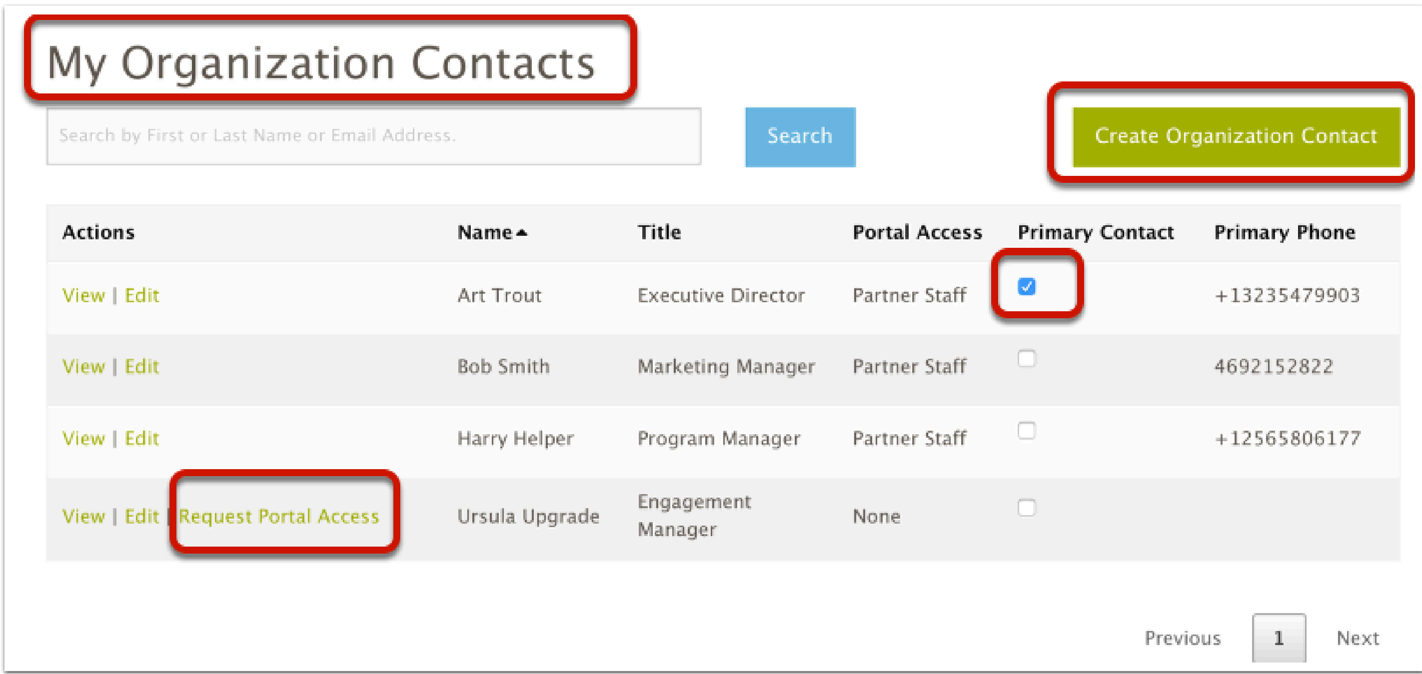
Sharing Portal: Ability to view and manage your staff contacts, and request portal access for additional staff members. (HOC3-3680)

It's nearly ready! The ability to view, edit and manage your organization's staff contacts, create new staff contacts, and request portal access for additional staff members.

(NOTE: This functionality must be activated for clients one at a time and we're giving it a few final tweaks. It should be available for eeryone no later than Monday, July 31. Don't panic if you don't see it yet. It's coming!

You'll find this new grid in the lower half of the "My Organization" page

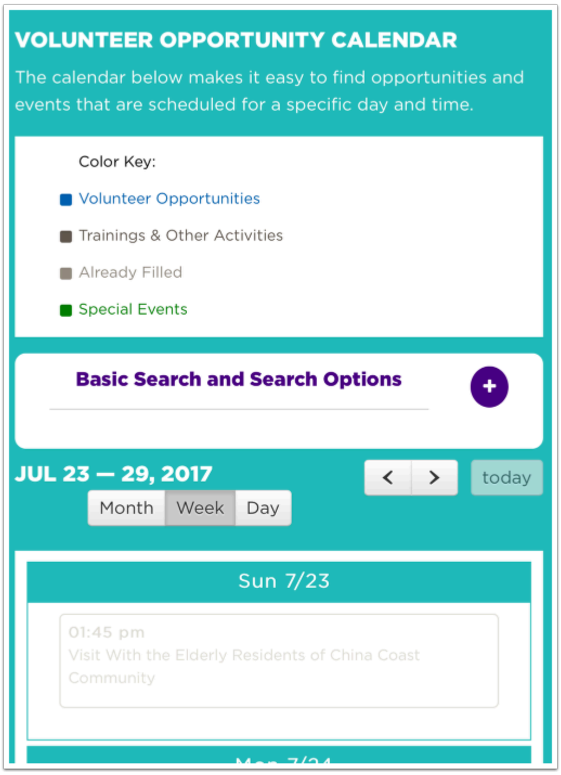
[See this article for full details]



Improvements to Mobile Calendar (HOC3-3811)

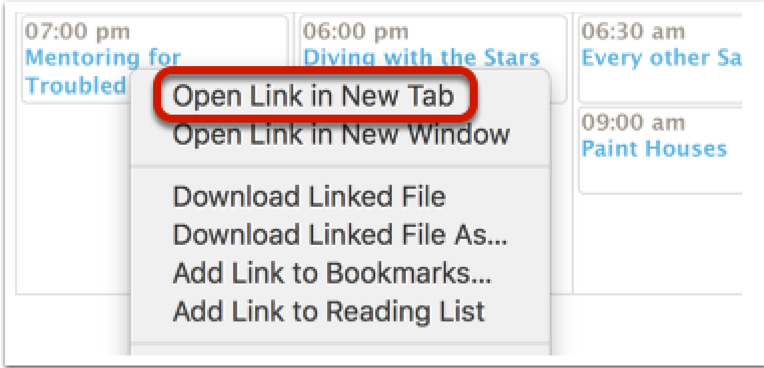
In the last release, we rolled out our new, easier to use and read mobile version of the calendar. In this release we've added a few of the features that are available in the full view of the calendar including:

- Dates in the past appear as 'grayed out'
- Color legend is displayed, and opportunity links are color coded to indicate projects, activities, special events, and full projects.



Usability enhancement: Opportunity links displayed in the calendar can now be opened in a new tab if desired (HOC3-3381)

Power users of the Internet often like to open a link in a new tab. Its now possible to have links in the calendar open the opportunity detail page in a new tab.



How to open a link in a new tab varies in different operating systems and different browsers. For example, on a Mac using chrome or safari, you hold down the control button when clicking on a link). People who frequently like to open links in new tabs know how to do it on their systems! Many people never do this - but now its possible for those who do!

Bug Fix: Registration questions of type number not displaying (HOC3-3813)

It was discovered that Custom Registraton questions with the field type of 'number' - were not displaying in HOC 3 sites. This has been fixed.

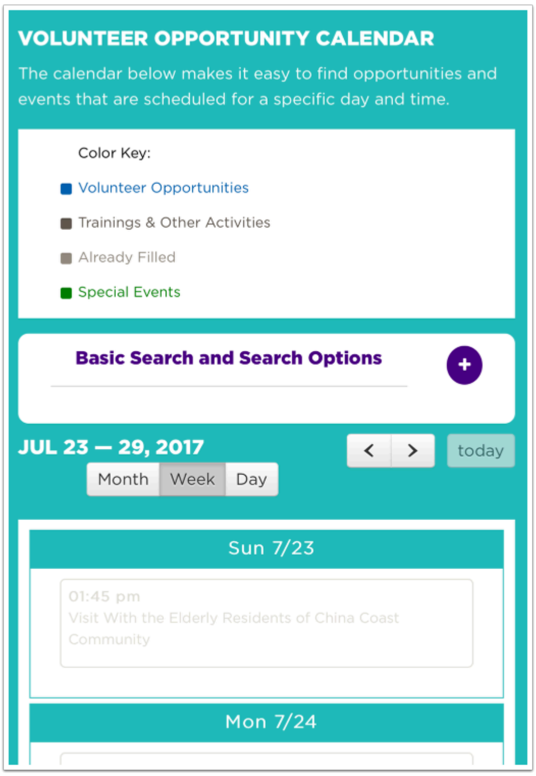
Verified Volunteer Restrictions now applied to Teams and ISOs (HOC3-3373)

Improvements have been made to Verified Volunteer integration for those customers using Verified Volunteers.

Minimum Requred levels of verification will now be applied to team signups and signups for Individually Scheduled Opportunities.

Be aware that this will make it difficult to create a new team and sign up team members for opportunities that require VV background checking. We recommend turning off team sign-up for opportunities that require background checks.

However - if you leave team signup on - then only team members who have created accounts, and had a background check conducted, will be able to be signed up for VV-required opportunities.



Administrator Update Recommended - Update Email Template "Organization Registration Activation"

NOTE: The following update is only needed for current users of HOC 3.0

When a non-profit organization applies to be made a partner by filling out the Oragization Sign-Up Page /organization-sign-up their contacts are created without a profile or login. When you then give that contact the profile 'partner staff" - two emails are sent to the organization.

- An email template called "Organization Registration Activation" and
- An email with instructions on setting your password is set from the .net database which tracks all users with logins to the public site and sharing portal

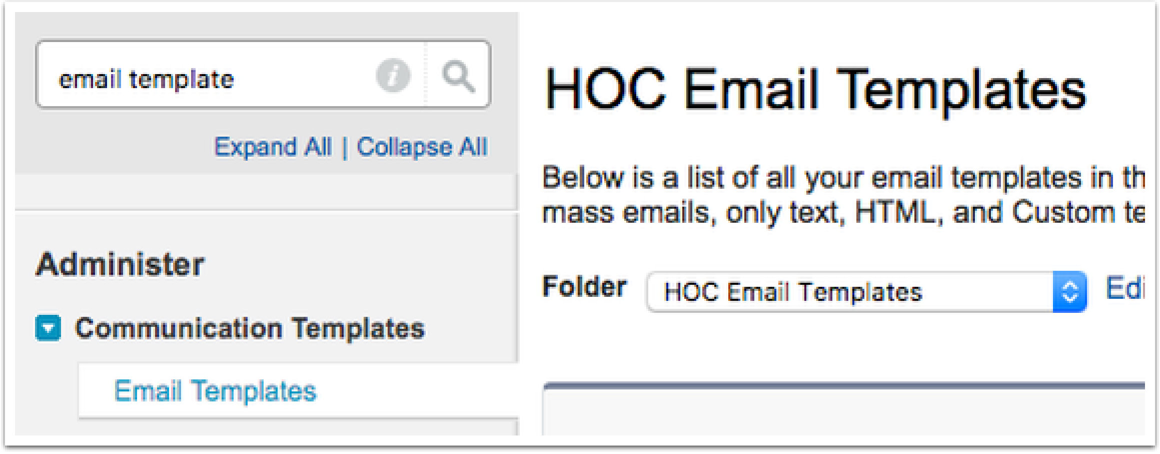
However, some organizations take organizational contacts and give them a volunteer profile before they make them partner staff -- and in that scenario, the user already has a login and password - and no password email will be sent to them. If they already had a password - their username and password remains the same -- they just now have access to their sharing portal.

The current email template "Organization Registration Activation" implies that a password reset email is always sent - but that's not always the case.

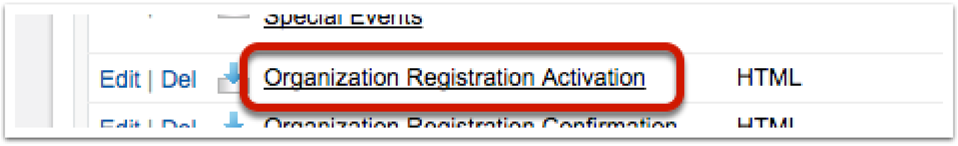
So we recommend that administrators make a small update to the email template to more clearly explaiin when a password related email will or won't be sent. Here's how to do this recommended, quick, easy update.

Edit the email template

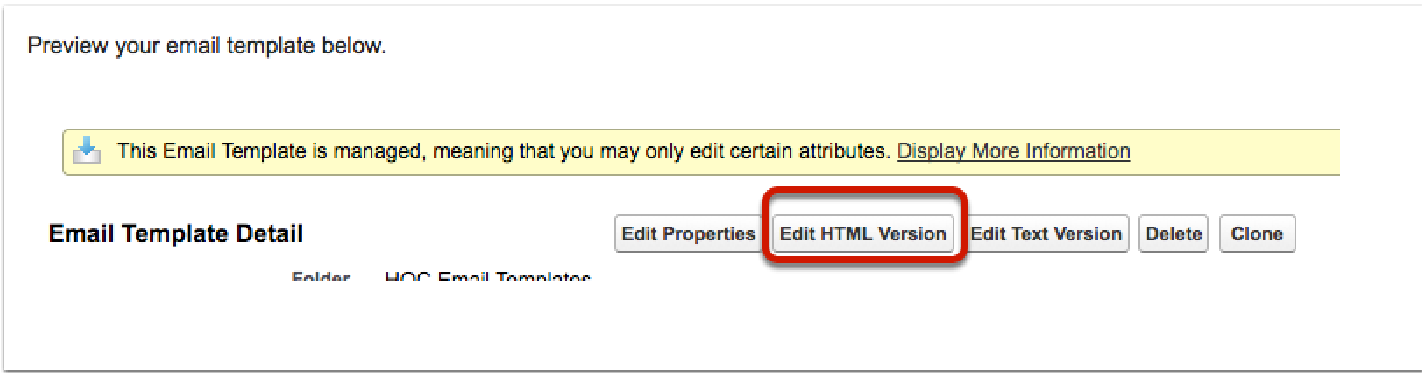
1. Go to Setup and use the quick find and search for "Email Templates"
2. Use the folder "HOC Email Templates"



3. Click on the email template "Organization Registration Activation"



4. Click on "Edit HTML version"



5. REPLACE the first two paragraphs in the template from this:

You have now been granted access to the Partner Portal with {!Organization.Name}. An email with your log in and password has been sent to you in a separate email.

As an approved user representing {!Account.Name}, you now have the ability to log-in and access your organizational portal through which you will be able to submit opportunities that will appear on our opportunity search engine and on our opportunity calendar. "

To this:

You have been granted access to the Partner Portal with {!Organization.Name}. If you've not previously created a member account on our site, an email with your log in information and a link to set your password will be sent to you in a separate email.

If you already have an active login and password for our site it will remain the same but when you log in you'll be taken to the partner portal.

As an approved user representing {!Account.Name}, you now will be able to submit opportunities that will appear on our opportunity search engine and on our opportunity calendar.

6. Click Save.

7. Click on Edit Text Version and click on the button "Copy text from HTML version".

8. Click Save.

HOC3 Release Notes: 3.0.30 (July 13, 2017)

This release contains continued improvements to the infrastructure of HOC 3.0 including the ability to track additional information when activity takes place on HOC public sites, sharing portal and check-in kiosks. There have also been a number of improvements to the way HOC appears on mobile and tablet devices.

Improved Calendar Page for mobile and tablet devices (HOC3-3011 and 3452)

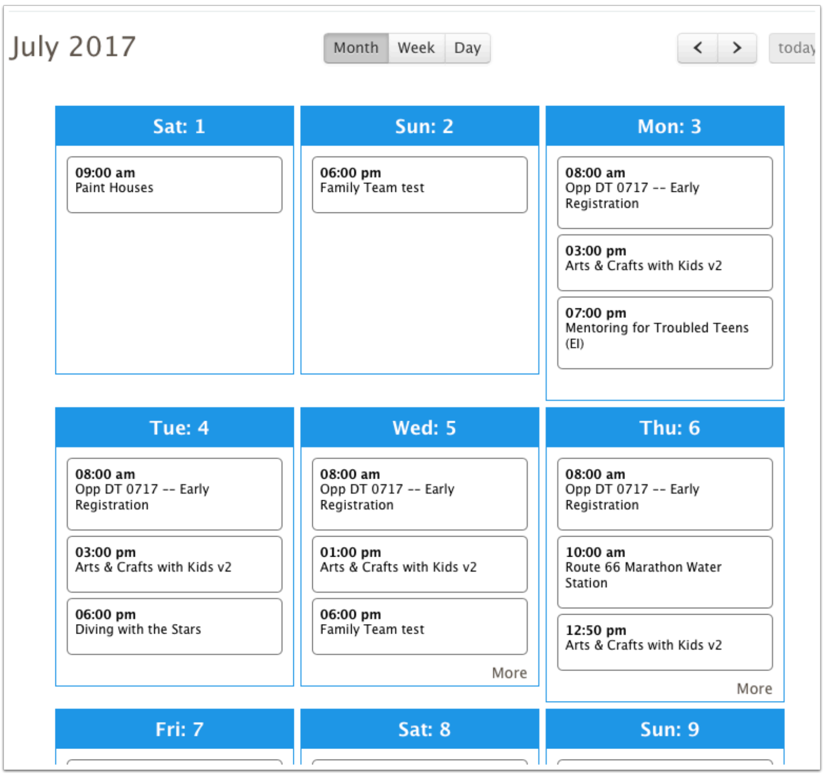
The HOC Volunteer Opportunity Calendar has been quite awkward to use on Mobile devices. Getting a 7 day view in a small width made things just too compressed.

With this release we introduce new improved mobile versions of the calendar. They are much easier to use, navigate through, and see opportunities by date. Features include:

- Month, Week, or Day view selection
- < and > icons move you forward or backward by month, week, or day depending on view being used.
- Today button quickly brings you back to the current month, week, or current day depending on which view you're in.
- "More" link shows additional opportunities taking place that day.

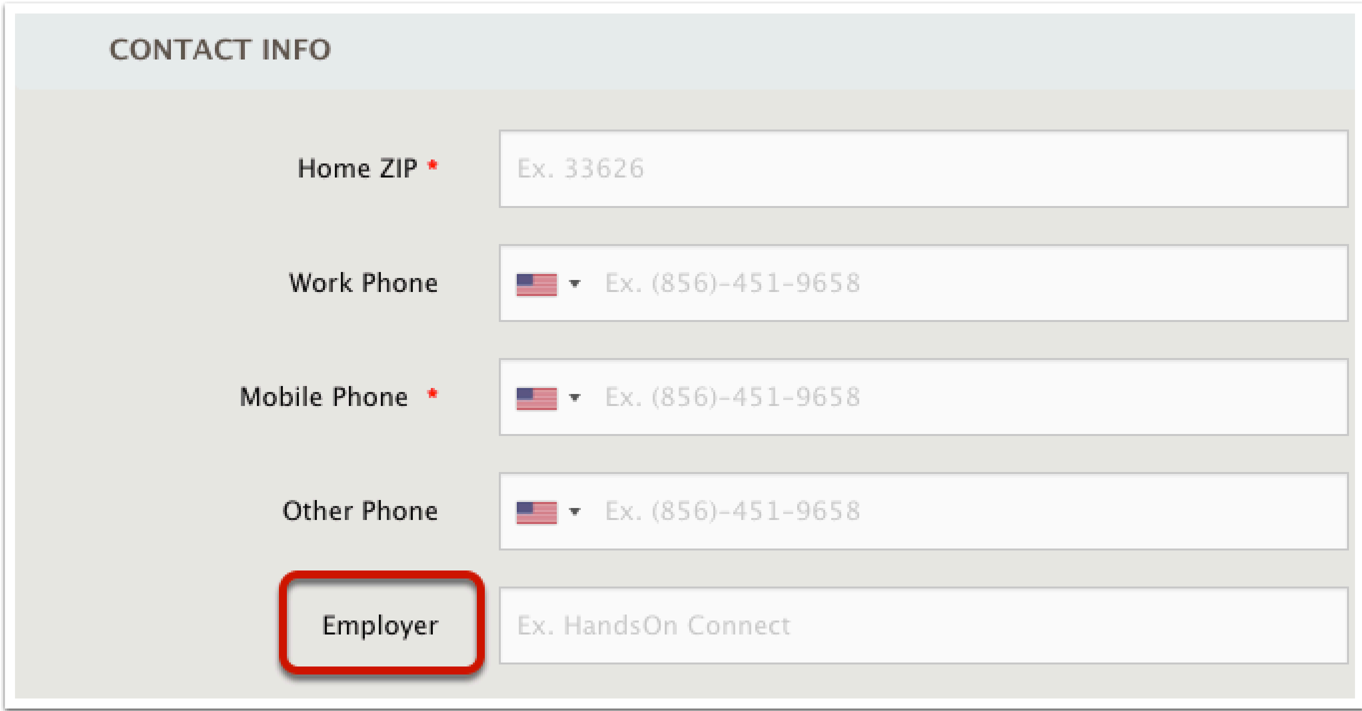
MOBILE VIEW:

TABLET WIDTH VIEW



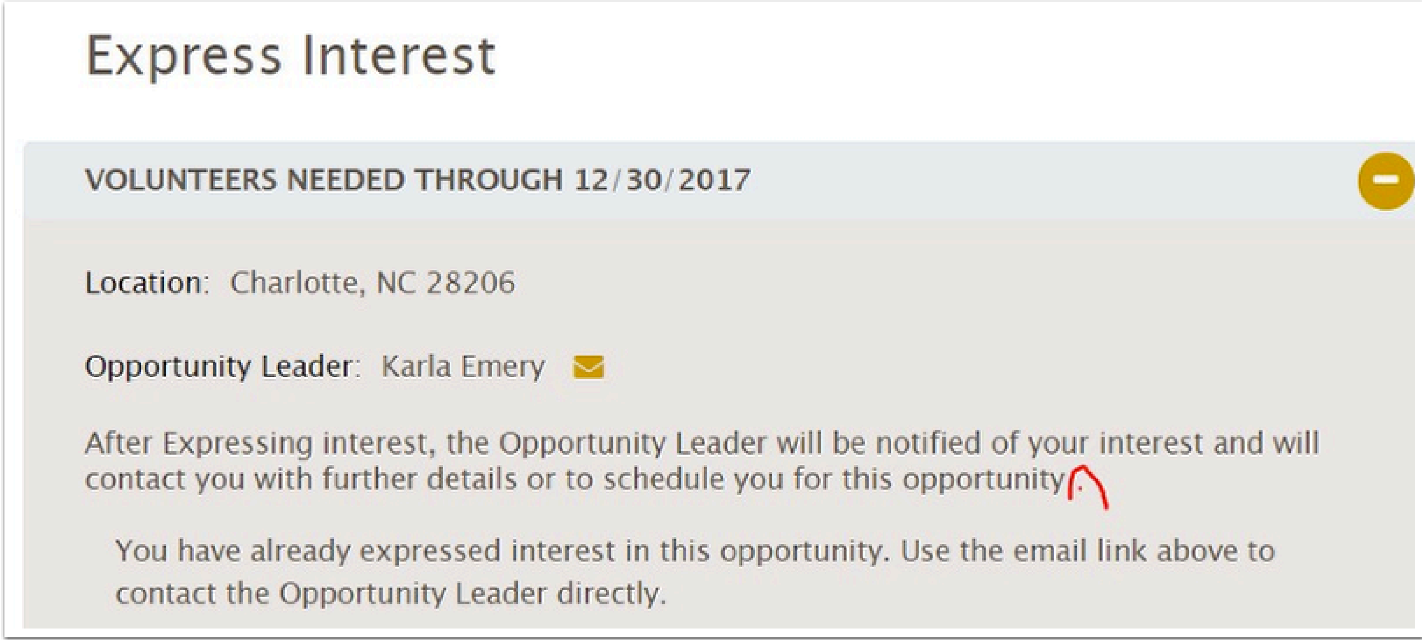
Text Updates on Public Site

1. The regisration form field "Place of Employment" has been updated to "Employer", matching the actual field on the back end of the site. Some volunteers have been confused and were entering the 'place' where they worked (an address) instead of the Employer name. (HOC3-2732)



2. Column label on Team Creation page changed from "E-mail & Communication preferences to "E-mail"

3. A missing period was added to the end of a sentence on the public site when a volunteer has already expressed interest.



Verified Volunteers: Help Text added in sharing portal (HOC3-3698)

If you are using Verified Volunteers in the sharing portal, the field "Minimum Required Level of Verification" is shown as part of the "Create a Volunteer Opportunity" page.   For those partners who are not using verified volunteers, the name of this field and its function is not self-explanatory.

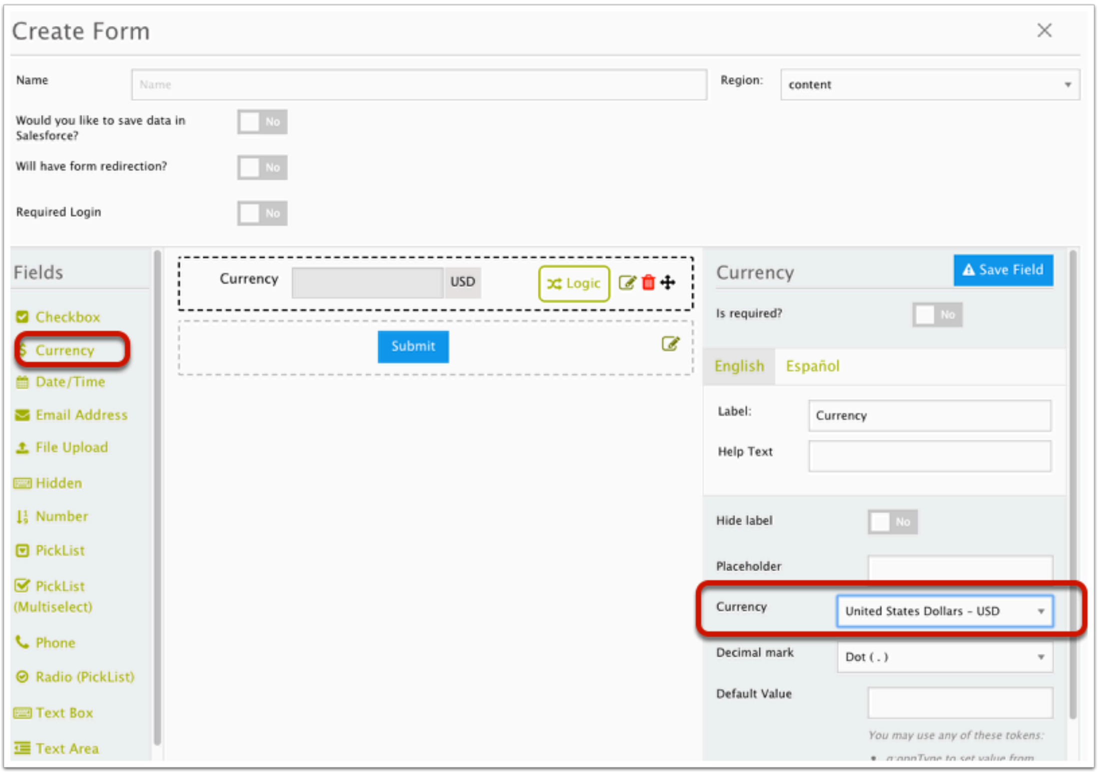
Help text has been added to the field so partners not using VV will understand what the field is for, and that's its only relevant IF you are using Verified Volunteers.

The help text is: "This field for partners using Verified Volunteers background checking service only. For more information on using Verified Volunteers, please contact your system administrator."

Advanced Registration System and Form Improvements

A number of performance improvements and features have been added to the Advanced Registration System (ARS)

- When using ARS for Opportunity Signup customizations - all system 'success' pages for various types of volunteer opportunties, individual and team signup are now supported so that the appropriate success page is presented during opportunity signup in ARS workflows.
- Forms now include a currency field option. The new currency field is compatible for use with international currencies.



- Forms can now be configured to update an existing contact record for a logged in user.

Improvements made to reset password functionality (HOC3-2963)

improvements have been made to the password infrastructure to reduce errors occasionally reported where user is not able to successfully reset their password.

HandsOnConnect Cloud Solutions

July, 2017 Release Notes

This release features a number of improvements that make HandsOn Connect more compatible with HOC3 sites. Adjustments have been made to sharing rules, and internal logic has been changed to support a broader range of Salesforce configurations and the needs of International Customers.

Now possible to configure which opportunity types do and don't apply restrictions to signing up or expressing interest (HOCAVV-974)

As has been noted elsewhere in this forum - the current behavior of HandsOn Connect is to apply restrictions (such as minimum age, background check required) ONLY to Date and Time Specific - full sign up opportunities. The various 'express interest' opportunities DO NOT apply restrictions to expressing interest.   This default behavior has come as a surprise to many HandsOn Connect users who assumed that restrictions were being applied to other opportunity types, and would prefer to have their instance configured to always apply restrictions.

It is now possible to control whether or not restrictions are applied to each Volunteer Opportunity Type. You can also easily make restrictions apply to ALL opportunity types. If you take no action at this time, the current settings will remain in effect.

Current settings for Applying Restrictions to Volunteer Opportunities:

- Date & Time Specific - Full Sign up ----> **Apply Restrictions**
- Date & Time Specific - Express Interest ----> **Do Not Apply Restrictions**
- Individually Scheduled - Express Interest with Schedule ----> **Do Not Apply Restrictions**
- Individually Scheduled - Express Interest Only ---> **Do Not Apply Restrictions.**

If you wish Restirctions to apply for ALL opportunity types:

Follow the simple Administrative speedup detailed in this article:

Doing this will make all opportunity types apply restrictions, and bypass the workflows described below that set the restriction settings for each opportunity type. If you apply the change to the default value for this field as described in the linked speedup, then there's no need to do anything to the workflows described below.

If you wish to have SOME opportunity types apply restrictions, and other NOT apply restrictions:

The current apply / do not apply settings for each opportunity type are controlled by the field updates applied to these four workflows found in Setup / Workflows:

- Apply Restrictions - Expresss Interest
- Apply Restrictions - Express Interest Only
- Apply Restrictions - Express Interest with Schedule
- Apply Regisrictions - Sign Up

If you view any of these workflows you'll see they are each assigned to one of two Immediate workflow actions:

Field Update: Do Not Apply Restrictions

Field Update: Apply Restrictions

If you wish to change the current restriction behavior of any of the opportunity types (but not all of them as described in the comment above), then simply EDIT the workflow action associated with the workflow rule, to either Field Update - Apply Restrictions, or FIeld Update - Do Not Apply Restrictions, as desired.

Want to make changes to the default behavior regarding restrictions, but nervous about following the steps above? Come to any lab session and we'll quickly take care of this for you and show you how :-)

Data Improvement: Contacts without login access will no longer have username created when contact email is updated. (HOCAVV-962)

The presence of a 'username' in a contact record generally indicates that a person has 'log in access' to the public site or the sharing portal.

The mechanism by which a change in email address automatically updates the username has always kept a person's username in synch with their email address. However, in some instances of Salesforce, there were contact records with email addresses who had not yet registered or been given access, and therefore had no username.

Because of this synching mechanism, if one changed the existing email address of a contact in SF who did not have a username, usernames were being ADDED to these contacts, which then prevented that contact from registering via the public site. (They'd get a message saying that the username already existed!)

This issue has been corrected - and now, if a contact does not already have a username and the email is updated in a Salesforce Contact Record -- a username will not be created for them.

Bug Fix: Errors received when making an inactive partner active again (HOCAVV-963)

There were reports that if you made an organization an active partner, and then changed their status back to pending or inactive, and then tried to update to active partner again an error resulted. This has been fixed.

Issues with nightly update of occurrence posting status addressed. (Admin advisory) - (HOCAVV-964)

Each night at midnight - an apex job is run to review all existing occurences and update the posting status so that the posting status is accurate based on the current date. There were reports were this was not happening in all organizations.

The culprit turns out to be 'bad data'. Having occurrences that are missing required fields (such as "Volunteer Opportunity" can cause a batch job like to fail.

We've updated the batch job to be more tolerant of bad data and to not attempt to update occurrences that are missing the volunteer opportunity.

That said - we urge all admins to monitor their occurrences and make sure that required fields are present in all occurrences. (This sort of 'bad data' occurs when users delete a record that is required for occurrences. This could be the result of deleted volunteer opportunities or locations. Our advice: Don't Delete Records! (or at least - don't delete them if they are used in any related records. Never delete a record that has 'related records".

Want to make sure your data is 'clean'? Run the report "Missing Informatioin-Occ' found in your HOC Support Folder. It will show you any occurrences that are missing either a location, a volunteer opportunity, a start date or end date, status, or maximum attendance. All these fields are required in an occurrence.

(Note: Except for 'location' - which is NOT required if its an Individually Scheduled, Express Interest Only opportunity.)

Run the report and clean up (or delete) the offending occurrences. (Make sure they don't have any connections before you delete them though!)

State no longer a required field when creating a location record (HOCAVV-969)

Creating location records have always required a value in the "State" field. However, since not all International customers use states the way they are used in the United States - the requirement for a value in this field has been removed. It's now possible to create a location that does not include a state. (Nonetheless, we recommend that for U.S. Customers you always DO put in a value for the state).

Check-In Kiosk - now reports hours when a pending volunteer checks-in (if guest check-in enabled). (HOCAVV-972)

Good news for those of you using the check-in kiosk and allowing guests to check in. If you have volunteers in pending status - their connection will now be properly checked-in!

The new HOC__EditiionSource__c field has been added to the workflow "Update Attendance Status" - to identify that the connection is being updated through the check-in kiosk. When this is the case:

- The status of the connection is updated from pending to confirmed
- The attendance status is updated to Attended and Hours Verified -- and the hours are now automatically calculated!

HOC3 Release Notes: 3.0.29 (June 29, 2017)

This release includes improvements to image resolution handling for image blocks and slider block on mobile devices, and improvements to existing site themes. Improvements have been made to business page styles, color and layout. A number of internal core improvements have been made to speed up the system and improve reliability.

Here are notes on three features of note to users of HandsOn Connect Add-Ons the check-in Kiosk, Advanced Registration System (ARS) or anyone creatingi custom forms, and the Parental Consent add-on.

Check-In Kiosk Improvement (HOC3-2788)

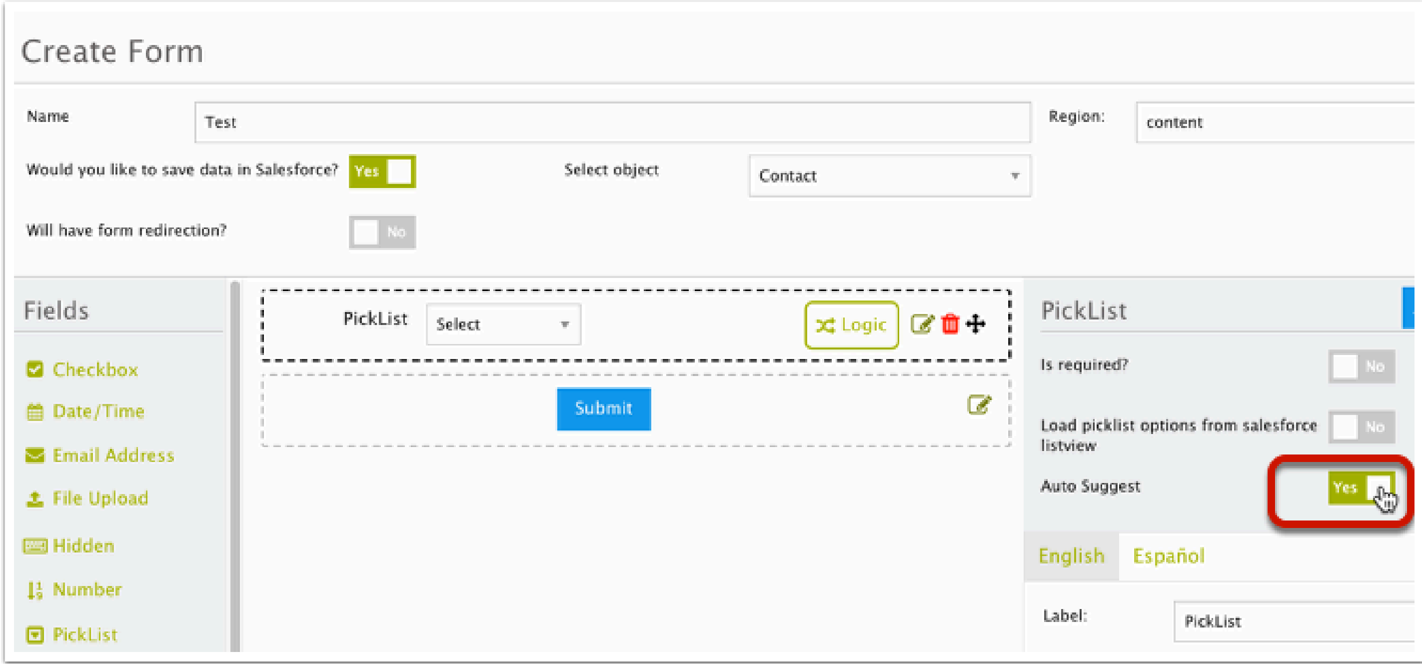
Its now possible to identify connections that were created or edited via the check-in kiosk. This makes it possible for users to consruct workflows or processes that are or aren't applied if the connection was created or last updated via the check-in kiosk. (As an example -- perhaps you don't want the normal confirmation email to be sent, when a guest checks-in (thereby creating a new connection) via the check-in kiosk.   You can now clone and update the workflow that sends confirmation emails and say 'don't send IF the connection was created via the kiosk".

The fields used to identify the source of record creation and updates are these:

- HOC_CreationSource__c   -- will have a value of HOC-Kiosk-3.0 if the connection was created via the kiosk
- HOC_EditionSource__c - will have a value of HOC-Kiosk-3.0 if the update to the connection was done via the kiosk.

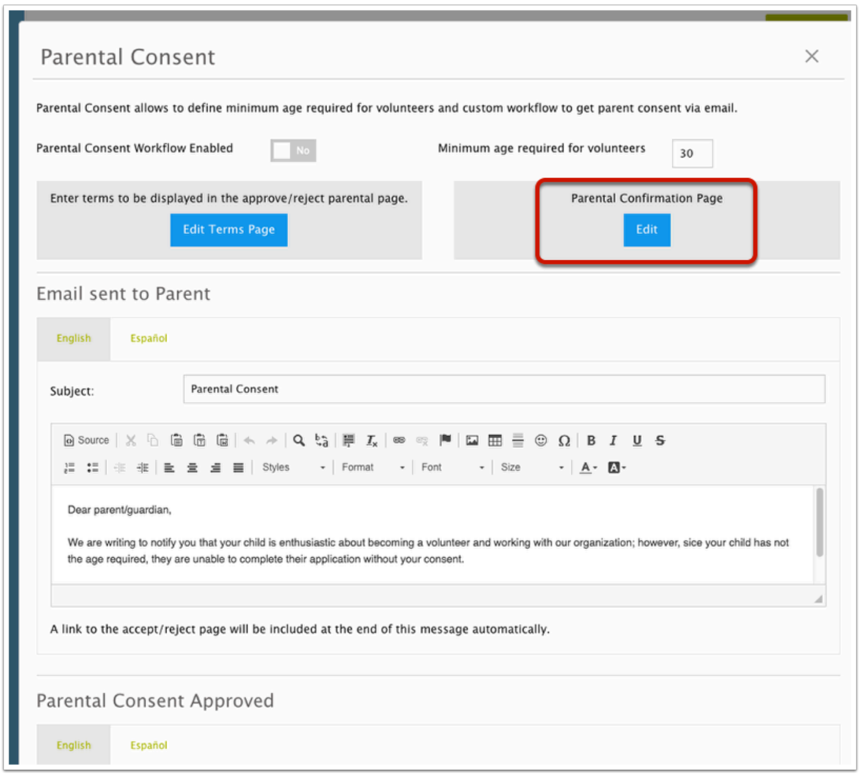
ARS and Form Improvement: Picklists now support 'autosuggest' (HOC3-3375)

When creating forms in the CMS - picklists now have an option to 'auto-suggest' text rather than simply display a picklist. When auto-suggest is enabled, a picklist will allow you to type in a picklist item name and this will filter the available picklist values making selection of the appropriate picklist value quick and easy.



Parental Consent Add-On - confirmation page is now edited within the mdule (HOC3-2113)

The page /volunteer-parental-confirmation can now be authored, edited and managed within the Parental Consent Add On - rather than as a separate page elsewhere in the CMS.



Important System Administrator Update for 3.0 users: Update your Volunteer Opportunity Wizard flow to the latest version!

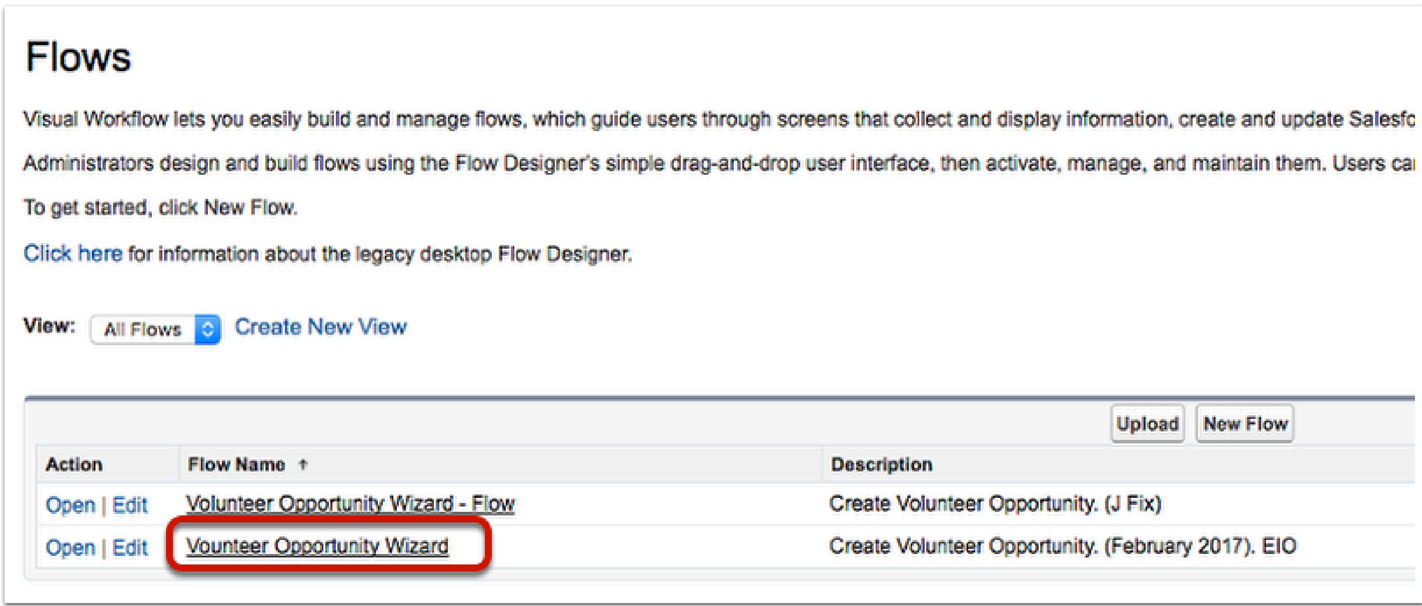
There are two bugs in the current version of the Volunteer Opportunity Wizard flow used to Create Volunteer Opportunities from the administrative site:

1. A minor bug - it which errors occur when you create an opportunity that starts at 12:00 pm exactly. Annoying, but not a major problem.
2. A significant bug - in which using the wizard to create an ISO opportunity on behalf of a partner organization fails to populate the field "Registration Type" - making it hard to know whether an ISO is "Express Interest with schedule" or "Express Interest Only".

All users with uncustomized versions of the Volunteer Opportunity Wizard are urged to install the 1.8 June, 2017 version of the flow. Here's how:

1. Deactivate the current flow:

- **Go to Setup > Create > Workflow & Approvals > Flows**
- Click on the label “**Volunteer Opportunity Wizard**”   (NOT: the older one called "Volunteer Opportunity Wizard - Flow"



Click on "Deactivate" for the most recent version of the flow. (Note: Your version numbers and descriptions may be different!)

Administrator Update: Make Restrictions Apply for all Volunteer Opportunity Types

HandsOn Connect has traditionally only applied opportunity restrictions to Date & Time Specific / Full Sign Up opportunities. Opportunities with registration types of "Express Interest" "Express Interest with Schedule" and "Express Interest Only" do not currently apply restrictions when a volunteer expresses interest.

For a full discussion of this, see this post.

The overwhelming majority of HOC users have stated they WANT restrictions to apply to all opportunities. Some were even unaware that restrictions weren't being applied to Individually Scheduled Opportunities and Date *& Time Specific / Express Interest.

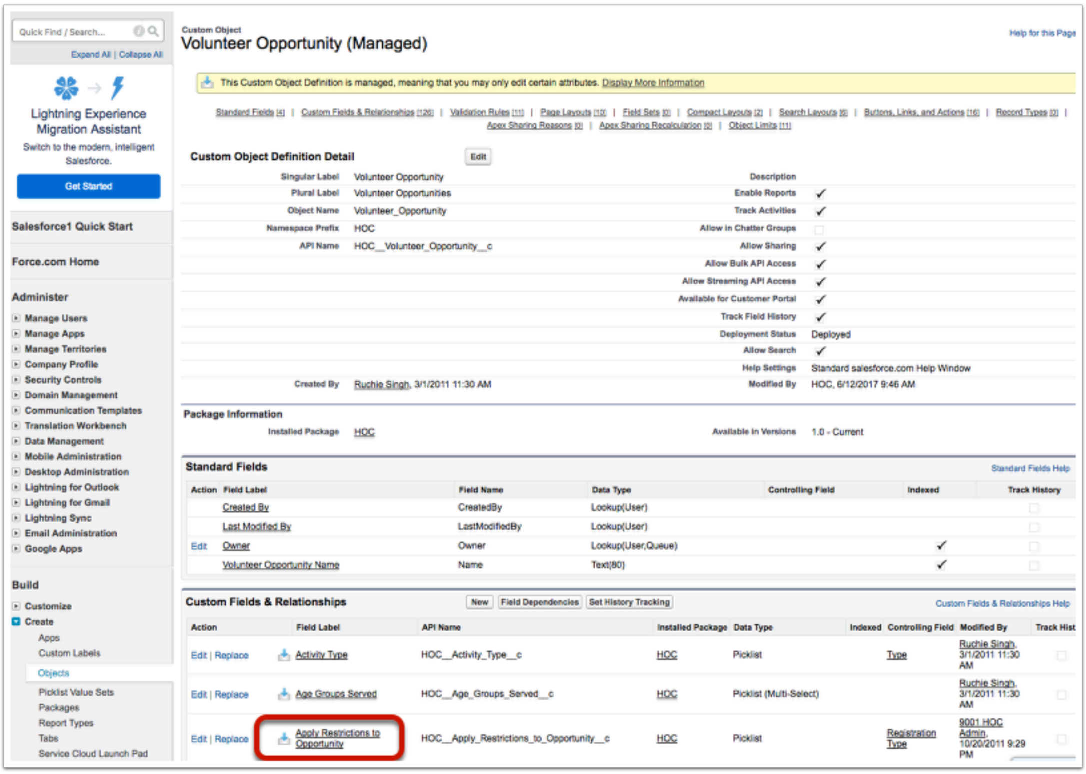
This article details a simple speed up you can perform, which will make all newly created opportunities of any type, honor restrictions during the signup / express interest process.

For those who wish to update their existing opportunities, created in the past, that don't honor restrictions, the second part of this article will tell you how to update those opportunities as well.

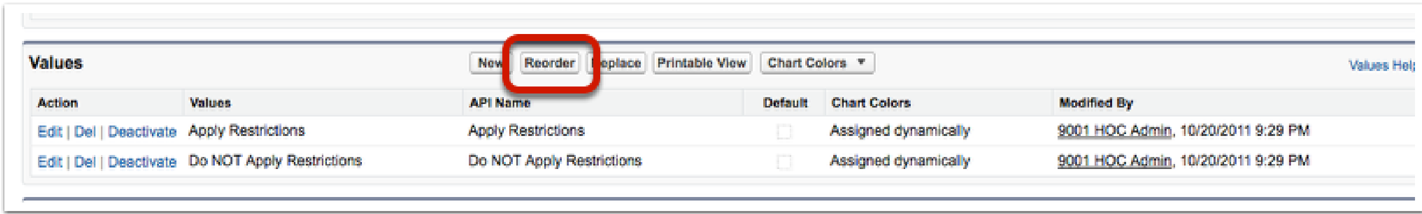
How to update your instance so that all opportunity types created in the future apply restrictions:

Set a default value for the Volunteer Opportunity field "Apply Restrictions to Opportunity"

1. Go to Setup / Objects / Volunteer Opportunity and select the field "Apply Restrictions to Opportunity" (Click on the field name, rather than the 'edit' button.

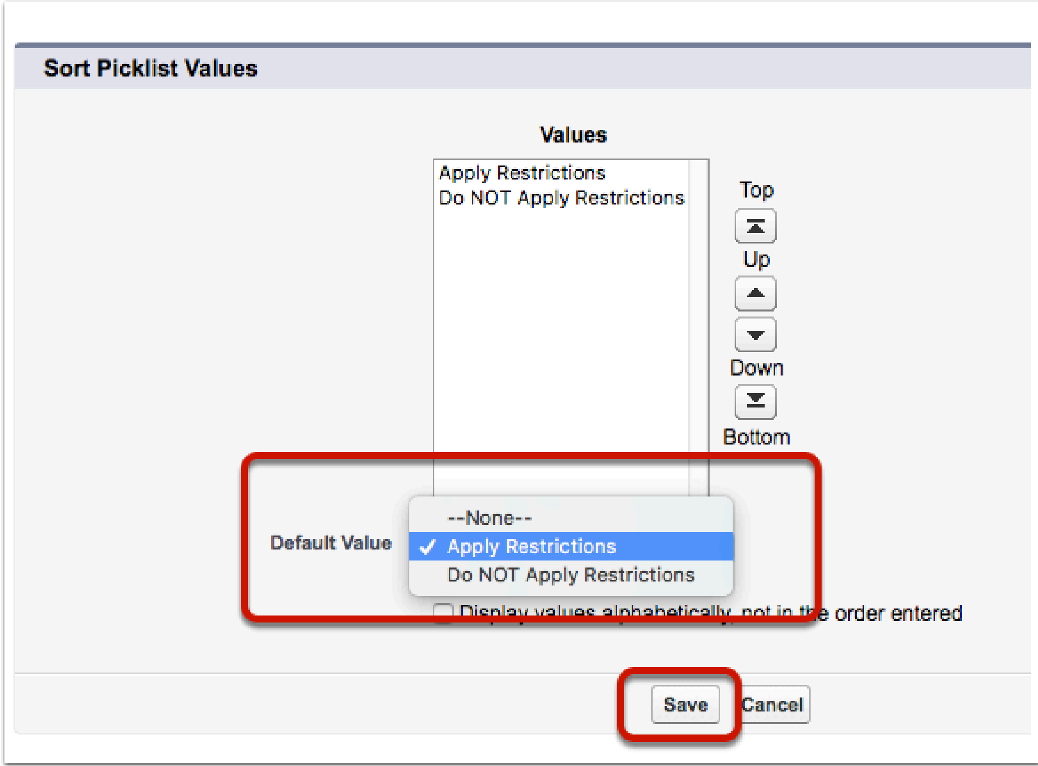


2. In the Values section of the page, click on the Reorder button:



3. Set "Apply Restrictions" as the default value for this field. and click the Save Button.

(now, whenever a new opportunity is created, it will be set to apply restrictions).



If you wish Express Interest opportunities (Date and Time specific, and both kinds of Individually Scheduled Opportunity) to continue to ignore restrictions, then no update to this field should be done.

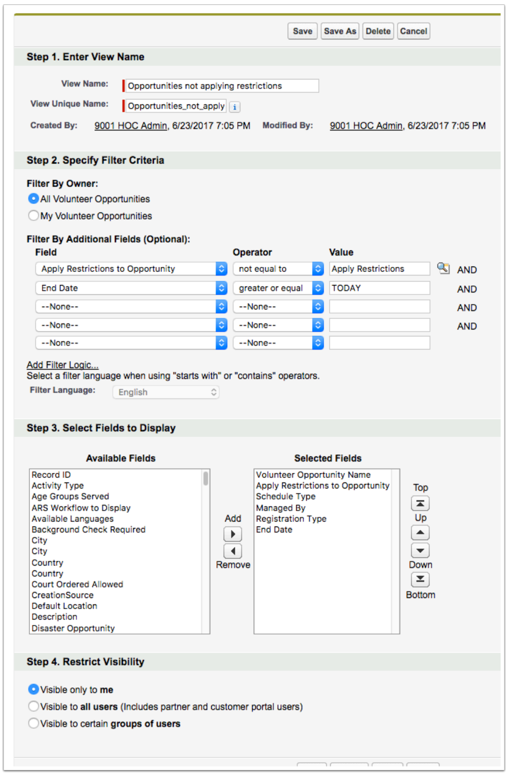
How to update your existing opportunities to apply restrictions going forward

Your existing opportunities that are either Date & Time Specific Express Interest, or Individually Scheduled Opportunities still are not applying restrictions.   If you wish to update them you can quickly and easily to do this by creating a view to see what opportunities were created and not applying restrictions. Here's how:

1. Go to Volunteer Opportunities Tab and create a new view:

- Name it "Opportunities not applying restrictions
- Filter All Volunteer Opportunities by the field "Apply Restriction to Opportunity NOT EQUAL TO "Apply Restrictions. " (This will give you both the ones that are already set to 'do not apply restrictions' and the newer opportunities types that are currently just placing a null value in this field.
- Optional: Only update opportunities with End Date Time > TODAY
- Display Fields that give you info to determine which opportunities you want to update (see screenshot for some that may be relevant to you:
- Make it visible only to you - this is a one time use view and you needn't trouble other users with it :-)

Click Save and examine your view:



Note: you are going to find some that are missing any value in "Apply Restrictions to Opportunity" -- This is because the current workflow rules were not populating a value in this field. Its a non-critical bug that will be addressed in a future release.

Note: You will also notice that some of the Partner Managed Opportunities are missing the Registration Type!   This is due to a bug that was recently found in the Administrative Volunteer Opportunity Wizard when created ISOs for partners. This bug will be fixed in an update to the VO Wizard - but if you find some of your Individually Scheduled Opportunities are missing a "Registration Type" value - you should clean this up too!

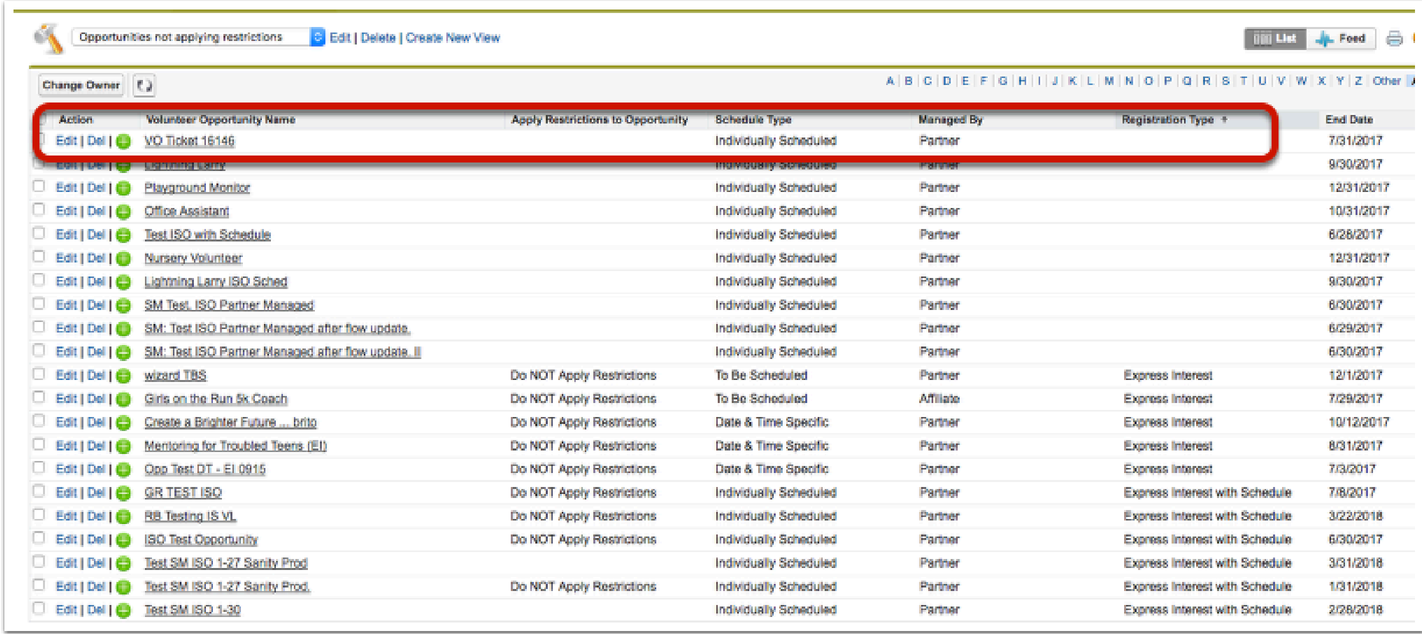
The resulting view will show you all the opportunities that currently do not have restrictions applied to them. You can leave them as they are and restrictions will still not be applied - or, one by one, you can update the value of "Apply Restrictions to Opportunity"

Note: You will also notice that SOME of the Partner Managed Opportunities are missing the Registration Type as well!   This is due to a bug that was recently found in the Administrative Volunteer Opportunity Wizard when created ISOs for partners. This bug will be fixed in an update to the VO Wizard - but if you find some of your

Individually Scheduled Opportunities are missing a "Registration Type" value - you should clean this up too!

By the way: If you haven't done so already - be sure to update your Volunteer Opportunity Wizard to correct this bug of the "registration type' field not being filled in for partner opportunities.

Click here for information on updating your Volunteer Opportunity Wizard to the latest version!


Opportunities not applying restrictions | Edit | Delete | Create New View

Action	Volunteer Opportunity Name	Apply Restrictions to Opportunity	Schedule Type	Managed By	Registration Type	End Date
Edit | Del	VO Ticket 16146		Individually Scheduled	Partner		7/31/2017
Edit | Del	Lightning Larry		Individually Scheduled	Partner		9/30/2017
Edit | Del	Playground Monitor		Individually Scheduled	Partner		12/31/2017
Edit | Del	Office Assistant		Individually Scheduled	Partner		10/31/2017
Edit | Del	Test ISO with Schedule		Individually Scheduled	Partner		6/28/2017
Edit | Del	Nursery Volunteer		Individually Scheduled	Partner		12/31/2017
Edit | Del	Lightning Larry ISO Sched		Individually Scheduled	Partner		9/30/2017
Edit | Del	SM Test. ISO Partner Managed		Individually Scheduled	Partner		6/30/2017
Edit | Del	SM: Test ISO Partner Managed after flow update.		Individually Scheduled	Partner		6/29/2017
Edit | Del	SM: Test ISO Partner Managed after flow update. II		Individually Scheduled	Partner		6/30/2017
Edit | Del	wizard TBS	Do NOT Apply Restrictions	To Be Scheduled	Partner	Express Interest	12/1/2017
Edit | Del	Girls on the Run 5k Coach	Do NOT Apply Restrictions	To Be Scheduled	Affiliate	Express Interest	7/29/2017
Edit | Del	Create a Brighter Future ... brito	Do NOT Apply Restrictions	Date & Time Specific	Partner	Express Interest	10/12/2017
Edit | Del	Mentoring for Troubled Teens (EI)	Do NOT Apply Restrictions	Date & Time Specific	Partner	Express Interest	8/31/2017
Edit | Del	Opp Test DT - EI 0915	Do NOT Apply Restrictions	Date & Time Specific	Partner	Express Interest	7/3/2017
Edit | Del	GR TEST ISO	Do NOT Apply Restrictions	Individually Scheduled	Partner	Express Interest with Schedule	7/8/2017
Edit | Del	RB Testing IS VL	Do NOT Apply Restrictions	Individually Scheduled	Partner	Express Interest with Schedule	3/22/2018
Edit | Del	ISO Test Opportunity	Do NOT Apply Restrictions	Individually Scheduled	Partner	Express Interest with Schedule	6/30/2017
Edit | Del	Test SM ISO 1-27 Sanity Prod		Individually Scheduled	Partner	Express Interest with Schedule	3/31/2018
Edit | Del	Test SM ISO 1-27 Sanity Prod.	Do NOT Apply Restrictions	Individually Scheduled	Partner	Express Interest with Schedule	1/31/2018
Edit | Del	Test SM ISO 1-30		Individually Scheduled	Partner	Express Interest with Schedule	2/28/2018

Unfortunately, because these two fields have dependcies - you can't edit these fields from the view itself. You need to click on each opportunity name, and then go to the fields in the record and manually update their value:

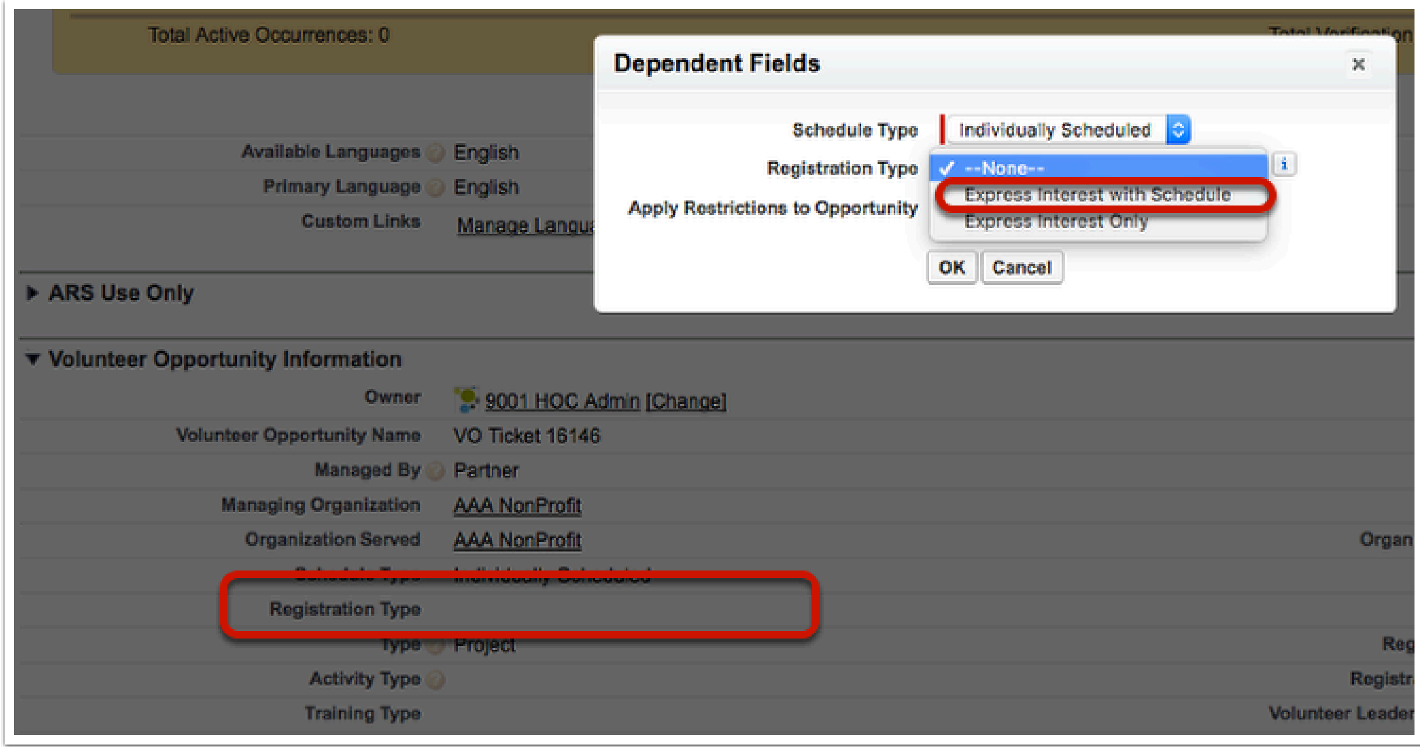
I've selected the first opportunity is this list (which doesn't have any value in this field - which means that restrictions aren't being applied), and gone to the opportunity record to update the field:

While I'm there, I'm also going to fill in the missing value for Registration type (as long as I'm cleaning up data)

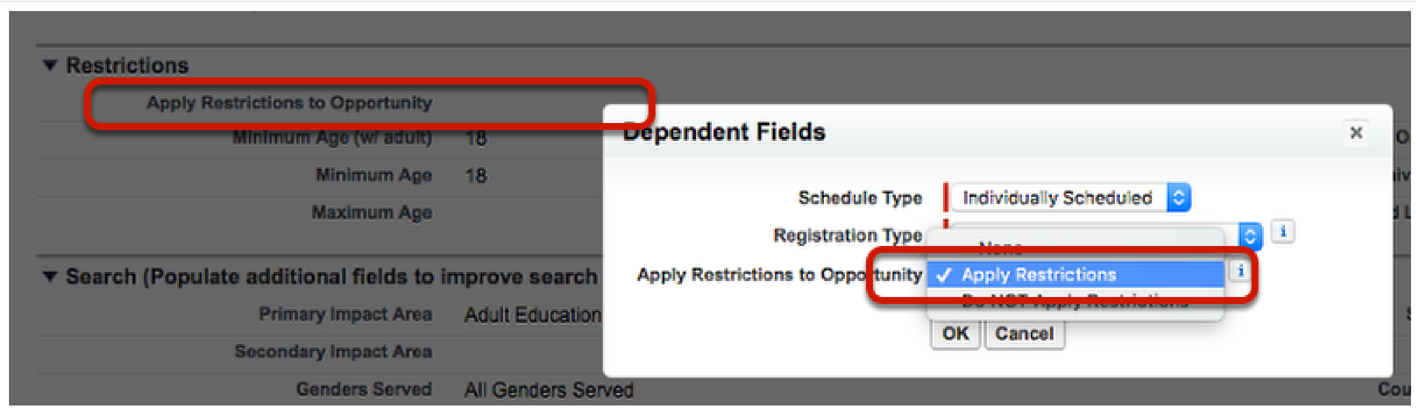
1. **Click on the field "Registration Type" and select a registration type.**

(If the ISO had a schedule associated with it - you should update to Registration Type = Express Interest with Schedule

If it was created as an Individually Scheduled Opportunity - Express Interest Only -- then change the Registration type to "Express Interest Only".



2. Set the value of the field "Apply Restrictions to Opportunity" to "Apply Restrictions" and click OK.



3. Click Save to save the updated record.

Repeat for each volunteer opportunity you wish to convert to "Apply Restrictions".

You'll only have to do this once, as your new default value for this field will automatically apply "Apply Restrictions" to all newly created volunteer opportunities!

Power Users familiar with using the data loader may choose to do a bulk update of their volunteer opportunities to set the value of Apply Resrictions to Opportunity through a bulk upsert.

Please Give us Your Feedback about Best Practices for Opportunity Restrictions and Signup

This post is a call to get your comments and feedback about a potential change in HandsOn Connect defaults regarding opportunity signup. It does require understanding a bit about how restrictions currently work with HandsOn Connect Opportunity Sign-up so read on!

Opportunity Restrictions: A History

What are Restrictions? -   Restrictions are parameters you can set to determine who can and can't sign up for a Volunteer Opportunity via the HandsOn Connect public site. HandsOn Connect 3.0 allows you to set the following 'restrictions' that govern who can and can't "sign up" for volunteer opportunities.

- **Minimum Age -** anyone under that age cannot sign up.
- **Minimum Age with an Adult** - allows a team captain (who must be at least Minimum Age, to sign up a volunteer who meets this age requirement. I.e. if Minimum Age = 18, and Minimum Age with adult = 14. An 18 year old team captain can sign up a 14 year old, but a 14 year old cannot sign up on their own. (in the partner portal - unless otherwise configured, the Minimum Age with an Adult is automatically set the same as Minimum Age to keep things simple for partners :-)
- **Maximum Age -** when a value is set here, anyone with an age greater than than the maximum age cannot sign up.
- **Background Check Required -** when enabled, does not allow a volunteer to sign up unless their contact record has the field "Background Check Completed" marked as true.
- **Minimum required level of Verification -** only available if you have Verified Volunteers installed.   When set, a volunteer who does not have a the necessary Verification Level is unable to sign up.
- **Orientation required -** when enabled, does not allow a volunteer to sign up unless their contact record has the field "Orientation Completed" marked as true.
- **Skilled Volunteeer Required -** when enabled, does not allow a volunteer to sign up if they do not meet the required skills.
- **Court Ordered Allowed -** when false, will not let a contact whose contact record indicates they are a court-ordered volunteer sign-up.

When are Restrictrions Applied?

Since the inception of HandsOn Connect, restrictions are only applied to Opportunities that are **Date & Time Specific - Signup.**
For any opportunities where a volunteer only 'expresses interest' - restrictions are not, however applied, and have no effect. Anyone can 'express interest' in an opportunity - even if they do not meet the restrictions.

Really? What was the original thinking behind this?

The original 'express interest' schedule type was an evolution of the old 'referral' concept of voluneerism where opportunity coordinators just wanted to know who was ***interested*** in volunteering, and didn't want to restrict or manage their interest in any way.

The thinking was -- "Hey! Let's let everyone express interest" -- and then I'll look at their contact information, see their age, see if they meet our requirements, and will reject them if they don't meet our needs. This presumed that the screening for volunteers would take place as part of the confirmation / rejection process of each volunteer who expressed interest, instead of that screening happening via the automations available in the technology. This was 'old school' thinking.

Is it time for a change?

The use of 'express interest' opportunities has expanded significantly since HandsOn Connect was first created. We now offer three types of Volunteer Opportunity that allows a volunteer to 'express interest' rather than sign up:

- Date & Time Specific - Express Interest
- Individually Scheduled Opportunity - Express Interest with Schedule
- Individually Scheduled Opportunity - Express Interest Only

And many people now assume, that for each of these opportunity types - that HandsOn Connect is screening the volunteers based on the restrictions they've applied -- only its not :-)

In HandsOn Connect support we often are asked: "Hey! My partner created an Individually Scheduled Opportunity with a minimum age of 18, and yet 14 year olds are signing up. What gives?"

And we respond -- well, if you DO want to apply restrictions to an express interest opportunity, you need to explicitly change the workflow rule that says 'don't apply restrictions' to that opportunity type (or that specific opportunity). At the moment, in the interests of simplicity, we don't even present the Volunteer Opportunity field "Apply restrictions to Opportunity" in the partner portal - because its just sort of confusing. It is automatically populated via workflows - but those workflows haven't yet been updated to reflect our new Registration Types ("express interest with schedule' and 'express interest only') which is something we plan to do shortly. But whether those workflows should say to apply restrictions or not apply restrictions is the question we're asking you about today.

If the paragraph above confused you in any way - then you're not alone. I got confused even writing it! And its why we think we need to simplify the behavior and thinking about restrictions and volunteer opportunity types.

Should we change the default rules regarding restrictions?

We want HOC to be simple for you and your partners. And we think that applying restrictions to some types of opportunities but not to others is confusing.

Partners may not realize that restrictions aren't being applied when people ***express interest*** - and they may not realize that they should then manually screen each volunteer before confirming them, check their age, etc... We keep hearing they assumed that the restrictions were in effect for these opportunities.

And so we are considering the following change to when restrictions are applied:

By default, all opportunity types (whether full sign-up or express interest) WOULD apply any restrictions associated with the volunteer opportunity to signing up or expressing interest.

That said, consider the following:

1. Changing the current behavior regarding restrictions to this new default would require a quick and easy administrative speed-up on your end. (More details will be given if/when we make this change)
2. If you wish to keep the current business practice (not applying restrictions to Express Interest, and only applying to full sign up), no action would be needed on your part. You will not be forced to make this change if you prefer the current behavior.
3. Administratively (but not in the partner portal), you are able to overide restrctions being applied if you wanted to do so for selected opportunities.
4. If you change your default to restrictions ARE applied to all opportunities, there's no rule that says you have to set any restrictions on an opportunity at all (other than minimum age). So if you want everyone to sign up, you can just set the minimum age to 1 and set no other restrictions to opportunity sign up!

Please give us your opinion on this proposed change to how restrictions work in HandsOn Connect.

Please add a comment to this post and express your opinion on what you think is best for your organization and your partners. Comment with any of the following, and feel free to expand and comment further:

1) I like it the way it is! Restrictions should only be applied to Date & Time Specific / Full Sign Up opportunities. Express Interest opportunities should ignore restrictions and let anyone express interest.

2) I think restrictions (if used in an opportunity) should apply to ALL opportunity types, both sign up and express interest!

3) Yikes! I didn't even realize that restrictions weren't being applied to Express Interest Registration types. How soon can we change this?

Thanks for your feedback as we work to make HandsOn Connect simpler and more straightforward for you and your partners!

HOC 3 Release Notes - 3.0.28 (June 15, 2017)

This release includes improvements to the form used in the Advanced Registration System, improvements to the CMS, improvements to site templates, and a variety of bug fixes. Highlights are detailed below:

CMS: Maintain relationship of friendly URL to menus and blocks (HOC3-309)

When the friendly URL of a page is changed the user had to also be sure to update any menu items that were associated to that page's friendly URL. The CMS has been updated so that if a friendly URL of a page is edited, the menu item(s) and any hard-coded links in blocks associated with that page are automatically updated as well.

Text Update: Team Signup Page improved (HOC3-2877)

The text that appears on the team signup page (after you click on "sign up with a Team" or "Express Interest with a team" - has been updated to better describe the options for signing up with a team. It removes references to 'public teams' that are not part of HOC 3.0. Here is the new text:

> **Opportunity Sign Up**
>
> Please choose one of the following options to sign-up for this opportunity with a team.
>
> 1. If you're the team captain, you can sign-up any of the members of your team or, if you are already a member of a team, you can sign yourself up as a team member.
> 2. You can create a new team, adding team members and signing them up for this opportunity. The team can be a family team, corporate team, or any kind of organized group.
>
> Remember , if you sign up members of your team, it is your responsibility to notify your team members and ensure they have agreed to attend and know the opportunity details. You can update your team sign-up for this opportunity at any time if there are changes to which team members will participate.

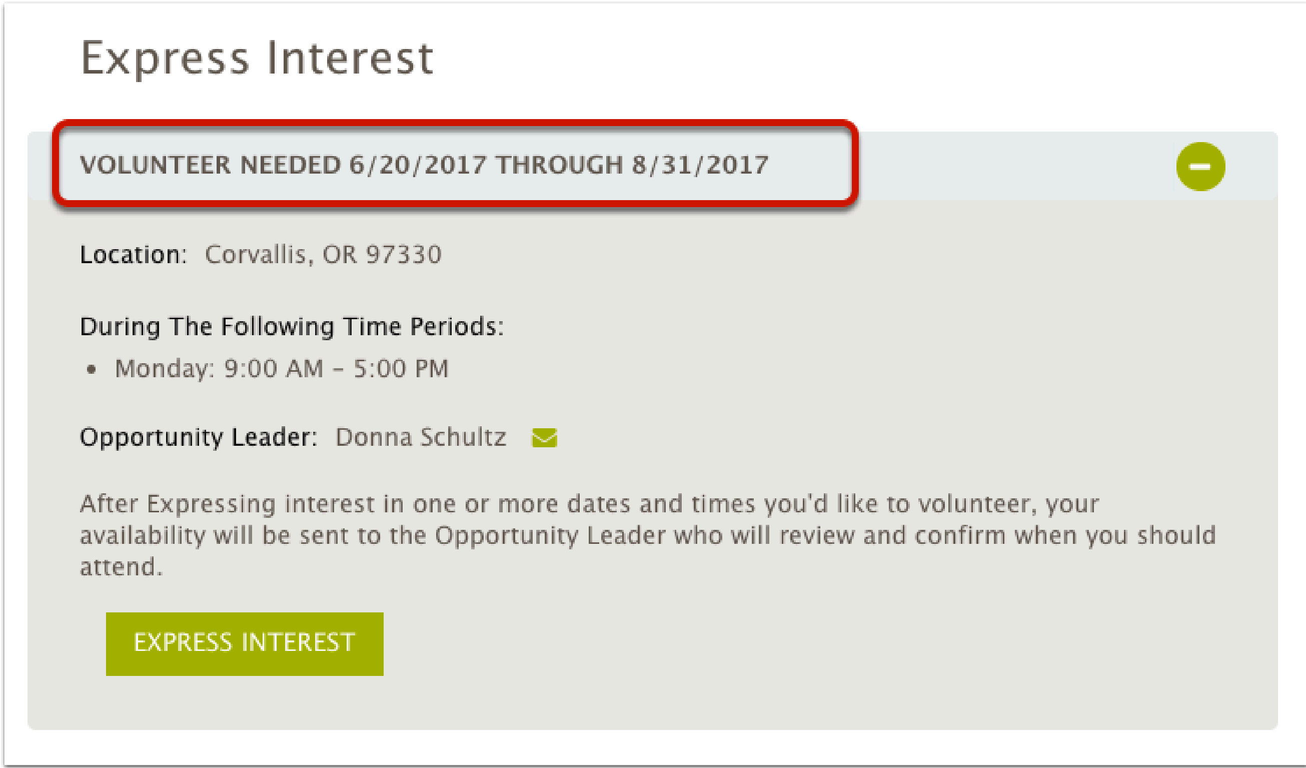
Fixed: Date display for Individually Scheduled Opportunities with schedule that are only accepting connections for future

dates (HOC3-3277)

For individually scheduled opportunities we do not display the start date but only the words "Voluneers needed through (end date)"   This made sense, since the start date might be a long time ago and is no longer relevant.

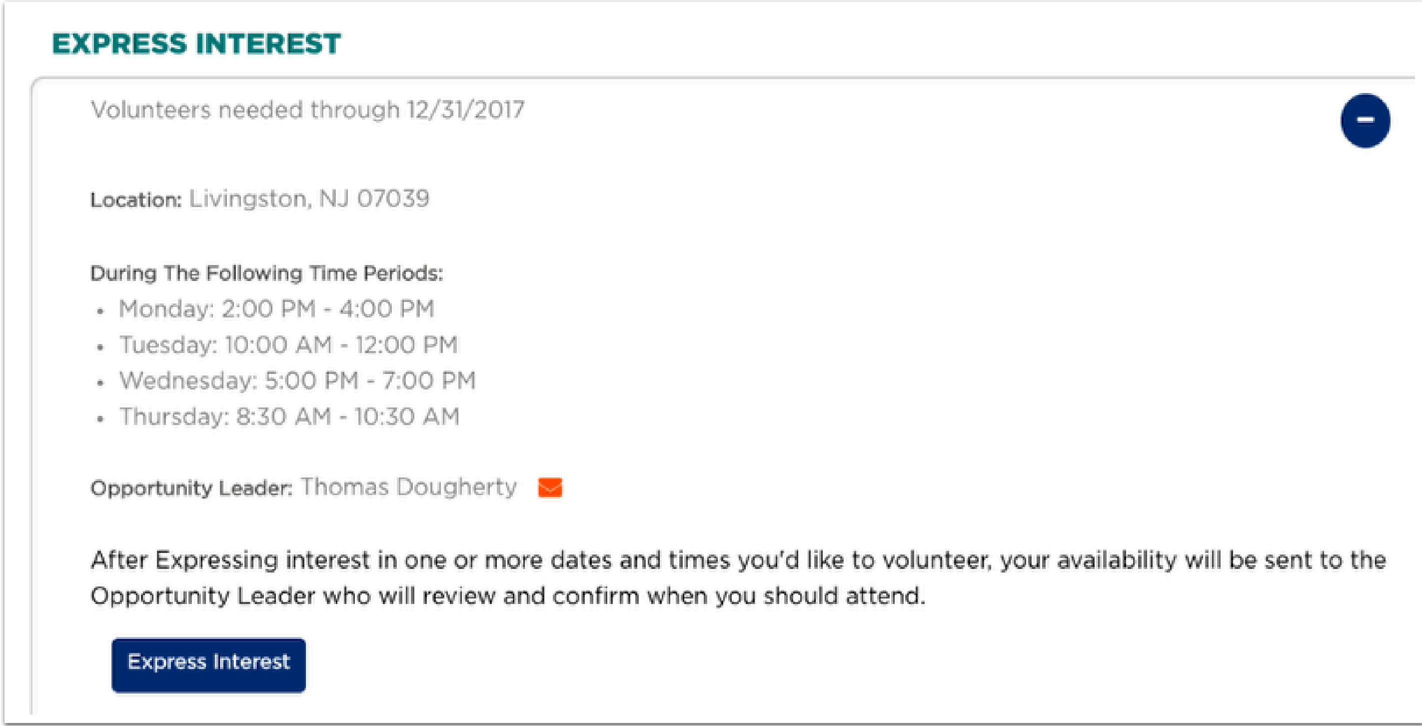
However, in circumstances where the start date was in the future, volunteers were confused when they tried to sign up to get a message saying they couldn't sign up for today's date.

Now, when an Individually Scheduled Opportunity is not allowing singups until a future date, the start date and end date will both be displayed. For example. Today is June 15, but we are not accepting volunteers to schedule themselves before June 20th. So the opportunity will appear like this:



Bug Fix for Template 3: Display of schedule for ISO opportunities. (HOC3-3278 and 3279)

Users of template 3 found that the schedule was not easily readable, or in some cases even visible for Individually Scheduled Opportunities. This has been fixed.



Bug Fix for Template 3: Menus should drop down while editing CMS (HOC3-3387)

When working in the CMS, menu items did not drop down. This has been corrected. You can now use the navigation while editing the CMS in template 3.

Fixed: Case sensitivity of friendly URLs (HOC3-3256)

When defining the URLs that a page or block is visible to, it turned out that the URLs were being treated as case sensitive. Now, when a URL is entered in the "Visible to" for "All pages, except URLs below" or "Only URLs listed below", the logic at execution is not case sensitive. The url /witness success and /WitnessSuccess will be treated as the same URL.

Sharing Portal: Bug Fix. Correct organization name and location merged into emails sent to connections (HOC3-3135)

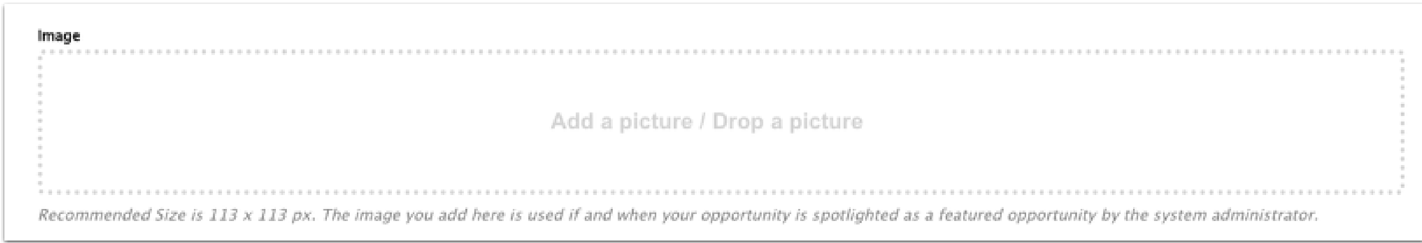
The merge tokens used to populate <Organization> and <Location> when sending emails to volunteers from the sharing portal have been corrected. Previously the <organization> field was not bringing in the correct value (the name of your organization, not the organization of the contact that created the email which might have been a partner. The <location> field was pulling the default location from the volunteer opportunity. It will now populate the correct location for the occurrence the connection is connected to.

Date Picker fixed for International Users (HOC3-3272)

The date picker on the self-reporting page, was not using the date format for the appropriate international regions. The date picker will now pick dates in the appropriate format used in that country.

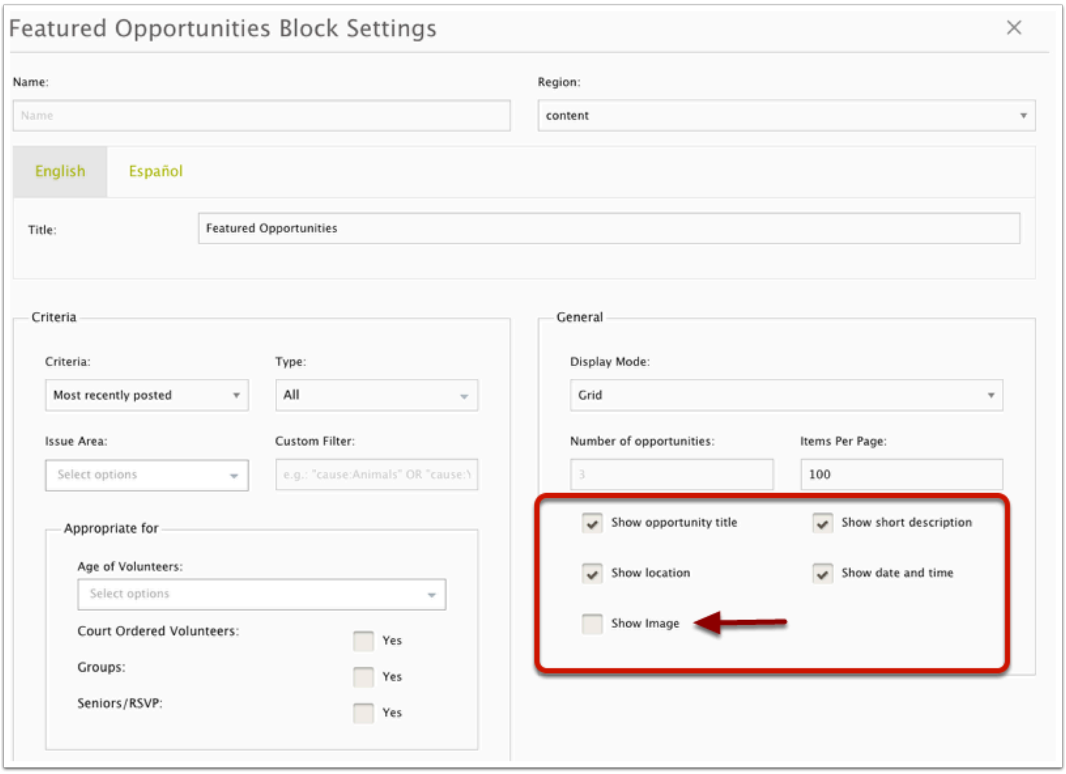
Power users: Sharing Portal: Help Text added to 'image' field in create volunteer opportunity (HOC3-3196)

If visible in your sharing portal when creating volunteer opportunities, the field "Image" has added help text to explain to partners what the image they upload here may or may not be used for.   Note: The image is only used if you are using a theme that has been enabled to use the "featured Opportunities" block. It clarifies that this image is only used when the system admin spotlights this opportunity as a 'featured opportunity'.



Power Users: Option to not show images in Featured Opportunity Block (HOC3-3094)

For those of you who have a customized theme using the featured opportunity block, its now possible to determine what items are or aren't displayed for each opportunity. You can now opt to not display images (in case you don't have images available for all your featured opportunities, and don't want to take up space with blank, placeholder images.


Featured Opportunities Block Settings
Name:
Name
Region:
content
English
Español
Title:
Featured Opportunities
Criteria
Criteria:
Most recently posted
Type:
All
Issue Area:
Select options
Custom Filter:
e.g.: "cause:Animals" OR "cause:\
Appropriate for
Age of Volunteers:
Select options
Court Ordered Volunteers:
Yes
Groups:
Yes
Seniors/RSVP:
Yes
General
Display Mode:
Grid
Number of opportunities:
3
Items Per Page:
100
Show opportunity title
Show short description
Show location
Show date and time
Show Image

June, 2017 Release Notes

As Spider Man was told: "With great power comes great responsibility". With this release, we are giving great power (increased flexibility of use) to the rules under which you can administratively grant a Volunteer, Volunteer Leader, or Partner Staff Profile / License to a contact. To make this flexibility possible, administrators have the responsibility of understanding and communicating to their staff the ramifications of granting profiles without being forced by HOC to fill in certain fields in the contact record.

HandsOn Connect was originially designed to 'persuade' admin users to follow certain best practices of what info was 'required' to make someone a volunteer or partner staff. However, as the HandsOn Connect user base has widened - best practices that were created for volunteer centers, may not apply to newer HandsOn Connect users, including international customers (who for example, don't necessarily use states and zip codes).

In HOC 3 we've made it possible for system administrators to define what information is or isn't required when registering on the site, and so with this release, we've also removed most of the back-end validations that forced you to fill out certain contact fields before granting a license / profile.

We recommend that all administrators read about these changes, and make your staff aware that HOC will no longer 'police' certain validation rules. The decision of whether or not to require an address, phone number or age (amongst other fields), is now up your administrative users -- and not forced or validated in order to administratively grant access to a volunteer or to the partner and VL portals. Here are the details:

Changes in Validations for granting Volunteer or Volunteer Leader profile to a contact (HOC-869)

Previously, in order to grant a contact a profile/license for Volunteer or Volunteer Leader, the following fields HAD to be populated in the contact record. Failure to fill in these fields presented you with a validation error:

- Email
- Date of Birth (Birthdate)
- Volunteer Type: this field had to have the value of "Volunteer"
- Must provide at least one phone number
- Home Street
- Home State
- Home City

- Home Zip (if "Home is selected as Primary Address?"
- or:
- Other Street
- Other State
- Other City
- Other Zip (if "Business is selected as "Primary Address?"

Going forward, the only requirement for granting these profiles will be that the contact must have:

- Email Address.

That's it!

Contact records themselves still require a Last Name and an Account Name.

Be aware of the following if you grant volunteer or VL profiles without certain fields:

1) If you do not enter a birthdate -- the contact will be considered 'ageless' and be able to sign up for any volunteer opportunity, regardless of age restrictions associated with that opportunity. On the positive side though, you no longer have to fill in 'artificial' calculated birthdates if you don't wish to.

Be sure your staff is aware of this - and they will no longer get a validation warning if the birthdate field is left blank when administratively granting a license to a volunteer or VL.

2) If your contact doesn't have a phone number, then emails where the primary phone number is shared will not have any phone information.

If desired, you can update the page layout for contacts and remove the requirement for the fields:

- Primary Address?
- Primary Phone?

Or you can give them a default value.

If the primary phone? field is not populated however, the primary phone field (used in connection records), will not be populated automatically. We recommend you always set a value for primary phone? when creating a contact. (Or better yet, set a default value for it to save you time).

Changes in Validations for granting Partner Staff profile to a

contact (HOC-869)

Previously, in order to grant a contact a profile/license for Partner Staff, the following fields HAD to be populated in the contact record. Failure to fill in these fields presented you with a validation error:

- Email
-
- Must provide at least one phone number
- Home Street
- Home State
- Home City
- Home Zip (if "Home is selected as Primary Address?"
- or:
- Other Street
- Other State
- Other City
- Other Zip (if "Business is selected as "Primary Address?"

And

the following organization fields for the partner organization had to be populated:

- Status = Active Partner
- Mission Statement
- Population Served
- Primary Contact (lookup)
- Primary Contact (First Name)
- Primary Contact (Email)

Going forward, the only requirement for granting these profiles will be that the contact must have:

- Email Address.

and the organization record must have:

- Status = Active Partner
- Primary Contact (lookup)
- Primary Contact (First Name)
- Primary Contact (Email)

> Be aware that if you do not provide a phone number for your partner staff contact, then emails sent to volunteers giving contact info for opportunities coordinated by that contact, will not have any a phone number included.

One validation that is still in place is the rule that in order to make an organization an 'active partner', you have to populate a value in the field "Impact Area".

If your organization does not wish to require an impact areas for your partner organizations - you can turn this validation off yourself! Go to Accounts / Validation Rules and disable the validation rule: ImpactAreaRequired

Bug Fix: Multiple Waitlist emails beings sent (HOCAVV-967)

Emails notifying waitlisted volunteers (and connected team captains) of space becoming available in full projects that now had space available - were being sent way too often. Every time another space opened up, another email was sent - which resulted in a lot of emails being sent when, for example, a team removed itself itself from a full opportunity.

This bug has been corrected. Emails will now only be sent once, when a full project has available space. And will not be sent again until 1) the project once again becomes full, and 2) Space once again becomes available.

HOC 3 Release Notes - 3.0.27 (June 8, 2017)

Along with bug fixes and improvements to the styles of several templates, this release brings HOC 3.0 users a number of improvements and options in Self-Reporting. Thanks to United Way of St. Louis and Hosteling International for partially funding the development costs of bringing this signifiant new improvement in Self-Reporting functionality to the HOC platform so that we could have additional resources to bring these features to you sooner.

Self-Reporting Ease of use Improvement (HOC3-2930, 3179)

1. Smart search for Organizations

Instead of a difficult to use picklist of your partner organizations, users can now 'search' for your active partners with the new smart search. As soon as you start typing into the organization field, the list will narrow to matching partner organizations.

If you do not find a matching organization name, then you'll be presented with the option to report to an external organization (*unless you turn this option off! See new configuration options below!)

This feature is now enabled for all HOC 3.0 Customers.

Self-Reporting new configuration options: (HOC3-3286)

Self-Reporting now can be configured to meet your organization's business needs around self-reporting. By default, no change will be made to your current self-reporting configuration, but the following new options now exist.

If you wish to change your self-reporting options, please open a zendesk ticket and request updates to any of these configuration options:

1. **Self Reporting can be enabled or disabled for your site:**

Default: Self-Reporting is on.

It is now possible to turn off the option for self-reporting volunteer service for opportunities not listed in your search or calendar.

2. Self-Reporting to non-partner organizations can be enabled or disabled:

Default: Self Reporting to non-partner organization is enabled by default.

In current self-reporting, volunteers have been able to self-report their service to organizations that are not part of your database of partner organizations. (These can be difficult to verify, but do allow a volunteer to track their own self-reported history with their church, community center, or other organizations that are not using your partner portal). However, you can now opt to disable reporting to non-partner organizations, so that they use self-reporting only to self-report service to your partner organizations.

When enabled, the "Don't see your organization, click here" option is not displayed.

3. You can now limit self-reporting to a certain time period:

Default: Volunteers can self-report for any date in the past. (ie. "No Limit")

For organizations that wish to limit how far back in time volunteers can self-report, there are now 4 limits that can be applied to the valid dates for self-reporting:

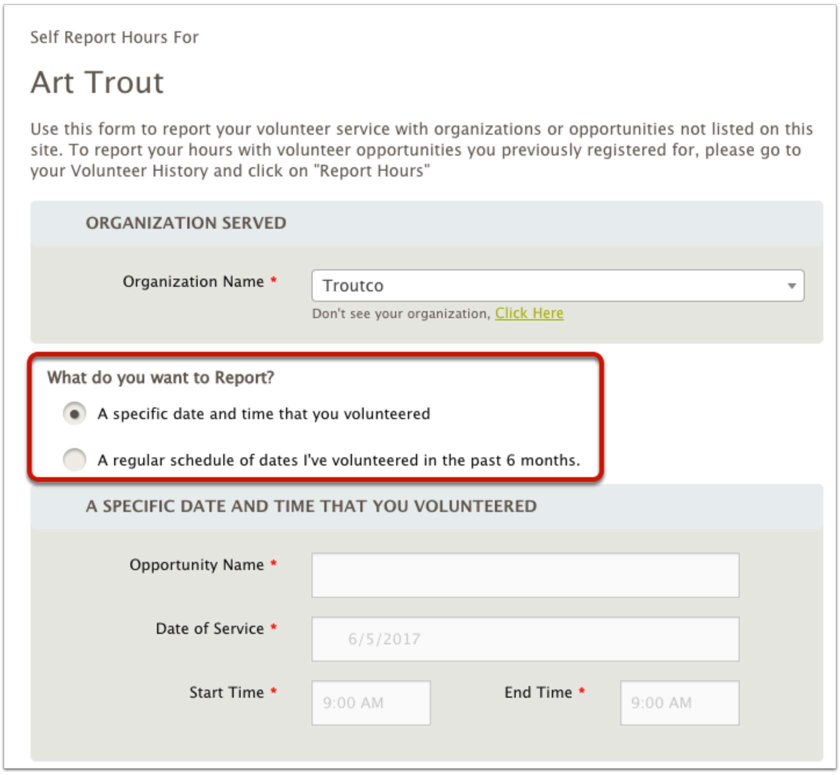
- No Limit (default)
- Past Year (volunteers cannot self-report for dates more than one year in the past)
- Past 6 months (volunteers cannot self-report for dates more than six months in the past)
- Past Month (volunteers cannot self-report for dates more than a month ago)

4. Self-Reporting can now be configured to allow submitting 'a regular schedule of dates' for the same self-reported opportunity: (Pilot)

Default: Off. Volunteers can only report one date at a time.

The new ability to report a regular schedule of dates is now available in Beta for those who wish to test this new functionality. Here's how it works:

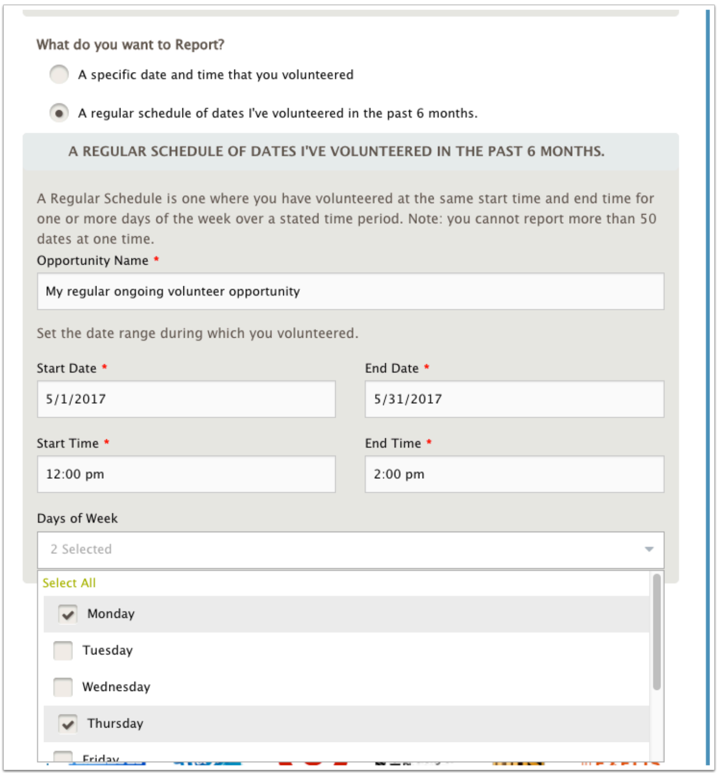
When activated, user has two choices of What they want to report:



Reporting a single, specific date works as it has in the past.

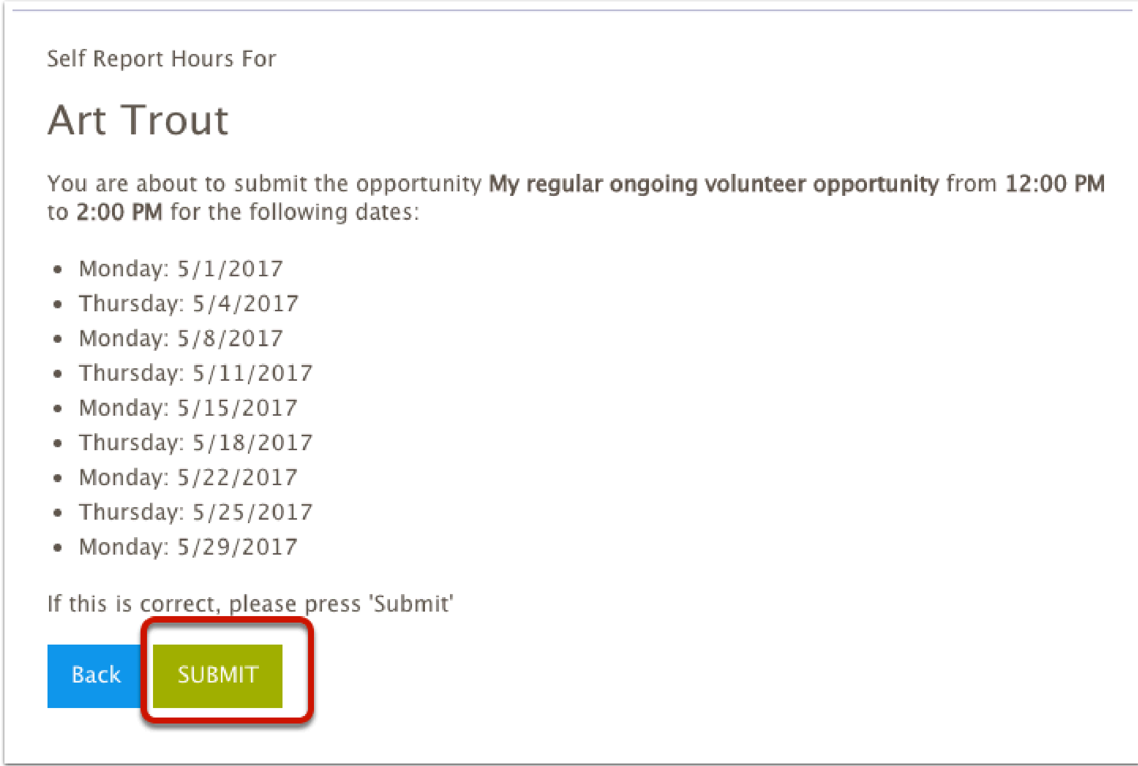
If you choose the option to report "a regular schedule of dates I've volunteered for..."   the interface changes to this:

(Note: In the screenshot above, we've also configured option 3, allowing self-reporting only for dates in past 6 months.

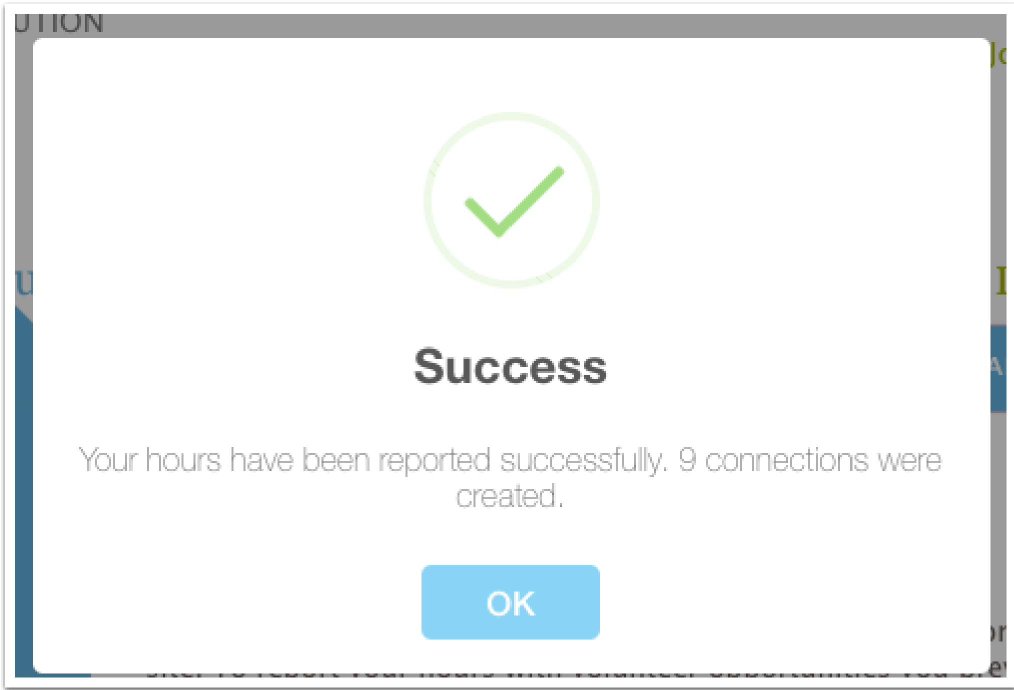


The user submits the name of the opportunity, the time period (start date / end date and start time / end time) and the day or days of the week they attended.   This way - if you volunteered every Monday and Thursday for the month of May from noon - 2 pm - you can submit all those dates with one submission!

The user then clicks the "Submit for Review" button at the bottom of the page, to double check the information they are submitting.



This creates all nine self-reported opportunities with one submission!

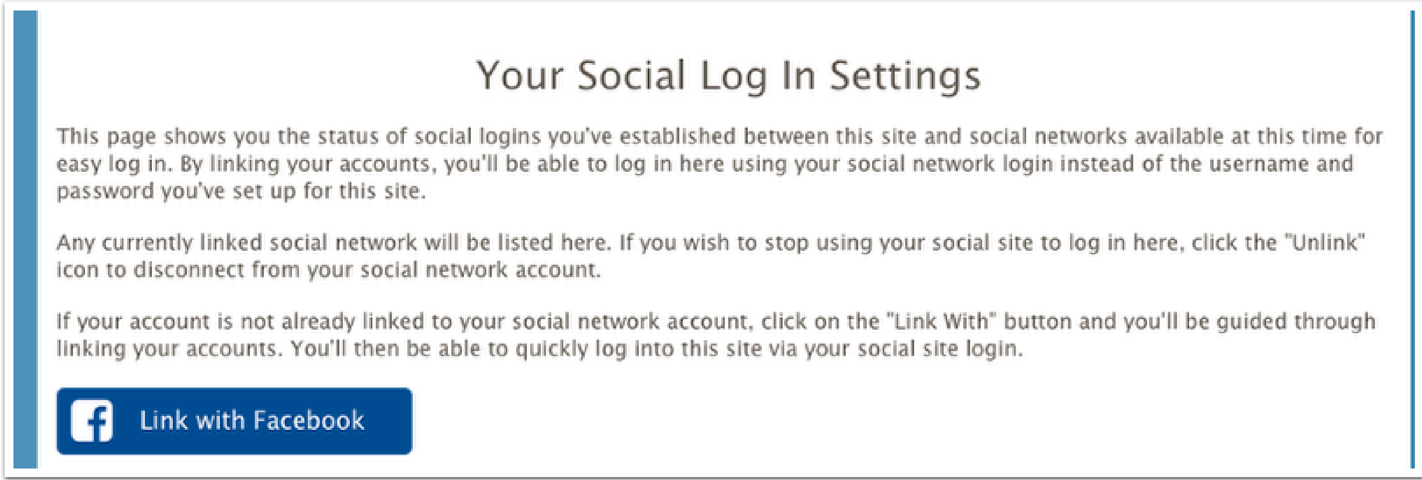


Note: The partner organization receives just one email notification that multiple connections have been created (instead of 8 separate notifications!)

> If you wish to change your default settings to use any of these new configuration options, please open a zendesk ticket stating the configuration changes you'd like to have made to your self-reporting functionality.

Updated text on Social Login Page (HOC3-2718)

The text on the Social Login Page for volunteers (typically found in the My Accounts sub-navigation on the public site, has been updated to reflect the current social login functionality.



Bug Fix: Locations and Express Interest Only Opportunities (HOC3-3236)

It was discovered that when la new location was created for Individually Scheduled / Express Interest Only opportunities in the sharing portal, that the new location was not created and associated with the opportunity. This has been resolved. (Note: Locations are optional for Express Interest Only opportunities)

Maximum Age Now validated for Volunteer Opportunities (HOC3-3255)

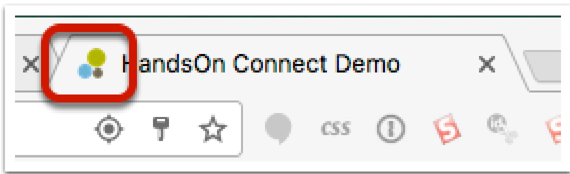
For those clients who desire to set a 'maximum age' for volunteers for a volunteer opportunity, the maximum age field is now supported and validated during opportunity signup on the public site. Any volunteer older than the maximum age will receive the message "Sorry, the maximum age for this opportunity is XXX"

HOC3 3.0 Release Notes - 3.0.26 (June 1, 2017)

This release continues our process of increasing the speed and reliability of HOC3. A number of under-the-hood improvements should result in faster response times for volunteers and sharing portal users. In addition, there are a number of bug fixes and improvements to site templates. Highlights are listed below:

Say hello to our new favicon! (HOC3-3183)

The favicon for HOC (the little image that appears in the tab of some browsers), has been updated to a brighter, more distinctive favicon. (The previous one was rather gray and muddy). Here's what our new default favicon looks like in supported browsers.



Note: if you are a favicon fanatic - we can now accept requests to update your site's favicon. Just open a zendesk ticket and attach your desired favicon in standard .ico format.

Want a custom favicon but don't know how to create it? For a small fee we can create a favicon for you. Open a zendesk ticket and tell us what image you'd like in your custom favicon. (Keep in mind it's very small (16 x 16 or 32 x 32) and must be square!

For everyone else -- our new default favicon will meet most people's needs!

GIF images now supported in image blocks and CMS (HOC3-1626)

In some circumstances in the CMS, attempt to upload .gif images were met with messages saying .gif was not a supported image type. This has been corrected. You can now use .gif images in additions to .jpg and .png.

Bug Fix: Express Interest opportunities now show 'add to wait list' button when maximum slots are reached. (HOC3-2292)

The "Express Interest" button was still appearing for date and time specific, express interest opportunities when the number of confirmed connections had reached the maximum limit.

Now, the button for express interest will be properly replaced with the button to join the wait list.

Bug Fix: Better validation for creating connections for Individually Scheduled - Express Interest with Schedule (HOC3-2976)

Previously, if a user proposed a one-time connection where the start date and time was LATER than the end date and time - the connection would still be created. Now, connections are checked to ensure that no one starts after they finish :-) User is alerted if they put in invalid values.

Bug Fix: Navigation Issues in the Sharing Portal (HOC3-3217)

It was discovered that if you were logged into the sharing portal and inactive for 20 minutes, that things 'timed out' and navigation no longer worked as expected. No matter what navigation item you clicked on you were often returned to the 'dashboard' home page of the portal. This has been resolved.

Bug Fix: Sharing Portal - menu dissapears on some screen sizes (HOC3-3259)

It was reported that in some in-between browser widths (not full screen, and yet not quite 'mobile' width) the navigation items in the sharing portal were no longer visible. This has been fixed. Menu is now available in all possible screen sizes and browser widths.

Pilot: Advanced Registration System (ARS) now supports the addition of donation blocks to the partner registration page. (HOC3-3020)

For those customers using the ARS -- it is now possible to add additional pages to the Partner Registration form, including the ability to take donations or solicit payments. If you have the ARS and need to use this feature, please open a zendesk ticket.

If you do not currently have the ARS add-on, please contact sales@handsonconnect.org for pricing information.

HOC 3.0 Release Notes - 3.0.25 (May 25, 2017)

This release features a number of behind the scenes improvements that improve the CMS, makes visual improvements to varius site templates, and offers a number of new customization options for CMS blocks. You can customize your website more deeply without needing a line of code! Here's some highlights:

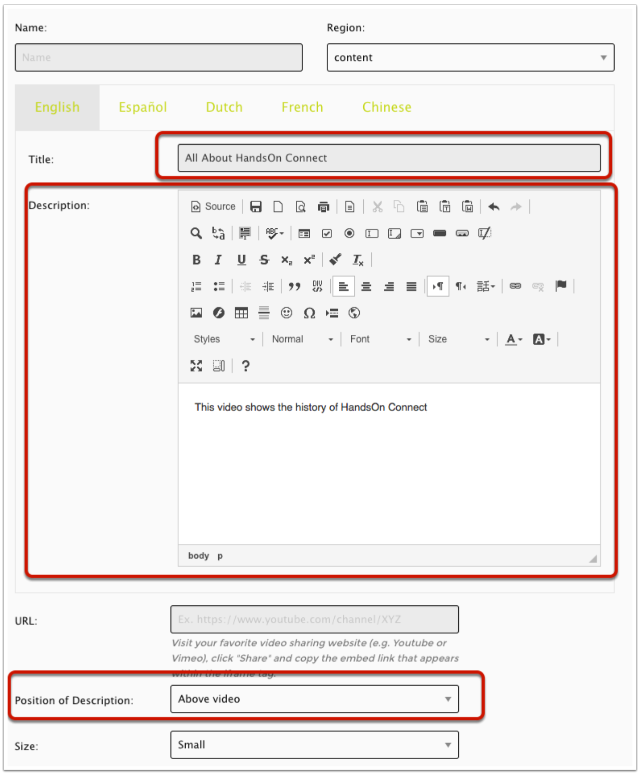
General CMS Improvements

A number of improvements were made to the CMS:

- Pages and forms required for use by the system can no longer be deleted. (Example, confirmation pages, registration forms) (HOC3-1693).   If you do not wish a system page or menu item to be displayed, just uncheck the 'enabled' box.
- Improvements made to the operation of a number of CMS blocks (HOC3-1934)
- Improvements to individual blocks (see below)

CMS: Video Block Improvement (HOC3-1951)

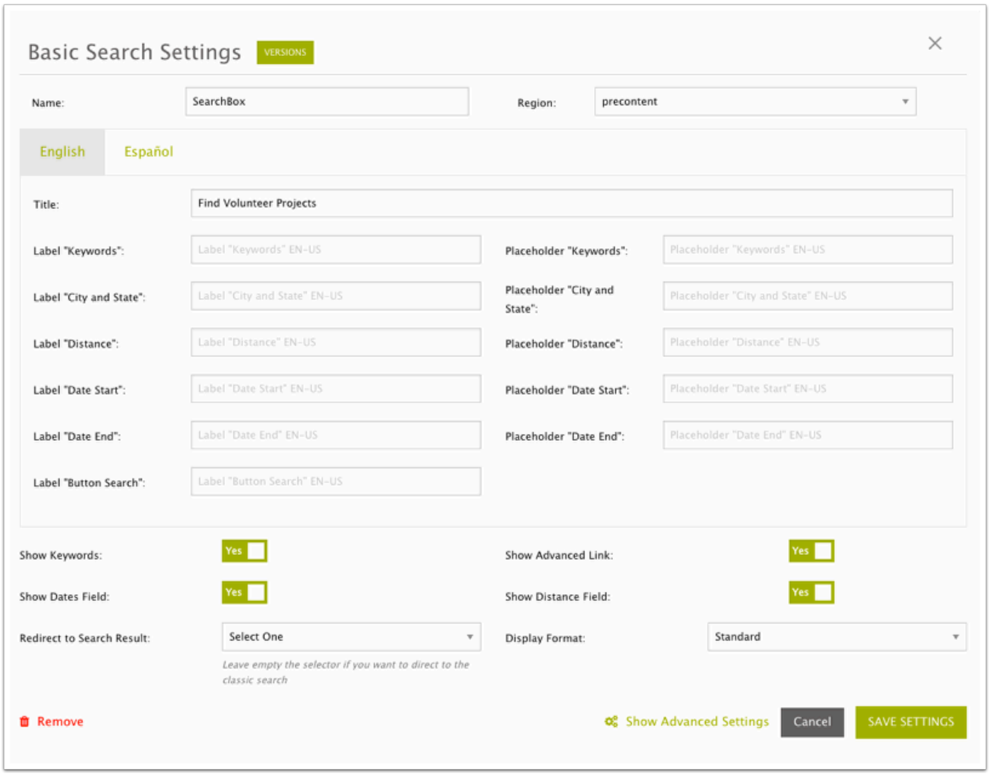
- Video blocks can now include a TITLE for the video, and a summary description. (HOC3-1951)



CMS: Basic Search Block much more customizable (HOC3-1952)

The basic search block can now be customized in many more ways:

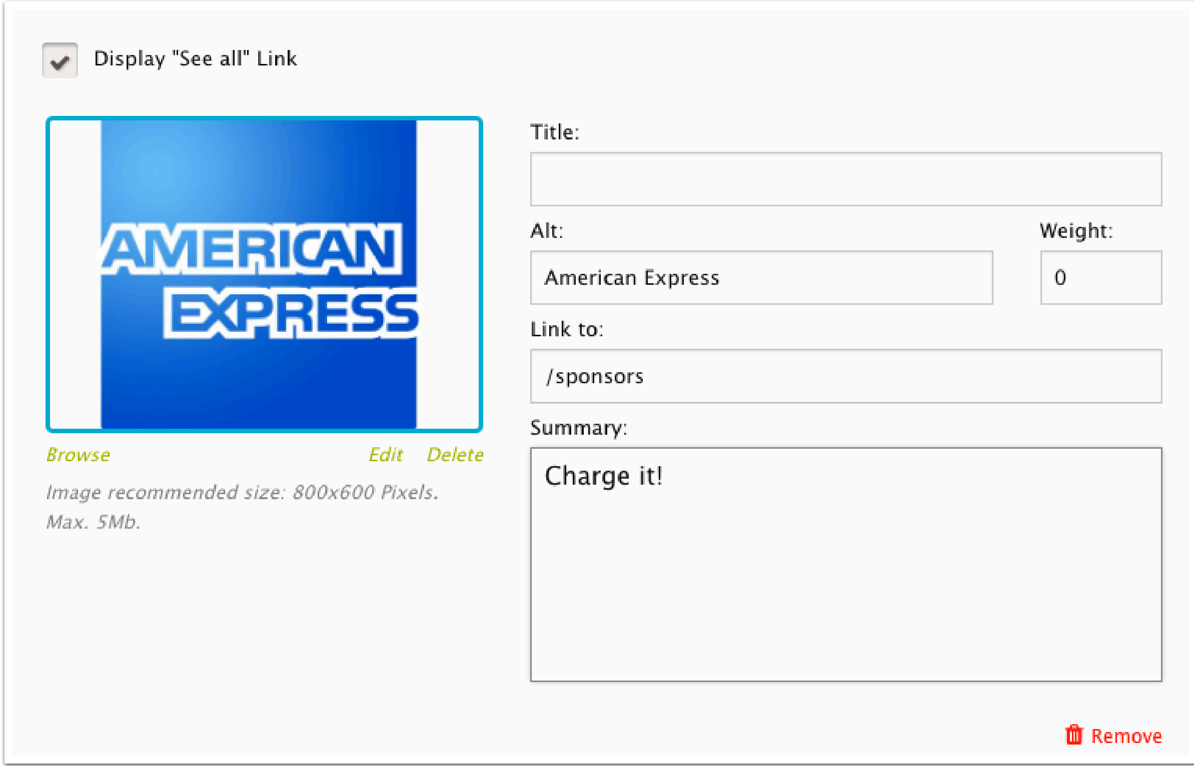
- Enable/Disable distance field.
- Can add custom text for the labe of each field, and the placeholder (suggested content or format for the field entry) for all fields and buttons. Leave blank to use defaults.
- The capability to display Date field in the block.
- The ability to display the widget in either standard format (box) of lineal format (vertically across the page!)

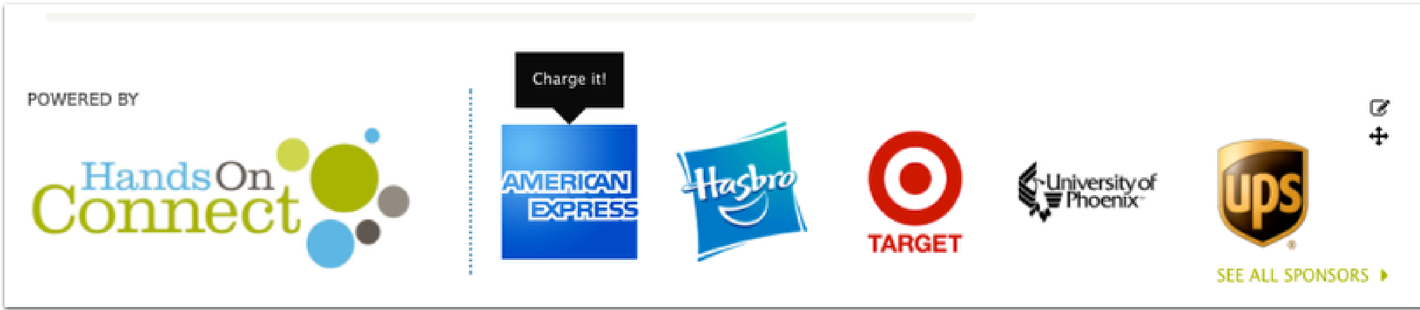


CMS: Sponsor Block improvements (HOC3-1955)

The sponsor block now has options to:

- Add a summary field per each sponsor
- If the summary field is filled in when the user passes the cursor over the sponsor image (frontend) the summary field appears as a tooltip.





CMS: Image Block Improvement (HOC3-1958)

Image block now offers a 'summary' field which adds a caption below the image.

Sharing Portal: Report performance Improvements

For those who have enabled reporting in the sharing portal for partners, performance has been improved.

- Addressed long 'please wait' dialogs that do not go away (HOC3-1950)
- Added filters to tabular reports (making it possible for partner to search through reported data in tabular reports

Important Information to understand about reports:

Reports you create for partners must include at least one of the following objects in order for it to work in the partner portal:

- Account
- Case
- Connection
- Location
- Occurrence
- Recurrence
- Registration Answer
- Volunteer Opportunity
- Volunteer Team

So a report of report type = Contacts would not run in the partner portal. This is due to the way sharing is handled to return only relevant information for each partner organization.

Also - when you create reports for use in the sharing portal - we don't recommend putting in columns with items like ID identifiers, etc.   Remember, these won't mean anything to your partners. Make your reports simple and only display fields that are relevant and will make sense to your partners.

If you wish to have reporting enabled for your sharing portal, please open a request in a support ticket. Be sure to specify which report folder contains the reports you wish to mace accessible to your partner organizations.

Advanced Registration System and Form improvements

(HOC3-2318)

We continue to expand the capabilities of what custom forms can capture and do in HandsOn Connect.

Forms now have the capability of automatically capturing information such as:

- User ID of logged in user
- Current Date and Time
- Current Date and Time when the form is submitted

This makes it possible to build custom feedback and survey forms, and associate form information with the contact record of the logged in user.

> ⚠ Forms in the CMS is an exciting feature making it possible to capture all kinds of data from your users. However, configuring Advanced Registration flows and standalone forms has a high level of complexity and requires advanced training, skills and knowledge.
>
> If you need a custom form for your HOC site, open a zendesk ticket and we can quote you a price for building custom forms for you that bring data into your Salesforce instance.
>
> We also can quote you pricing on specialized training for advanced HOC users who wish to build their own forms and registration flows.

Also addressed was a problem that resulted when commas were used in form picklists. (HOC3-3176)

Bug Fix: Difficulties exiting CMS mode (HOC3-3204)

Some users were experiencing difficulty exiting from CMS mode and returning to Salesforce. This has been fixed.

HOC 3.0 Release Notes - 3.0.24 (May 18-19, 2017)

With the release of new features in the last release came a few bugs that impacted stability in the sharing portal. These have been quickly resolved and are part of this release. A variety of under the hood improvements have been made, including improvement in the log-in process for volunteers on sites migrated from 2.0 to 3.0, and styling improvements to various site templates.

New Image Management system now available in the CMS (HOC3-2753)

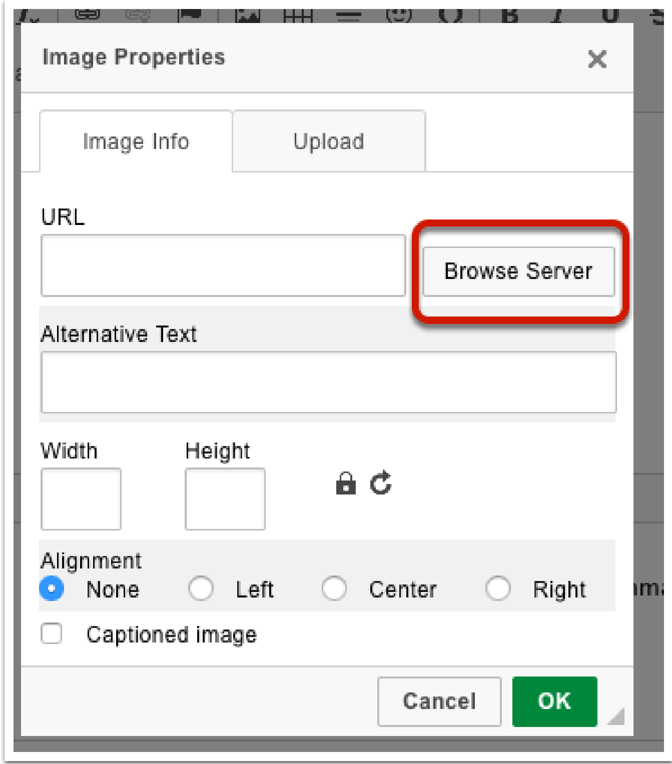
The new image manager introduced in the last release in the sharing portal, is now available in the CMS as well. For information on how to use the advanced functions available in the new image manager, see this summary in the last release notes, and see this documentation from the makers of CK Finder.

The new CK Finder image manager includes the ability to:

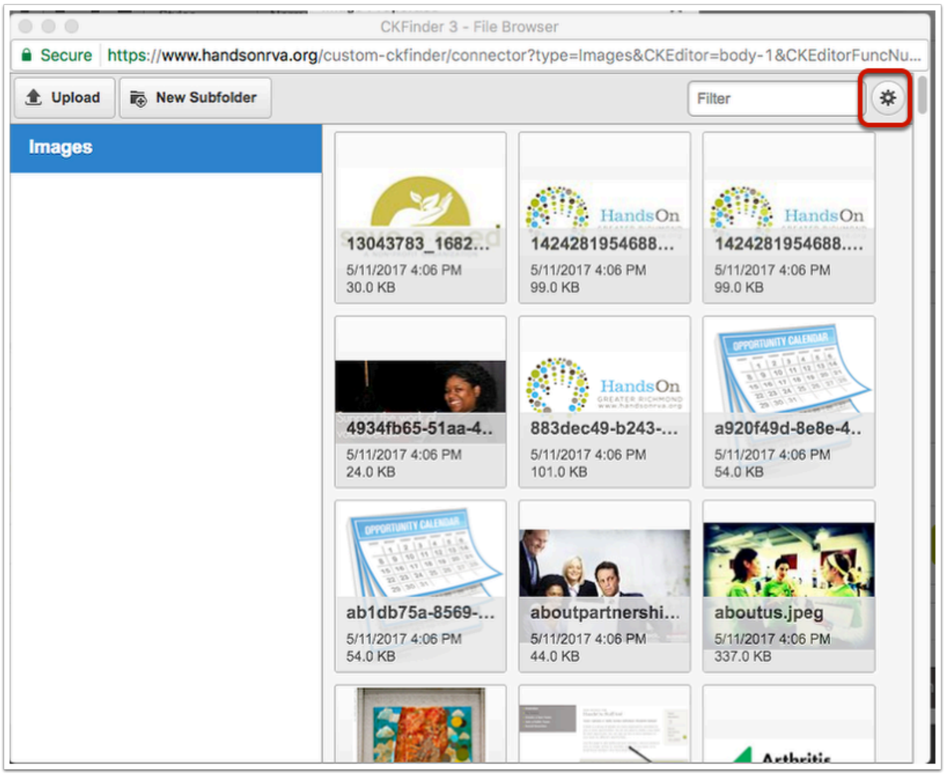
- Upload multiple images at one time
- Create folders for images to improve organization
- An Image editor
- Drag and Drop Support
- The ability to view and manage images in different ways.

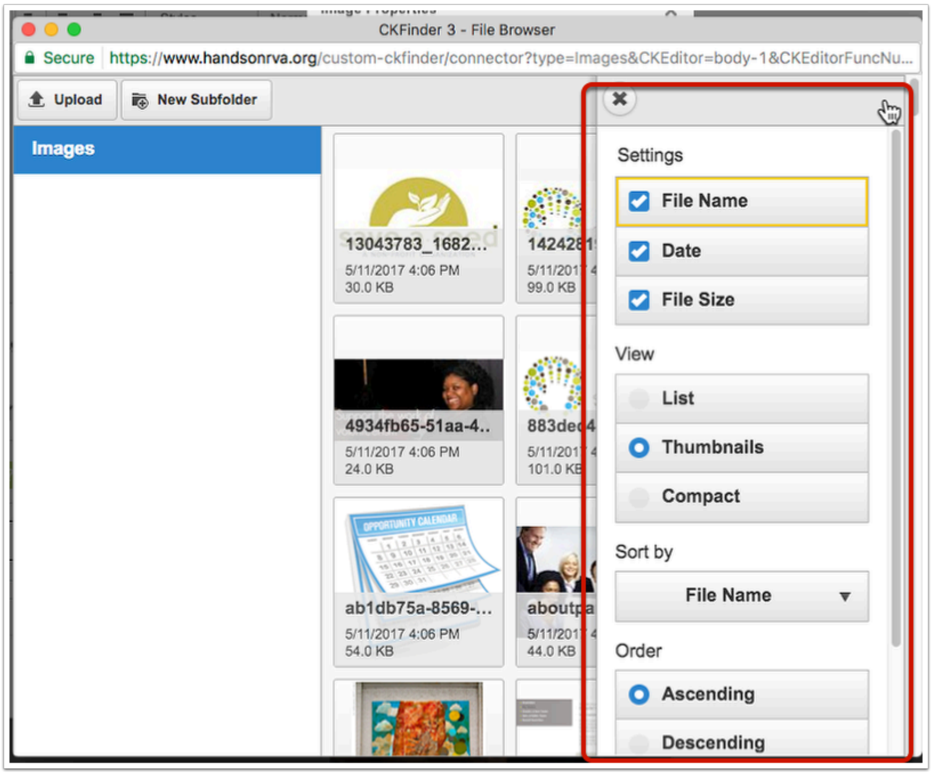
To use the new image manager, click on the "Image" icon in the WYSIWYG editor.

What will open initially is image information. Click on "Browse Server" to browse the image library and use the many new features.

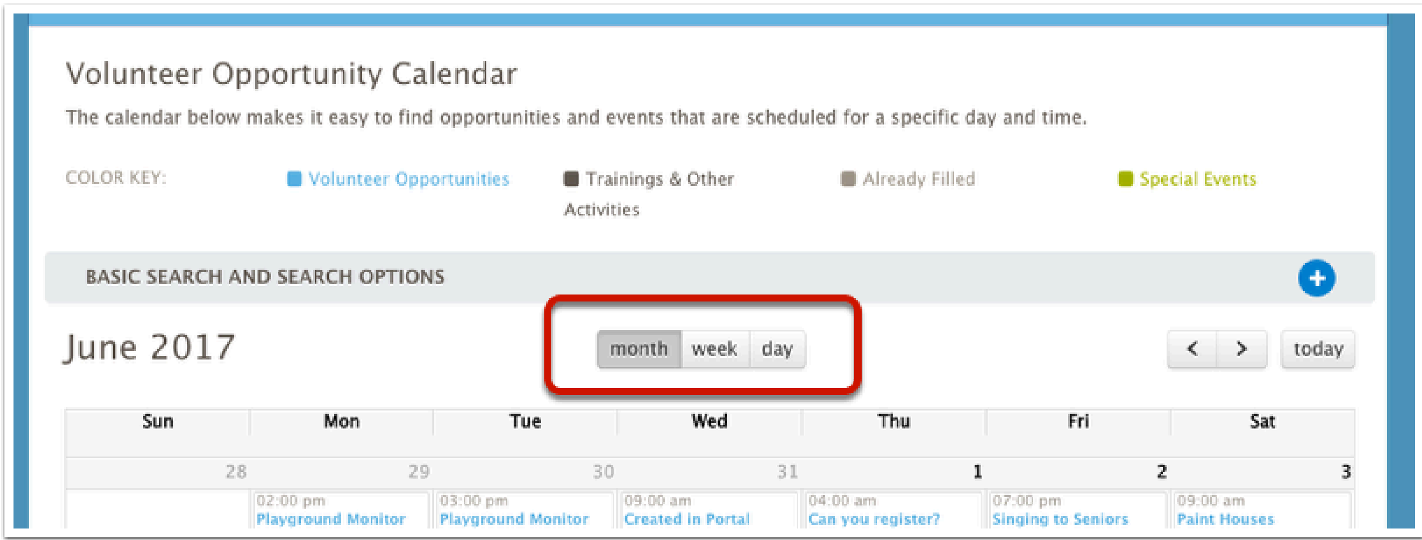


Click on the COG on the right side of the page, to configure the display of files in whatever manner you wish.





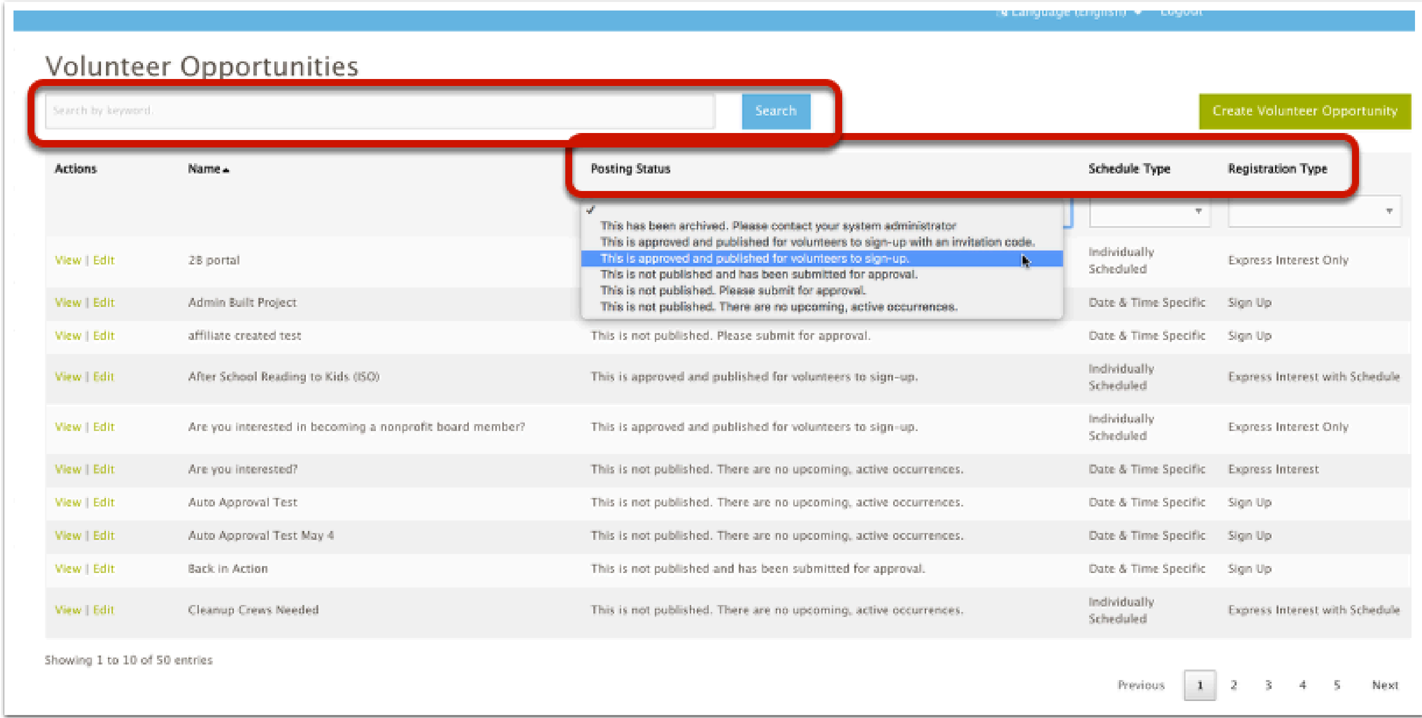
All HOC3 templates now offer Month, Week, and Day Calendar Views (HOC3-2713)



Sharing Portal: Volunteer Opportunity Page improvement available to all sites (HOC3-3074)

To make it faster and easier to filter volunteer opportunities in the sharing portal, the fields "Posting Status" "Schedule Type" and "Registration Type" are now available in all HOC instances. You can use these filters to quickly filter and see just your currently published volunteer opportunities for example, or add a second filter and find just the published "Express Interest Only" opportunities.

Note: You can also filter any search (filered or not) by using the search bar and typing in a keyword (like part of the name of an opportunity you're searching for).



Fixed: Sharing Portal navigation kept returning to home page (HOC3-2988)

The issue where navigation in the sharing portal was not working as expected for some customers has been resolved.

Fixed: Save to Calendar for ICalendar produces valid attachment (HOC3-2932)

In some browsers, if you selected "Add to Calendar" and chose "ICalendar" as your calendar type. The file that was created did not properly place the date on apple's calendar application. This has been fixed.

Fixed: Sorting after filtering in search (HOC3-2883)

It was reported that in some cases, when you filtered a search, and then sorted by organization, the sort did not work correctly. (Example: search filter "Appropriate for: Age of Volunteer, Children under 13" and when you got your results, if you sorted on organization column it did not sort correctly. This has been fixed.

Improvement to Advanced Registration System and Forms (ARS)

- The ARS and forms are able to use dates, such as birthdates, for branching logic. This makes it possible to present different registration options based on the age of the volunteer. (HOC3-2319)

Fixed: Filters for connection grid (HOC3-3130)

Filtering the connection grid by start time or end time was returning no results. This has been fixed.

HOC 3 Release Notes - 3.0.23 (May 11-12)

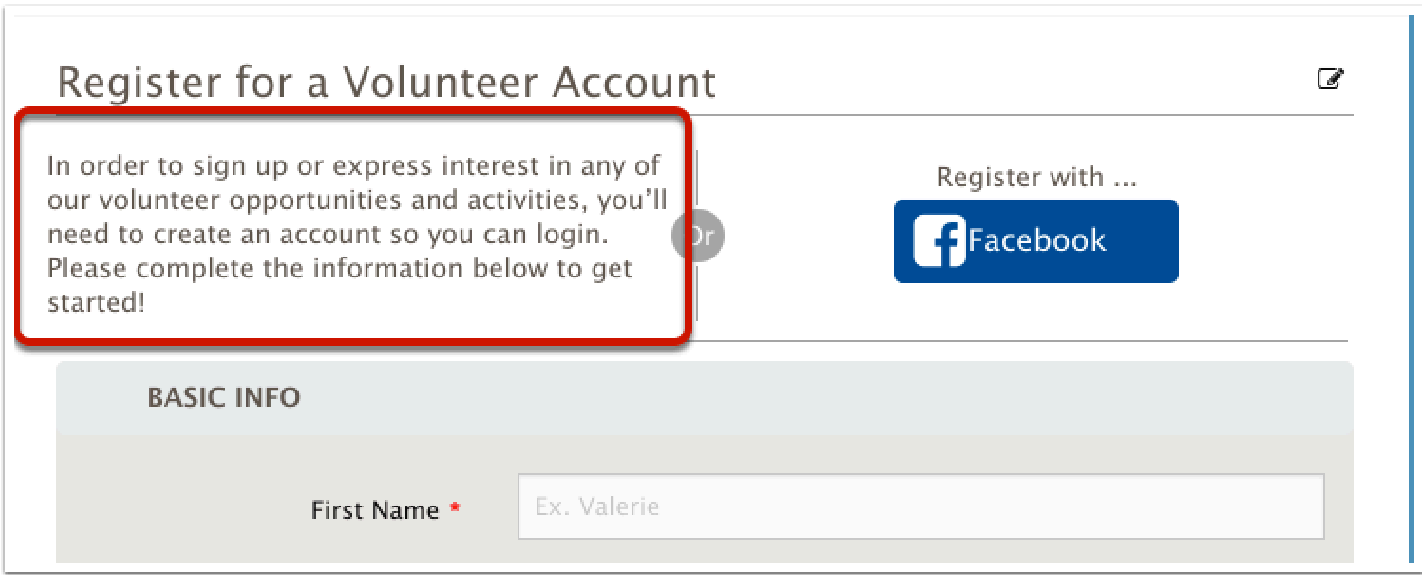
This release contains performance improvements to address server issues that caused temporary performance issues during the last week. Additional work was done for International multi-lingual users, and a number of under-the-hood improvements were made. Here are the most vivsible new features and improvements that are part of this release.

Ability to edit text on Volunteer and Organization Registration Forms (HOC3-2051)

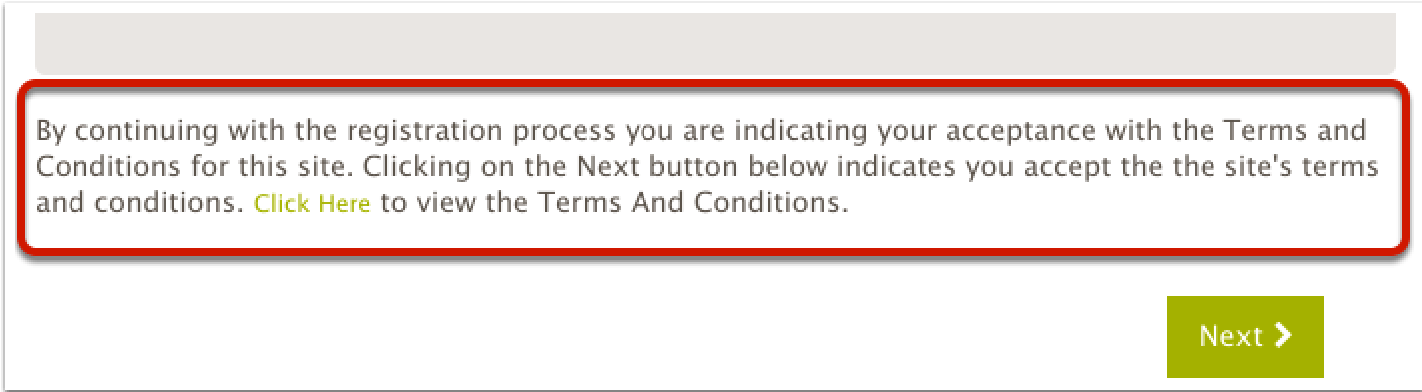
It's now possible to edit the introductory text and the submit text on the Registration forms for Volunteers and Organizations.

Here's what can now be edited:

Intro Text



Submit Text



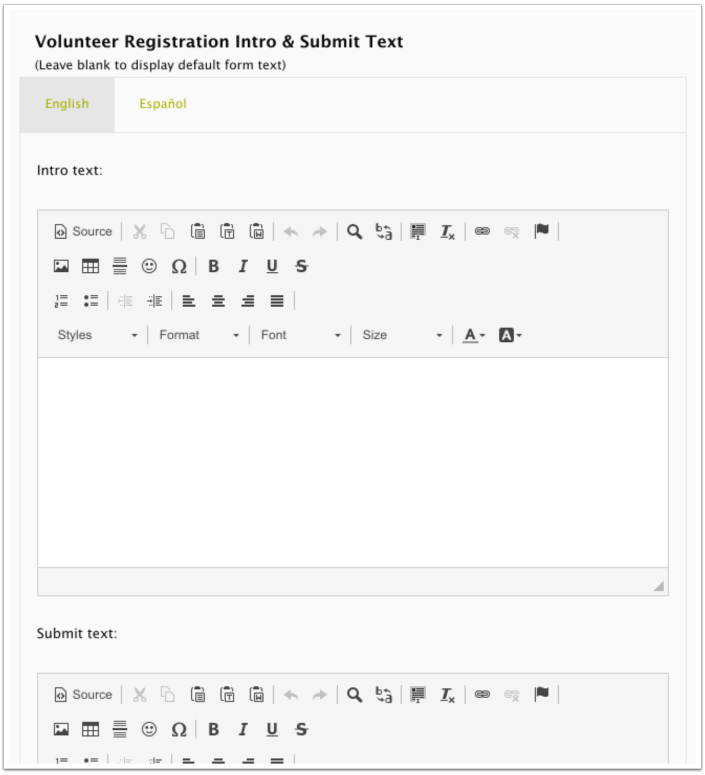
To Edit these text areas: Open the Block "Form Setting - Volunteer Form".

Edit the Form (This is how you set which fields appear in the form)

At the bottom of the field settings, you'll see a new section called "Volunteer Registration Intro & Submit Text"

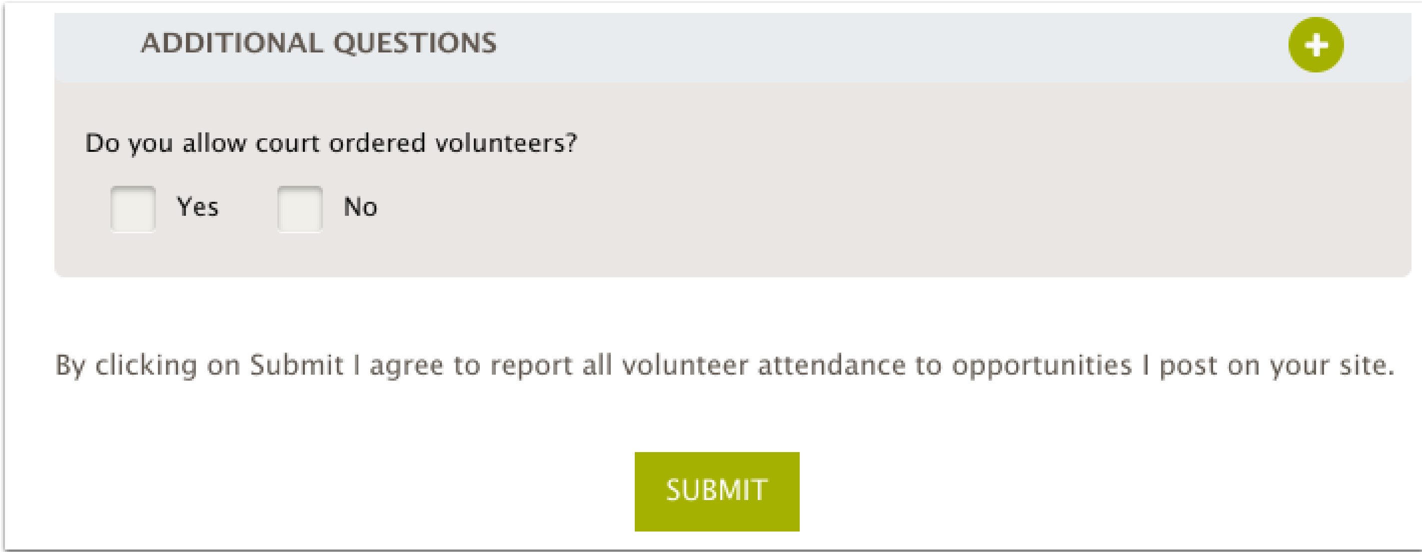
Any content you add into these WYSIWYG editors will replace the default text appearing on the form. This makes it possible for you to customize the language as desired.

To return to the default text -- leave these boxes blank (no content) and the default text will be returned to the form.



Look at the defaul text carefully before changing this text. You may want to copy some of the existing language to use in your replacement text. Also, be advised that if you change the submit text and do not leave in the hyperlink to the site's terms and conditions you are bypassing having the user agree to your legal agreement.

To edit the Organization Registration form, go to blocks / Form Setting / Organization Setting. Click on the edit icon to access the same interface. Note that the organization form does not have standardized 'submit' text -- but you can add your own language here as desired. It will appear at the bottom of the form below the submit button.



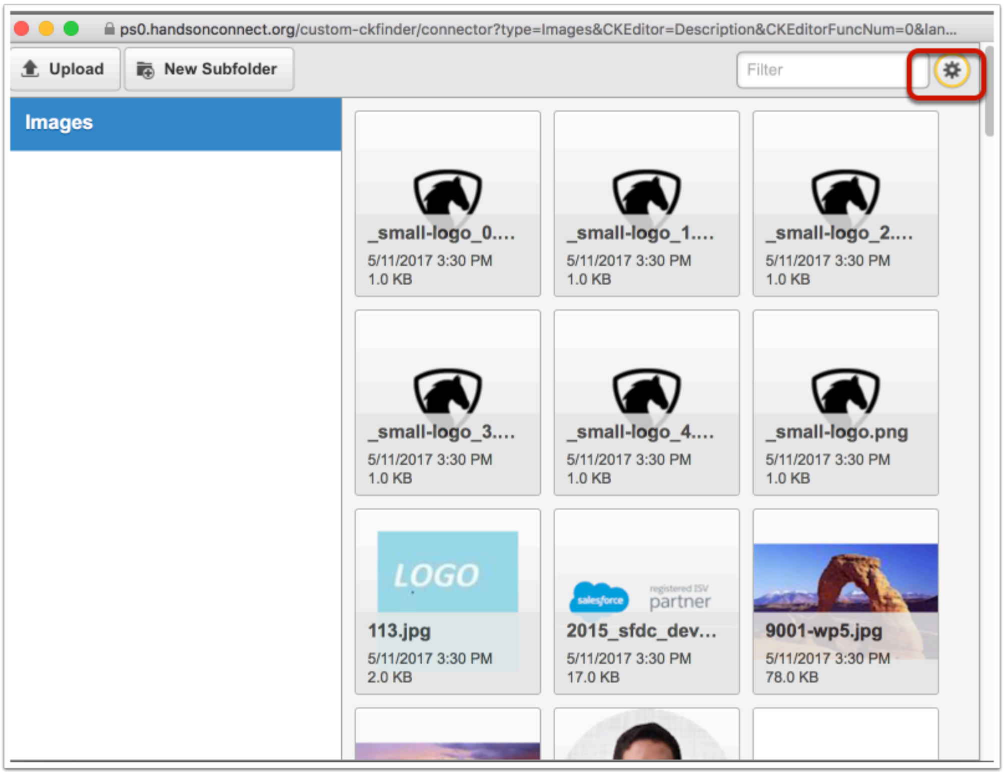
Improvements to Image Management in Sharing Portal (HOC3-3012)

A new, more robust image management system has been added to the Sharing Portal. It has a number of features that will make managing and finding images easier:

Click on **'Browse Server"** and you'll see a new interface.

You can create subfolders to make it easier to group images

Click on the cog on the right to access options to view and manage images in different ways:



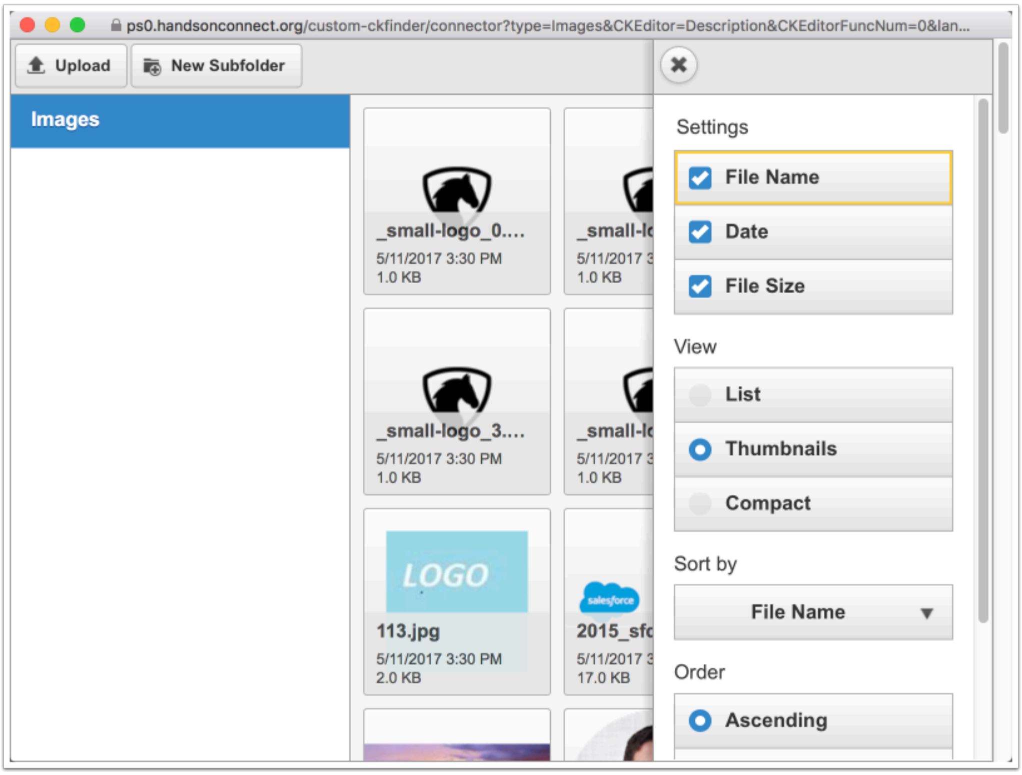
You can choose what info you want to see:

- File Name
- Date
- File Size

You can choose between three views:

- List
- Thumbnail
- Compact

And can sort in a variety of ways.

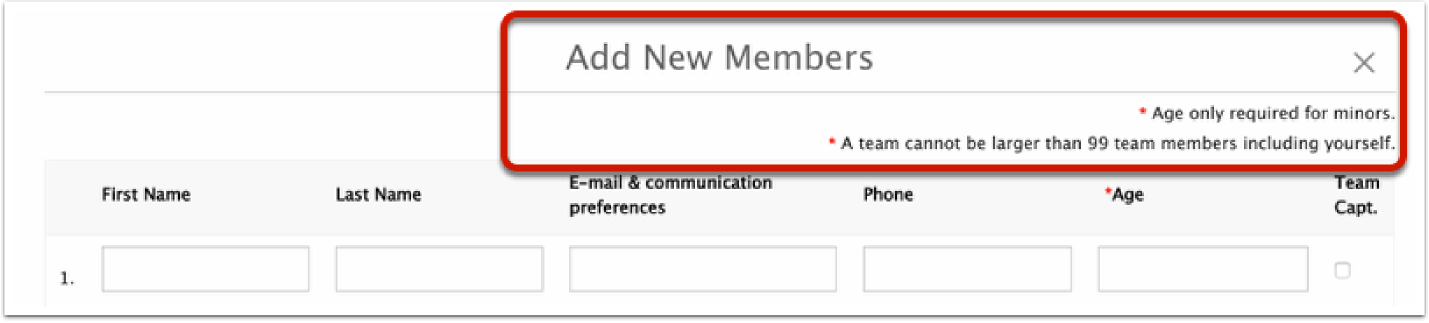


This new image management tool will be added to the CMS soon. For the mment, its only available in the sharing portal WYSIWYG for creating and managing volunteer opportunities.

Teams now limited to 99 team members (HOC3-2495)

Because of Salesforce limits to the number of connections and/or emails that can be sent out through one action, HandsOn Connect teams are now limited to 99 members (including the team captain).

Users attempting to create a team with more than 99 members, or to add additional team members to a team that would result in more than 99 members being added, will no longer be able to do so. The 'add more members' buttons will not be available.   Screens for creating teams will advise users that teams cannot be larger than 99 team members including yourself.



If a user has a current team that is more than 99 members and they try to select more than 99 team members at once, the following message is now displayed: "Your team can not sign up because it has more than 99 members. Please split your team or select only 99 members."

HandsOnConnect Cloud Solutions

HOC 3 Release Notes - 3.0.22 (May 4, 2017)

This release addresses:

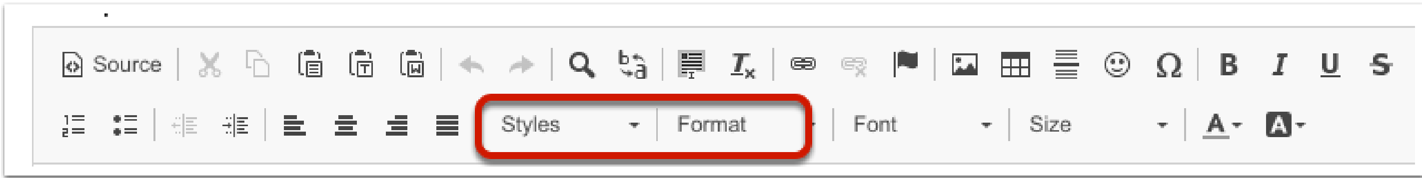
- A number of issues affected volunteer leaders for HOC clients who have migrated from HOC 2.0 to 3.0.
- Various issues affecting inernational and multi-lingual users of HOC.
- A number of performance improvements
- Some cosmetic improvements to some of the alternate themes.

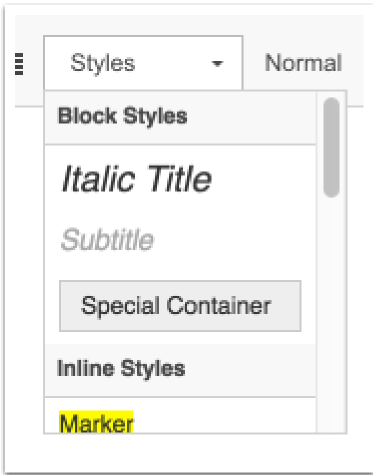
Here's the highlights of new functionality and general bug fixes in this release.

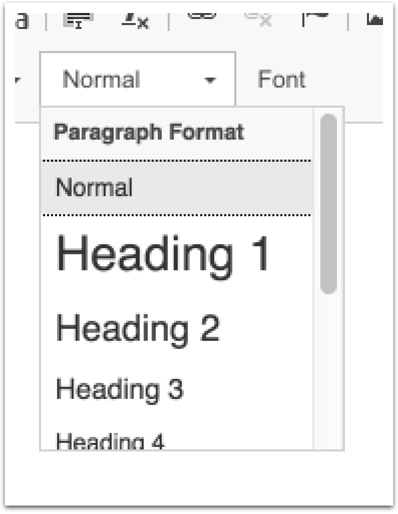
Improvements to WYSIWYG editor (HOC3-2752)

To give quicker and easier control over heading types,and styles for paragraph content in the CMS, the WYSIWYG editor has been updated:

There is now a **Styles Picklist** (which lists styles that can be quickly applied to a range of text), and a **Format Picklist,** which allows you to select text and set it as a heading level, paragraph, etc.







Sharing Portal: New filters added to Volunteer Opportunities grid (HOC3-2691)

For portal users with a lot of volunteer opportuntiies, it wasn't quick or intuitive how to find the Volunteer Opportunities they were looking for. The Search by keyword" function makes it possible to quickly find an opportunity if you know any part of its name. If you happened to know the posting status of the opportunities you were looking for, you could filter the list as well -- but most people don't know the possible posting status messages.

So -- to make it easier to filter the Volunteer Opportunity List -- three new filters have been added to the Volunteer Opportunities page.

You can now quickly filter by:

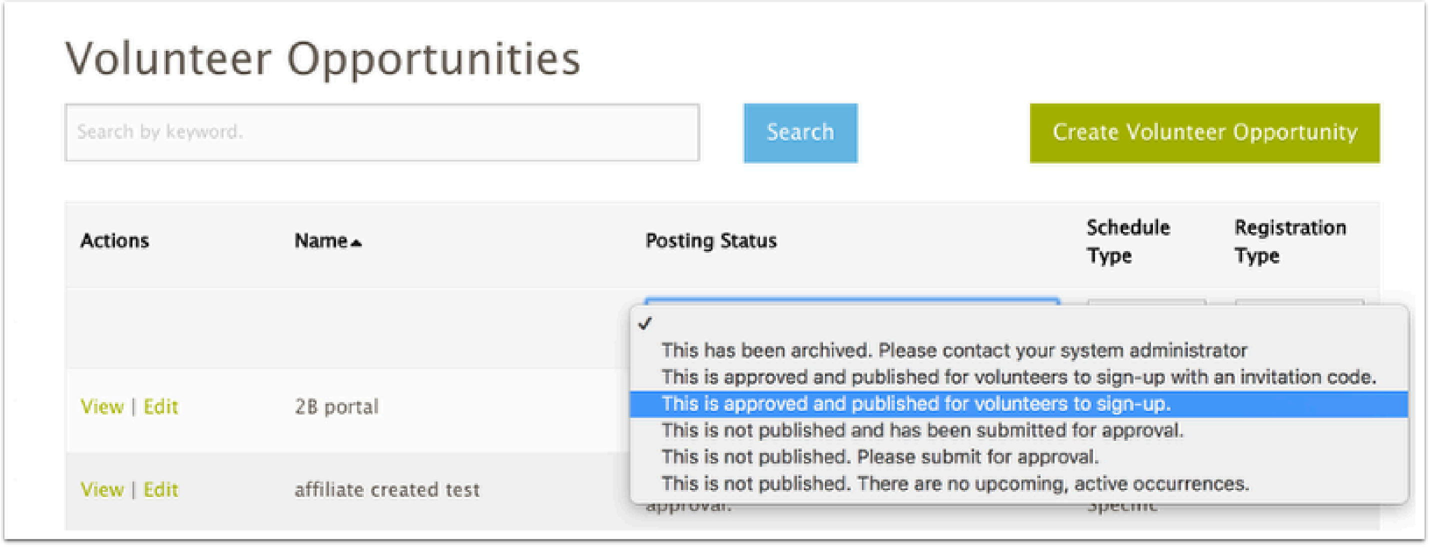
- Posting Status
- Schedule Type
- Registration Type

to narrow the list of volunteer opportunities quickly. So, for exampe, if you want to see which opportunities are currently approved and published, you can click on the Posting Status filter and select 'This is approved and published for volunteers to sign-up" and then only opportunities in th at posting status will appear in the grid.

You can then filter further by adding a search term which will further narrow the list.

You can also use multiple filters at once, if, for example, you want to see what's approved and published for volutneers to sign up and is a date and time specific schedule type.

This added filter will make it easier and faster for portal users to access the opportunity records they are looking for.



Fixed: "Describe your volunteer needs" on Partner Registration Form did not populate data in SF (HOC3-2850)

For configurations of the partner registration form that included the question "Describe your volunteer needs" - the answer to this field was not being populated on the back end of the organization record in SF. This has been corrected.

Fixed: Required fields seemingly not being required (HOC3-2073)

It was discovered that entering a blank space in a 'required' field in a form satisfied the requirement. This resulted in allowing people to skip 'required' information in a form and successfully submitting the form. Going forward, blank space in a form will not be treated as content satisfying the required field.

Fixed: (Sharing Portal) Edit Organization was not showing current values (HOC3-2896)

When editing an organization record in 'my organization' - the current settings of picklist values in the organization record were not being shown. This has been corrected.

Fixed: Issue with multiple changes to a connection (HOC3-2909)

If a volunteer signed up for an opportunity, and then removed themselves, and then signed up again --- the connection was properly updated to status = confirmed -- however the 'decline reason' of 'removed themselves' was being left populated. Now, if a volunteer signs up, removes themselves, and then signs up again -- the connection record will no longer have a residual 'decline reason' listed in the connection.

Pilot: Ability for one contact to manage multiple organizations in sharing portal (HOC3-2332)

In the past, if you needed a single contact to manage more than one partner organization, it required setting up multiple contact records, each with their own unique email address.

We have now launched a beta of new HandsOn Connect functionality that makes it possible for a single contact, using their one single email address, to be configured to manage multiple organizations via the sharing portal.

If you have a business need for this functionality and would like to participate in the pilot. Please open a zendesk ticket and request admission to the "One Contact Manages Multiple Organizations" pilot and we will configure your instance to support this functionality, and provide you with training on how to use this new functionality.

May, 2017 Release Notes

The May Release of HandsOn Connect will be pushed to all customers May 4 - May 5. The most critical fix in this package was pushed to production in Mid-April. There were also a number of fixes for international and multi-lingual customers. But here's the highlight of what's fixed in this month's release.

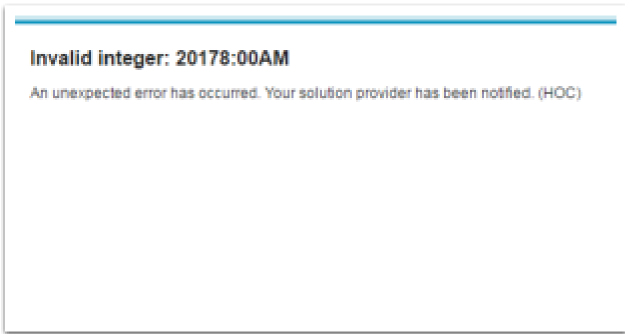
Fixed: "Invalid Integer Error" (HOC-926)

Many HOC customers were experiencing an 'invalid integer' error when updating connections using the connections grid on the occurrence record in SF Administration. These errors came up when adding guest connections or editing the hours of an existing connection.

The culprit was a subtle change that appeared in the connection grid. The "Date" field was now populating a date and time value (instead of just a date), and as a result the grid was not functioning as expected and produced the errors.

This has been resolved and the connection grid should once again be working as expected.

Because of the critical nature of this bug - it was actually pushed out to all instances of HandsOn Connect in mid-April.



Improved message for partners with Auto Approval turned on. (HOC919)

When an NonProfit partner is given the permission to 'auto-approve' its own volunteer opportunities and occurrences (rather than having them submitted for review and approval) the following behavior is in effect.

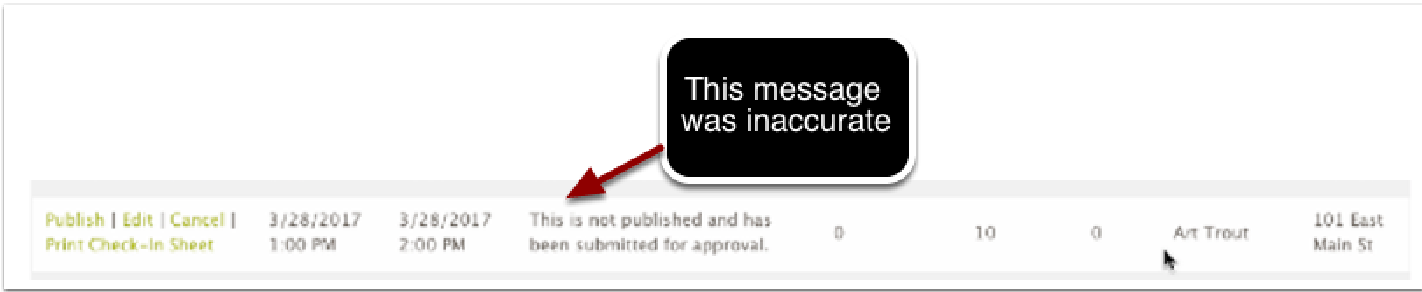
When a new Volunteer Opportunity and one or more occurrences are initially created in the partner portal, the volunteer opportunity will automatically be set to status active. They they are able to self-publish each of their individual occurrences.

The partner will see each occurrence they created in the posting status "Not yet published. Click on the Publish action to make this occurrence available for volunteers to sign up"

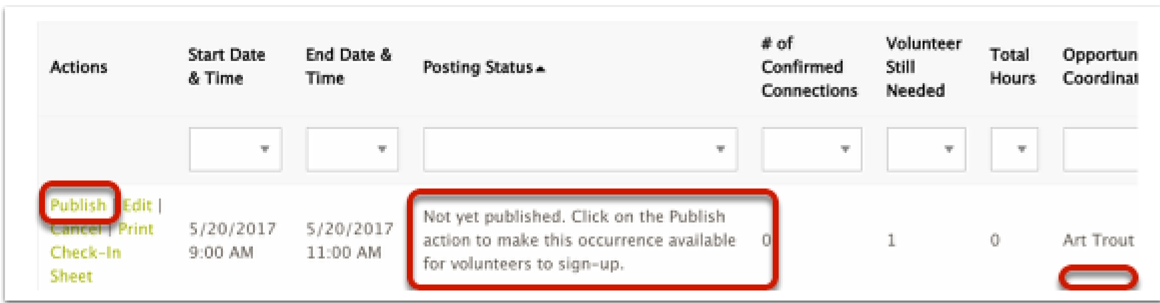
Previously - the partner saw an innaccurate posting status message that said "This is not published and has been submitted for approval".

Parners can then click on the "Publish" link in the occurrence record to self-publish occurrences when they are ready to publish them.

Messaging that appeared before:



Messaging that appears now:



Note: The screenshots above are from the 3.0 sharing portal. 2.0 customers will see the same posting status messaging in their portal -- (though the link for publishing the occurrence appears differently).

HOC has been tested and is ready for the end of TLS 1.0 support by Salesforce on July 22, 2017 (HOC-930)

Many HandsOn Connect customers have been getting messages from salesforce that effective this July support for TLS 1.0 will be suspended.

What is TLS?

TLS stands for Transport Layer Security. It is a protocol that provides privacy and data integrity between two communicating applications. Its the most widely deployed security protocol used today, and is used for web browsers and other applications that require data to be securely exchanged over a network. TLS ensures that a connection to a remote endpoint is the intended endpoint through encryption and endpoint identity verification. The versions of TLS, to date, are TLS 1.0, 1.1 and 1.2.

What does this mean to you?

1) HandsOn Connect has been tested and found to be TLS 1.1+ compliant. So you don't have to worry that HandsOn Connect will break on July 22nd when support for TLS 1.0 is discontinued by Salesforce.

2) The best versions of browsers to use with Salesforce and HandsOn Connect are always the most stable **current** versions of:

- Chrome (chrome is always auto-updated - so you are usually using the most current version!)
- Safari   (Recommended: Version 10.x   but versions 8.x, 9.x on Mac OS X are also supported.)
- Firefox (most recent stable version. Its also recommended you configure firefox according to these instructions
- Microsoft Internet Explorer versions 9, 10, 11 (11 recommended) -- you should make sure however than TLS 1.1 and TLS 1.2 are enabled in Internet Explorer. Here are instructions for enabling these in IE

3) There may be errors generated by users who are using older browsers. When support for TLS 1.0 is dicontinued, users of older browsers will receive a "Stronger Security Required" error message, which will direct them to a Salesforce HelpDesk article which will suggest they update their browser.

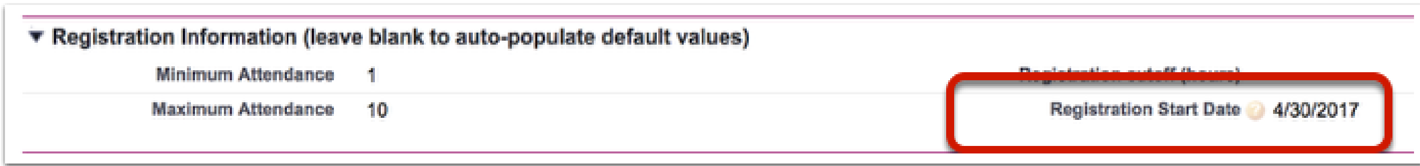
HOC 3.0 Release Notes - 3.0.21 (April 26-28)

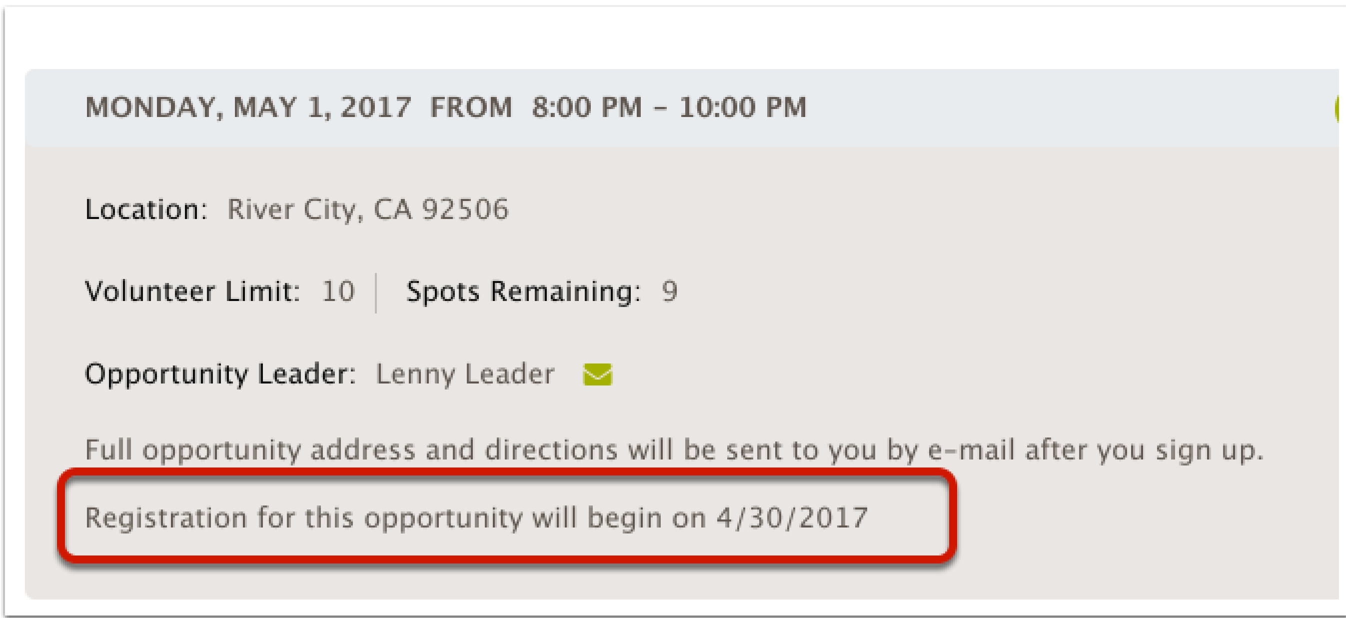
A number of improvements have been made to address issues on the public site and sharing portal that occurred when a large amount of data is called for.
(For example - you had a date and time specific opportunity with more than 100 occurrences available for sign up. While this is not a good practice, HandsOn Connect is addressing issues like this to remove error messages, and to make speed and performance improvements, for organizations with a lot of data that must be displayed.

Among with these sort of infrastructure improvements, here's the most notable fixes and improvements.

Fixed: Registration Start Date Now works as expected (2299)

The occurrence field "Registration Start Date" now works as expected in HOC. If you give an occurrence a "Registration Start Date" that's in the future, volunteers will not be able to sign up for the opportunity until that date.





Fixed: Sharing portal user permissions related to images (HOC3-2889)

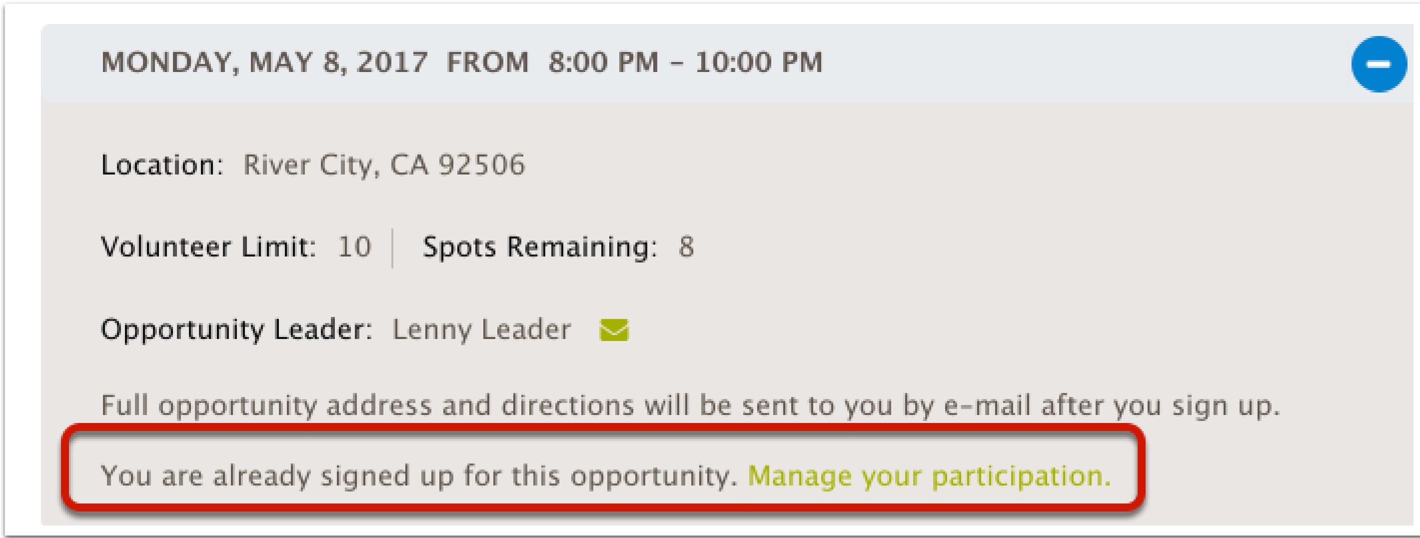
Because the WYSWYG editor for volunteer opportunity descriptions was accessible in the sharing portal for partners, it was discovered that partners could inadvertanly choose to delete images from the CMS or other volunteer opportunities.

We are planning to create a schema to track ownership of individual images, so that a partner could only get access to their own images -- but to address the immediate problem, we've remolved the permission for any portal user to delete an image found in the image library.

Fixed: Users were able to create more than one connection for date and time specific opportunities (HOC3-2857)

When a user signed up for an opportunity and reached the opportunity sign-up success page, it was discovered that if the volunteer went back to the opportunity sign-up page using their browsers back button (instead of navigating back to search), the sign-up button was still present for that occurrence and they could sign up again!

This has been fixed. Now, no matter how a user nagivates back to a volunteer opportunity detail page - the sign up button will be gone and they will receive a message that they are already signed up for that occurrence.)



Improvements to Sharing for Volunteer Leaders

A number of issues related to sharing for Volunteer Leaders in the sharing portal have been addressed and fixed. Issues that have been addressed are related to profile management for HOC 3 users migrating from HOC 2, and issues resulting from large amounts of existing data needing to appear in the portal for some leaders.   The development team continues to work on improving speed and performance related to large numbers of records associated with some leaders or partners.

Improvements to Form Builder

The form builder functionality in the CMS has a number of improvements, broadening the capabilities of HOC Forms for advanced users.

(Note: Forms are still in Beta. Training on how to work with CMS forms will be available at a future date.)

- Forms now support the donation block if donations are active (Click & Pledge or Paypal). (HOC3-2767 and 2770)
- Ability to set the page where a user is redirected after they submit the form (HOC3-2650)
- Date and Time can be set to default to current date + time (HOC3-2650)
- Logic added to determine whether or not to display description field (HOC3-2768)
- Added greater than and less than logic when comparing numeric values (HOC3-2769)
- Fixed issues related to numeric slider field in forms (HOC3-2766)

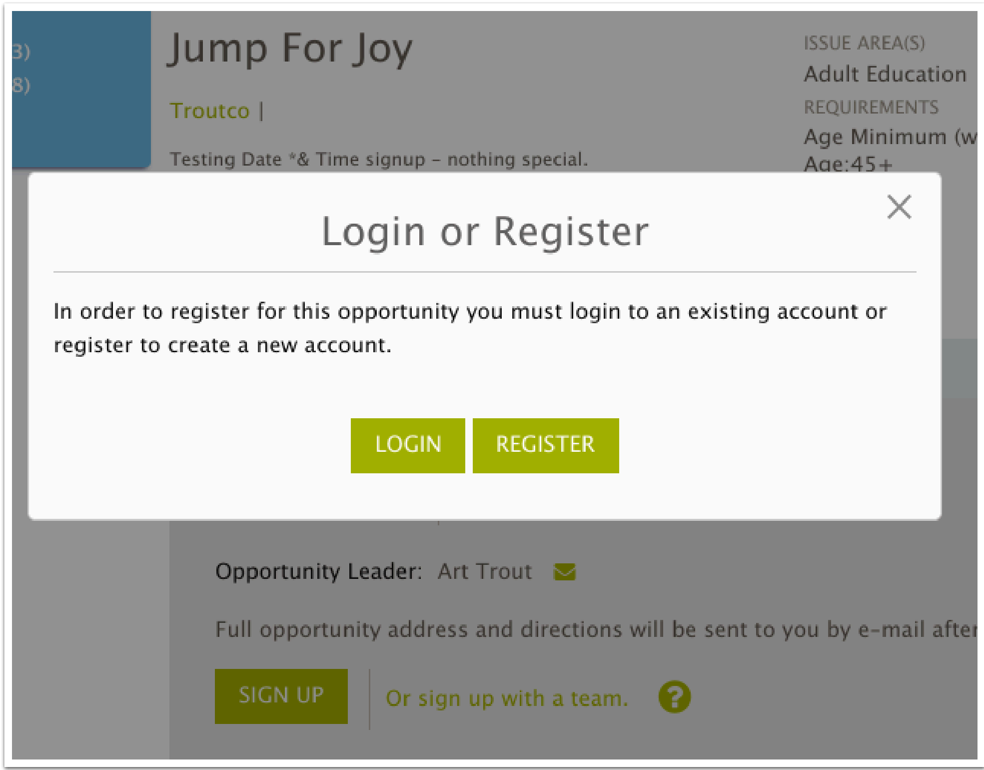
HOC 3.0 Release Notes - 3.0.20 (April 21)

Another jam-packed release coming at the end of this week. It includes several long-awaited features and the usual pile of improvements and bug fixes, as well as tweaks to various HOC public site templates.

Here are the highlights of this release which will be pushed out to all HOC 3 users by Friday, April 21.

One Step Opportunity Signup (HOC3-2499)

When a volunteer goes to a volunteer opportunity and clicks on the "Signup" or "Express Interest" button and they've not yet logged in, or don't have a volunteer account, a familiar pop-up comes up instructing them to Login or Register:



If they then log in, they are returned to the opportunity detail page, and may be confused about whether or not they have signed up for the project (they haven't :-(and some forget to click the 'sign up' or 'express interest' button.

The confusion is even greater if they click on "Register". They are then taken to the registration page, complete the registration process, and remained on the Registration success page. Many people mistakenly feel that they've signed up for the opportunity (they haven't :-(Because they 'registered' (which actually is creating a member account for them, but NOT signing them up for the opportunity). To sign up, they have to go back to the opportunity page, and then sign-up again for that opportunity.

The distinction between 'registering' and 'signing up for an opportunity' can be confusing to volunteers - and sometimes led to people registering but not signing up :-(

One Step Signup / Registration fixes all this!

Here's how it works:

1) If they are not logged in, and click on Sign-Up or Express Interest -- they get the same pop-up as before.

2) If they log in, the act of logging in from this popup will then automatically sign them up for the opportunity they had tried to sign up for. Depending on the opportunity configuration, they will either then go to the success page right after logging in), or, if its a team signup, or there are custom opportunity questions, they'll be presented with the next step of the sign-up process. No more confusiion about whether or not to click the 'sign-up' button again.

3) If they Register, they will be guided through the registration process, and upon completing it, they will be signed up for the opportunity they were trying to sign up (or express in) for when they were asked to register. As in the login scenario, they will either reach the success page, or be taken to the next step in the signup process. No more will they complete registration and have to navigate back to the opportunity, click on the sign-up button, or have any confusioin about whether or not they have been signed up!

This will make the process of signing up for an opportunity, and logging in or registering one seamless process, making things clearer and easier for your volunteers!

.

Success Pages Improved (HOC3-289)

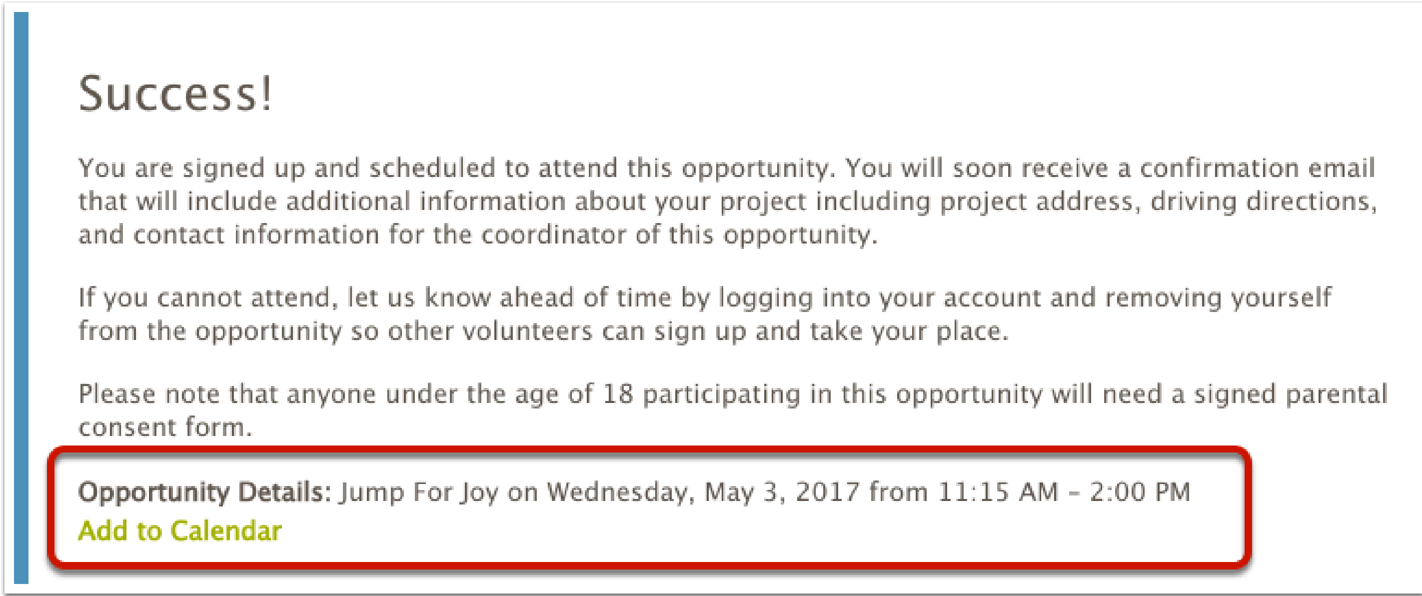
When volunteers arrive at the "Success Page" after signing up, they'll now see more info than before.

You've been able to customize the messaging on the Success Pages in the CMS -- but in addition to the messaging you supply, indicating that they've successfully signed up -- the Success Page will now include:

- The Name of the Opportuniity they just signed up for (very helpful if you've had to register and then are signed up for the opportunity -- you may have forgotten just what you'd signed up for :-)

- An "Add To Calendar" Link (for confirmed connections only, NOT for express interest opportunities).

The Add to Calendar link is still available on the "My Account" page under upcoming opportunities - but we've now added the link to the Success Page as well, so that people can add it to their calendar as soon as they've completed sign-up!



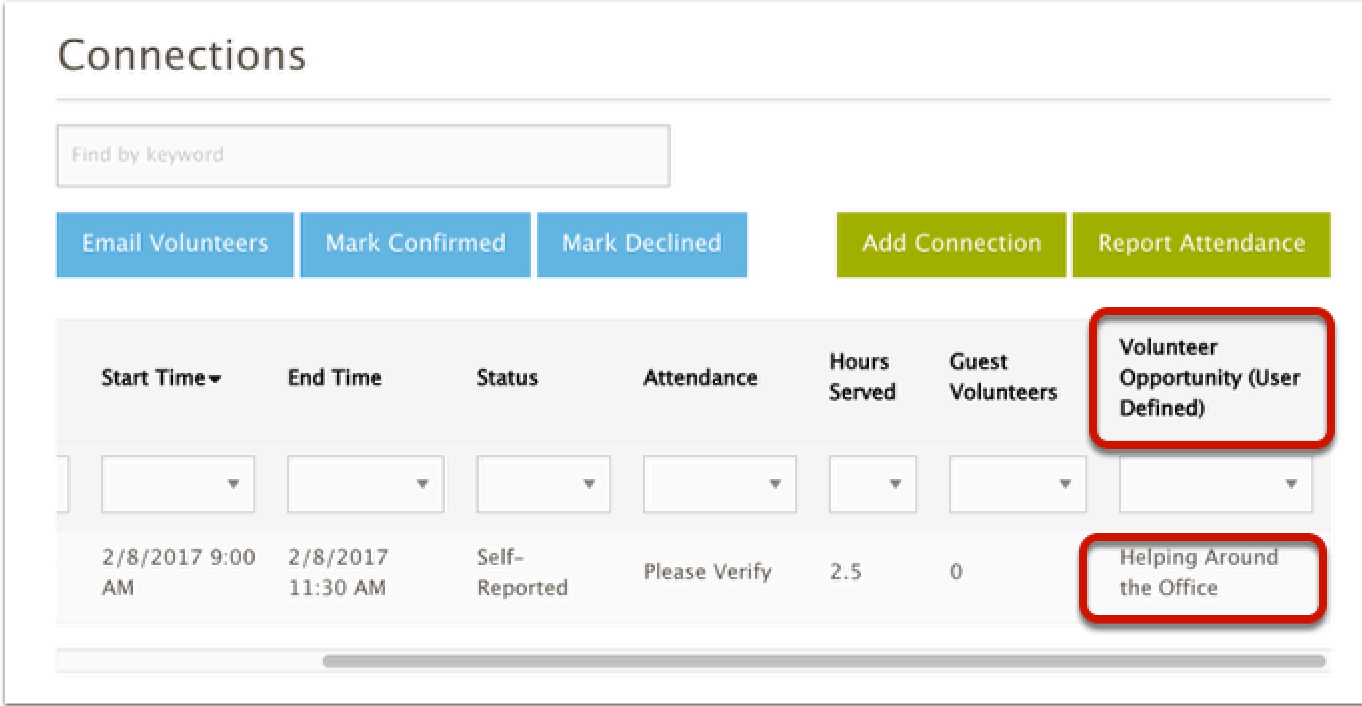
Improvement in sharing portal for handling self-reported volunteer opportunity connections (HOC3-2668)

In the last release we made it possible for partners to see the 'self-reported' connections that volunteers submitted and verify their attendance. Unfortunately, all those connections appeared under the volunteer opportunity name "Self-Reported Volunteer Opportunity" - and though you could see the date and time they said they'd volunteer, you couldn't see exactly what the volunteer said they did!

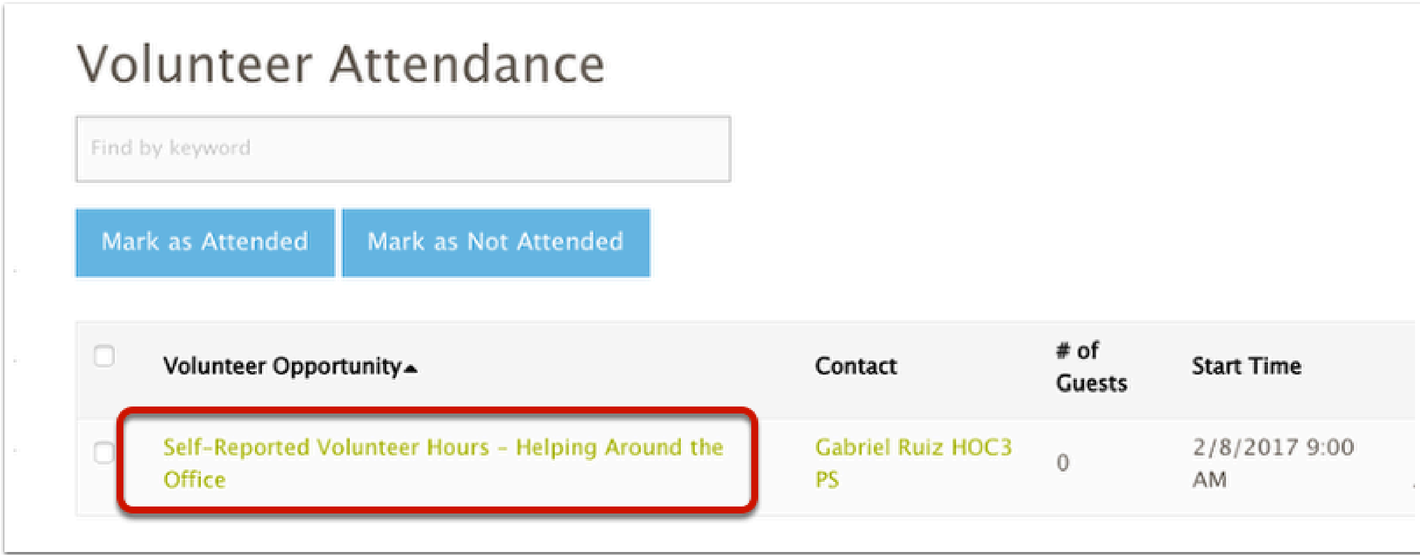
This has been improved, and now, self-reported connections display the 'user defined' name of the self-reported opportunity as well.

This will make it easier for partners to see what self-reported connectioins their volunteers have reported!

The Connections listed under the "Self-Reported Volunteer Opportunity" will show the name the user gave the opportunity in the last column of the connection grid:



On the "Report Attendance Page" - the name of the opportunity will include both "Self-Reported Volunteer Hours" AND the name of the opportunity as defined by the user.



Improvement to Search:

HOC3 - 2676 - Notify when a search is filtered

The message "You are seeing a filtered number of volunteer opportunities...." that was added to the search, list view page in the last release, has now been added when displaying a filtered list of opportunities in either Calendar View or Grid View (Grid view is available on corporate page search results).

Grid view is planned to become available for public searches in addition to corporate search results, in a future release.

HOC3-2678 -- Clear Filters Functionality

Clicking on "Clear Filters" on a search page will automatically clear the filters and return ALL opportunities to search. This will make it possible to select new filters for a new filtered search, based on all available opportunities. It also clears up confusion where people didn't realize that after clicking clear filters they had to hit the submit button to see all opportunities again.

Bug Fix to Volunteer History Report (PDF) - (HOC3-2774)

A bug wherein the volunteer history report available to volunteers with extensive volunteer history has been fixed. Their entire history will now be displayed in the report.

Improvements: Login and Registration Errors (HOC3-2818 and others)

A number of improvements have been applied to the error messages that may occur when logging in incorrectly, resetting your password, or when registering an email address that is already registered in the system.

If a user attempts to register with an email address already in the system, the message will now explain ""This email address is already registered. Please login using your existing account. If you do not recall the password, click on the 'forgot password' link in the login widget to reset your password."

Bug Fix: Personal information deleted

When updating your personal information, if a field that was present on the registration formand was not present on the personal information form, when the personal information was saved, the hidden fields deleted the data from the contact record. This has been fixed.

Note: Unless you don't want the volunteer to be able to update information they entered when they first registered, you should make sure that the personal information page has all the fields from the registration page. However - if you choose not to do so - the original data not shown on the personal information page will no longer be affected.

Text Improvements to site messaging:

- When 'turn off waitlist' is enabled for an occurrence and the project is full, the message displayed will now read "This occurrence is full. There are no spots remaining"

Volunteer Account Page - Hours Served

Addressed bug where volunteer hours was not including self-reported hours on the 'my account page". Hours will now include self-reported.

Updated text on page /volunteer-skills (HOC3-2677)

The text on the /volunteer-skills page was a bit confusing and not general enough to cover the variety of practices different HOC 3 sites had around how they used volunteer skill information and what an 'invitation' was.
The text on this page is now:

*Accept Invitations *- Are you open to receiving email invitations to volunteer for opportunities that are good matches for your skill profile?

Yes / No

This neither promises that invitations will be sent, but just let's the user notify you if they are open to receiving requests to sign up for volunteer opportunities that match their skills.

Improved password messaging in emails (HOC3-2514)

Password links that are sent out when administratively granting someone a volunteer login, partner staff login, or when a volunteer requests a reset on their password are only good for 24 hours.

The automated emails above that send out a password link will now include this information:

They will say: "Note: This password link is valid for 24 hours. If more than 24 hours have passed, you can request a new password link by going to the "Forgot Your Password" page here: [[Affiliate URL]/forgot-password] and entering your email address:[Contact UserName (email address)]."

Fixes related to using IE 11 browser

Darn those Microsoft Browsers -- they always encounter problems on the web. We've implemented a number of fixes to address issues encountered by IE 11 users:

- Team Sign-up stalled for IE 11 users (HOC3-2623)
- A number of other display issues have been addressed

Bug Fix - Default Email sent to volunteers had wrong date and time (HOC3-2761)

In some instances, the hard-coded email sent by Volunteer Leaders through the sharing portal had the wrong start time (due to time zone issues). This has been fixed.

HOC 3.0 Release Notes - 3.0.19 (April 10 - 17)

This release features a number of imrprovements to the CMS making it easier to control the display of content on the site. You'll see some new items in the CMS menus which are currently in Beta and not fully implemented for use yet - but we want to give you a preview of what they'll be used for in the future! Our CMS becomes more powerful and customizable with each release. Here's a peek at some recent changes:

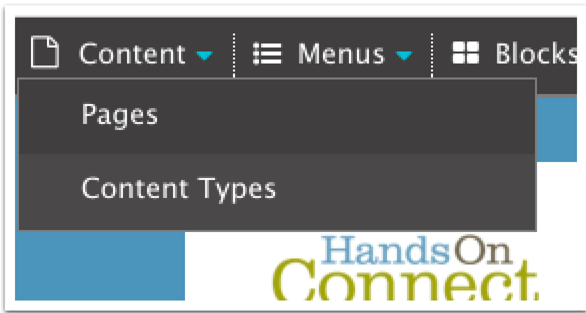
New Items found in your CMS (Beta)

Several new elements have been added to the CMS to lay the groundwork for some new ways to display content on the public site. These new elements are in beta right now, but we want to mention them since you'll see them appearing in your menus in the CMS. This will give you a sense of some of the new features you'll have available to in the coming months:

Where did the "Pages" menu go?

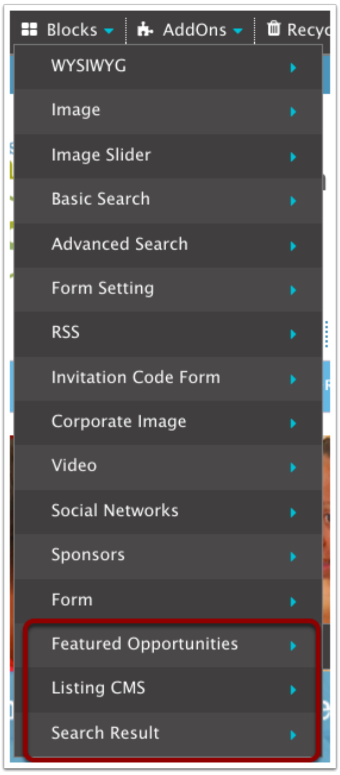
Pages are now found under the new 'Content" menu. The content menu contains your pages as a sub-menu item, as well as a new menu item for future use called "Content Types"

Content Types will be used as a method of organizing your content for use in the new listing blocks that we're adding to the CMS for future use:



New Blocks:

You'll see three new block types under the blocks menu that are in beta and being tested for future use:



Featured Oportunities Block (HOC3-1742)

The featured opportunies CMS Block will allow users to display a selection of opportunities based on specific criteria pulled dynamically from a search. It'll make it possible to dynamically show a list of opportunities based on a stated criteria such as "upcoming opportunities" 'Featured Opportunities" "Holiday Opportunities" etc. You'll be able to display these opportunities in a number of different formats.

Listing CMS Block (HOC3-1821)

This block will allow users to organize and display 'list-like' content such as events, blogs, job opportunities, news, etc. You can organize page content here by creating 'content types', and in the future you'lll be able to create lists that pulll data diretly from from Salesforce. We're also planning to make it easier to bring in content from external feeds, Rss, etc.

Search Result

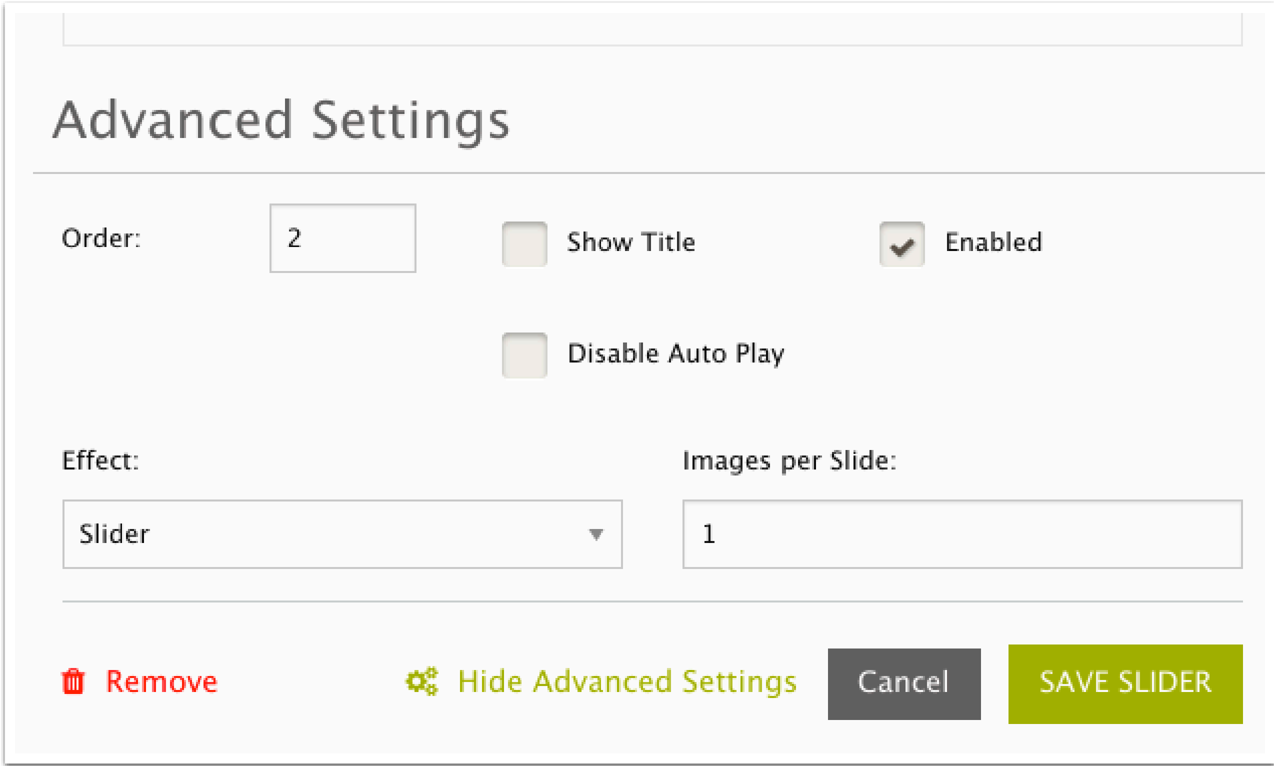
This one is so super-secret the developers haven't told us what wonderful thing they have in store for us in the future. We'll tell you more about what this will be used for as this block enters its beta phase.

For now, don't worry about these new blocks. But we wanted you to know that these are laying the groundwork for a more powerful CMS, that can display your content in smart and attractive ways. We'll be providing you with more information in the coming months on how to use these exciting new content options.

Improvements to Image Slider Block (HOC3-1957)

The Image Slider block has a number of new options in the advanced settings section of the block:

- You can **disable auto play** (pictures won't automatically change, unless you click on the butons to move to the next image.
- **Effect** - you can choose to have images 'slide' or simply change from one image to the next "fade"
- **Images per slide**: If you don't want to have a single, large, cinematic landscape image in the slider, you can now choose to display more than one image across the space used by the slider.



Improvements in styles for specific HOC themes

We continue to make improvements to each of the new themes available for HandsOn Connect. Each of the six new themes has its own style sheets and as these new themes are starting to be used by more and more 3.0 customers, we continue to make improvements to the look and readability of each theme.

This release includes a number of theme improvements and fixes, as well as improvements for those 3.0 users using 'custom themes'.

Issues with white text not being visible in some themes and color schemes have been addressed and corrected.

Bug Fix: Log in with Facebook missing (HOC3-2172)

For a short while, the previously available "log in with Facebook" and "register with Facebook" buttons were no longer visible. This has been fixed.

HOC 3.0 Release Notes - 3.0.18 (April 6, 2017)

This release, in conjunction with the HOC monthly April release, brings a ton of fixes and new functionality in HOC 3.0. Spring is in the air!

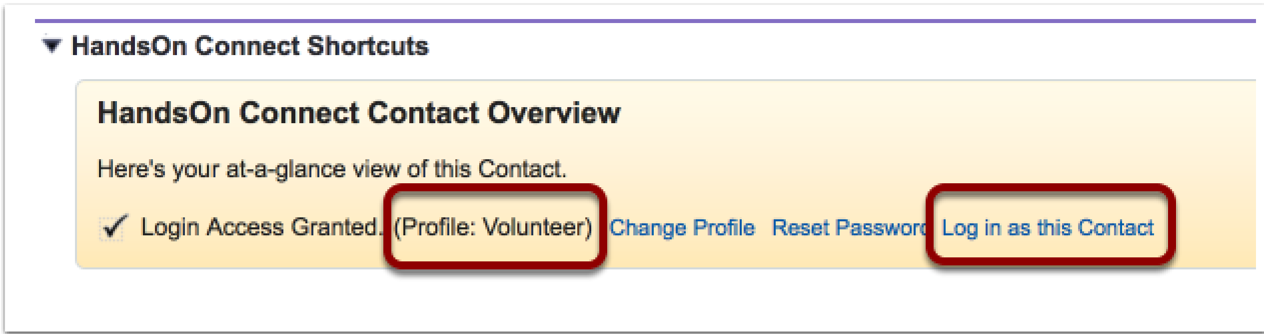
New Feature: Log in as this Contact

A powerful new tool has been added to help HOC Admin Users in working with their volunteers, volunteer leaders and partners. It's the ability to "impersonate" any user in their system that has a profile, login and password. This functionality makes it possible for you to troubleshoot issues or carry out tasks on behalf of one of your users, by logging into their account, and seeing exactly what they see when they are logged in. Furthermore, when you are logged in as a contact, you'll be able to do things in their account on their behalf. This makes it possible to:

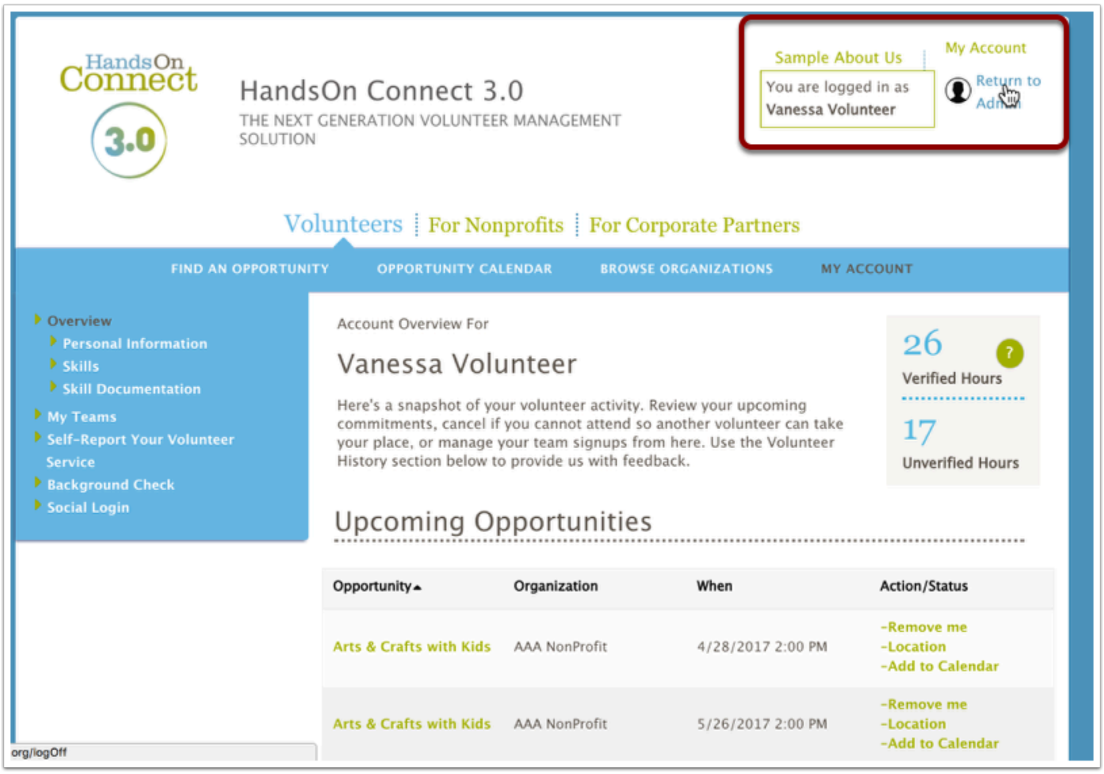
- See a volunteer's view of their own account
- Sign up for volunteer opportunities, create teams, and act on their behalf via the public site
- See a Volunteer Leade'sr view of opportunities when they are logged into the sharing portal
- See a Partner's view of opportunities when they are logged into the sharing portal
- Create or manage a volunteer opportunity for a partner using the sharing portal instead of the admin site (if desired)
- All of this makes it possible for you to help and support your users if they have questions or report issues with using the site!

Here's how this new functionality works:

- For any contact with a profiile, you'll see a new link in the Contact Overview section at the top of a contact record marked "Log in as this Contact



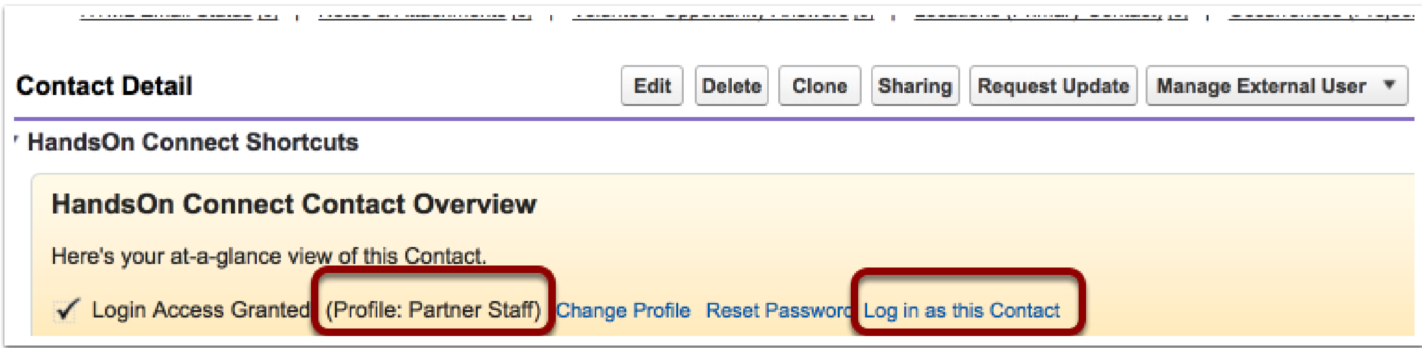
- Click on this link and wait patiently for a few seconds. (Loading time may vary depending on server activity, and this can take from a second to up to 15 seconds.   Other than seeing your browser is working at loading new content, you won't receive any feedback that anything is happening. But in a short while, your admin site will be replaced by the public site!



- You will now be viewing, and able to act as, the contact you've logged in as. For volunteers, you'll arrive at the "My Account" page and can navigate from there.
- To return to Salesforce, click on the "Return to Admin" link in the upper right.
- If you hover over "Return to Admin" you'll be able to see the name of the contact you are currently logged in as:
- You can navigate freely through the site and will remain active as that contact until you click on "Return to Admin". Any actions you do on the site will be carried out as if they had been done by the volunteer themselves.

How does this work when log in as a contact who has Partner Staff or Volunteer Leader profile?

- Log in in the same way, by clicking on the link in the contact overview:



- You will arrive in the sharing portal, and now be able to act as this sharing portal user.
- On the left you will see the name of the contact you are logged in as and impersonating in the portal.

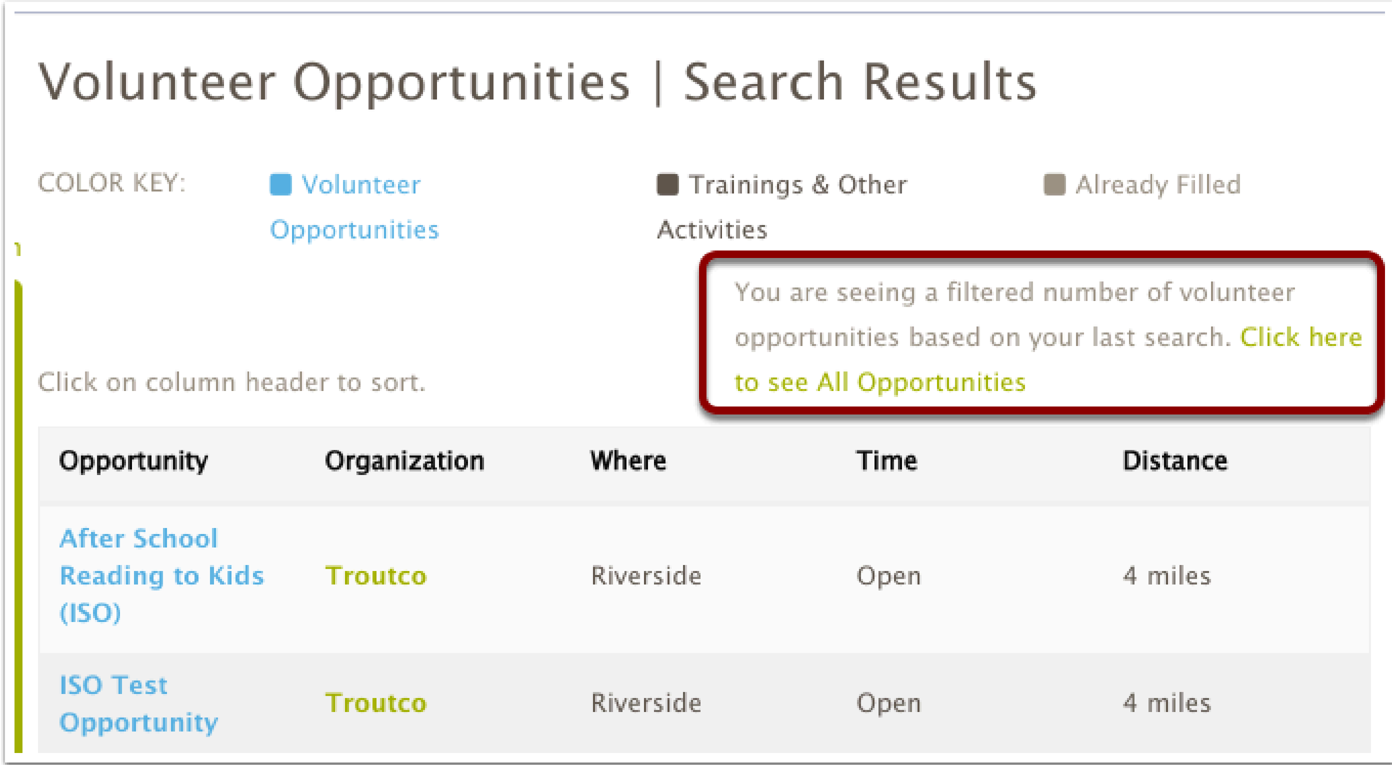
- To return to the admin site, click on "Return to Admin"
- You can freely navigate through the sharing portal as this contact, and see what they see, as well as act in their behalf.

8 new Improvements to Search and Calendar Functionality

A number of improvements have been made to search and the calendar in this release. Here's the highlights of search improvements in this release:

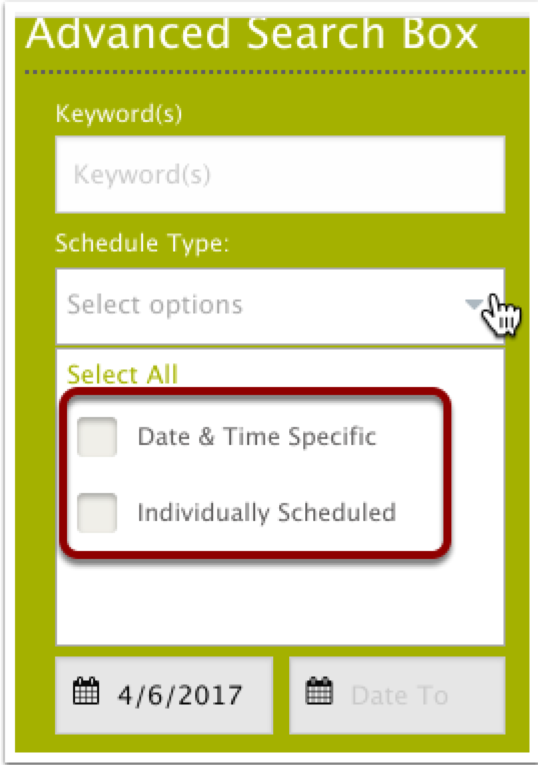
1) Make it clear whenever a search filter has been applied and the search results are showing less than all of the opportunities. Provide a more obvious way to clear all fitlers and see all opportunities (HOC3-1288)

Since search results are preserved when you return to the search page, users aren't always aware that they are still seeing a filtered view of all your opportunities. Now, whenever a filter is showing a subset of your volunteer opportunities, a message appears at the top of the search result letting them know they are see a filtered number of opportunities, and providing a clear link to see all opportunities:



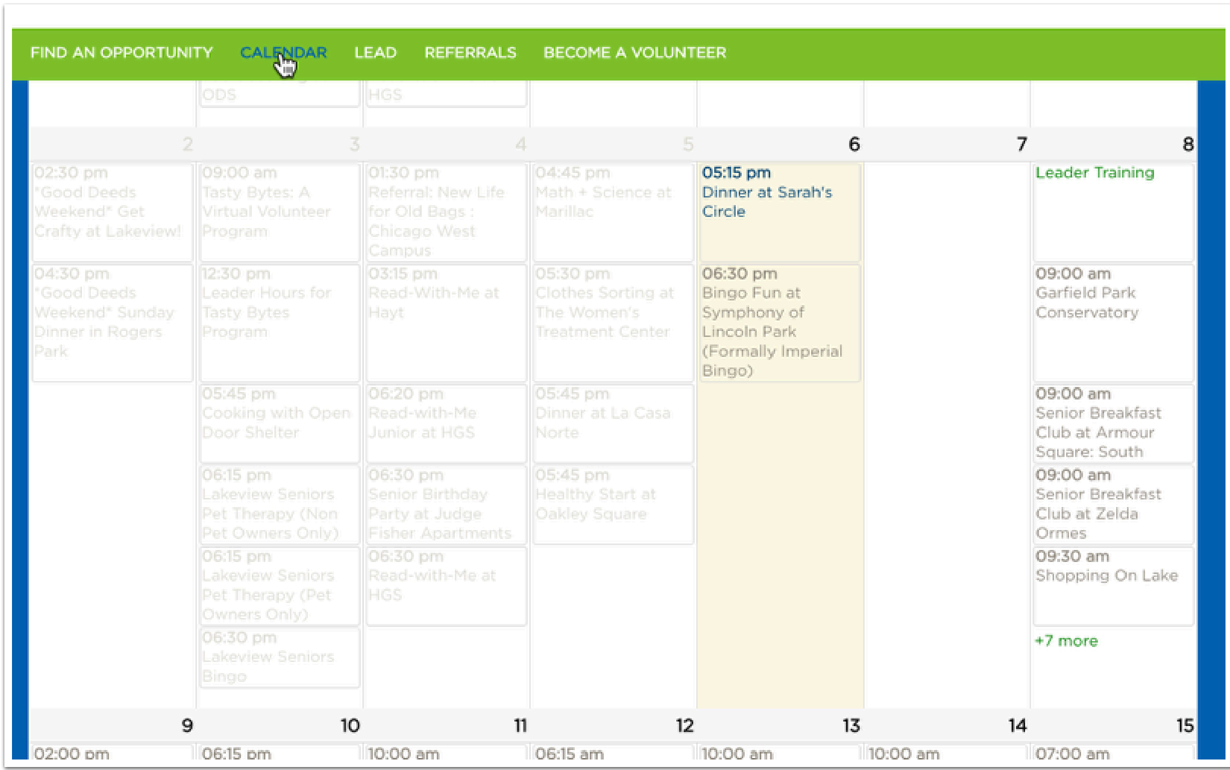
2. Search filters should not present picklist values that have no matching data. (HOC3-1879)

Some search picklist options included values that had no matching volunteer opportunities. For example, the "Schedule Type" filter listed the no longer used "To Be Scheduled" schedule type as an option to select. (To Be Scheduled Opportunities only exist for legacy opportunities from migrated HOC 2.0 customers).



3. In Calendar view, opportunities in the past will appear grayed out (HOC3-2005)

Opportunities in the past are now visible, but grayed out, making it more obvious that these are past dates, and drawing more focus to the current and future days on the month's calendar. The current day of the month is highlighted in yellow.



4. Filters on Search are reset after 24 hours (HOC3-2386)

When you perform a filtered search, HandsOn Connect maintains those filters automatically for you when you return to the search or calendar page, so that you can continue to look at opporunities that meet your search criteria. (You can choose to clear those filters by clicking on New Search or by using the new 'see all opportunities' link at the top of the page mentioned in #1 above.

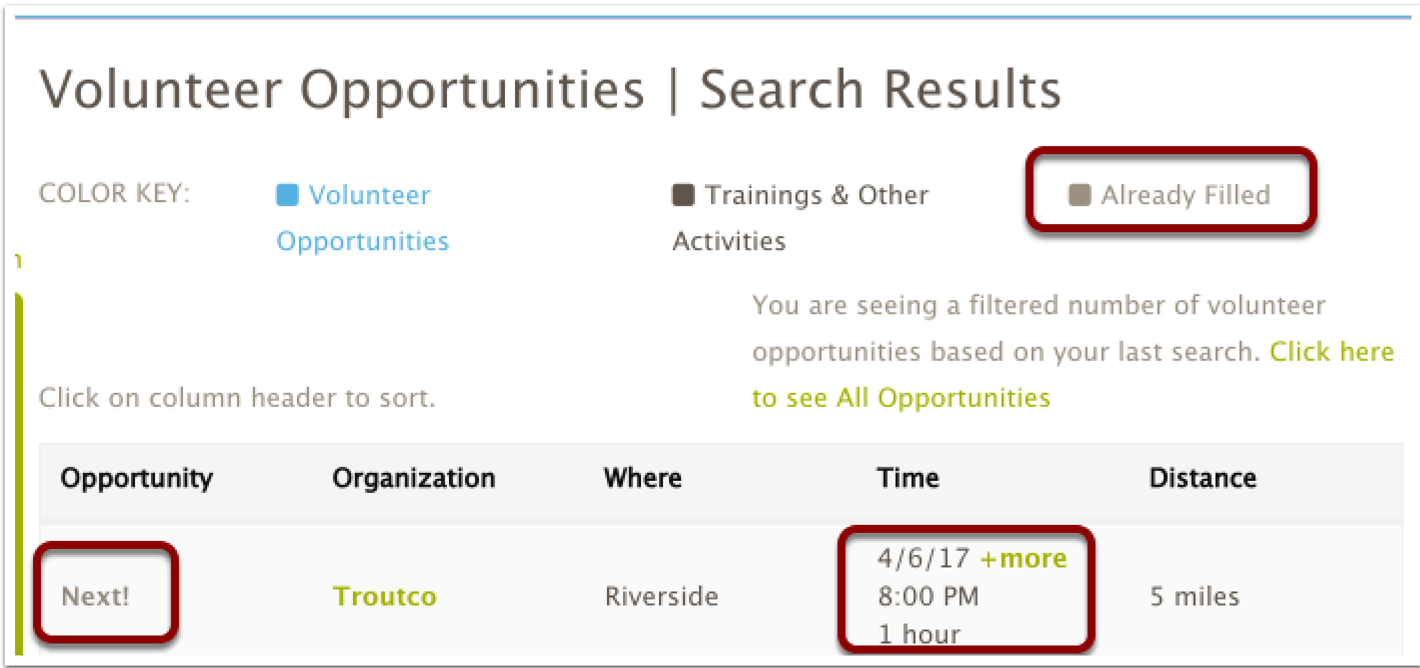
However, these filters remained in place so that if you logged out and came back to the search page in the future - the filters would still be in place from your last visit. Feedback from you has told us that many volunteers find this confusing. So, we've now set filters to automatically expire after 24 hours so that when you come back on a new day, you will iniitially see search without any filters applied (unless you apply new filters yourself!). This makes search maintain things while you're using the site, but gives you a fresh start if you haven't used the site in 24 hours :-)

5. **Search results now display the Time/Date of the NEXT occurrence with available slots. (HOC3-2388)**

Previously, the occurrence date and time that showed up for a date and time specific opportunity with multiple occurrences, was the next one occurring chronologically, even if it was full. The opportunity appeared in grey because the next occurrence was full, even though other occurences had space.

In response to many requests, we now will show the NEXT occurrence date with available slots, and not indicate that an opportunity is full, so that volunteers are directed to the best date to sign up for an opportunity (rather than to a full occurrence where all they could do is get on the waiting list).

When no upcoming occurrences have slots, THEN the opportunity will appear in a gray color meaning "already filled" and the next available occurrence will be listed and you can opt to join the waiting list. This much requested change will help drive volunteers to the dates that need volunteers, rather than to occurrences that are already full.



There is also an option available by request, to NOT display a volunteer opportunity in the search results if no occurrences are available for sign-up. Please open a help desk ticket if you do not want full opportunities with no available slots to appear in your search results as 'already filled'.

6. The ability to create URLs that go to a specific month or to a specific day (day view) on the calendar (HOC3-2389)

There are some use cases where you might want to be able to have the calendar open to a month in the future (rather than the current month), or in day view, to provide a link to a specific day on the calendar.

It's now possible to create URLs that do this by using the following formula for construction of the URL:

Examples:

- The URL   /calendar?year=2017&month=12 will open the calendar to December, 2017
- The URL   /calendar?year=2017&month=03&day=29 will open the calendar to March 29, 2017

If you only specify the year, the calendar will be open on the month of January for that year.

Month must be 2 digits, (January is 01): If you only specify the month, the calendar will open in the date: current year-month-01

Day must be 2 digits (the 1st is 01): If you only specify the day, the calendar will open in day view for the current year - current month

You can use these URLs as hyperlinks, or create menu items that open to specific days or months.

In April 2018, we also added a way to create a URL that goes to a specific week on the calendar.

7. **A number of interface improvements in mobile versions of search and calendar.**

We continue to act on your feedback on useability of search and calendar for mobile useres. Lots of tweaks to make the experience better on small devices.

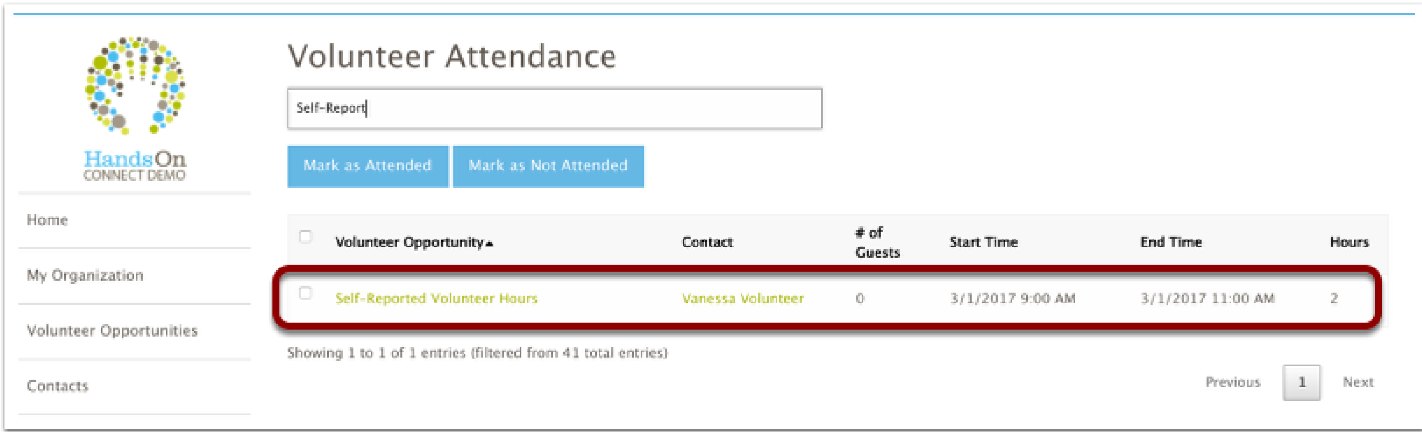
8. Preserve the last view of calendar (HOC3-2478)

Previously, when a user is on the calendar page (mobile or desktop) and uses the arrows to advance from the current month (March) to May and then selects a project from the May calendar, when they click back to return to the calendar they were brought back to March rather than May.

Now, the last month viewed is preserved. (Note: after the site tab or the browser is closed, saved views of month are reset back to the current month)

Self-Reported Hours now available for verification in Report Attendance (HOC3-2448)

The date and times that volunteers report via Self-Reporting now show up in the Report Attendance grid so that partners can verify attendance for self-reported hours.



You can easily find self-reported connections by typing "Self-reported" in the search box - which will bring up any self-reported connections awaiting verication.

Sharing Portal: Only staff members with partner staff profile will be shown as eligible opportunity coordinators (HOC3-2396)

Previously, when creating a volunteer opportunity in the sharing portal, the picklist of available opportunity coordinators included any contact that was associated with the organization. This created confusion, because selecting someone to be opportunity coordinator when they did not have access to the sharing portal meant they received email notifications asking them to report attendance or confirm volunteers and had no access to do so.

Now, the list of eligible opportunity coordinators will be limited to the members of a partner's organization that have been granted partner staff access.

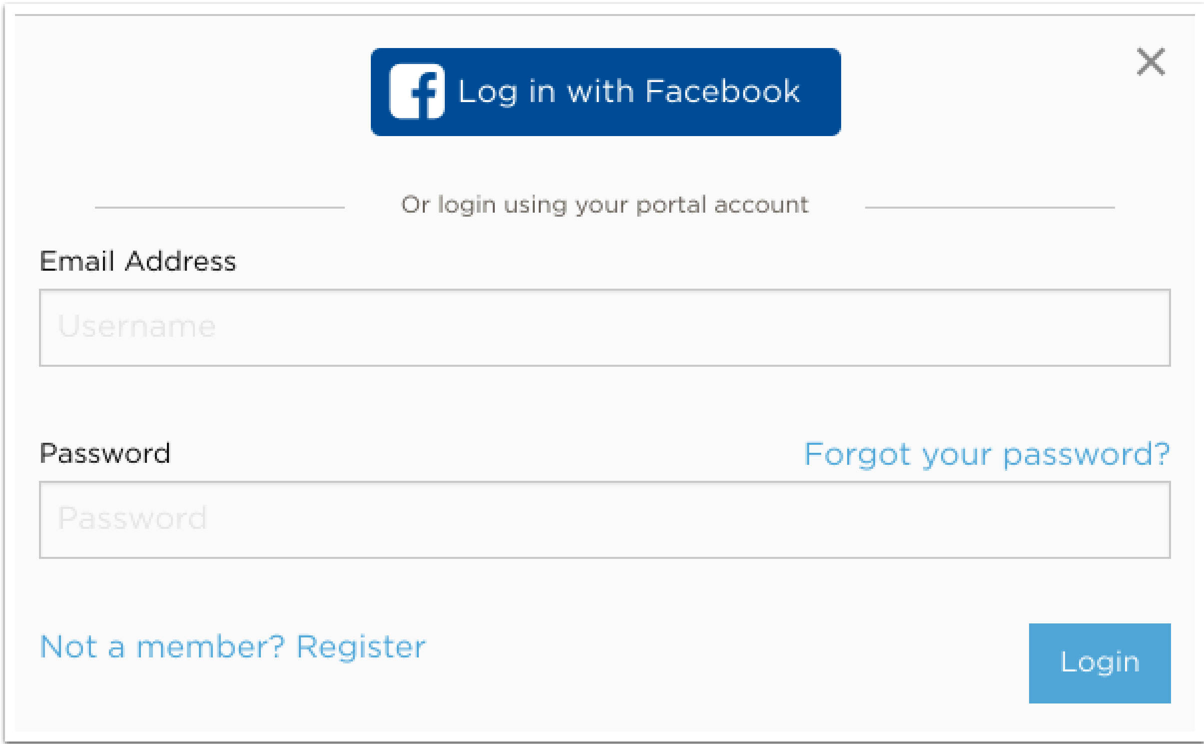
Sneak Peek. Planned on our roadmap for this quarter: The ability for a partner organization to see all their staff contacts and who has partner portal access. Partners will be able to add, remove and update staff contacts, and request portal access for new staff members. This much requested functionality is in the works. We'll tell you as soon as its ready!

Facebook Login and Registration now enabled for most HOC 3.0 sites (HOC3-2626)

The success that we've had with users linking their Facebook accounts as a way to speed up registration and subsequent logging in has encouraged us to turn this on by default for all HOC customers who are not using another SSO (single sign on) login process.

You'll now see a button to 'log in with facebook' on your login widget and on your registration page.

If you wish to NOT have this available on your site - please open a ticket in the Help Desk and let us know - and we can disable it for you (though honestly, its pretty cool and works great!)



Handling of Full Occurrences (HOC3-2388)

Previously HandsOn Connect search showed the next occurrence coming up, even if the occurrence is full.

In order to make it easier to steer volunteers to opportunities where space is available, the following behavior now exists when displaying opportunities in the search list view:

- The occurrence that will be shown in the 'Time" column, will be the next available occurrence that has available slots.
- If no future occurences of the opportunity have available slots, then the opportunity will appear in gray (indicating 'already filled" and the 'time' will be listed as the earliest FULL occurrence date (so that users can join the waiting list for it).

- An opportunity will not be marked as 'filled' as long is there is a future occurrence that still needs volunteers.

There is also a configuration option available on request to 'not display opportunities when they are filled"

If you wish to not show filled opportunities in your search results, thereby emphasizing opportunities that still need volunteers rather than encouraging people to join the waiting list for filled opportunities, please open a zendesk ticket and request the configuration "Do Not Display Full Opportunities in Search Results"

Bug Fixed: Dates not sorting chronologically in sharing portal Report Attendance (HOC3-2531)

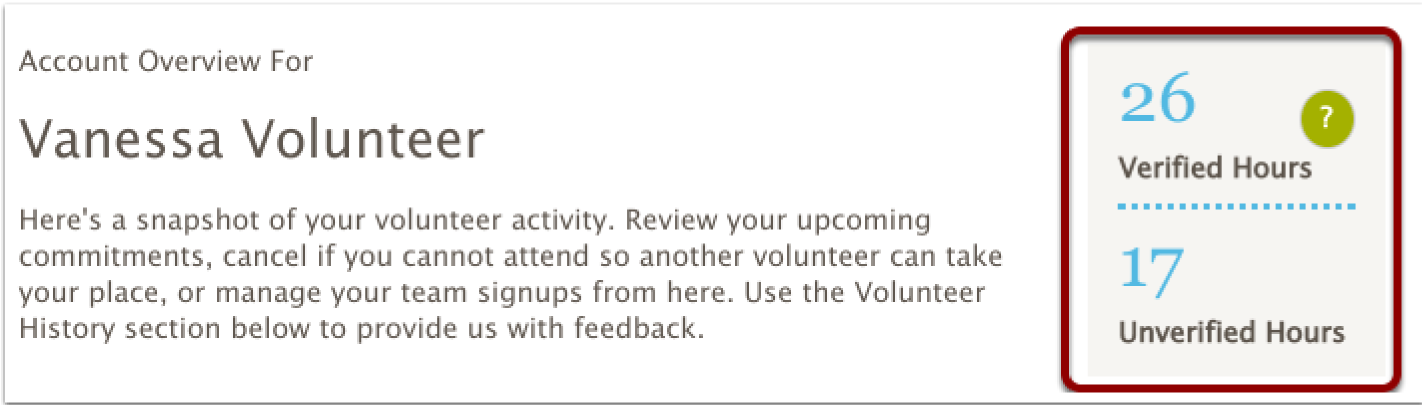
Previously, When sorting by date (start time or end time) the dates were not sorted chronologically. Dates with 1 digit were treated differently than dates with 2 digits....So 3/2/2017 would appear after 3/11/2017.

This has been fixed and dates now sort chronologically.

Bug Fixed: Self-Reported Volunteer Hours were not being included in the totals in a volunteer's Account Overview page (HOC3-2561)

A bug was discovered where the totals of verified hours and unverified hours on a volunteer's Account Overview page were no longer including their 'self-reported hours".

This has been fixed- and the total verified and unverified hours should now be accurate once again.



Bug Fixed: Team members not showing up when editing team participation (HOC3-2590)

Team members who team member record status was "pending" were not showing up when a team captain tries to edit participation of a team.   This has been fixed.

> In HOC 3.0, the team member status "pending" and "declined" are no longer used. However 2.0 customers migrating to 3.0 may have existing team members who are still in the now deprecated 'pending' or 'declined' status.   This fix ensures compatability with team member records that were created while still on HOC 2.0.   No action is required for you to change these statuses... but its worth noting they are no longer being used in 3.0.

Bug Fixed: Inability to add more than 7 team members to a team at one time (HOC3-2438)

An error message that resulted when adding more than 7 new members to an existing team has been resolved. You can now add more than 7 team members at a time.

> HOC recommends that team sizes should not exceed more than 50 team members. Because there is a system limit of creating 50 connections at one time - a team with over 50 members may experience errors if they try to sign the entire team up at once.
>
> There is also a limit of sending no more than 150 emails at once... so a team larger than 150 would not be able to be emailed all at once.
>
> We are researching ways to handle larger teams and/or set system limits to the number of members on a team, but for now, we recommend that when asked, you encourage team members to split very large teams into multiple teams of no more than 50 members. They wont' run into any errors or problems if they wish to sign up or communicate with all their team members at once.

Bug Fix: Error when creating Individually Scheduled opportunities with a Volunteer Leader as Opportunity Coordinator (HOC3-2475)

We've resolved an issue that caused an error in the rare circumstance in which a Volunteer Leader is used as Opportunity Coordinator for an Individually Scheduled Opportunity.

We're not sure what the business case would be to have a volunteer leader as OC for an ongoing, Individually Scheduled Opportunity, but if you have a reason to do so - the error will no longer result.

(Be aware that the automatic connection that is created for a volunteer leader when they are made opportunity coordinator, will create a connection for them, but not know the start date and end date they are scheduled to attend.)   If you choose to use a volunteer leader as an OC for an ISO with Schedule - we recommend that you manually fill update the start date and time and end date and time for the connection that is automatically created.

April, 2017 Release Notes

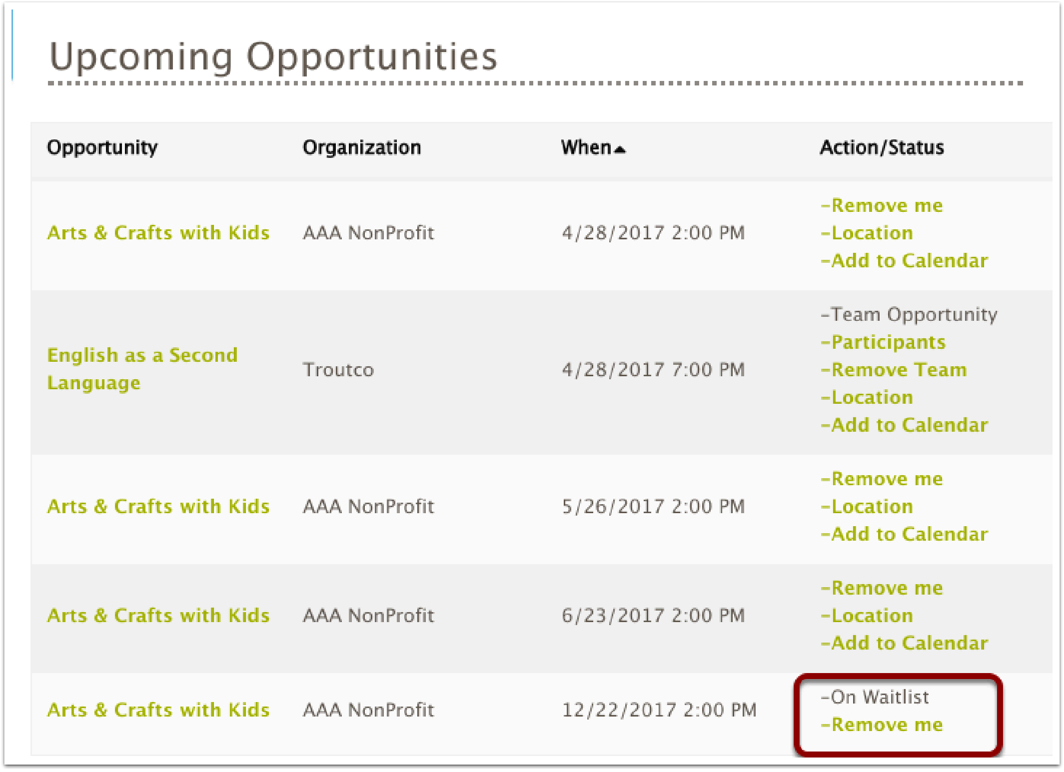
The April Release brings 'under the hood' improvements to better support HOC 3.0 features and functions.

In addition, volunteers logging into their account will once again see waitlisted connections in the upcoming opportunities section of their My Account page, and an improvement to one step attendance reporting.

My Account / Upcoming Opportunities includes waitlisted connections (HOC-897)

By popular demand we've brought back the display of waitlisted connections in the Upcoming Opportunities grid of a volunteer's account. That way they can quickly see if they are still on the waitlist for an upcoming occurrence.

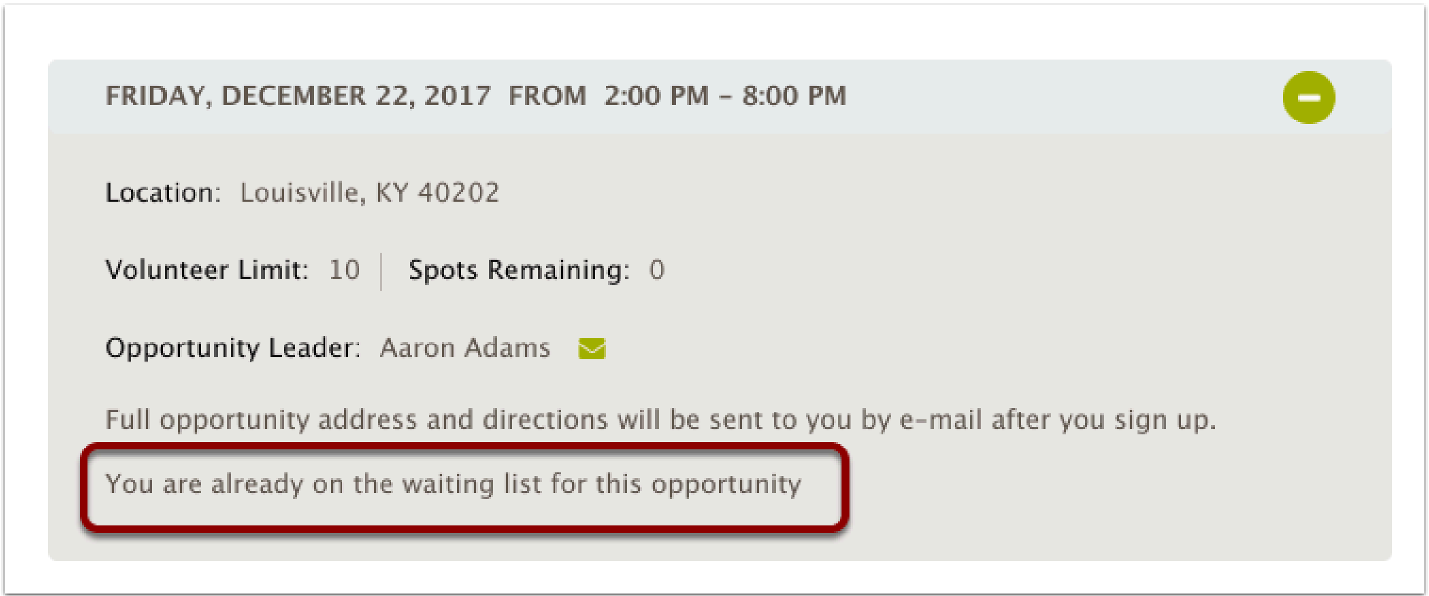
If they remain on the waitlist, it will be removed from their volunteer history after the connection end date, since they won't have been confirmed as a volunteer.



Upcoming Opportunities

Opportunity	Organization	When	Action/Status
Arts & Crafts with Kids	AAA NonProfit	4/28/2017 2:00 PM	-Remove me -Location -Add to Calendar
English as a Second Language	Troutco	4/28/2017 7:00 PM	-Team Opportunity -Participants -Remove Team -Location -Add to Calendar
Arts & Crafts with Kids	AAA NonProfit	5/26/2017 2:00 PM	-Remove me -Location -Add to Calendar
Arts & Crafts with Kids	AAA NonProfit	6/23/2017 2:00 PM	-Remove me -Location -Add to Calendar
Arts & Crafts with Kids	AAA NonProfit	12/22/2017 2:00 PM	-On Waitlist -Remove me

HOC 3.0: For HOC 3.0 users - a volunteer returning to the occurrence sign up page will see a message if they are already on the waitlist and there is still no space available.



If and when space becomes available, the SignUp button will once again appear and the volunteer will be able to sign up - which will convert their connection status from 'Waitlisted' to "Confirmed".

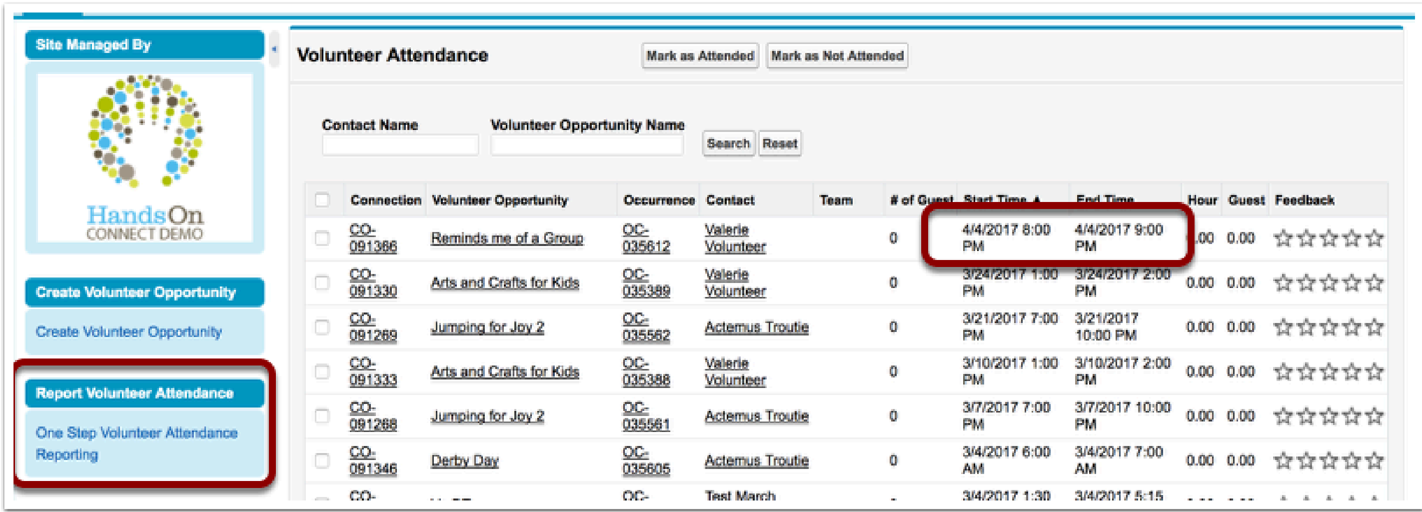
One-Step Volunteer Attendance Reporting now supports real-time check-in (HOC-905)

Not everyone may be aware of this, but in the connection grid of an occurrence, its possible to report attendance for any connection taking place that day. This was added a while ago to make it possible for an admin to report attendance administratively as volunteers checked in for an occurrence taking place that day.

We've now extended this same functionality to the One Step Volunteer Attendance Reporting feature. Previously it only displayed connections who end date and time had passed -- but now the attendance grid will also include any confirmed connections taking place that day.

This makes it possible for administrators, partners, and volunteer leaders to use the one-ste volunteer attendance reporting grid as a way to check volunteers in as they arrive for a volunteer opportunity (instead of waiting until after the occurrence is over.

This brings the one-step attendance reporting feature in line with what's possible in the individual occurrence record grids, or via the HandsOn Connect add-on feature "Check-In Kiosk".



Internationalization Improvements (HOC877 and 879)

For HOC 3.0 customers using international time conventions and translations, the following improvements have been added to the admin site:

- The Scheduler for Individually Scheduled Opportunities now usees the 24 hr format for International Customers
- Improvements in managing languages for admin users working in different languages.

HOC 3.0 Release Notes - 3.0.17 (March 23 - 24)

In addition to the usual batch of performance improvements behind the scenes, here are some of the most significant fixes and improvements in this week's release:

Improvements to "Report Attendance" in sharing portal (HOC3-2430)

Ability to report atttendance for the day's occurrences:

Connections that are taking place TODAY, are now displayed in the one step attendance reporting grid in the hsaring portal. This makes it possible for an opportunity coordinator or volunteer leader to actively use the portal to report attendance as volunteers arrive for the day's occurrence (if desired.)

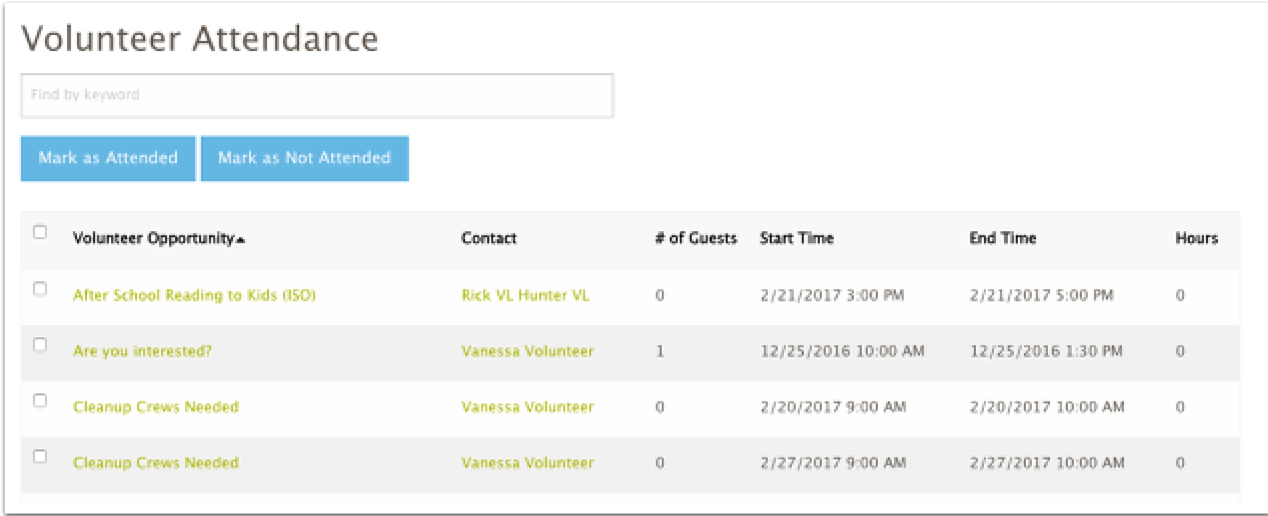
Just use the filters to bring up connections taking place today for the opportunity you are leading - and you'll be able to mark people as attended either when they arrive, during the project itself, or afterwards. (It's also a handy way to see all the confirmed connections of the volunteers who will be arriving if you don't want to print out a paper check-in sheet :-)

Improved column structure for Report Attendance page:

The report attendance grid in the sharing portal had several columns of information that were confusing and unneeded by partners. To streamline and simplify reporting attendance, the table now only shows columns that are relevant and meaningful for reporting attendance:

- Volunteer Opportunity
- Contact
- # of Guests (editable for adding guests before reporting attendance)
- Start Time (editable)
- End Time (editable)
- Hours (editable -- so you can credit a volunteer for staying longer (or shorter) than the scheduled duration of the connection.

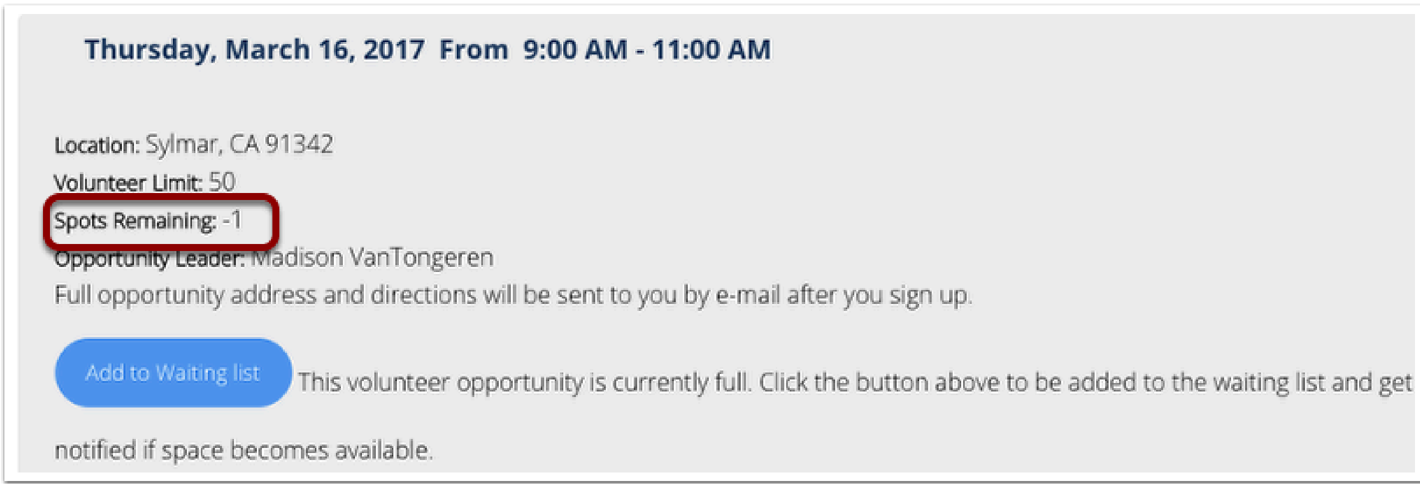
Note: Make any edits BEFORE marking a volunteer as attended.



Improvement to the display of 'remaining slots" in Volunteer Opportunity Detail (HOC3-2353)

Because its possible administratively to exceed the max number of connections for an occurrence, sometimes the 'available slots' for an occurrence is a negative #. (You have signed a 51st person up administratively for an opportunity with a maximum of 50).

Displaying negative slots remaining was confusing to voluteers - so now when a project is full the spots remaining will be listed as 0 instead of a negative number:



Improvements in entering URLs on public site (HOC3-1366)

Users entering URLs into forms on the public site used to receive error messages if they didn't put http:// or https:// as part of their URL.

It's now possible to simply enter a URL as www.handsonconnect.org and not receive an error message. (The system will automatically add the http:// for the user if its not been entered :-)

Improvements to Mobile User Experience

We continue to bring improvements to use of the public site and the sharing portal on mobile devices:

- Calendar View on mobile now defaults to 'month view' instead of 'day view' in themes that provide a day view. (HOC3-2477)
- Prevented letters from being cut off in project details when viewing monthly calendar on a mobile device (HOC3-2480)
- Improvements to the log in widget when displayed in mobile (HOC3-2313)

Improvements to private (invitation code) opportunity search (HOC3-2361)

On corporate pages that require an invitation code, a user who entered an invalid code simply saw no search results listed. It wasn't clear that the reason no search results were shown is that they had made a mistake in entering the invitation code.

Now - if there is not a matching invitation code, the user will be alerted "Sorry. That is not a valid invitation code"

Email content improved when granting volunteer profile administratively (HOC3-2007)

The email sent by the system when administratively granting a volunteer profile was a bit confusing. This has been improved so its clear to the volunteer receiving the message that their account was created by administrators (and not something they inititated themselves). It also notifies them of how to set their password.

Fixed: Unable to report attendance to more than 10 connections at once (HOC3-2339)

Circumstances where error resulted in sharing portal when more than 10 connections were marked as attended at once has been addressed. Its now possible to report attendance to significantly more connections at one time.

Fixed: Display of legacy To Be Scheduled Opportunities in 3.0 (HOC3-1066)

For customers migrating from 2.0 to 3.0 who still have legacy TBS opportunities in their system, we've improved the display of the project detail page for TBS opportunities so it doesn't display the start day of that long-running ongoing opportunity.

Remember: TBS opportunities are not to be extended past their current end date, and should be replaced by one of the new opportunity types "Individually Scheduled - Express Interest with Schedule" or "Individually Scheduled - Express Interest Only". These provide a much better experience for volunteers and for partners - so encourage your partners to replace their existing TBS opportunities with these improved opportunity types as soon as reasonable its reasonable.

Fixed: Display of Waiting List button and duplicate waiting list connections(HOC3-2355)

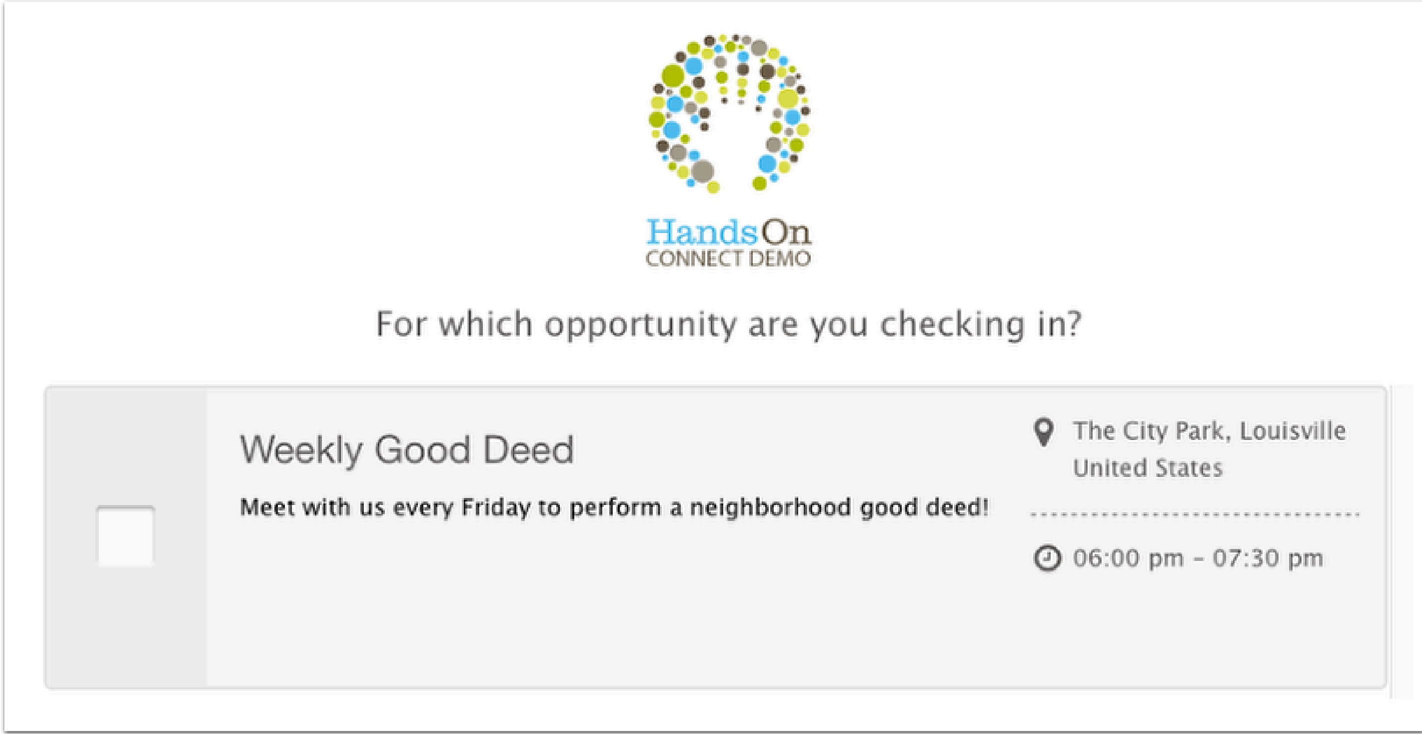
If an opportunity is full, and the volunteer clicked on the "Add to Waiting List" button, they are put on the waiting list.

However, if they were to return to that opportunity, they would still see the "Add to Waiting List" button even if they were already on the waiting list. This enabled them to click on the button again and create a second connection (or more), with status "Waitlisted".

Now, a volunteer returning to the occurrence who is already on the waiting list, will see a notification that they are currently on the waiting list. (Unless space has opened up and a sign up button is available now). They will only be able to create one waitlisted connection.

Check-In Kiosk - fixed color problem on opportunity listings. (HOC3-2505)

Check-In Kiosk users reported that the color scheme for listing opportunities had shifted to a darker grey, making it difficult to read the text when checking in. This has been corrected and readability is restored.


HandsOn
CONNECT DEMO
For which opportunity are you checking in?
Weekly Good Deed
Meet with us every Friday to perform a neighborhood good deed!
The City Park, Louisville
United States
06:00 pm - 07:30 pm

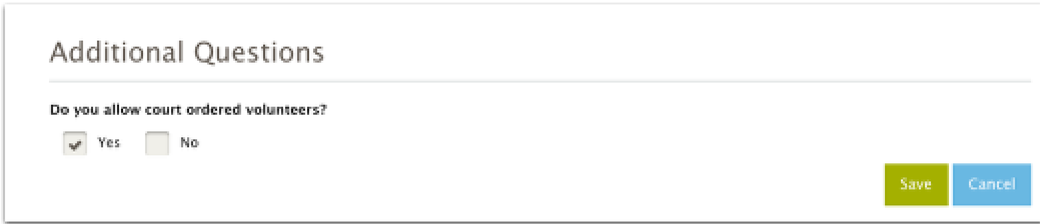
HOC 3.0 Release Notes - 3.0.16 (March 17 - 21)

Add to Calendar Time Zone bug fixed (HOC3-1369)

The add to calendar links for opportunities were adding projects to calendars without adjusting properly for the time zone. This has been fixed and add to calendar should now post the opportunity correctly in your calendar.

Improvements to Partner Portal "My Organization" Page (HOC3-2378)

- The My Organization page can now be edited by any contact with partner staff access to the organization's portal
- A cancel button has been added when editing, in case you do not wish to save any changes.
- A partner Logo added administratively via Salesforce will now properly display in the sharing portal.
- Organization URL no longer requires a http:// to be entered as part of the URL.
- The "My Organization Page" in the partner portal now includes the ability to view and edit answers to any 'custom registration questions' that are part of organization registration.



Improvements to Mobile version of Sharing Portal

Improvements are starting to be made to make the sharing portal for partners and volunteer leaders easier to use on mobile devices. Here's one fix that was included in this release.

- Added "return to managing opportunity' navigation for VLs who move to the public site and need to get back into the portal.

Compliance Module now available for Advanced Registration System (HOC3-1786)

For organizations needing a very stringent series of requirements for a volunteer to complete before being allowed to sign up for volunteer opportunities, HandsOn Connect now has a premium feature available, the Advanced Registration System Compliance Module (ARS-CM)

The compliance Module allows a volunteer to start the registration process (thereby creating an account), and then return to the site to continue the registration process and requirements at a later date. This is useful for an organization that requires a volunteer to:

- Complete a background check before volunteering
- Submit documents, proof of insurance, certifications or referrals.

Since a volunteer is unlikely to have all required document at hand when they first register -- they are able to save their registration information, and login and return to the site to continue submitting documentation until all requirements are satisfied.

Once compliance is satisfied - the system will then 'unlock' the volunteer's account and they'll be able to sign up for volunteer opportunities.

For more information on adding the Compliance Module to your HOC registration process, please contact melissa@handsonconnect.org

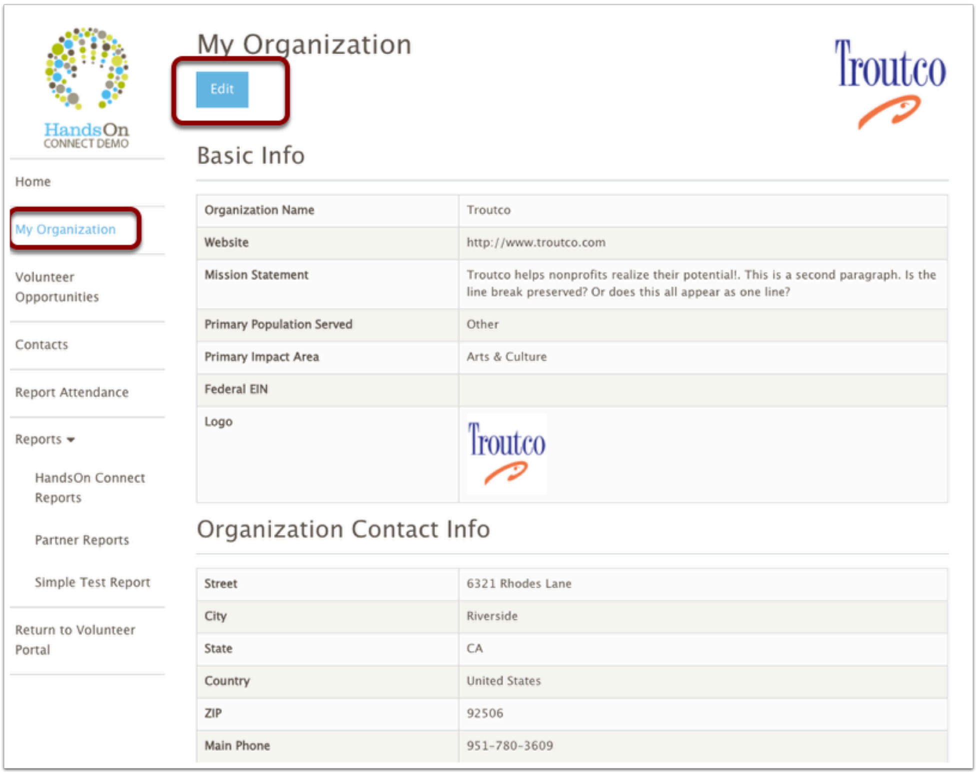
HOC 3.0 Release Notes - 3.0.15 (March 9 - 14)

Another advanced feature (Grouped Occurrences) has arrived in HOC 3.0 - along with an addition to the partner portal - "My Organization" and a number of improvements and bug fixes.

Organizational Info can now be viewed and updated in the Partner Portal (HOC3 -2285, 2301...)

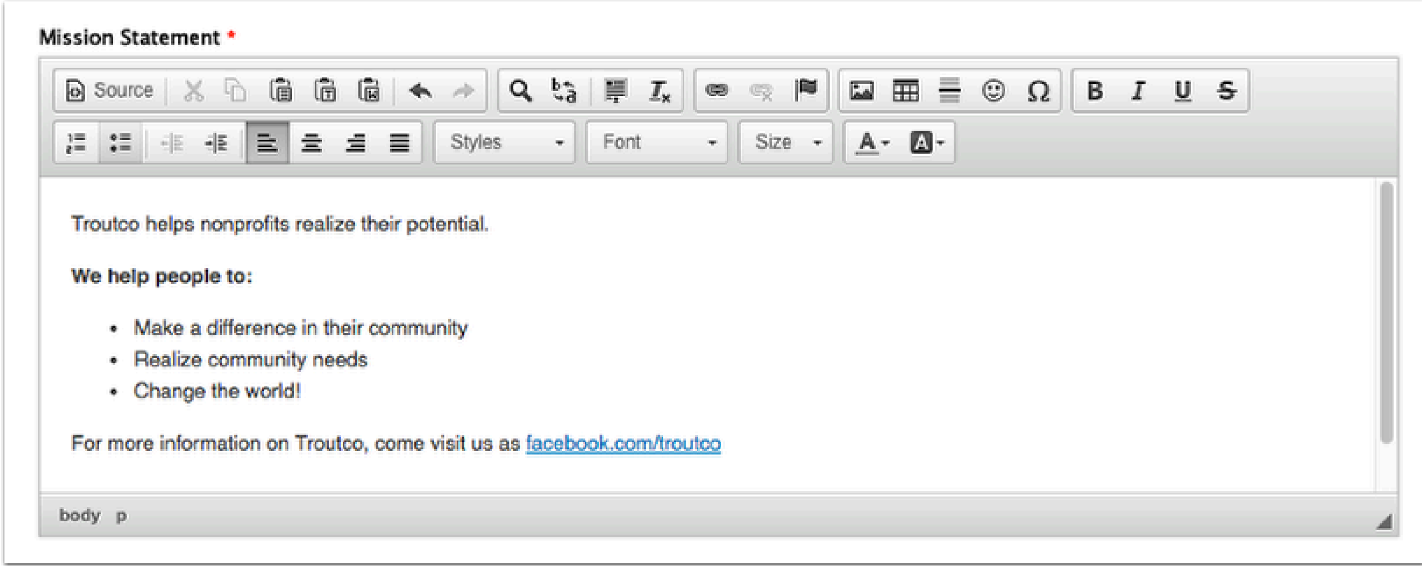
Partner Portal users now have the ability to view and edit their organization's information on the new "My Organization" page in the sharing portal.

You can quickly see if your info is up to date by viewing the page, and edit the address, mission statement, and update your logo by clicking on the Edit Button.



In this weeks' release, the edit button only works for the organization's primary contact. In the next release, we'll be making the ability to update organizational information available to all partner staff for your organization.

New: The Mission Statement field is now 'rich text' - which means that it will support line breaks, paragraph breaks, and formatting. This gives partners the ability to edit the information they originally submitted on the registration form, and make it more detailed and attractive!



Grouped Occurrences (HOC3-221 & 1937)

HOC3 now has support for Grouped Occurrences.

Grouped occurrences are not enabled by default in HandsOn Connect, but are now supported if enabled by your system administrator.

Grouped Occurrences allow users to have volunteers sign up or express interest in a series of occurrences as in one step. They can only be associated with Date & Time Specific volunteer opportunities and all the occurrences in the group must be associated with a single volunteer opportunity.

See this article on how to enable grouped occurrences if you need this functionality in your instance of HandsOn Connect.

See this article on how to use grouped occurrences once enabled on the back end by your system administrator.

Back button not working from Opportunity Detail Page (HOC3-2043)

When going from the search page or calendar page to the detail page of a specific opportunity - the back button in browsers was not bringing you back to the search page you had been on.

This has been fixed.

Search displaying wrong hours for opportunities

It was discovered that a previous search fix inadvertantly caused the start time of occurrences appearing in search to be displayed in GMT instead of local time.

This has been corrected and time search once again displays correct start time based on your organization's time zone.

Search problems for organizations with punctation in their name (HOC3-2056 and 2170 and 2333)

The search results for "View all opportunities with this organization" were innaccurate in cases where the organization name had a comma or apostrphe or other punctuation mark in their organization name.

This has been corrected and now organization names can include punctuation marks without consequences.

Prerequisite bug related to one prerequisite used for many opportunities

It was discovered that the newly implemented prerequisite functionality (from the last release) had a bug when a single opportunity was the prerequisite for multiple other opportunities. After signing up for the prerequisite opportunity, the user was directed back to the wrong original opportunity.

This has been corrected and prerequisites will now function as exepcted.

March, 2017 Release Notes

The March 2017 release was issued to all customers on March 2nd, and fixed two regressions in previous behavior that appeared as the result of system maintenance and improvements:

Remove me Button on Volunteer Accounts not appearing to work (HOC-875)

Volunteers, clicking on the 'remove me' link for an upcoming opportunity, were not seeing the connection removed. (It was, in fact being marked as declined on the back end of the system, opening up the slot for others to sign up for), but from the volunteer's perspective the connection stilled appeared listed as 'upcoming'.

This has been corrected, and normal behavior of the 'remove me' button has returned.

Opportunity ▲	Organization	When	Action/Status
Arts & Crafts with Kids	AAA NonProfit	4/28/2017 2:00 PM	-Remove me -Location -Add to Calendar

Self Reported Hours not appearing on volunteer's Account Overview Page (HOC-852 and 881)

Volunteers were not able to see their self-reported hours connections in the self-reported hours grid on the Account Overview page. Self-reported connections were still working, but the volunteer only saw a blank grid in the section labeled "Self-Reported Hours".

This has been corrected and self-reported hours once again appear in both the grid and in the printable volunteer history.

Self-Reported Hours

Opportunity ▲	Organization	Date	Hours	Action/Status
Larry testing 8/18	Individual	8/17/2016 5:00 AM	5	-Awaiting Verification
Testing alternate entry	Individual	8/21/2016 5:00 AM	2	-Awaiting Verification
Testing impact area and odd start / end formats	Individual	8/19/2016 4:00 AM	6	-Awaiting Verification

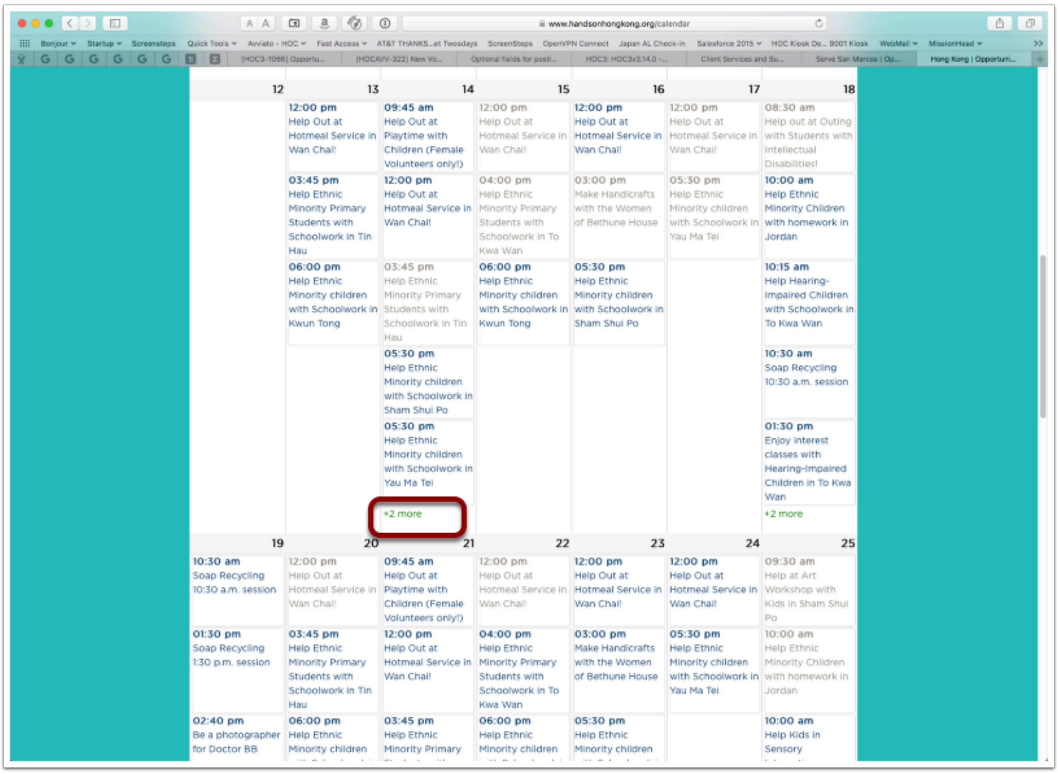
HOC 3.0 Release Notes 3.13 / 3.14 (Feb 17 - 24)

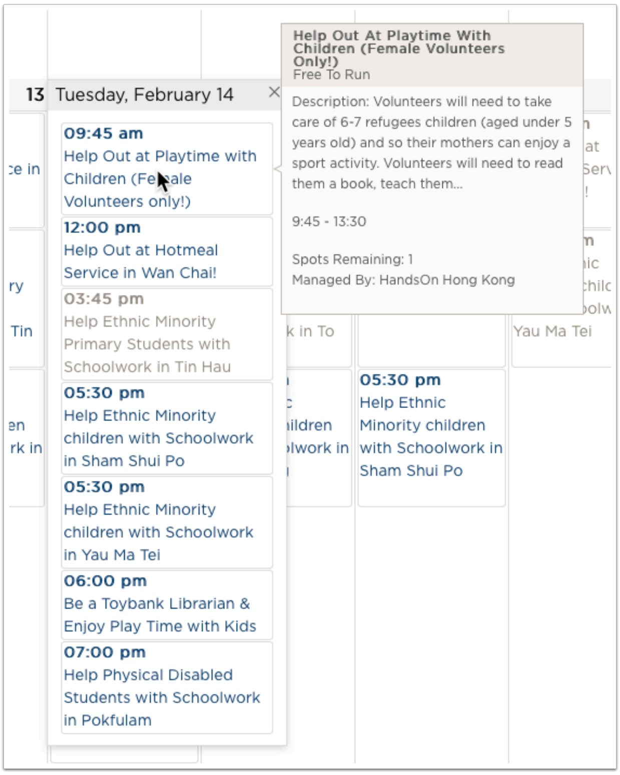
The following items are the highlights of the most recent release of improvements and bug fixes for HOC 3.0 customers.

Improvement to month view of Calendar (HOC3-2057)

As a first step in the planned improvements to search and calendar, a significant improvement to the monthly calendar has been released. Each day on the monthly calendar has been expanded so that you can see full title of opportunities, and more opportunities per day are immediately visible.

The "more" link, which appears when 6 or more opportunities take place on a single day, now has a more robust pop up view so that all opportunities from the single day can be seen and full opportunities titles can be read.





Volunteer Portal: New Search fixed (HOC3-1878)

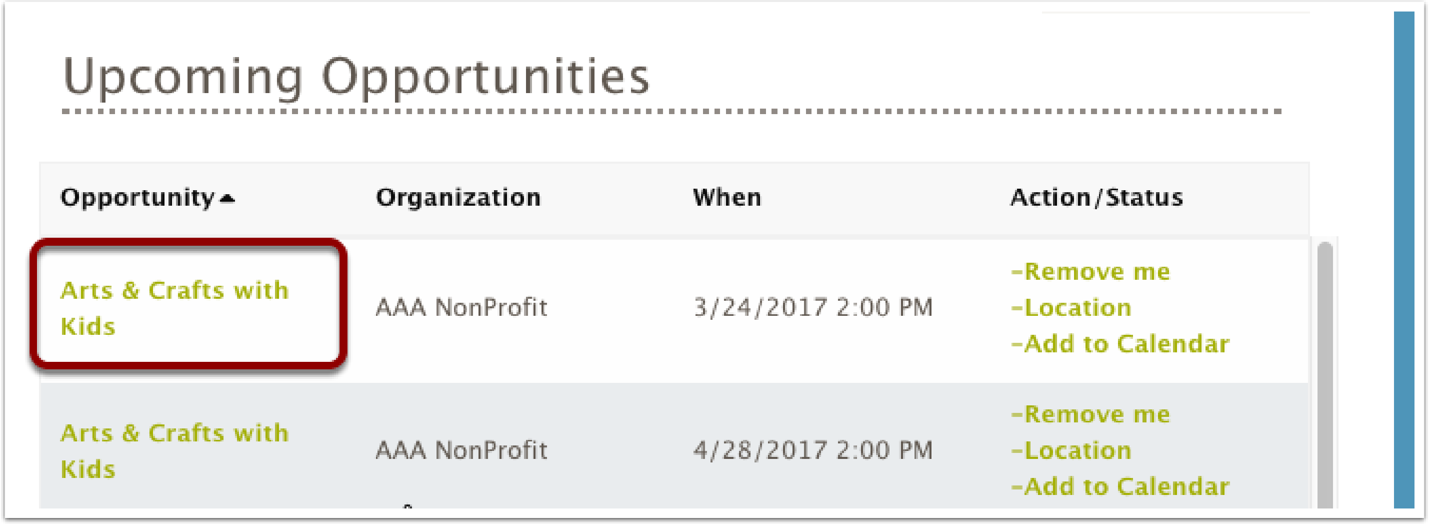
An issue where clicking on 'new search' did not always clear existing filters has been corrected.

Clicking on 'new search' will now clear all filters except:

- City & State and/or Zip Code   (required and auto-populated)
- Date From (is reset to today)

Volunteer Portal: Account overview page opportunity names now hyperlink to opportunity detail pages (HOC3 -1481)

The names of Volunteer opportunities on the Account overview page for volunteers, now hyperlink to the Opportunity's detail page, making it easier for volunteers to see opportunity details.



Volunteer Portal: Fixed - Custom Registration questions not showing up on Personal Information Page for volunteers (HOC3-2055)

Custom registratioin questions were not showing up for all users on the personal information page. (If they hadn't previously answered the question, then the question itself wasn't appearing. This has been fixed so that volunteer can update and/or answer custom registration questions on this page.

Volunteer Portal: Waitlist functionality Fixed (HOC3-1625)

Two bugs related to waitlist functionality were fixed in this release.

- Emails were not being consistently sent to waitlisted volunteers notifying them of space becoming available.
- A volunteer with a waitlisted connection, who then signed up for the occurrence when space became available, was not having their connection updated to confirmed. This has been corrected.

Volunteer Portal: Team Sign up issue fixed (HOC3-2075)

When someone had an individual connection, and then declined it, and then created a team connection instead, volunteers were not able to successfully register as part of a team. This has been corrected so that a declined individual connection (with decline reason "removed themselves") will now be properly updated if the volunteer subsequently signs up as part of a team.

CMS: unresponsive when using Safari browser (HOC3-1971)

The CMS menus did not always respond when using the Safari browser. This has been improved for better performance for those editing using Safari.

Advanced Registration System (ARS) donation forms now support Paypal (HO3-1474)

For those using the ARS, it's now possible to use either Click & Pledge, or PayPal as a merchant system for handling on-line donations during registration or opportunity sign-up.

HOC 3.0 Release Notes - 03.11, 03.12, and 03.13 (1/27, 2/2, 2/9, and 2/15)

Improvements to HandsOn Connect 3.0 are coming out every week, and over 100 items has been addressed in the last 3 weeks. These release notes highlight the most significant improvements and new features available in HOC 3.0

Pilot: New Express Interest Opportunity Types Available

Current HOC 3.0 users have two volunteer opportunity types available:

- **Date and Time Specific (Sign Up)** -- Use this type of opportunity when you need a certain number of volunteers, all of whom will be volunteering on the same date, start time and end time. You can create one or more occurrences or shifts of dates and times for this opportunity. Use this type of schedule if you need, for example, 5 volunteers on May 18th from 6 - 8 pm, or every Monday from 6:00 pm - 8:00 pm. When using the "Sign Up" schedule type, volunteers who meet your sign-up criteria like minimum age, are automatically confirmed for the opportunity. No additional action is needed on your part. When your specified maximum attendance is reached, volunteers will have the option of joining the waitlist for that opportunity.
- **Individually Scheduled Opportunity (Express Interest with Schedule) -** Use this type of opportunity when you have a flexible schedule of when you need volunteers. Each volunteer may be scheduled for a different date and time. You define a range of times when volunteers are needed. For example, you are looking for volunteers over the course of the next 4 months on Mondays between 9 - 5 and Fridays between 9 - 12. Volunteers will see the times you need volunteers, and will be able to express interest in volunteering for any period of time within your specified schedule. You are notified of their interest and then can review the proposed time or times they wish to volunteer. Then confirm, decline, or reschedule them as you wish. Volunteers can express interest in additional dates at any time, making this volunteer opportunity type ideal for volunteers who engage with you on an ongoing basis, and minimizing your need to contact the volunteer to schedule them. Simply confirm and the volunteer is notified that they've been approved for the proposed dates. The system also makes it easy for you to administratively schedule volunteers for one or more connections, if you wish.

The following two **new** types of opportunities can be added to both your partner sharing portal and for use administratively:

- **Date and Time Specific - Express Interest --** Use this type of opportunity when you need a certain number of volunteers, all of whom will be volunteering at the same date and time, but you want to review and/or contact each volunteer before confirming them to volunteer. This is useful if you need volunteers to submit to a background check or other review before confirming them. Volunteers are not confirmed to attend until you have reviewed their pending connection and either mark it as confirmed or declined.

- **Individually Scheduled - Express Interest Only --** Use this type of opportunity when you simply want volunteers to indicate they are interested in an opportunity. There is no schedule of days or times volunteers are needed. You are not even required to list a location. This opportunity type is well-suited for general interest opportunities like “Contact me in times of Disaster” or “Interested in working as a Board Member?”. It can also be used to generate lists of people interested in receiving more information on a topic or on an event being managed outside of HandsOn Connect. It is also a way to create ‘virtual’ or ‘volunteer from home’ opportunities. Simply leave the location blank, and put the details of how to complete the virtual opportunity in the project description.Volunteers click on express interest and connections in pending status are created for you. You then have a list of interested volunteers to do with as you wish. No further action is required on your part. If you wish to do so, you can email volunteers with further information or administratively schedule volunteers for specific dates and times and record their volunteer hours.

These two new opportunity types are being piloted now and any HOC 3 customer can request they be added to their instance. To request these two new opportunity types, please open a support ticket in zendesk and request "Add new opportunity types".

A webinar, showing these new opportunity types was held last week, and a recording is available here:

https://www.youtube.com/watch?v=GAhpUEZ4vI4&feature=youtu.be&t=2s

Prerequisite Opportunities functionality now available for HOC 3.0

A Prerequisite Opportunity is one that a volunteer is REQUIRED to sign up for in order to signup or express interest for another opportunity. (Example: You require volunteers for a painting project to also attend the prerequisite 'painting training' opportunity. They will be unable to sign up for the opportunity unless they also signup or express interest in the training OR have attended that prerequisite in the past.

When a volunteer signs up or expresses interest in an opportunity that has a prerequisite, they will be also automatically be directed to signup or express interest in an occurrence of the prerequisite opportunity.

In order to keep HandsOn Connect easy to learn and use, this 'advanced' feature is not automatically enabled administratively. If you wish to use this functionality follow these instructions to enable prerequisites in your instance of HandsOn Connect:

https://support.handsonconnect.org/hc/en-us/articles/214414423-Enabling-Prerequisites

Once enabled, follow these instructions on how to create a prequisite relationship between two volunteer opportunities:

https://support.handsonconnect.org/hc/en-us/articles/212857326-Prerequisite-Opportunities

Improvements to Sharing Portal

A number of tweaks and improvements have been in the sharing portal to make creating volunteer opportunities quicker and easier:

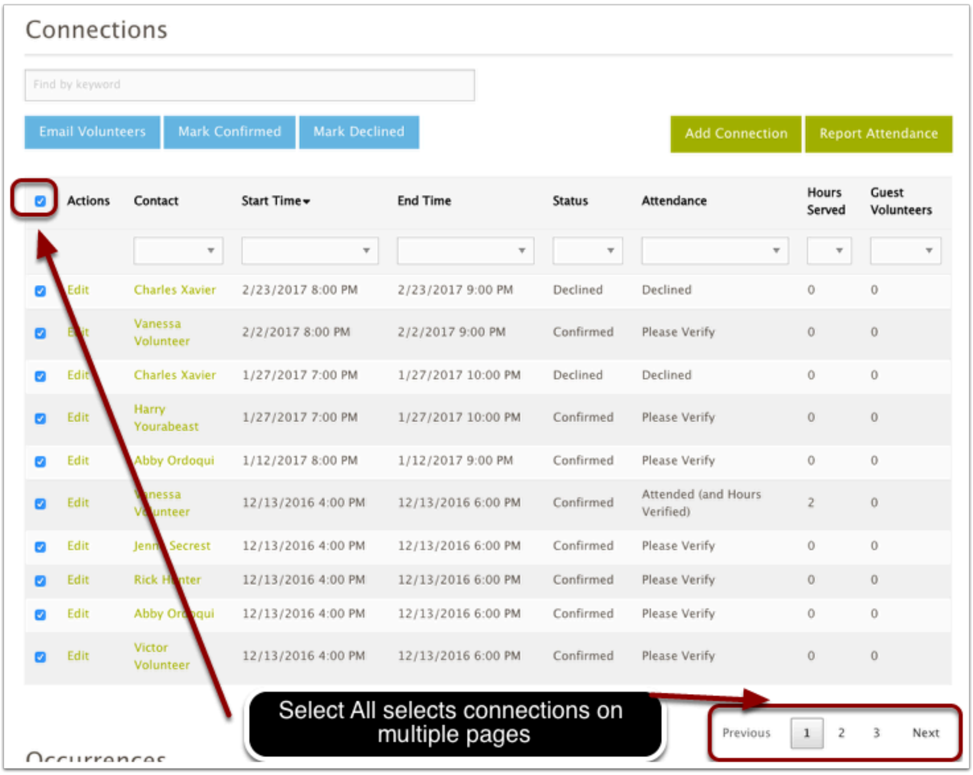
- **Help Tips** added for Opportunity Types (for those using four opportunity types)
- **Removed field "Minimum Attendance"** - This field has no functional use for portal users since it has noa bearing on opportunity sign-up and is only useful to administrators who may want to create custom reports to monitor whether minimums are being reached. This field has been removed for partners (who cannot create custom reports that make use of the field), and will automatically be populated with a value of 1 administratively.
- **Maximum Attendance field only appears for Date & Time Specific Opportunities -** This field can be confusing and misleading to partners, as it only impacts maximum attendance for date & Time Specific opportunities. What it actually does is turn on waiting list for opportunities that have reached the max number of Confirmed connections. Since Individually Scheduled opportunities allow many, many connections to be assoiated with one occurrence, the number should always be set at a high value. To avoid confusion, this field is not presented when creating Individually Scheduled Opportunities, and automatically populated with a value of 2000 (confirmed connections) on the back end of the system. (That is the recommended maximum number of confirmed connections for a single opportunity). This saves the partner user from having to understand or populate a correct number, and speeds up creating Individually Scheduled Opportunities.

Improvements to Connections Grid in Sharing Portal

The list of connections that appears in the sharing portal for each volunteer opportunity has the option to select individual connections, and then take action on them (email, mark confirmed) This grid has been improved in the following ways:

- Previously, selecting the "All" check box only selected the 10 visible connections , and did not select connections on additional pages. Now the "All" check box will select ALL connections, across multiple pages. This makes it possible email more than 10 volunteers at a time.
- When filtering connections to limit the connections displayed, the ALL button will now select ALL connections that meet the current filter. So it's possible to select all the volunteers who

are starting at specific occurrence date and time, across multiple pages, without selecting the connections who do not meet the filter requirements.



Improvements to Reporting (pilot) in Sharing Portal

Reporting for Partner Staff is now available as a Pilot. A number of improvements have been made to the speed and availability of reports that can be run and exported by partners. Administrator can create reports using standard SF reporting functionality, and make them available in a folder accessible to all partners using the sharing portal. Improvements in this release cycle include

- Able to share more report types
- Report Description available in report list view
-

If you'd like to participate in the pilot of Reporting and have it added to your partner sharing portal, please open a ticket in zendesk.

Improvements to Facebook Registration and Login (pilot)

Improved process of first-time users of Facebook login and/or Registration. Facebook Registration and Login is a pilot feature. Any HOC 3.0 customers who wish to join the pilot and offer facebook registration and login please open a request ticket in Zenesk. Facebook login and registration is now available for users of Advanced Registration System (premium add-on) as well.

Improvements to custom themes

A number of improvements have been made to each of the alternate public site themes available to new and migrating HOC 3.0 customers.

CMS: Improvements to Registration and Personal Information forms (HOC3-1666)

The different fields that can be included or left out of the registration form are not organized by the sections the fields actually appear in. These same improvements have been made to Organization Setting block (organization registration), and the Personal Information Block.

Check-In Kiosk v2 released (premium add-on)

The HOC Check-In Kiosk add-on has been updated to v2 and now includes the following additional features:

- Activation Code - provides security and prevents volunteers from checking in from home if they know the check-in kiosk URL. Activation code ensures that only authorized kiosk users can activate the kiosk for checking-in volunteers.
- Multi-Time Zone Support - for organizations with projects across multiple time zones - the kiosk can be configured to adjust for the time zone the opportunities are actually taking place in.
- Check-out feature now credits extra time to volunteers wh check-out after the project end time.
- When configured to allow check-out, the check-in button now reads "Submit" to avoid confusion while checking out.

If you are not a current check-in kiosk user and are interesting in adding the check-in kiosk to your HandsOn Connect instance, please contact melissa@handsonconnect.org for pricing information and details.

Improvements to Advanced Registration System (premium add-on)

A number of improvements have been made to the capabilities possible for those using the Advanced Registration System (ARS), forms, and parental consent modules.   This premium add-on makes it possible for us to create custom registration pages, integrate payment processing, and update existing Salesforce objects with information entered during registration, opportunity sign-up, or through custom forms based on your specific business needs. Here are some of the highlights of new functionality available:

- Fixed bug related to 'next' button not appearing during registration workflow
- Improvements to Donation Page
- Improved integration of form fields to Salesforce records
- Parental Approval functionality now available (when activated, has a minor enter a parent's email address. Parent must respond and 'approve' that their minor child can sign up for volunteer opportunities.

If you wish to add the ability to customize registration pages, opportunity sign-ups and create custom forms that integrate with Salesforce, please contact melissa@handsonconnect.org for pricing information and details.

Misc Bugs corrected

Here's a few of the most irksome bugs that have been squashed in these releases:

- Date fields in custom volunteer opportunity questions were not allowing data to be populated. This has been corrected. (HOC3-1605)
- Corrected a variety of spelling/grammatical errors in uneditable messages and content
- Setting a partner organizations record to 'auto-approve" not allows you to give a particular organization the ability to publish opportunities directly when created in the portal, instead of submitting them to you for review and manual approval. (HOC3-1637)
- Error messages resulting when updating personal information if multiple custom registration questions were presented have been corrected. (HOC3-1744)
- A variety of bugs fixed related to multi-lingual sites.
- Corrected error when submitting skill documentation date (HOC3-1840)
- On the public site, the header on the skills page has been corrected to read "Volunter Skills Profile for...." (HOC3-1712)
- A number of incorrect URLs in automated emails sent out in HOC 3 have been corrected for most customers. (If you find any broken links in emails sent to volunteer leaders or opportunity coordinators, please open a zendesk ticket and we'll update your email template for you!)
- Record types when an organization registers via the public site are now correctly applied depending on the account model of your HOC instance. (HOC3-1945)
- Resolved occasional error messages that resulted during team creation in some circumstances (HOC3-1988)

February, 2017 Release Notes

The February 2017 release will be rolled out to customers between February 7 and 14. It features an improvement to the contents of volunteer history and upcoming opportunities, and a couple of irksome bugs. The items in this release affect all HOC customers, whether using version 2.0 or 3.0.

New features and functionality continue to be added to HOC 3.0, which will be introducing the new "Express Interest Only" volunteer opportunity type in a pilot this month. Please see HOC 3 release notes as they continue to be added to this forum for previews of exciting new functionality in HandsOn Connect 3.0.

Improved: Display of Upcoming Opportunities and Volunteer History in volunteer's "My Account" page. (HOCAVV-835)

A number of issues and suggestions related to "Upcoming Opportunities" and "Volunteer History" on a volunteer's Upcoming Opportunity page have been addressed and improved. Pending, Cancelled, and not-attended connections will not be part of history. Connections that are not properly scheduled will not appear and clutter up history and upcoming opportunities.

The following rules will be determine what is and isn't displayed:

Upcoming Opportunities:

- Only Confirmed and Pending Opportunities with a start date and time < the present time will appear in Upcoming Opportunities.
- Connections that do not have a start date and time or end date and time will NOT be displayed as upcoming opportunities.

Upcoming Opportunities:

OPPORTUNITY	ORGANIZATION	WHEN	ACTION/STATUS
Visiting with our Seniors	Troutco	2/13/2017 9:00 AM 3.00 hours	- Pending Approval - Remove Me
Help around the Office (ISO)	Troutco	2/13/2017 10:00 AM 0.50 hours	- Pending Approval - Remove Me
Monitor Teens	Troutco	2/15/2017 1:00 PM 1.00 hours	- Pending Approval - Remove Me
Visiting with our Seniors	Troutco	2/20/2017 9:00 AM 3.00 hours	- Pending Approval - Remove Me

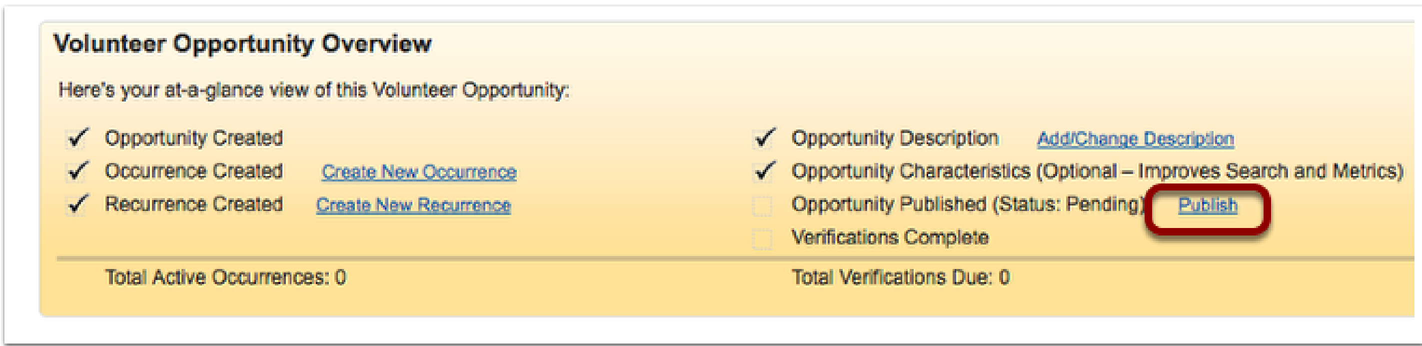
Volunteer History:

- Will only display connections that are in confirmed status. Connections that were never confirmed and are now in the past will not be displayed.
- Will only display connections that have both a start date and time and end date and time.
- Will only display confirmed connections with attendance status of attended or please verify. If attendance status is 'not attended' it will not be displayed as volunteer history.
- The "Print Volunteer History" link will produce a .pdf that follows the same rules as for Volunteer History, but will also include Self-Reported Volunteer Opportunities.

Fixed: Publishing Volunteer Opportunity was not publishing all occurrences (HOCAVV-835)

A regression in the process of publishing a new volunteer opportunity has been fixed. It was discovered that when using the Volunteer Opportunity Wizard to create a new date & time specific Volunteer Opportunity *with a recurrence*, that clicking on "Publish" on the Volunteer Opportunity Record did not automatically also publish and make active all the related occurrences.

This has been fixed and now publishing a new Volunteer Opportunity will automatically also publish and make active, all upcoming, pending occurrences.



Note: In order to see the updated posting status of the occurrences in the occurrences related list on the volunteer opportunity page immediately, you'll need to refresh the page. But rest assured that the occurrences will be published and made active.

Fixed: Errors when confirming Individually Scheduled Opportunity connections (HOCAVV-842)

There were reports of circumstances in which confirming individually scheduled opportunity connections in the connection grid resulted in an error message saying "The start and end date and time must be populated". This message appeared even when the dates were, in fact, populated.

This error message validation rules have been fixed. Please let us know if you encounter other inappropriate error messages when confirming connections.

HOC 3.0.3.9 (Jan 6, 2017) and HOC 3.0.3.10 (Jan 13, 2017) Release Notes

The most recent two releases to HandsOn Connect 3.0 covered 37 new features, bug fixes, and improvements. Here are the highlights in these two releases.

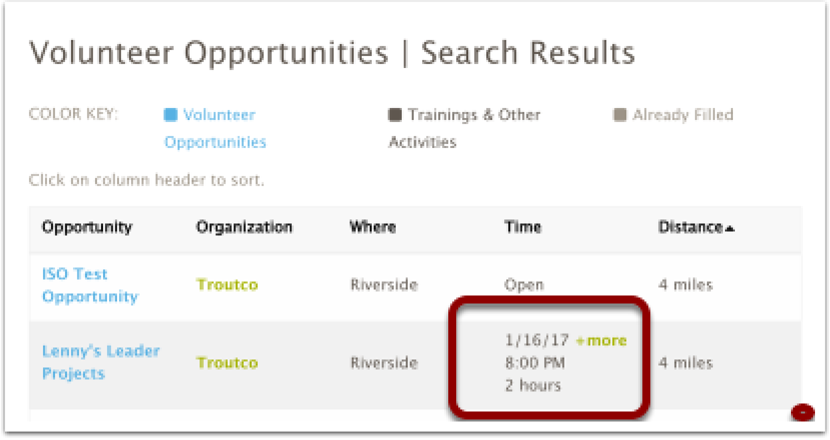
Bug Fix: Special Event Images (HOC3-1470)

It was discovered that the newly implemented availability of Special Events pages in HOC3 was not displaying images properly on the Special Event Detail page. This has been fixed and images will now display as expected.

Improvement to Public Site Search Result Page (HOC3-1472)

The HandsOn Connect pubic site search page always shows the date of the next upcoming occurrence (if not full) for a volunteer opportunity. This didn't make it clear that there might be additional occurrences of that opportunity on future dates.

To improve clarity on this, date and time opportunities with additional occurrences now display a "More" link after the date of the next occurrence. Clicking on the opportunity or the word 'more' will take you to the opportunity detail page where all upcoming occurrence dates will be displayed.



Pilot: Reporting in Partner Portal (HOC 3-582, 725, 836, 1373

We have opened a pilot program to test the new functionality which makes it possible for reports to be made available in the partner portal. If you are interested in testing the new reporting functionality please open a ticket in zendesk and request participating the "partner reporting pilot".

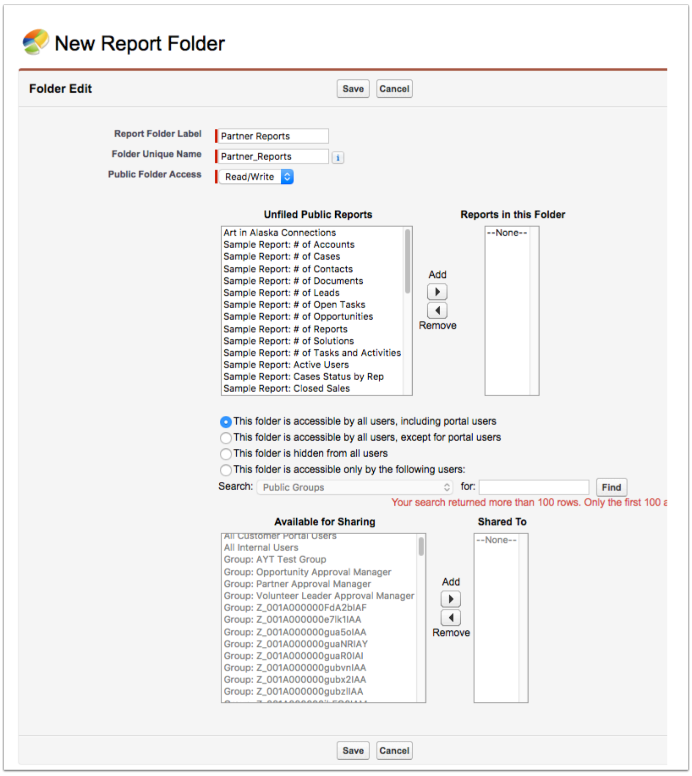
For those of you in the pilot, here's how reporting works:

1. If you don't already have a folder for reports for your partners, **Create or edit a folder to place your partner reports in.** In this example I don't already have a folder, so I'm creating a folder called "Partner Reports". Set the folder access to Read/Write, and the sharing to "All Users, including portal users."

If you already have a folder for your partner reports, you can skip this step.

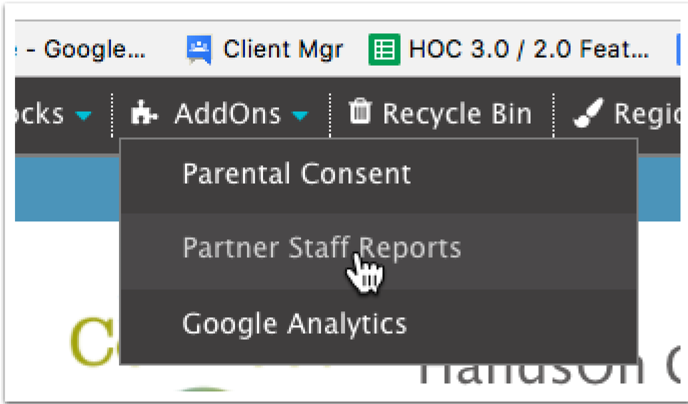
In any case - put at least one (or more) reports into this folder for your partners to access:

> Note: in the partner portal, reports will not have clickable links, so we recommend not including fields with record names like CO-000234 or OC-000235 as these terms will be meaningless to partners who don't have to worry about Salesforce record names.

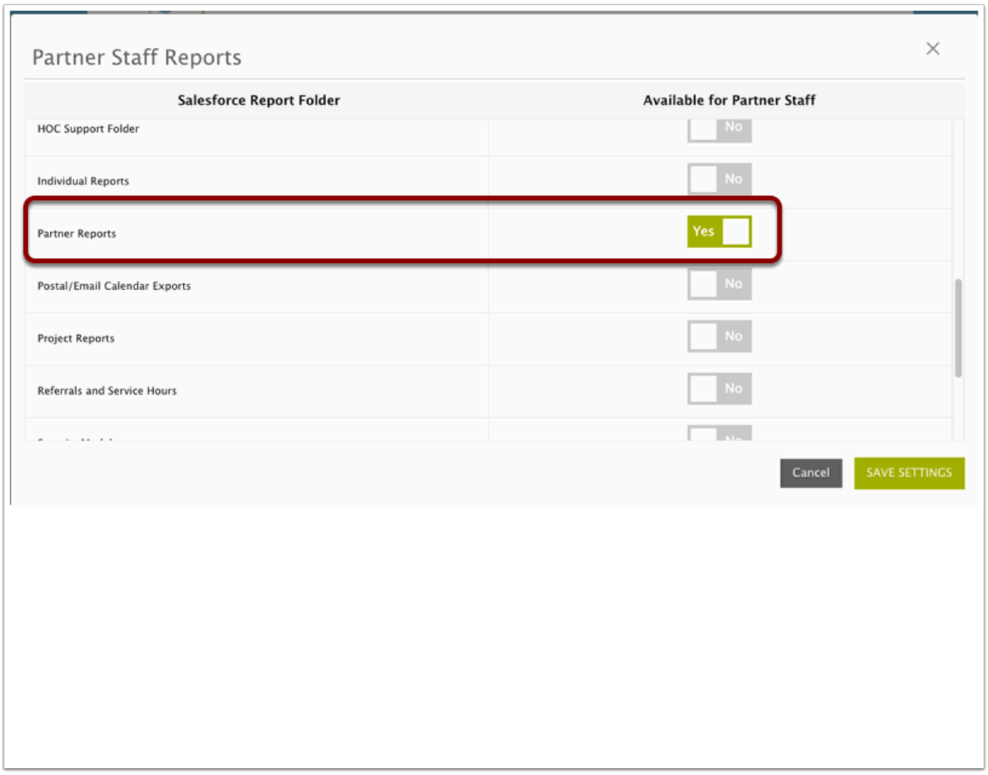


2. Go into the CMS and select that folder to publish in your partner portal:

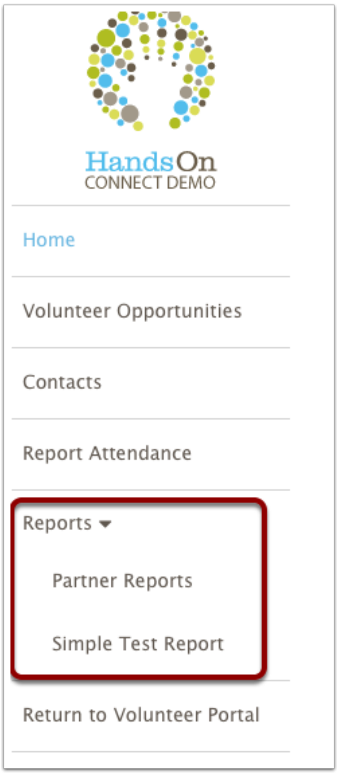
- Select CMS / AddOns / Partner Staff Reports



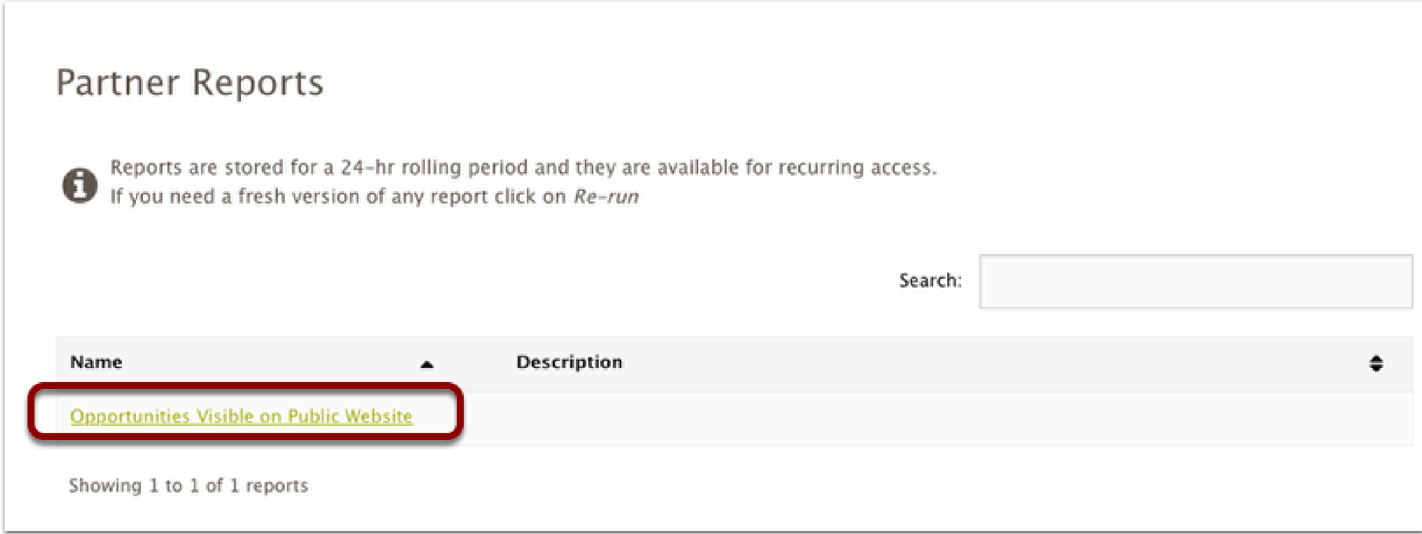
- Choose the report folder(s) you wish to make available to partners. Toggle the folder to "Yes" in the column "Available for Partner Staff"



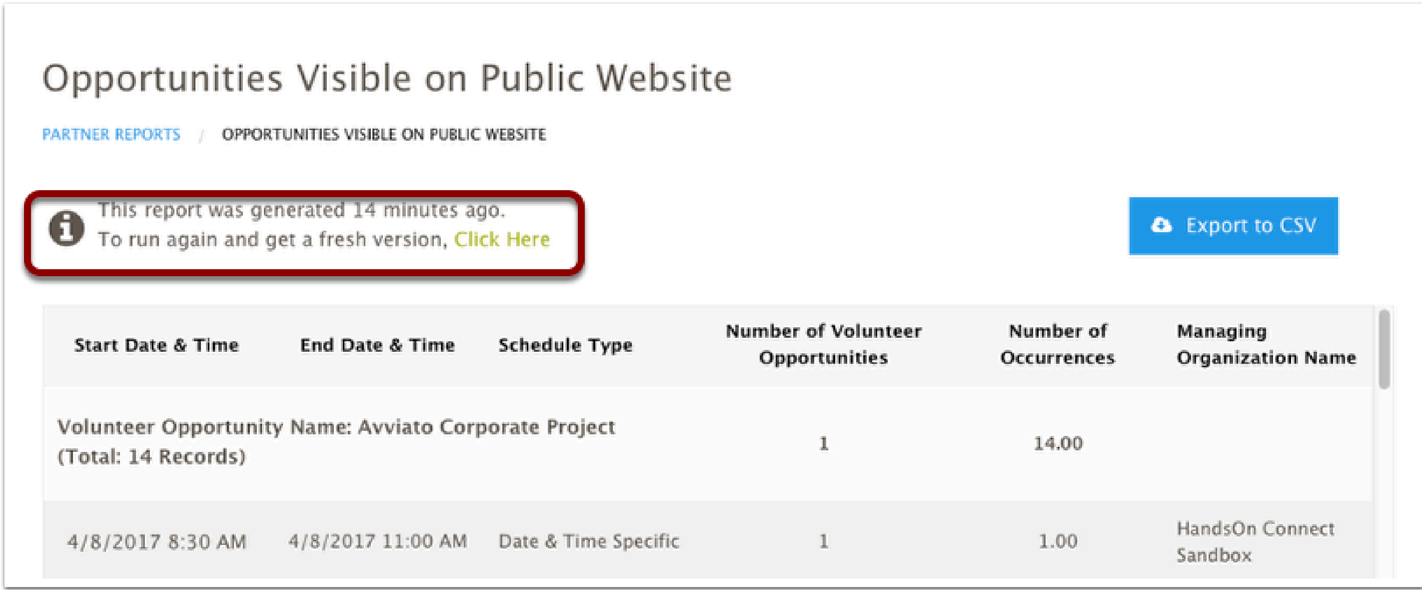
3. **In the partner portal: a new menu item appears, and clicking on it reveals the available report folder(s):**



4. Clicking on the report folder shows links to the individual reports that are available. You can click on a report name to run the report.



5. The report will be run (a 'please wait' message will be displayed while the report is being loaded. The finished report can be viewed, sorted (if its a tabular report), and exported as a .csv file



Reports are cached for 24 hours to speed up performance. A user has the option to get a freshly run version of the report by clicking on "Get a fresh version" after the report appears, those this requires the report to be generated again and will take longer than viewing a cached version.

Note: Due to limits in the Salesforce API - a report can only return 2000 records. Design your reports so that the filtered results are unlikely to return more than 2000 records for any of your partners.   (You can choose to create separate reports with different filters to ensure that all records can be returned by running separate, filtered reports.)

Improvements to Mobile display of custom themes (HOC3-1484)

In HOC 3 there are a number of alternate themes (the look and style of the website) available. Improvements continue to be made to ensure that alternate themes are optimized for mobile display, making HOC 3 equally accessible on web, tablets and phones.

Improved ease of use for editing connections in sharing portal (HOC3-1427)

It was discovered that when editing a connection the dependencies between status and attendance status were not being maintained. ¬†This has been fixed so that when the status of a connection is changed, no illegal values for attendance status remain in the connection, and attendance status is cleared or updated appropriately.

This will prevent partners from creating data integrity problems when editing connections.

Example: Please verify attendance status should only be possible for connections with status = confirmed (not waitlisted or cancelled or pending approval).

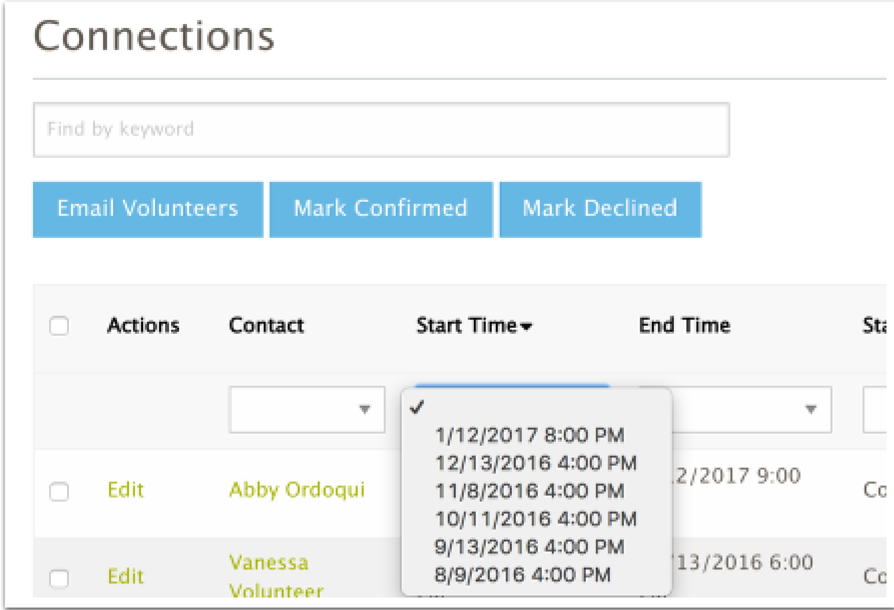
Removed hyperlinks to contacts in connections when contact permissions are not enabled (HOC3-1429)

In the Volunteer Leader portal, by default, leaders do not have access to contact records. Rather than have an error message appear if they clicked on the contact name in the connection grid - we've adjusted it so that the contact name is no longer a hyperlink when read permission is not enabled for Volunteer Leaders.

Bug Fix: Dates and Times in table filters appear in chronological order (HOC3-1340)

In the last release the ordering of dates and times of occurrences was fixed to appear in proper chronological order (instead of alphabetical).

This fix has been extended to the filters used in the various tables and grids. All dates and times will now appear chronologically.



Advanced Registration System (ARS) - addition of forms - HOC3-901

The Advanced Registration System is an optional HOC 3 add-on that allows the creation of custom registration pages and processes -- allowing a customizable registration experience.

Options include:

- Additional pages of content
- Custom fields that will populate directly into records in Salesforce
- Payment or Donation processing pages (integrated with Click and Pledge)
- Parental Consent process
- Acknowledgement of a waiver (captured in a custom field in the contact record)

The add-on also allows for customizations to the sign-up process of individual volunteer opportunities.

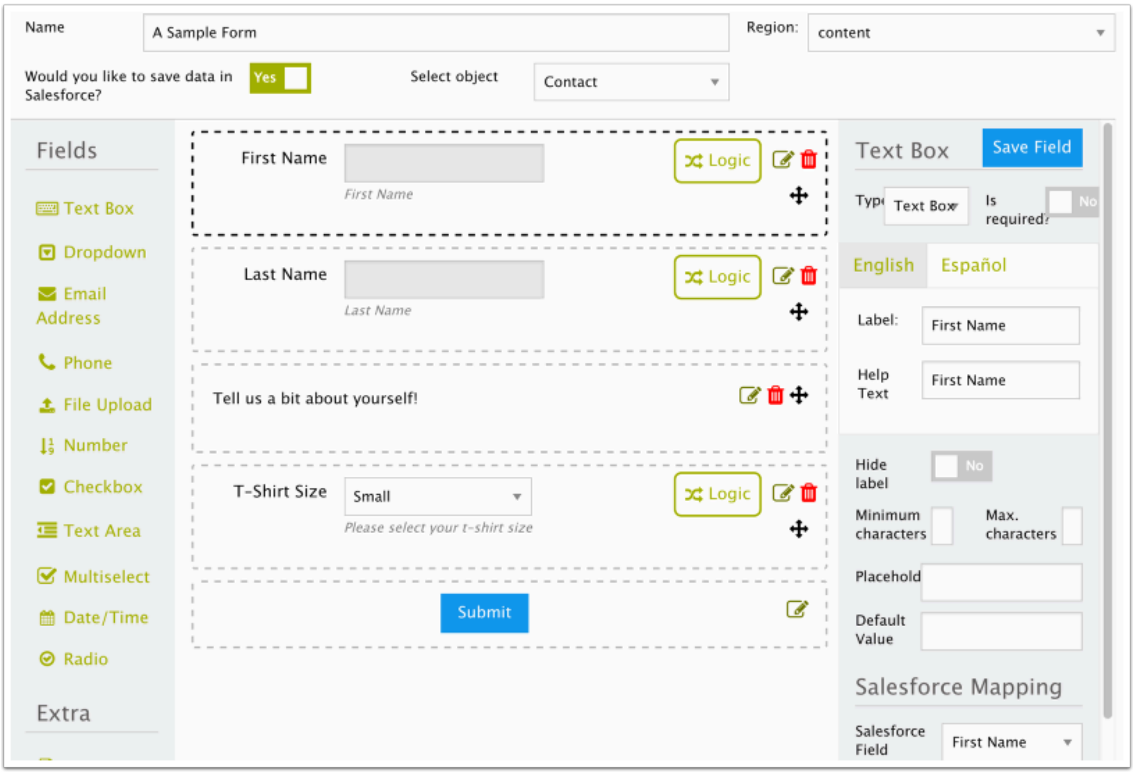
If you have a need for customized registration or sign-up processes - contact us about adding the ARS module to your instance of HandsOn Connect.

The newest addition to the ARS is the ability to create forms which can be embeded into pages that can be part of the registration process or project sign up process. Forms can also be used to create surveys and other stand-alone sources of user-input. Forms include the following abilities:

- The ability to capture user inputs in labeled fields of text, checkboxes, radio buttons, multi-picklists, dates, and other field types
- The ability to create field labels, picklist values, and help text.
- The ability to export user data directly from your CMS's internal database, or
- The ability to map the form directly to standard or customized fields in Salesforce
- Logic Branching to control which fields are displayed on the form in response to inputs to other fields in the form.

Forms become a powerful tool that allow for customized registration processes and sign-ups and provides a more direct way to create custom registration questions and populate detail directly on the contact record.

The screenshot below shows the interface for creating a form via the ARS:



Advanced Registration System (ARS) - ability to add custom 'success pages" HOC3-858

When creating a workflow for custom opportunity signup pages, it is possible to select the success page for 'sign-up' 'express interest' or to create a custom success page which unique messaging just for that particular volunteer opportunity.

Non-verified Parental Consent Functionality added to Advanced Registration System (ARS) - HOC3-1052

A new element has been added to the Advanced Registration System add-on for HOC 3. This functionality calculates the age of a volunteer, and then sends a customizable email to the parent of the volunteer with a link to a customizable page on the public site the parent is directed to. On this page the parent can give their consent for the minor volunteer's account to be activated.

This functionality (available only to those using the ARS add-on to HOC3) makes it possible to require parental consent before a volunteer account can be activated.

When using this feature, admins should add two new fields to the contact record:

- Parental Consent (picklist)
- Parent Email (email)

Jan 2017 Release Notes

The January 2017 release is primarily 'under-the-hood' improvements to HandsOn Connect that will ensure compatability between HOC 2.x and HOC 3.0. The process of beginning to migrate HOC 2.x customers to HOC 3.0 is underway and in 2017 we expect to eventually migrate all HOC customers to the exciting HOC 3.0 platform. We'll keep you posted on the timelines for migrating in the coming months.

The monthly releases will reflect changes that affect ALL HOC customers, whether in 2.0 or 3.0. Much of the work done this month has been to ensure that future migrations will go smoothly when 2.0 customers make the jump to 3.0

We've also begun posting release notes regarding the features and improvements to HOC 3.0 in this forum -- so HOC 2.0 customers can get a sneak-peek at what's coming when they migrate to 3.0

Fixed: Occurrence Start and End Times (HOC-744)

It was discovered that it was possible to create an occurrence or recurrence, where the start date and time and end date and time were identical. This resulted in an occurrence that lasted 0 minutes! This created issues with data integrity and search.

Granted - this isn't something someone should choose to do - but we've improved the validation rules so that no one will accidently create occurrences that last for no time at all (or negative minutes :-)

All occurrences will now have a duration of at least 1 minute :-)

Salesforce Critical Update Notifications

A number of you have opened tickets asking about Critical Update Notifications you've received from Salesforce. The development team continuously reviews all critical updates and ensures that HandsOn Connect will not have issues related to these mandatory updates.

What action do you need to take?

None! Salesforce will automatically auto-activate all critical updates when the time comes. And you can be assured that these updates will not affect the smooth operation of HandsOn Connect. So you can ignore those notices, and don't need to take any action.

If however, you want to avoid the occasional 'nag' that comes up when you go to Setup, reminding you that you have critical updates to review, you can safely activate any of the following updates if you wish to at this time:

- Disable Access to Lightning Experience and the Salesforce 1 mobile browser app from Microsoft Internet Explorer 11
- Enable Lightning LockerService Security
- Enable Lightning LockerService Security for Communities
- Make Sure Records that are submitted behind the scenes are routed to the right approval process
- Add Clickjack Protection for Legacy Browsers to Visualforce Pages without Page header.
- Trust Percent Values in Flow sObject Variables Again
- Require TLS 1.1 or higher for HTTPS connections

Note: when this last update is activated, which will occur automatically on March 4, 2017, some older non-compliant browsers and older mobile devices may not be able to access your site. You can see the current minimal standards for browsers and devices in this post from Salesforce. https://help.salesforce.com/articleView?id=000221207&type=1   If you receive any 'I can't get to your site' questions from partners or volunteers -- refer them to this document. These changes are necessary to meet today's norms for Internet security.

Release Notes 2016 and earlier

Dec 2016 Release Notes

The December release includes a number of bug fixes that will increase HandsOn Connect performance. Also, there is an Administrator alert - with instructions on a 5 minute update all System Admins should make to correct errors in two workflows that manage the sending of reminder emails.

Separate release notes will be published with the latest features and improvements for HandsOn Connect 3.0 users.

Administrator Alert: Action Required (Update Workflows for Reminder Emails) (HOC-722)

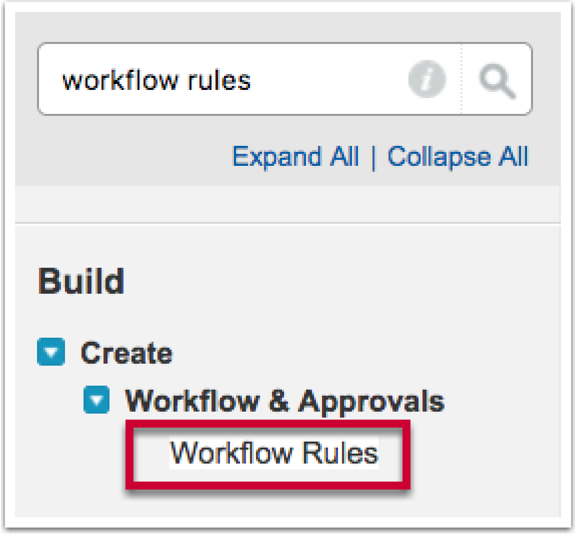
This update will take you about 5 minutes as is recommended for all HandsOn Connect customers.

We've learned of a bug that exists with the workflows that send Reminder Emails to volunteers 4 days before the occurrence takes place. These emails are only supposed to be sent for Date & Time Specific Opportunities, and we've learned that the current workflows are sending these for TBS and ISO opportunities as well. This is confusing for volunteers as the email reminds them to attend based on the **occurrence end** date. Since TBS and ISO opportunities have a single occurrence, the end date of the occurrence is of no relevance to the volunteer who would be scheduled for a connection at some time other than the end date of the occurrence. And they may receive this reminder months or years after they actually expressed interest to volunteer. (It's sent four days before the expiration date of the TBS or ISO opportunity). So reminder emails shouldn't be sent for TBS or ISO based occurrences, and a quick update to the two workflows involved with resolve this.

Because the two workflows that handle this are "unmanaged" - they have to be fixed directly in your instance and can't be 'pushed' as part of the release process. Admins should follow these simple steps to update the code for two workflows. Here's what to do:

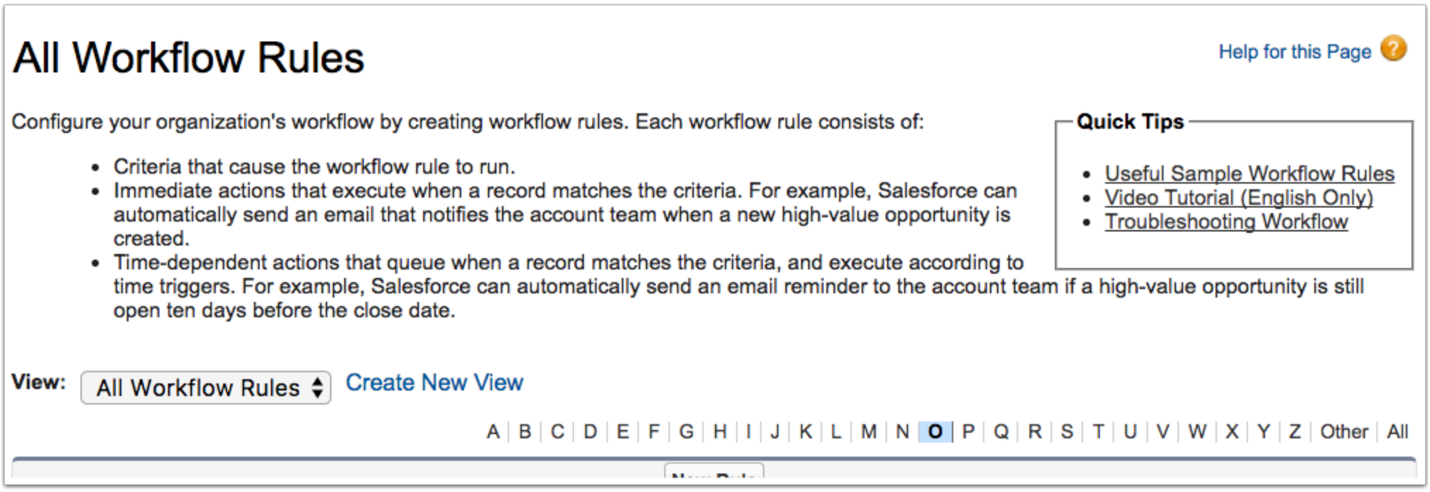
Find the two affected workflows

Go to Setup and type "workflow Rules" into the search box, and click on the link for workflow rules



Use view "All workflow Rules" and click on the letter O

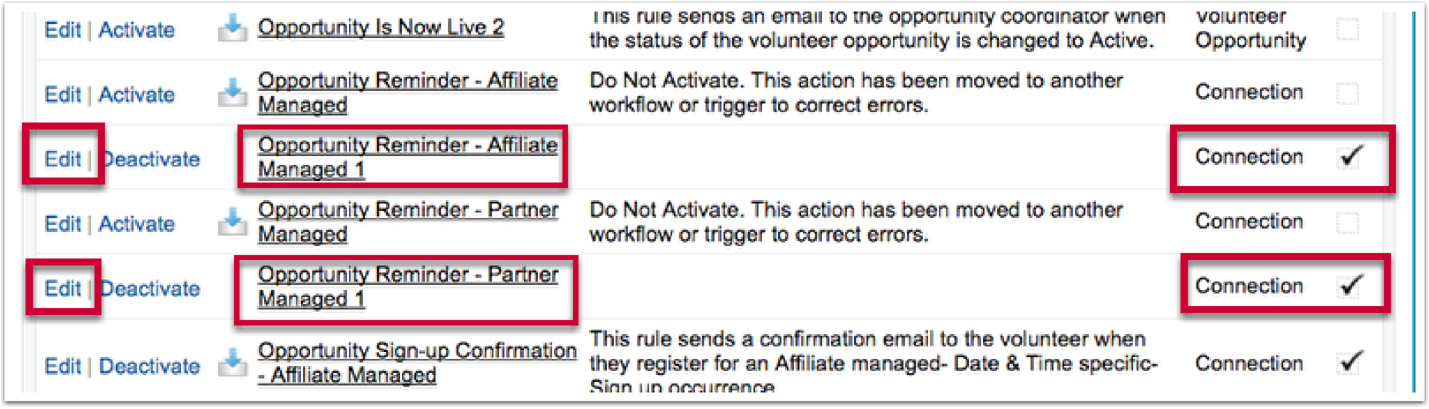
The rules we are looking for begin with the words "Opportunity Reminder"



Find the two active workflows for opportunity reminders

Look for the 'active' checkbox on the right of the listing to see which Opportunity Reminder emails you are currently using. For most customers these will be named "Opportunity Reminder - Partner Managed 1" and "Opportunity Reminder - Affiliate Managed 1" -- for some customers these may not have the number 1 after them -- but they are unmanaged workflows (meaning they don't have the symbol with the arrow next do them. (Those are older managed workflows that are no longer used).

Whatever their names, there are two active workflows, one for Affiliate Managed projects, and one for Partner Managed projects. We're going to edit the code in each. Click on EDIT, and then replace the code as instructed in the next step. Let's start with "Opportunity Reminde r- Affiliate Managed 1"



Edit | Activate	Opportunity Is Now Live 2	This rule sends an email to the opportunity coordinator when the status of the volunteer opportunity is changed to Active.	Volunteer Opportunity	
Edit | Activate	Opportunity Reminder - Affiliate Managed	Do Not Activate. This action has been moved to another workflow or trigger to correct errors.	Connection	
Edit | Deactivate	Opportunity Reminder - Affiliate Managed 1		Connection	✓
Edit | Activate	Opportunity Reminder - Partner Managed	Do Not Activate. This action has been moved to another workflow or trigger to correct errors.	Connection	
Edit | Deactivate	Opportunity Reminder - Partner Managed 1		Connection	✓
Edit | Deactivate	Opportunity Sign-up Confirmation - Affiliate Managed	This rule sends a confirmation email to the volunteer when they register for an Affiliate managed- Date & Time specific- Sign up occurrence	Connection	✓

Opportunity Reminder - Affiliate Managed 1

Select all the contents of the current rule criteria and delete it. Then replace that content with this formula:

IF(AND(ISPICKVAL(HOC__Status__c , 'Confirmed'),

ISPICKVAL(HOC__Volunteer_Opportunity__r.HOC__Managed_By__c , 'Affiliate'),

ISPICKVAL(HOC__Volunteer_Opportunity__r.HOC__Status__c , 'Active') ,

!(ISPICKVAL(HOC__Attendance_Status__c , 'Canceled')), (

(AND((DATEVALUE (HOC__Occurrence__r.HOC__Start_Date_Time__c) - 4)>Today(), ISPICKVAL(HOC__Volunteer_Opportunity__r.HOC__Schedule_Type__c , 'Date & Time Specific'))) | |

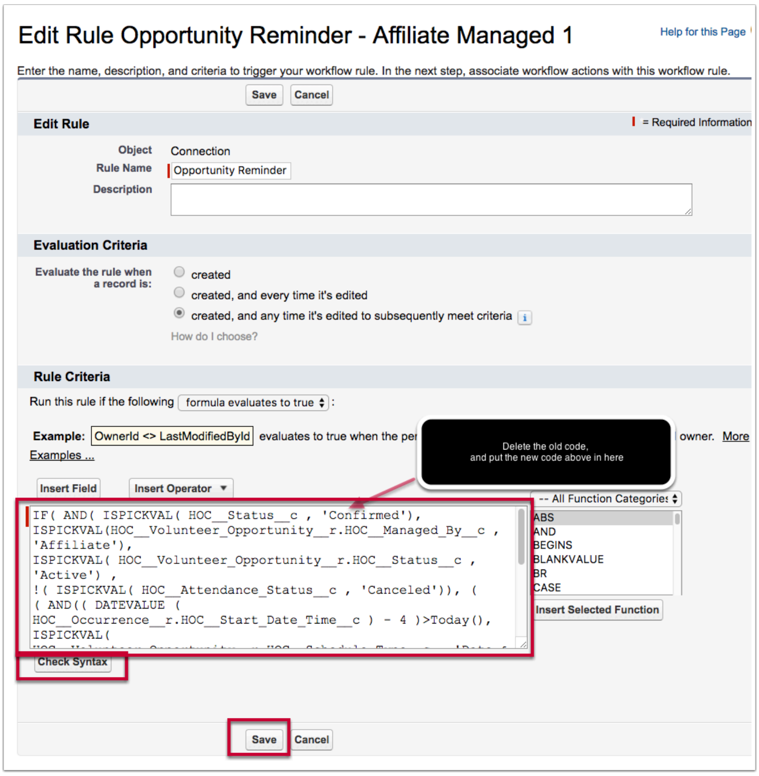
(AND ((DATEVALUE (HOC__Start_Date_Time__c) - 4)>Today() ,ISPICKVAL(HOC__Volunteer_Opportunity__r.HOC__Schedule_Type__c , 'Date & Time Specific')))

), ISPICKVAL(HOC__Occurrence__r.HOC__Status__c , 'Active')) ,

true, false) && IF(HOC__Occurrence__r.HOC__Send_Reminder_Email__c == TRUE, FALSE, TRUE)

Click on 'Check Syntax" to make sure there are no errors in which you've pasted.

Click Save.   1 down. 1 to go.



Opportunity Reminder - Partner Managed 1

Select all the contents of the current rule criteria and delete it. Then replace that content with this formula:

IF(AND(ISPICKVAL(HOC__Status__c , 'Confirmed'), ISPICKVAL(HOC__Volunteer_Opportunity__r.HOC__Managed_By__c , 'Partner'), ISPICKVAL(HOC__Volunteer_Opportunity__r.HOC__Status__c , 'Active') ,

!(ISPICKVAL(HOC__Attendance_Status__c , 'Canceled')),

((AND((DATEVALUE (HOC__Occurrence__r.HOC__Start_Date_Time__c) - 4)>Today(),

ISPICKVAL(HOC__Volunteer_Opportunity__r.HOC__Schedule_Type__c , 'Date & Time Specific'))

|| (AND ((DATEVALUE (HOC__Start_Date_Time__c) - 4)>Today(),

ISPICKVAL(HOC__Volunteer_Opportunity__r.HOC__Schedule_Type__c , 'Date & Time Specific')))),

ISPICKVAL(HOC__Occurrence__r.HOC__Status__c , 'Active')

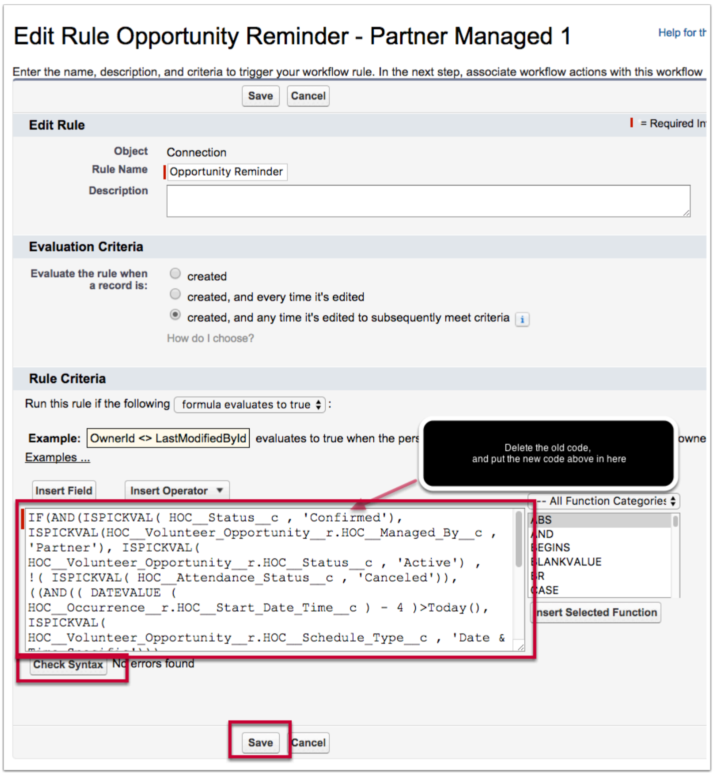
),

true, false)

&& IF(HOC__Occurrence__r.HOC__Send_Reminder_Email__c == TRUE, FALSE, TRUE)

Click on 'Check Syntax" to make sure there are no errors in which you've pasted.

Click Save.   You're done!



Problems?

If you experience problems doing this update or have any questions or reservations, open a ticket in the help center and we will take care of this for you upon request.

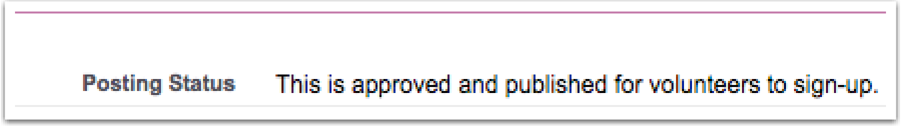
Fixed: Business Page opportunities for companies with an "&" in their name not showing up (HOC-782)

We've fixed a known issue where invitation code opportunities (that appear on a company's business page) do not show up for organizations with an "&" in their name, such as "AT&T".

Fixed: Incorrect Posting Status for occurrences created via recurrences (HOC-777)

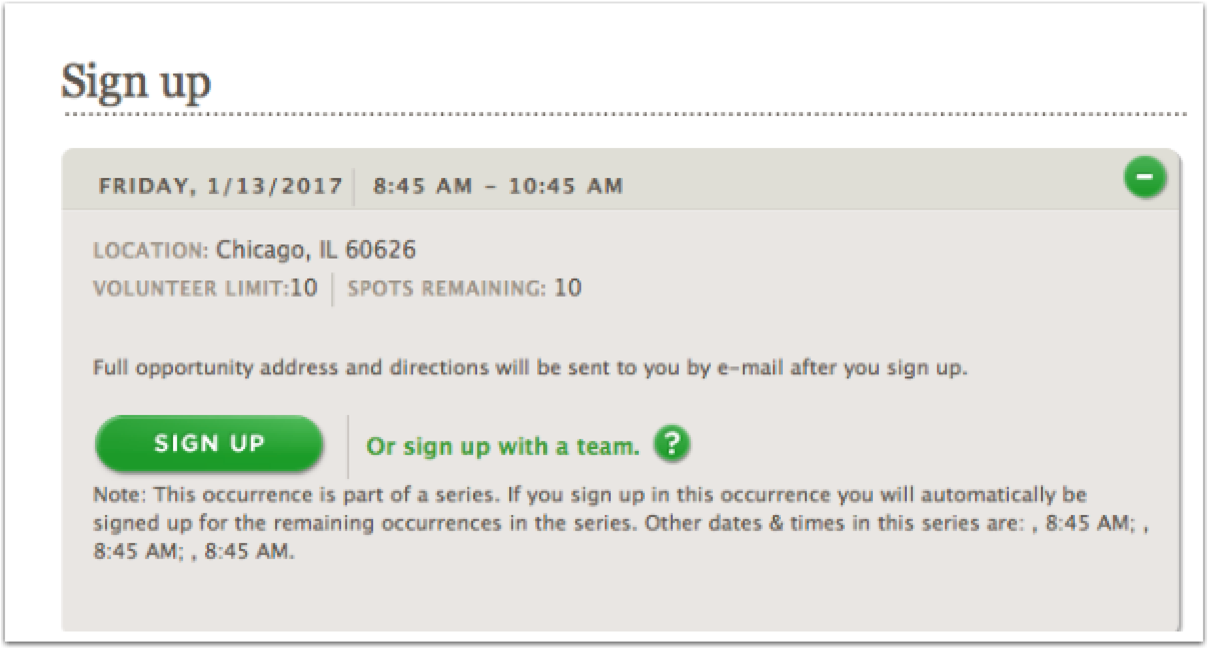
We've made a number of improvements to the accuracy of the "Posting Status" field as an indicator of whether or not a volunteer opportunity and/or occurrence is published and available for signup on the public site. It was discovered that when creating an active recurrence, the individual occurrences that were created had a posting status of "This is not published. The Date & Time is in the past" which wasn't the case.

This has been corrected and the posting status will now be accurately reflected when creating recurrences.   Posting status is a reliable indicator of whether an opportunity is on the public site, and is updated every night shortly after midnight to update expiring occurrences and volunteer opportunities.



Fixed: Dates missing from grouped occurrences (HOC-784)

For those using grouped occurrences, you may have noticed that the 'note' on the occurrence sign-up detail was missing the dates of the other occurrences in the series. This occurred on the signup page and the success page.   This issue has been fixed and dates will now accurately show up for grouped occurrences.



Trigger filters updated for improved performance with large Salesforce databases (HOC-766)

A number of HandsOn Connect customers use their Salesforce instance for far more than volunteer management. They may have thousands of organizations and contacts that have nothing to do with volunteerism. To improve performance and minimize conflicts that can occur in these deep Salesforce databases, the triggers used by HandsOn Connect have been updated to only operate on contacts and organizations that are related to the functions in HandsOn Connect. Customers with these sorts of SF instances will see improved performance and fewer trigger-related errors.

Fixed: Conflicts between HOC and NPSP batch updates

(HOC-767)

Customers using the NonProfit Success Pack have reported trigger-related errors that occur when NPSP performs its nightly batch updates. This release will minimize the conflicts that have occurred and prevented batch updates from completing.

Fixed: Errors related to "too many SOQL queries" (HOC-780)

A number of customers have reported errors that occur on the public site or administratively under some circumstances where a lot of records need to be updated at once. We've seen reports of "Too many SOQL queries" related to signing up for grouped occurrences, self-reporting, and administratively adding connections.   This release includes a fix that streamlines the number of SOQL queries necessary for complex processes, so that it does not bump into Salesforce's limit of 100 queries per transaction.

HOC 3.0.3.7 (December 22) and 3.0.3.8 (December 30) Release Notes

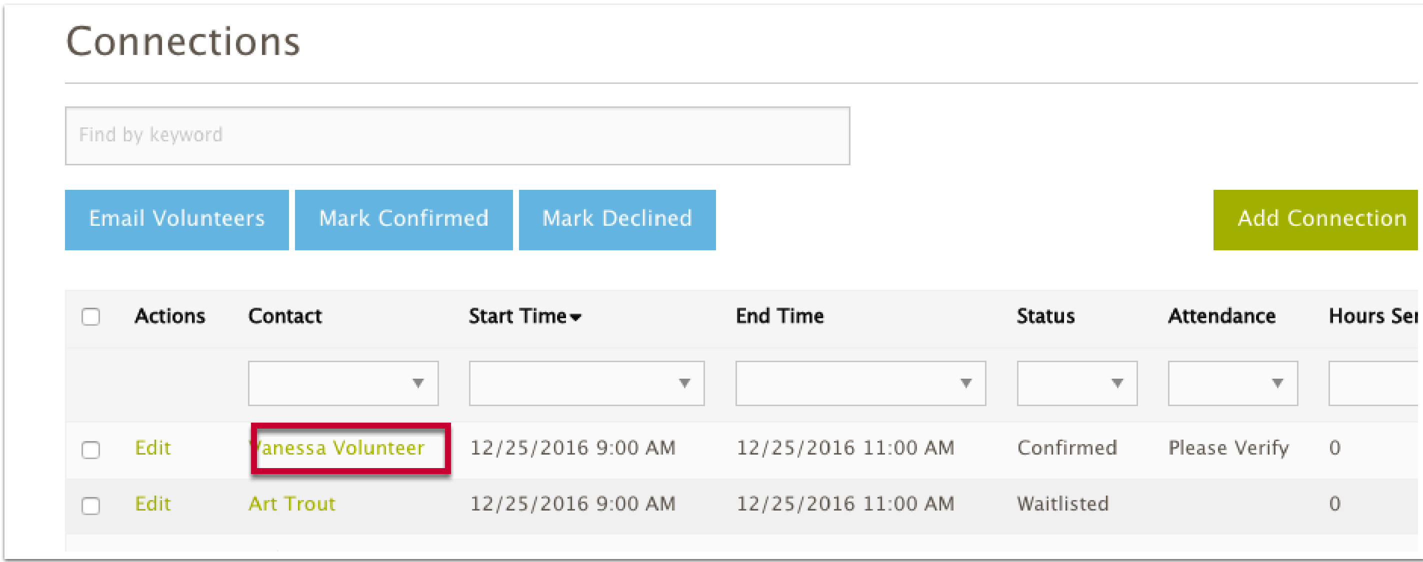
Improvements continue to be made to HandsOn Connect 3.0 to make it faster, more efficient, and to improve ease of use in the sharing portal (for partners and volunteer leaders). These last two releases included over 80 'under the hood' improvements, and improvements to page layouts and user interfaces.

Here's a few of the more visible changes and new features released during the latter half of December.

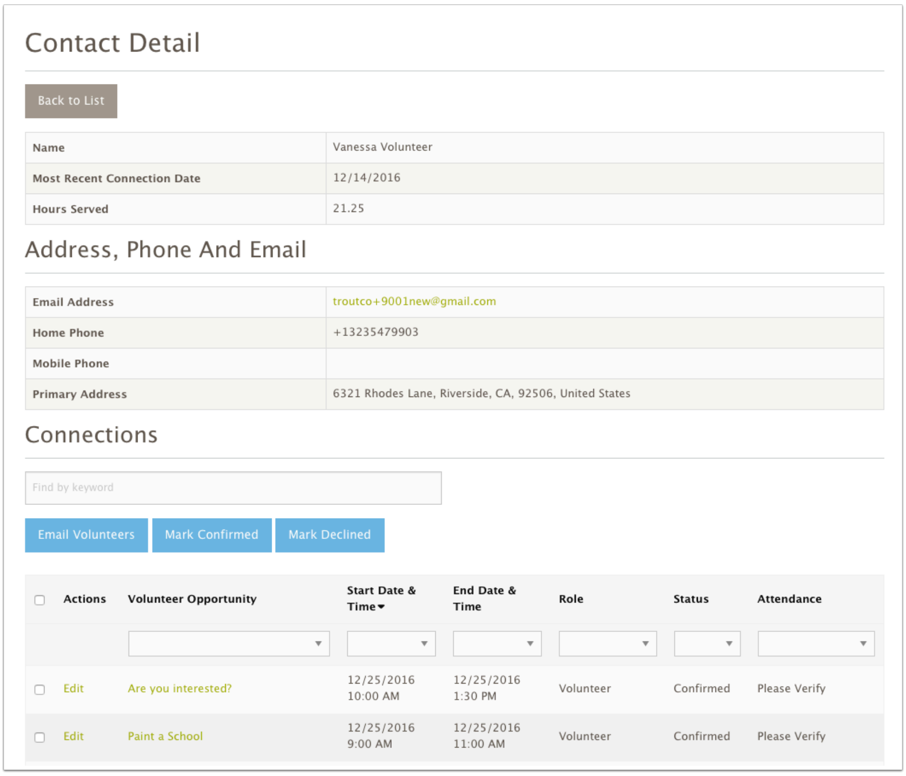
Partner Portal: Ability to view Contact Information (HOC3-1311 +)

New in the partner portal is the ability to view additional information about contacts. There are two places where you can access contact information:

1. In the connections grid for each volunteer opportunity the name of a contact is now a hyperlink

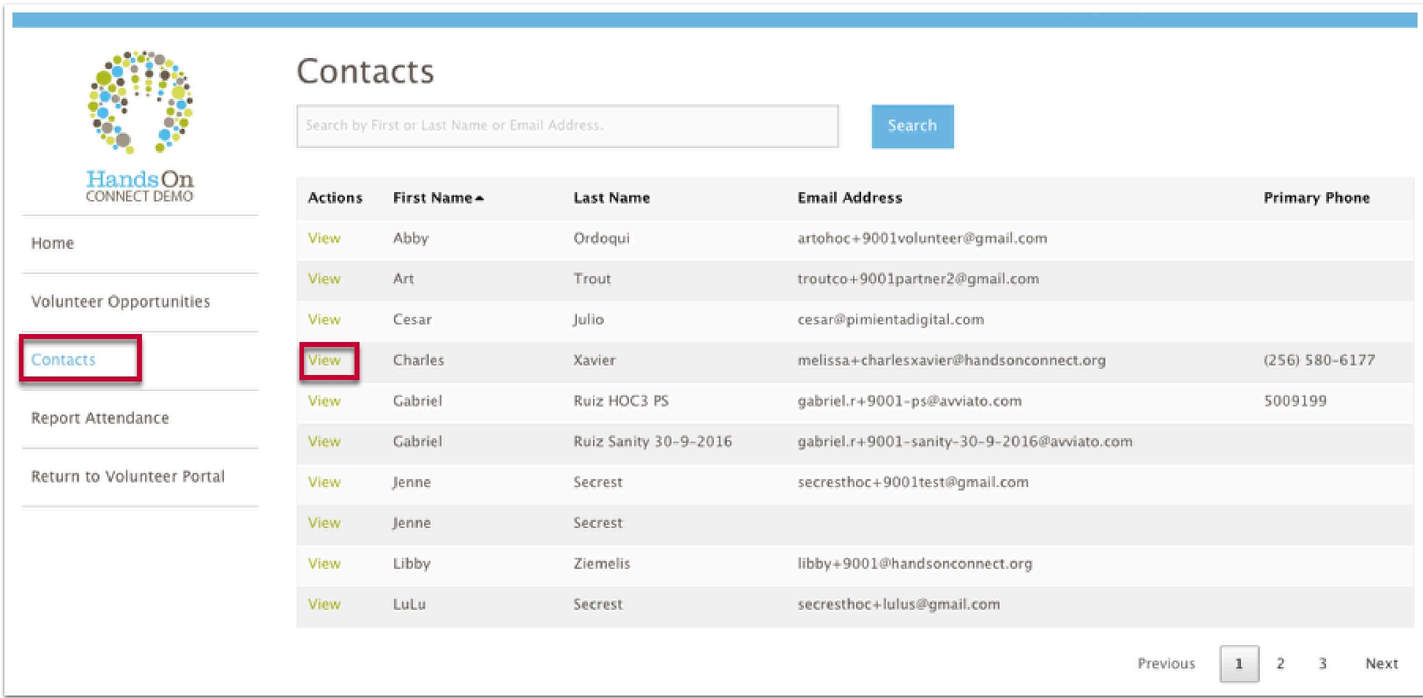


This will take you to a contact detail page. Here you'll be able to see basic contact information as well as a list of all connections that volunteer did with your organization.

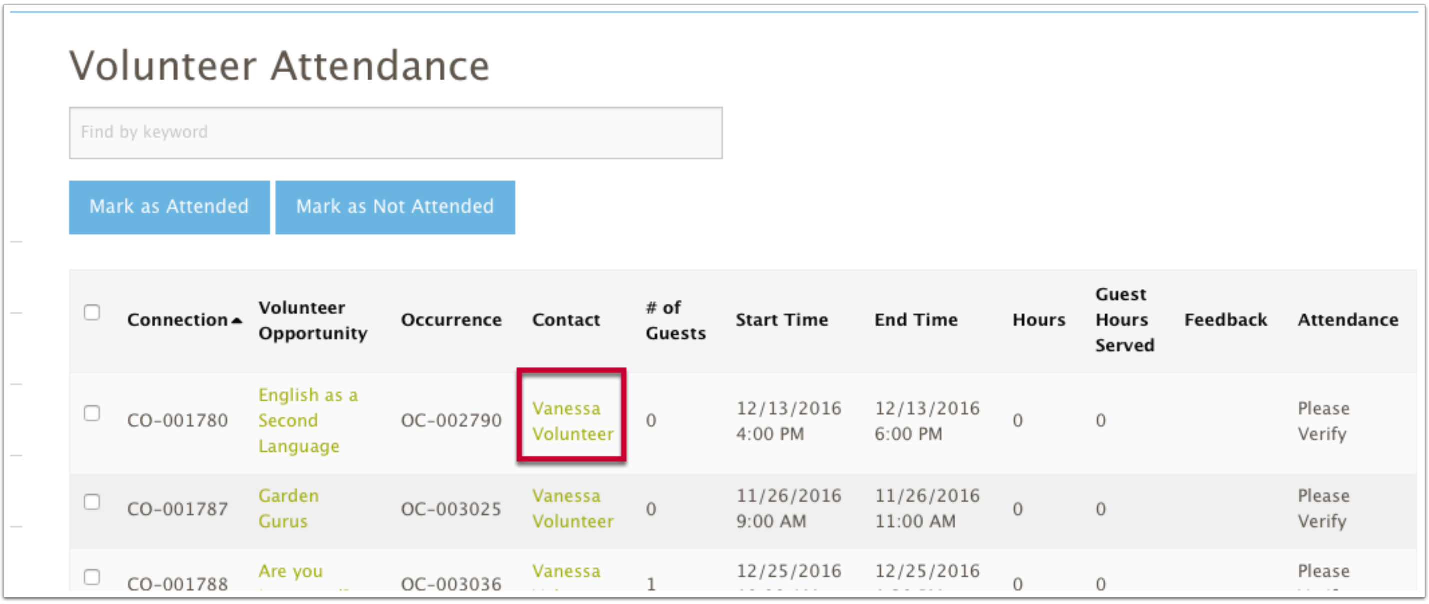


2. Contacts Menu

The new Contacts menu allows you to view your organizations contacts, and search for them by name. You can view basic contact info in the list view, or click on "view" to go to the contact detail page.



3. You can also access contact detail by clicking on the hyperlink of the Volunteer Attendance page



CMS: Ability to configure field visibility and requirements on Personal Info Page and Organization Registration Page (HOC3-217 and 583)

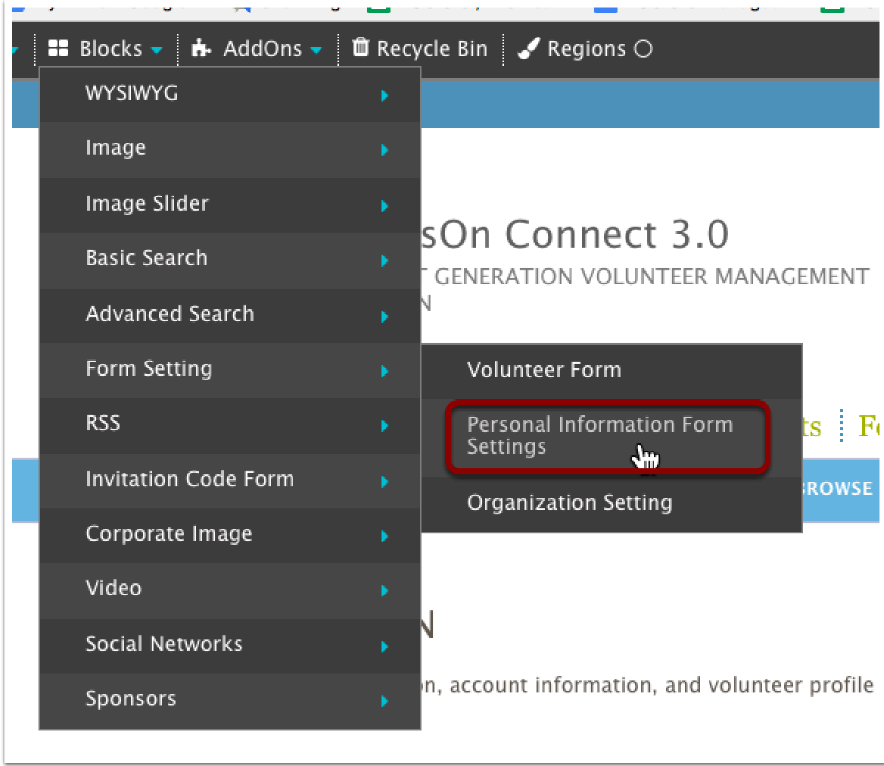
Up to now its been possible to customize the **volunteer registration page** and define which fields are visible and which are required during volunteer registration. Those settings became the same settings that appeared on the "Personal Information" page (where a volunteer can update their information).

In this release, a new form settings panel is available for the **Personal Information page**, so you can make additional fields visible and/or required, on the personal information page itself.

In this release, a new form settings panel is available for the **Organization Registration page,** so you make additiional fields visible and/or required, on the organization registration page itself.

Editing the Personal Information Page layout

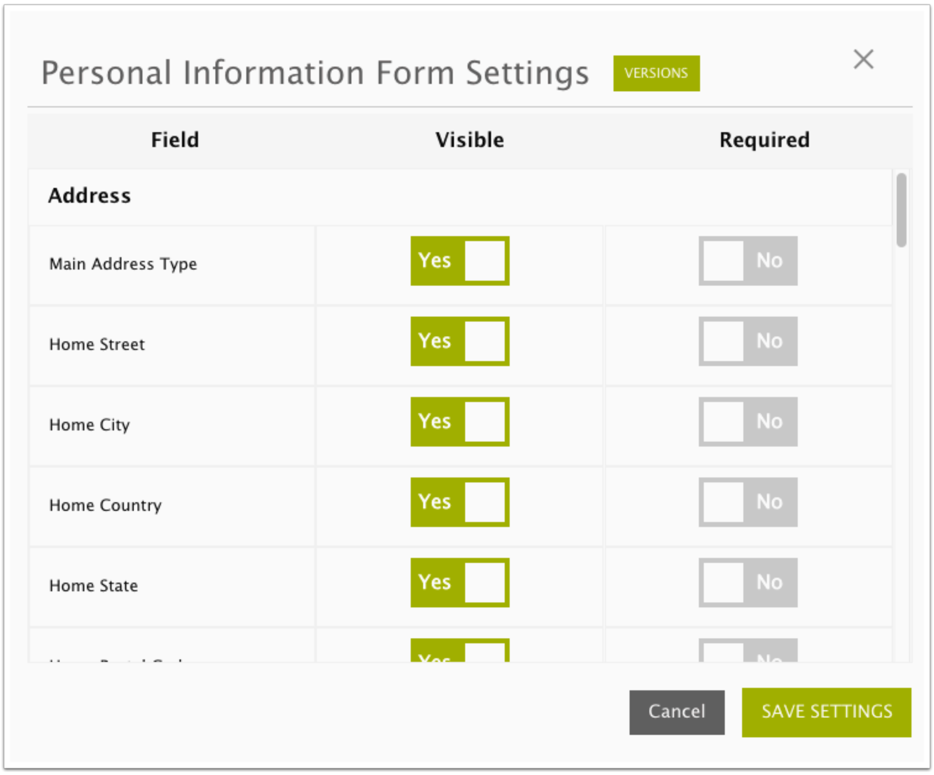
To get there go to the CMS and select Blocks / Form Setting / Peronal Information Form Settings



You'll then be able to specify which fields you wish to have visible and/or required on this page. (This is handy if you want to keep the registration form short and simple, but give the opportunity for volunteers to addd additional information later).

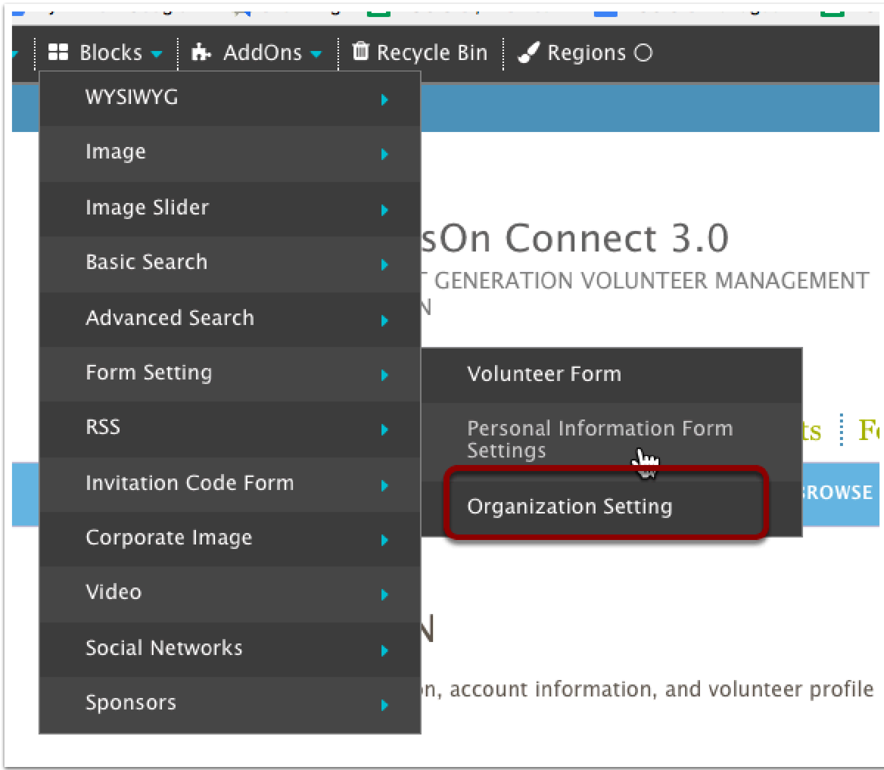
Click on the edit box on the Personal information Page:

Set visibility and required as desired. Then click Save Settings.

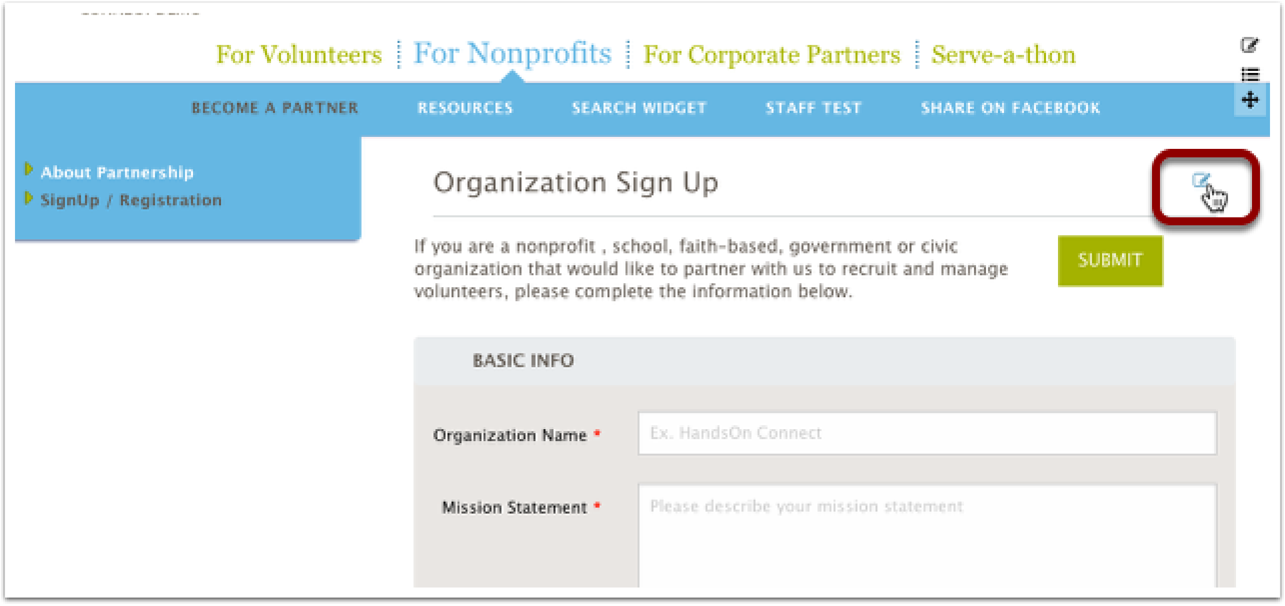


Editing the Organization Registration Layout

To get there go to the CMS and select Blocks / Form Setting / Organization Setting



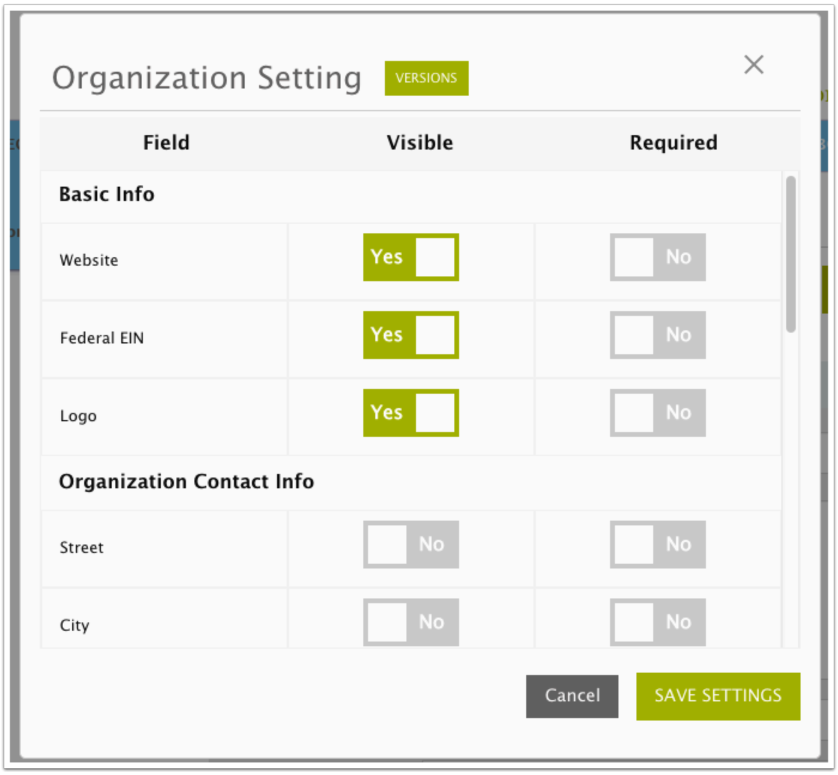
Click on the edit box on the Organization Sign Up Page:



You can then set what additional fields you want to make visible and/or required.

Note: Some fields, which are required in order to register an organization, are not available to be removed or made not required. These include:

- Organization Name
- Mission Statement
- Primary Population Served
- Primary Impact Area
- The information for the Primary Contact



Registration Page: Communications Settings improved (HOC3-1367)

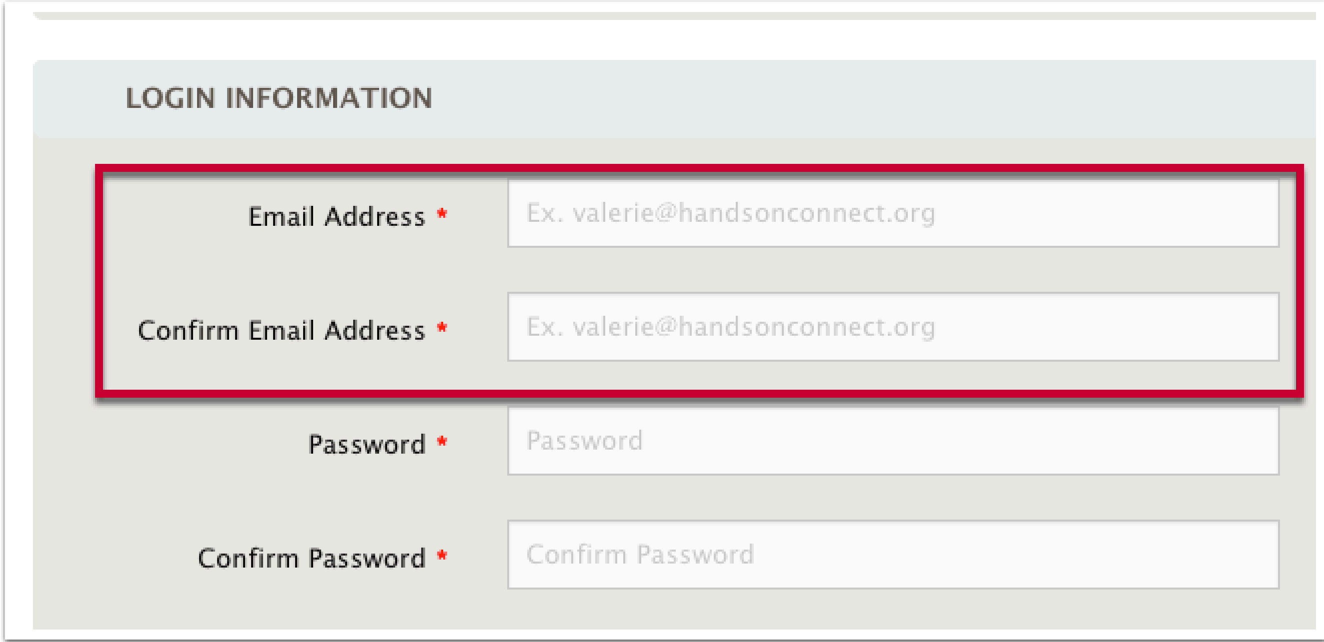
The two communications preferences on the Volunteer Registration form previously had the options:

- Receive from HandsOn Connect Demo
- Reeive from HandsOn Network

The first option has been corrected and will now read "Receive from [Your organization's name]

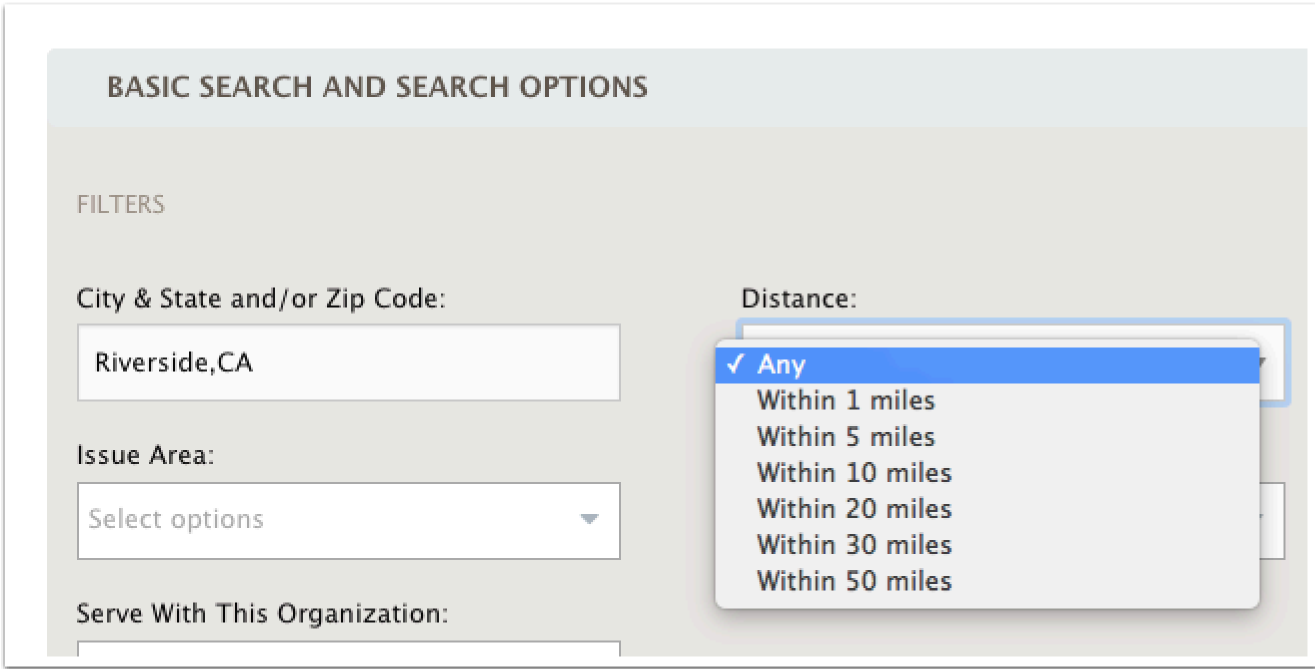
Registration Page: Email confirmation now validated (HOC3-1425)

On the volunteer registration form, it was possible to enter an email address, and then put a different email address in the field "confirm email address".   Now the same email address must be put in both fields which ensures that the user is properly spelling and entering their email address.



Search: Added more "search by distance" options to calendar search view (HOC3-1228)

The calendar search filters did not offer as many distance ranges as the regular search page. Now in both searches you can filter opportunities by distance within 5, 10, 20, 30 or 50 miles.



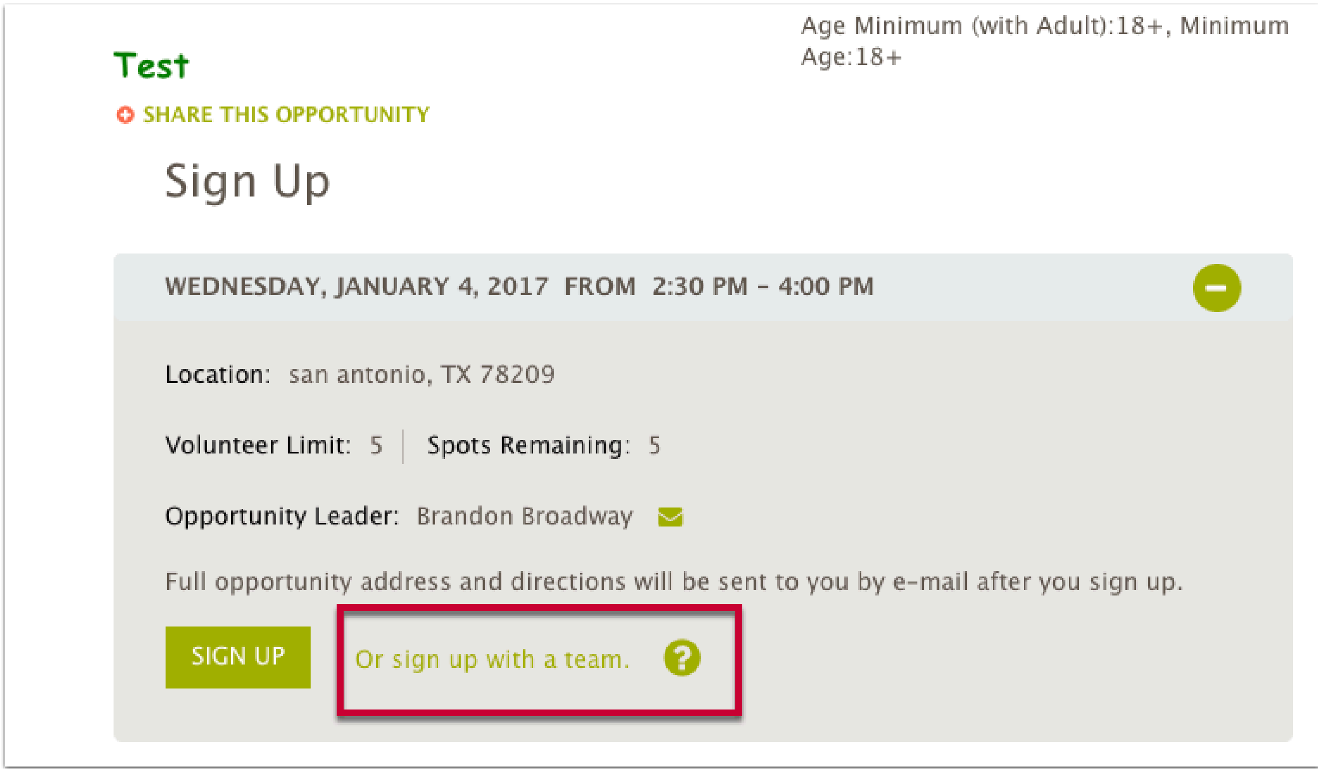
Team Sign-ups: Generally available and active for HOC 3 customers (HOC3-1248)

Unless your organization specifically requested to disable teams, teams are now 'on' and available on the public site for all HOC 3.0 customers. Volunteers can now sign-up for **Date and Time Specific Opportunities** with a team, and either create a team, or sign-up with an existing team.

If you do not wish to use teams at all on your site, open a zendesk ticket and we can turn off team functionality for your organization.

Notes:

- Team sign-ups are not available for "individually Scheduled Opportunities", as each volunteer is scheduled separately.
- it's possible at the individual occurrence level to turn off teams for an occurrence if desired. To do so, you must enable the advanced occurrence options. If you wish to have the ability to selectively turn off teams, here's the instructions for enabling 'turn off teams' for occurrences: https://support.handsonconnect.org/hc/en-us/articles/212864086-Enabling-Advanced-Occurrence-Options



Improvements to Mobile site (HOC3-1262)

We've made some visual improvements to the mobile site, including removing instances where text was overlapped and difficult to read.

HOC 3.0.3.6 Release Notes (December 9, 2016)

version 3.6 was pushed to production for all HOC 3.0 customers on December 9. Here's an overview of key new features and bug fixes for HOC 3.0 users.

Sharing Portal: Ability for users to administratively create connections (HOC3-108)

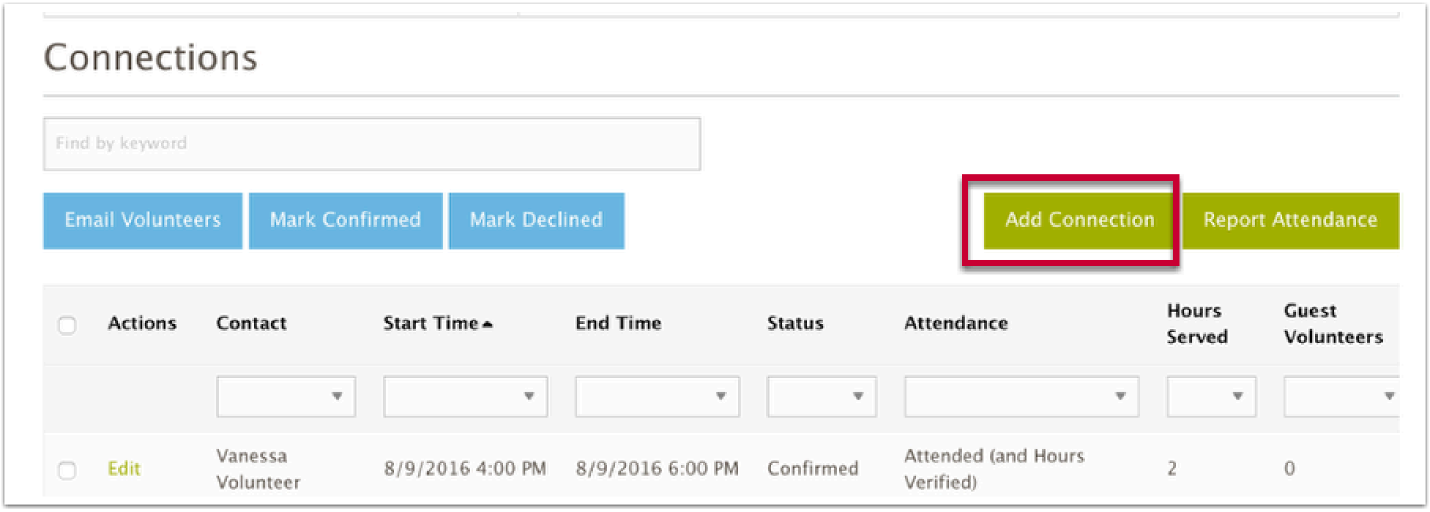
Most connections are created by volunteers when they sign up or express interest via the public site. However, sometimes an opportunity coordinator using the sharing portal may wish to administratively create one or more connections on behalf of a volunteer.

It's now possible to create a new connection for a volunteer administratively in the sharing portal

Creating a Connection for a Date and Time Specific Opportunity

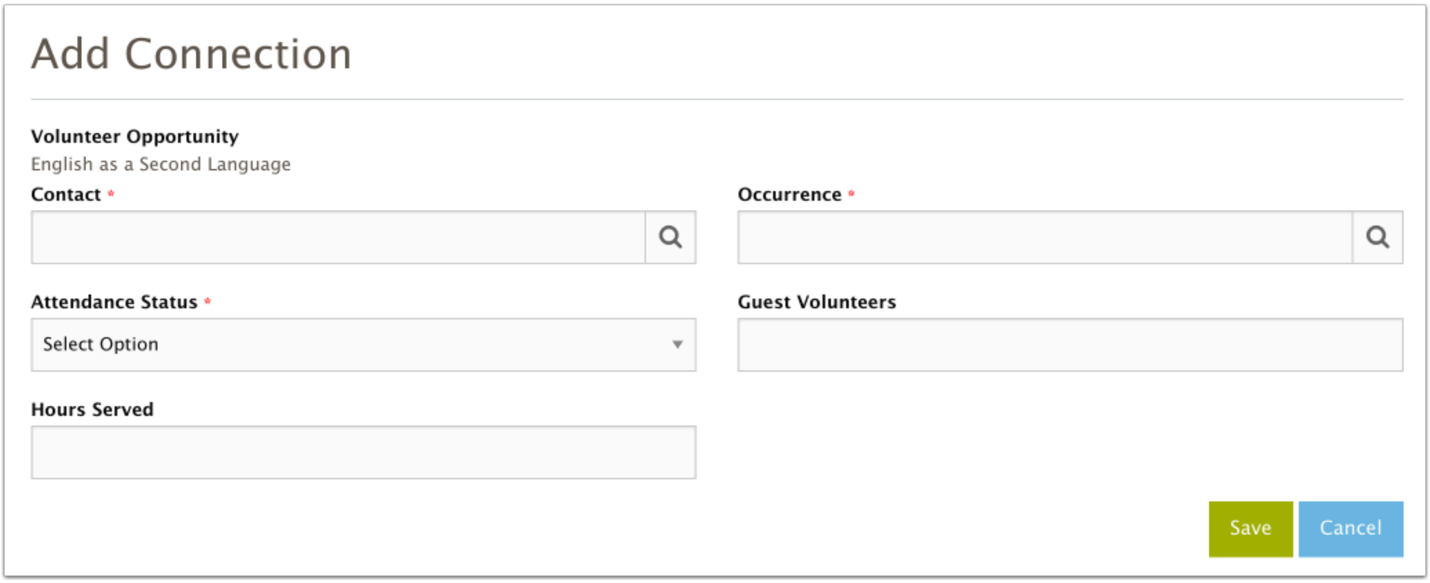
Go to the Volunteer Opportunities list, and click "view" next to the opportunity you wish to add a connection to.

Scroll down to the connections grid and click on the "Add Connection" button.



- The fields necessary to add a connection will appear

- Click on "Contact" and a list will be presented of the contacts who have previously connected with your organization
- Click on "Occurrence" and a list of occurrence dates, past and present will appear. Select the occurrence you wish to connect the volunteer to.
- Attendance Status: For Future Occurrences select "Please Verify" (as you'll need to verify attendance after the occurrence takes place. For past occurrences select either "Attended" or "Not Attended".
- Guest Volunteers - if the volunteer is bringing unregistered guests, indicate how many guests are coming with the volunteer.
- Hours Served - this will only be visible for past occurrences. If marking as attended you can leave blank and the hours will automatically be populated based on start and end time of the occurrence. Optionally, if a volunteer stayed longer than the scheduled time, you can increase (or decrease) the hours by entering a value. (Hours should be entered in decimal format i.e. 2.25.



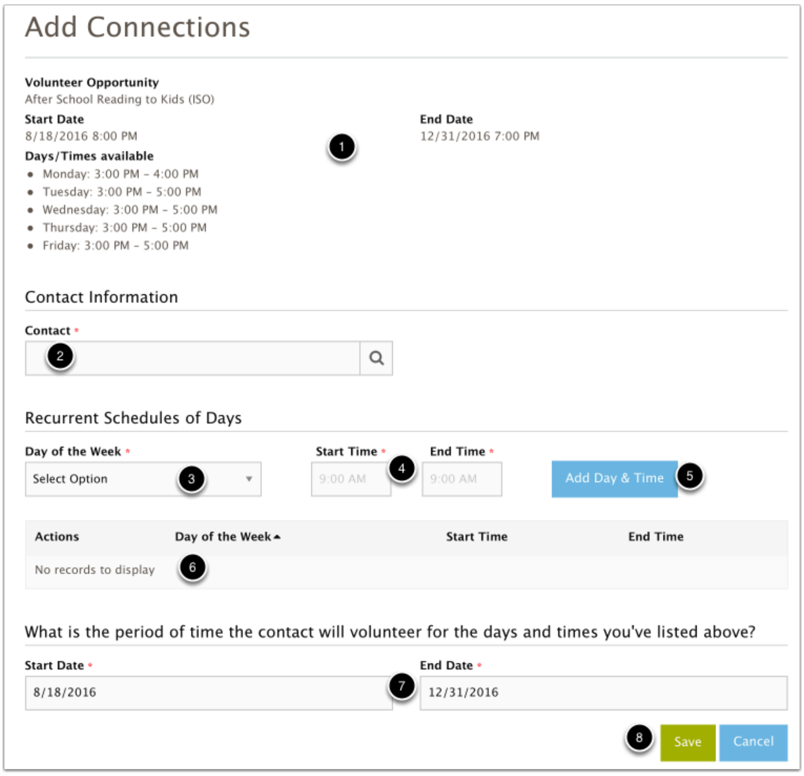
Creating one or more connections for a 'Individually Scheduled' Opportunity

Normally, volunteers will propose their own connection times when they express interest in an Individually scheduled opportunity. However you can administratively create one or more connections for a volunteer for your ISO volunteer opportunities.

- Click on the Add Connections button on the right of the connections grid on the Volunteer Opportunity Detail Page
- You'll be taken to the Add Connections screen

1. At the top of the page you'll see the schedule you've created for this Individually Scheduled Opportunity.   This is strictly for reference, because as a sharing portal user you can administratively create connections for a volunteer for any time, whether or not it is within the schedule you've specified on the public site for volunteers to use.

2. Click on Contact to see or search for a contact from all the volunteers who have connected with your organization. Choose the contact you wish to create one or more connections for.
3. Day of the Week: Pick the day of the week you wish to create connections for.
4. Start and End Time for the connection(s) on that day of the week
5. Click on the "Add Day & Time" button to add that 'schedule' to the list below (6). You can then pick additional days of the week if desired if you are creating multiple connections.
6. All the days / times you are scheduling the volunteer to attend will be listed here.
7. Set the Start Date and End Date of the period you wish to create connections for.   (If you wish to create just one connection, then just put in that date. If you are creating connections each Monday and Friday for the month of December, you would enter the period of time as 12/1/2016 to 12/31/2016.
8. Click "Save" and one or more connections will be created for the day(s) and dates you've defined. They will be marked as confirmed and the volunteer will receive an email informing them they've been scheduled for one or more dates.



Sharing Portal: Ability to edit connections (HOC3-108)

If after a connection has been created, confirmed, or attendance reported you wish to change or update the connection, you can do so by clicking on the 'edit' button to the left of the connection. This makes it possible to correct errors in attendance reporting (for example).

Some fields within the connection record can be edited by moving the cursor to the right of the field, and revealing the edit icon. After editing a field or a connection record, always click the Save Button to record the changes.

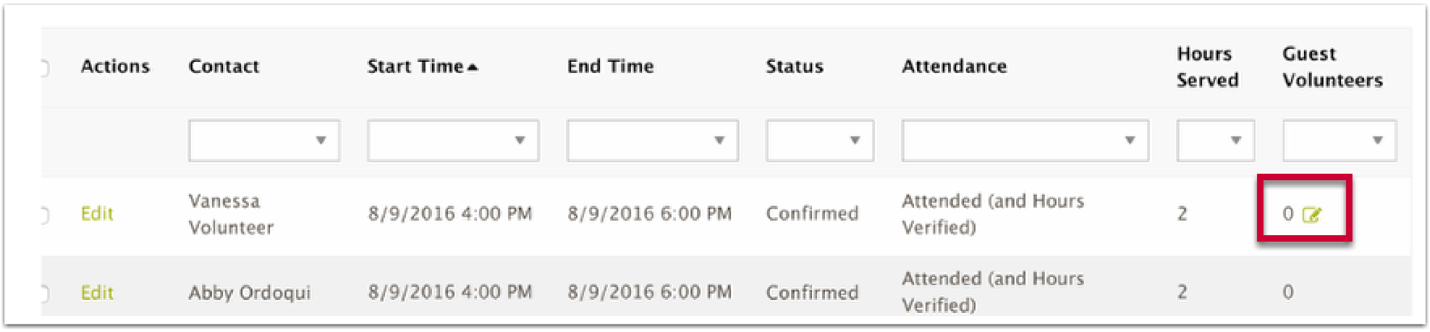
Sharing Portal: Ability for users to add Guest Volunteers to Connections (HOC3-107)

While we usually want each volunteer that's attending to sign up and create their own connection, sometimes volunteers will contact you and say they are bringing a friend or family member.

The field "Guest Volunteers" can be used in HandsOn Connect so that an Opportunity Coordinator can administratively note that a volunteer is bringing one or more unregistered 'guests' to a volunteer opportunity. Guest volunteers can be added administratively when creating connections, editing connections, or as part of Attendance Reporting.

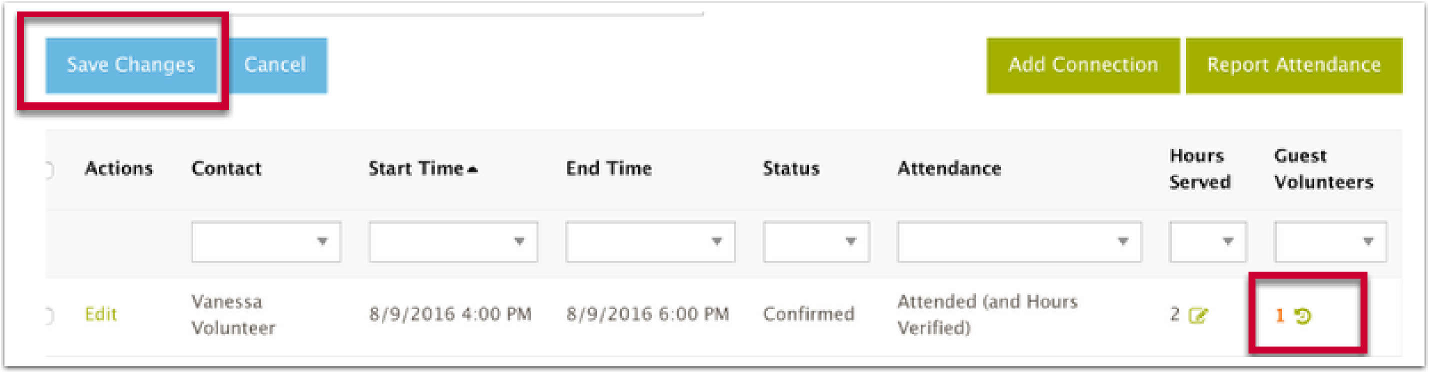
To update Guest volunteers:

- Go to the connections grid on any volunteer opportunity detail page or on the Report Attendance Page.
- Place your cursor to the right of the Guest Volunteers field for an individual connection, and the 'edit icon' will be visible.
- Click on the edit icon and you'll be able to enter the number of guest volunteers.



- After making changes to one or more connections on the page, move your cursor out of the field you've edited.
- Your edits will appear in red indicating that you have proposed changes to the values of one or more fields in one or more connections.
- Click on the Save Changes button to record the changes you've made.

When reporting attendance, hours for 'guest volunteers' will be counted so that you have an accurate number of hours served for each occurrence of an opportunity.



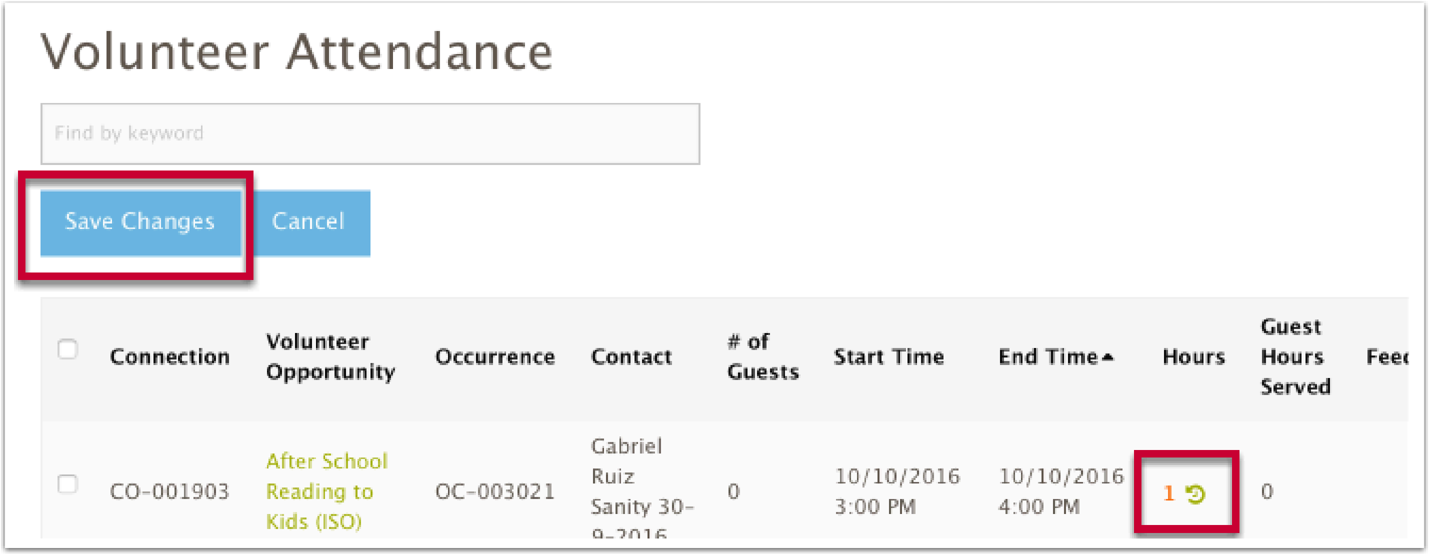
Sharing Portal: Ability to specify hours served when reporting attendance (HOC3-1037)

When you mark someone as attended on the "Report Attendance" page - by default, the connection is updated to attendance status = attended, and the 'hours' field is automatically populated with the hours served based on the start time and end time of the occurrence.

However, in some cases, a volunteer may have stayed longer (or left early), and you want to accurately reflect their hours. This can now be done on the "Report Attendance" page before marking the volunteer as attended.

To do so:

- Move your cursor to the right of the column "Hours" on the Report attendance page.
- Click on the 'edit' icon and put in the number of hours you actually want to report (note: this isn't necessary if they stayed for the scheduled number of hours)
- After editing the hours, move the cursor out of the field, and then click on the SAVE button to save any changes to connections you've made, BEFORE you report attendance.
- Once the changes are saved, then report attendance as usual. The hours recorded will be the values you added.
- Note: If a value already exists in this field, its because the volunteer 'self-reported' their hours. You can edit this if you don't agree with their self-reported hours.

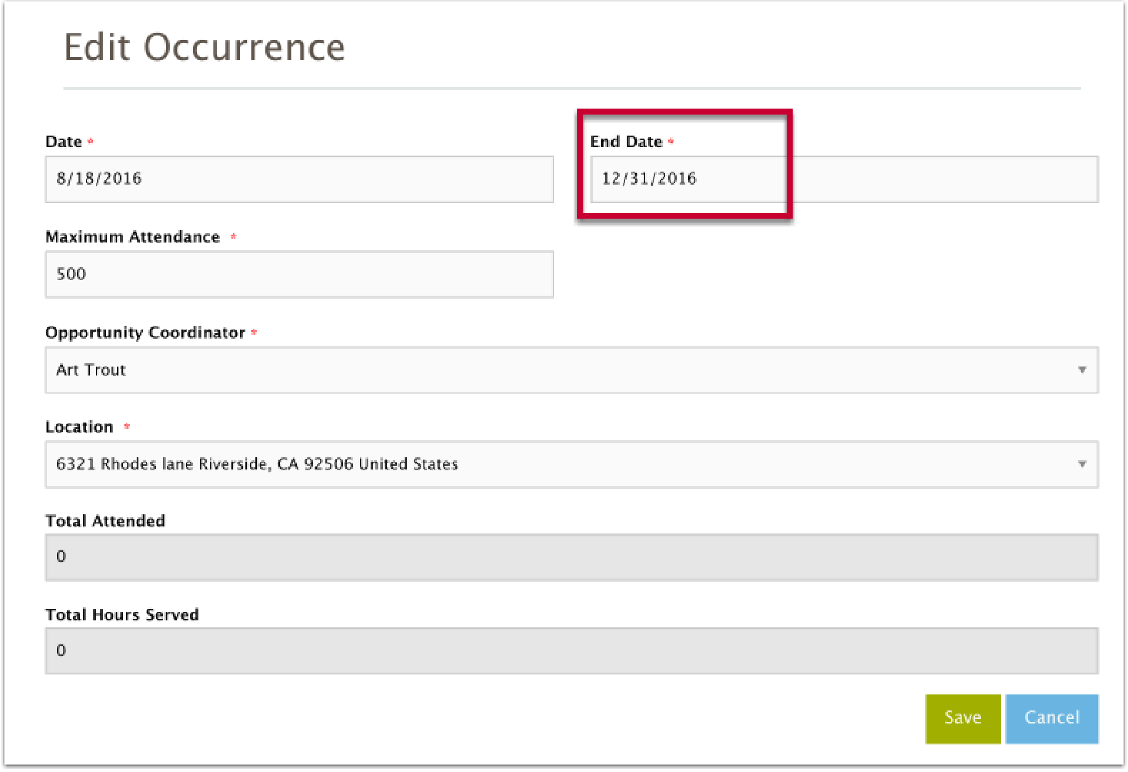


Sharing Portal: Occurrence end dates for Individually Scheduled Opportunities can now be edited

If you wish to continue to list an ISO opportunity past its current end date, its now possible to edit the occurrence end date so that the opportunity will continue to be listed. Just click on the Edit button next to the occurrence.

For migrating 2.x customers, it will not be possible to extend the end date of legacy To Be Scheduled occurrences in the partner portal as TBS is no longer a supported opportunity type in HOC 3.0. If they try to edit the occurrence end date, they will receive the message "This 'To Be Scheduled' volunteer opportunity will expire on (date)and cannot be extended. The 'To Be Scheduled' registration type has been retired. Please create a new Volunteer Opportunity to replace this one using one of the current Volunteer Opportunity Registration types."

Administrator Note: The best replacement for TBS opportunities is to use Individually Scheduled Opportunities. We also will be introducing an 'express interest only' volunteer opportunity type in First Quarter 2017. These two opportunity types will serve as improved replacements for TBS opportunities.



Fixed issues related to times being listed incorrectly (HOC3-1296)

In some emails occurrence times appeared in GMT time zone rather than local time zone. This has been fixed.

Sharing Portal: Fixed ordering of occurrence dates and times

When using filters to select an occurrence by start or end date, the dates were appearing alphabetically rather than chronologically. This has been corrected.

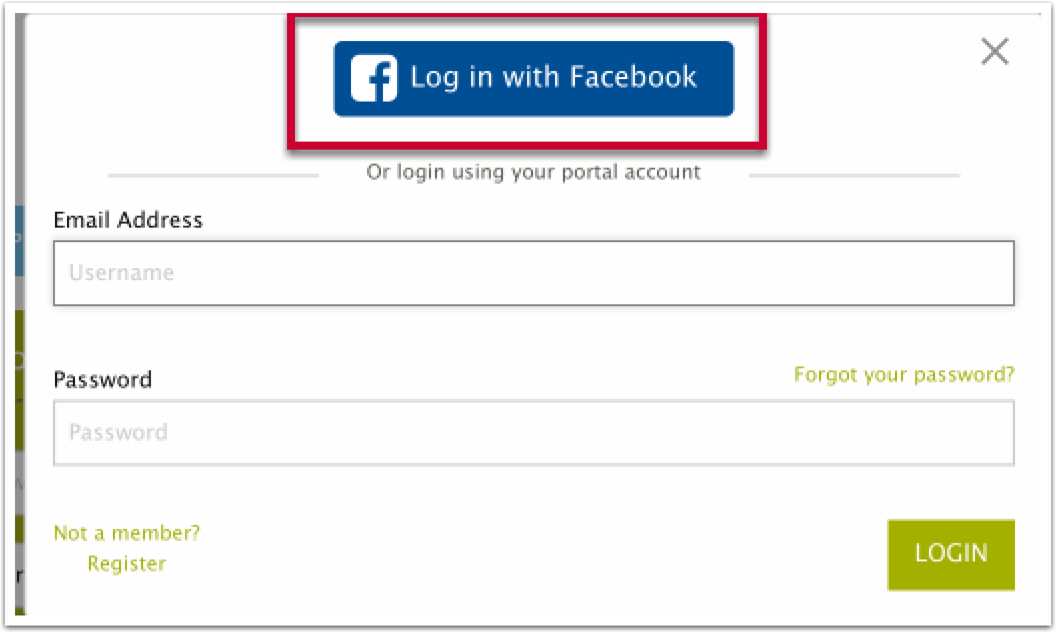
User interface improvements throughout sharing portal

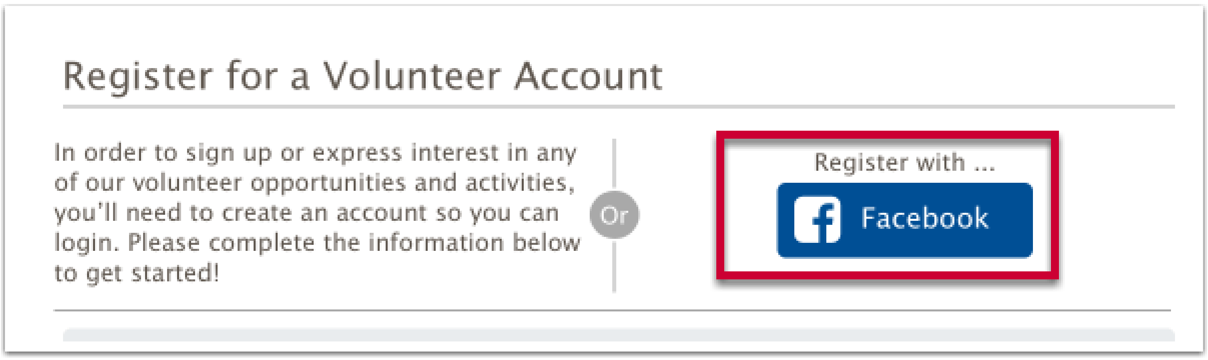
In addition to the major items above, this release includes a number of refinements and improvements to the user-interface in the sharing portal, improvements in layouts and list views, corrections to minor typos on pages, improvements in error messages (when they are displayed), and additional validation rules to prevent entering illegal values in fields.

Facebook Login and Registration (Pilot)

A pilot program has begun for the HOC 3.0 public site, which allows a user to associate their facebook account with their HOC user account, and log into the public site via facebook. Also, new users may register with Facebook - which will speed up their registration process by bringing over known information from their facebook account.

The pilot will be taking place during the next month, and this feature will be generally available to HOC 3.0 customers in January, 2017.





Nov 2016 Release Notes

The November Release includes a handful of bug fixes, and for HOC 3.0 customers the launch of the custom themes pilot and the advanced registration system pilot.

Fixed: Mobile pages not loading under IOS10 (HOC-738)

Changes introduced by Apple in IOS 10 (the latest release of the IOS for Iphones, Ipads, etc) were causing HandsOn Connect sites to not load properly. The code has been updated and HOC is once again mobile responsive and ready!

Fixed: Issues where occurrences were appearing on the wrong date or time (HOC-727)

Some HandsOn Connect clients were reporting issues where upcoming occurrences created through the recurrence object were appearing on the wrong days, and that some occurrences were off by an hour. This issue turns out to be related to the complexities around changes from daylight savings time to standard time (which will be occurring at 2 a.m. on Sunday, November 6. Don't ask us why - but this comes up every year around this time, particularly if you have projects that start at 12:00 a.m.

The appropriate updates to the code has been applied and users should no longer experience this problem in future.   But to be safe, please see the Administratove Advisory below:

Administrative Advisory: Check recently created recurrences

If you've created recurrences while daylight savings time was active, that extended beyond the date that daylight savings change ends -- we advise you to take a look at the occurrences created by recurrences. You may find that the occurrences created by that recurrence that take place AFTER November 6 are off their correct time by one hour.

We advise you to double check, and make sure your occurrences are populated with the correct time and edit as necessary.

Fixed: URLs with parameters fail in Organization Registration (HOC-633)

Some partner organizations have experienced problems registrering via the organization registration page if the URL for their website was nontypical and had paths that included elements like /index.php?p-cspc

The code has been updated to be more forgiving of URLs of this sort, and organizations can now list their website URLs even with this sort of URL path.

Verified Volunteers: Ability for administrators to create connections for unverified volunteers (HOC-700)

The verified volunteer functionality ensures that a volunteer cannot sign up for an opportunity requiring a background check if their contact record doesn't indicate they have the appropriate clearance from verified volunteers. This validation also prevented administrators from administratively creating a connection for a contact without the appropriate clearance.

In order to make it possible to create exceptions if desired - we've added the ability for a system administrator to administratively create a connection, even if the contact does not meet the required background check levels.

We caution administrators to always consider whether or not they wish to connect an unverified volunteer to an opportunity - but now it will be possible for them to do so if desired.

Fixed: Error Messages that appear when editing start date or end date of a connection (HOC-717)

When editing a connection's start date and time or end date and time (as you might choose to do in either a connection, or during one-step attendance reporting), an error message is generated if you try to make the start date and time earlier than the occurrence's start date and time, or changing the end date and time of a connection later than the end date and time of the connection.

The error message that was appearing was not the correct one however. If you tried to change the date/time to an invalid value the error message wrongly said "Difference between start date and end date must be less than 24 hours" which was confusing and misleading.

The error message now will explain the issue more clearly:

For invalid changes to start date and time: "The connection start date and time cannot be later than the occurrence end date and time"

For invalid changes to end date and time: "The connection end date and time cannot be later than the occurrence end date and time"

HOC 2.x to 3.0 migration pilot begins this month

HOC 3.0 is improving every week. While it still does not support all the functionality of HOC 2.x, it contains many improvements and advancements and this month the first 'pilot' customers using HOC 2.x will be migrated to the 3.x platform.

HOC 3.0 recent additions

New features, functionality and fixes to HOC 3.0 are released at least every two weeks and not part of the monthly release cycle. Nonetheless, its worth noting here some of the recent improvements and changes to HOC 3.0

- Improved team functionality on public sites
- Fixes to Individually Scheduled Opportunity Signup
- Volunteer Events now part of 3.0 public sites
- Custom theme pilot launches later this month with new site for Chicago Cares
- Ability to remove volunteer / partner / volunteer leader profile/license from contact
- Ability to create Individually Scheduled Opportunities in Partner Portal
- Ability to approve pending connections in Partner Portal
- Home Page for Partner Portal
- Pilot of Volunteer Leader Portal

Many bug fixes and improvements in usability and performance.

More details on migrating to HandsOn Connect 3.0 will be coming soon!

Sept 2016 Release Notes

The September Release has a number of bug fixes and brings added flexibility to all HandsOn Connect users. Additionally, a significant number of features and improvements (not listed here) have been brought to pilot users of HandsOn Connect 3.0 including the first round of improvements to team functionality, improvements to the CMS, and the first release of the new 3.0 partner portal.

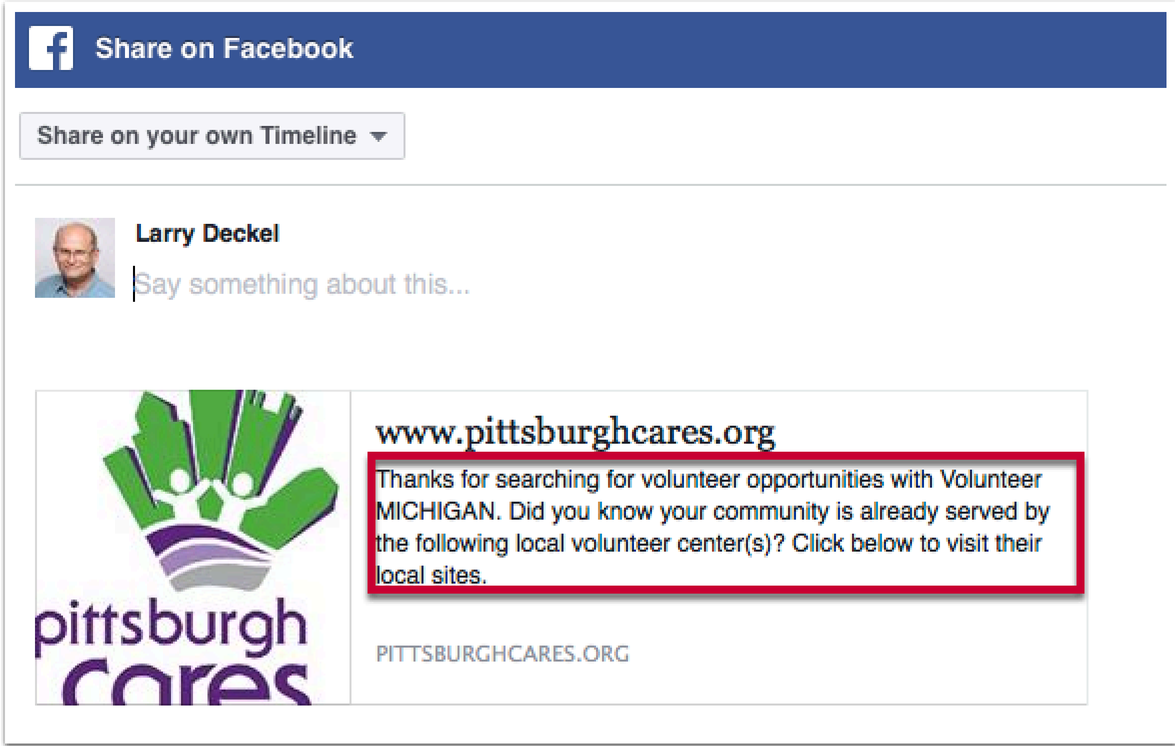
Be sure to join us for the roadmap previews in September to find out more about HOC 3.0

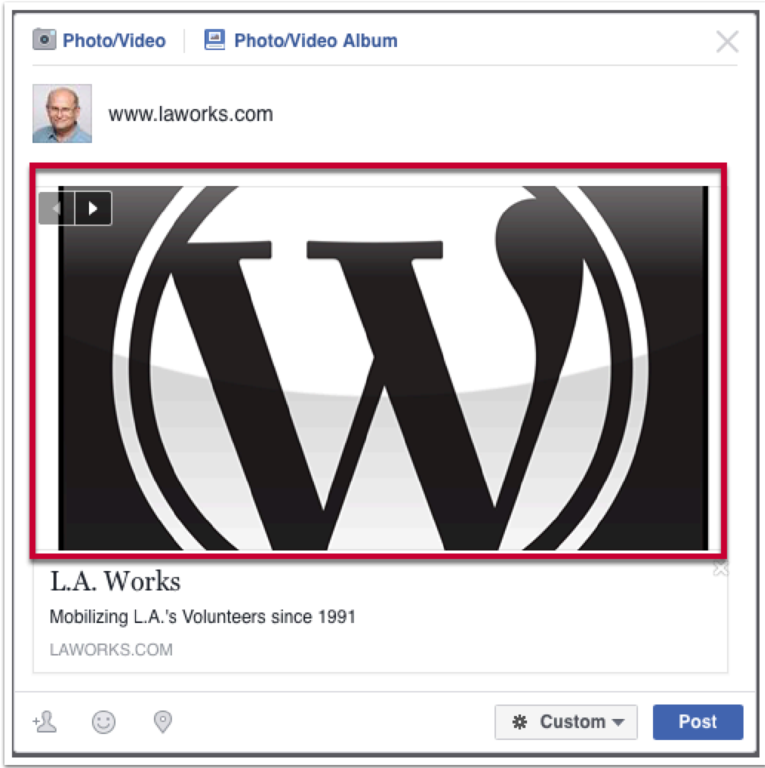
Administrative Action Recommended: Improved Facebook Integration - HOC663, HOC673,

A number of issues have been reported regarding the way Facebook publishes information about your organization and what happens when volunteer opportunities are shared from your site via the Share button on the opportunity detail page. These range from random images being published on facebook, to random information referencing Volunteer Michigan showing up from opportunities shared from your site.

These issues have been fixed, but require administrative action on your part if you want to control the image appearing on Facebook when someone types your URL into a facebook post.

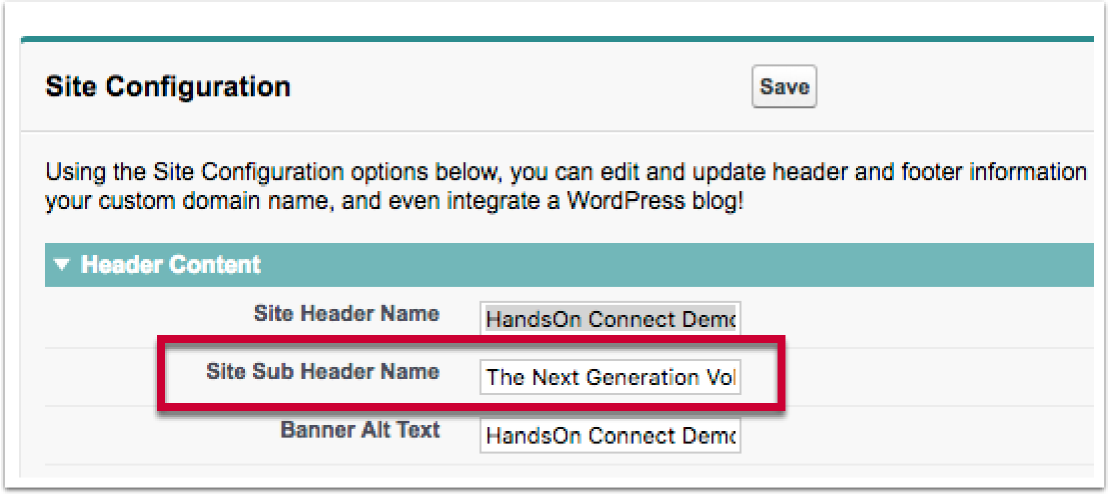
(NOTE: These instructions only apply to HOC 2.0 users).   See below for HOC 3.0 instructions:





1) Do not leave "Site sub Header Name" blank in the control panel

Go to Control Panel / Site Configuration and make sure that the field "Site Sub Header Name" has text in it. This is the text that appears when someone types your URL into facebook. Do not leave it blank. (Keep in mind this text also appears on your home page as your site sub header (unless you are using the banner logo).

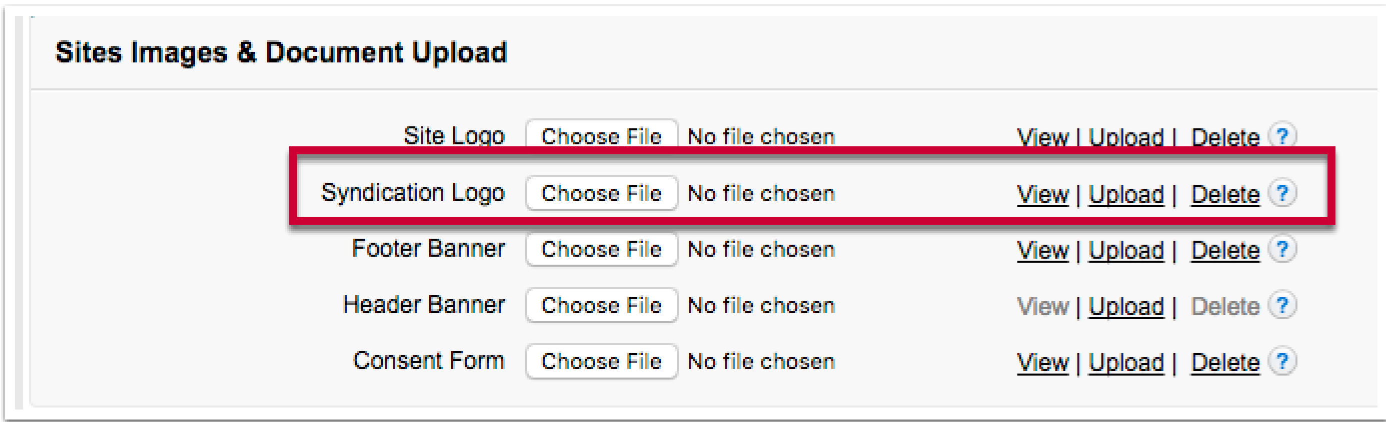


2) Populate the Syndication Logo in control panel with the image you wish to have appear on Facebook.

On this same page, scroll down to "Site Images & Document Upload" and upload the image you wish to have appear on facebook to the file "Syndication Logo"

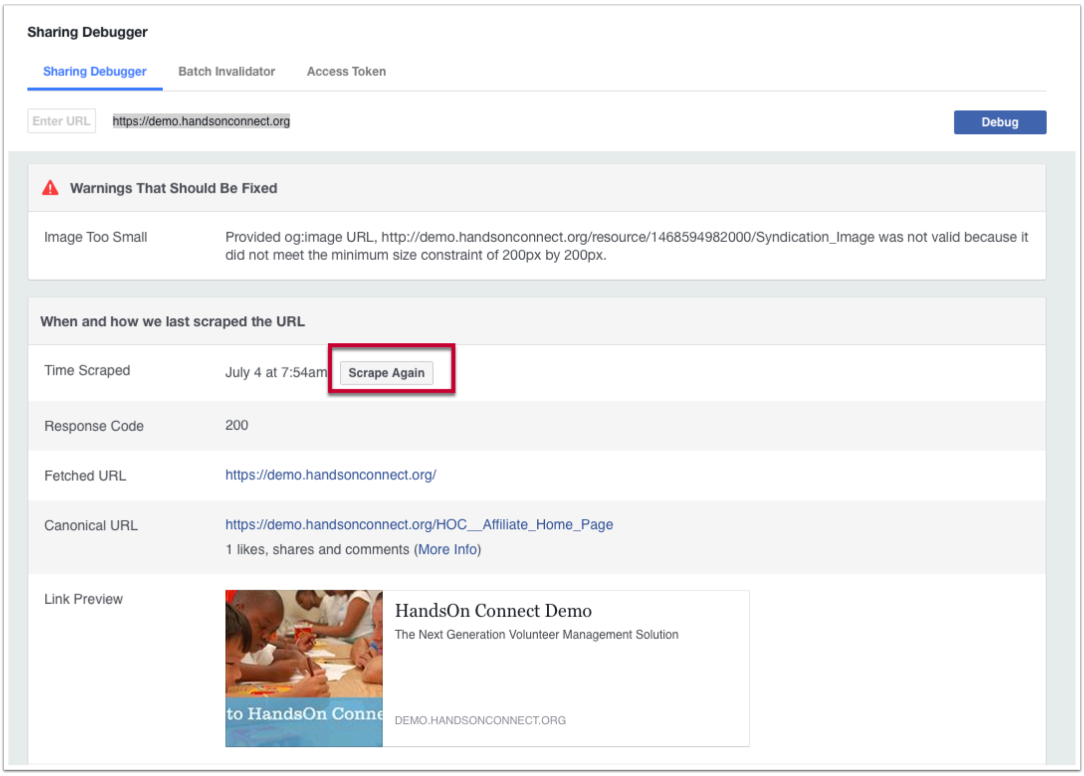
For Facebook compatibility, that image must be at least 200 x 200. Use images that are at least 1200 x 630 pixels for the best display on high resolution devices. At the minimum, you should use images that are 600 x 315 pixels to display link page posts with larger images. Images can be up to 8MB in size. Try to keep your images as close to 1.91:1 aspect ratio as possible to display the full image in News Feed without any cropping. If your image is smaller than 600 x 315 px, it will still display in the link page post, but the size will be much smaller.

(Note: You can safely replace the syndication logo that was originally in place here. It was 100 x 100 and too small for Facebook to pick up and use.)



3) Have Facebook 'scrape' your site again to pick up these changes:

Once you've uploaded the new logo into HOC, Go to: https://developers.facebook.com/tools/debug/ Enter your site URL, and click on ‘Debug” . Then click on “Scrape Again” to get Facebook to start using the new logo.



HOC 3.0 instructions for Facebook Intergration

In HOC 3.0 - your sites 'syndication logo" and 'syndication name' are handled differently than in 2.0.

To Update your site name and site image for syndication for 3.0 do the following:

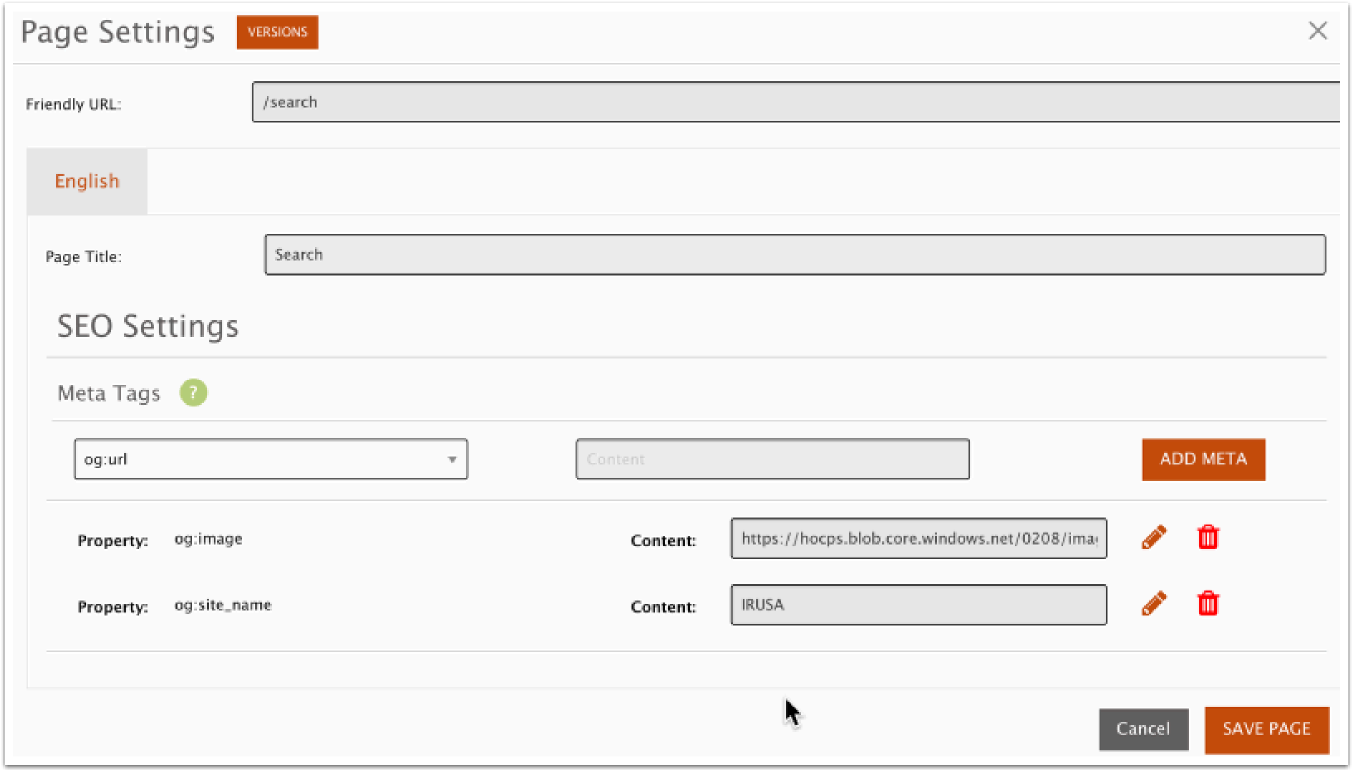
1) Go into your CMS and get the URL for your site image. OR, add an image to the CMS with your logo at size 300 x 300 and get the URL for the Image. The URL will look something like this: https://hocps.blob.core.windows.net/0208/images/0834d8b3-d0c2-4f61-ac2a-488c463189a1.png

2) Go into Pages and search for the page called /search . This is a special page that just has the search engine optimization features. It does not have any content:

3) choose the meta-tag og:Image and enter the URL of the image. Click on "Add Meta"

4) choose the meta-tag og:site and put in the name of your site.

5) Click Save.



Then go to your Facebook account and have facebook scrape your site again as shown in step 3 above.

Guest Volunteer Hours and Total Hours Fields in Occurrence Record now returns correct hours! (HOC-216)

It's been one of the most elusive bugs in the system, but our developers have finally sent this bug packing! For reasons that have long eluded us, the summary field "Guest Hours Served" in the occurrence record sometimes showed double the correct hours for guest volunteers. As a result, the "Total Hours Served" field was also incorrect, as it added the Volunteer Hours Served and the Guest Hours Served to produce its total. This seemed to occur when editing connections directly, but not via the connections grid in the occurrence record. But this resulted in a number that was a combination of doubled hours and undoubled hours. Ugh!

Well, those days are over, and now these fields will show correct results for all managed connections. In addition to identifying and correcting the bugs that were causing the doubling, we'll also be going into your instance of HandsOn Connect and rerunning all the calculations, thereby cleaning up the data to update these fields to their proper values. There's no action you need to take, though for those of you who had, at our suggestion, removed these funky fields from your occurrence page layout, you can now put them back in if you like.

We still recommend, as we have in the past, that you calculate hours by using the hour fields in the individual connection records -- but if you have a need to, you'll now once again be able to use these summary fields for reports on hours related to occurrences and rely on their values in the occurrence record

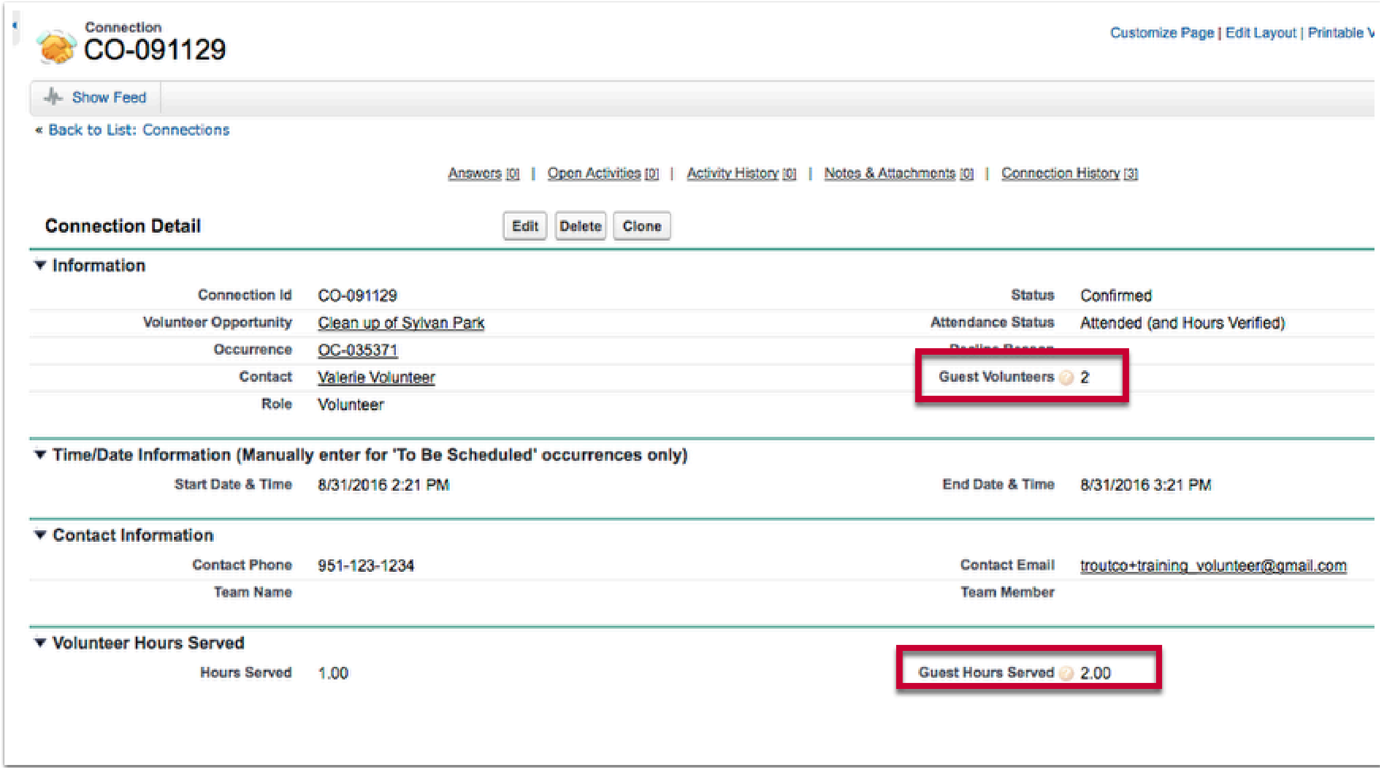
Note: The update to guest hours only affects managed connections. Occurrences related to self-reported connections will not be updated (though since volunteers cannot report guests on their self-reported connections), this should be moot.

Occurrence Summary Stats

Total Connections	2	Volunteers Attended	1
Total Pending	0	Guest Volunteers Attended	7
Total Confirmed	8	Total Attended	8
Total Declined	0	Total Not Attended	0
Volunteers Still Needed	0	Total Unreported	0
		Volunteer Hours Served	1.50
		Guest Volunteer Hours Served	10.50
		Total Hours Served	12.00

Fixed: Guest Volunteer Hours not calculating for Date and Time Specific Opportunities when administratively creating connections for past dates(HOC-660)

It was reported that when administratively creating connections, for dates in the past, and marking the attendance as Attended (and Hours verified), that guest hours served wasn't being properly calculated.   (It worked when you reported attendance on an existing connection, but not when creating a new connection in the past with Attendance already verified. This has been fixed, and now administratively created connections will properly populate both hours served and guest hours served for these connections).



More intelligent creation of Self-Reported Volunteer Opportunities and Occurrences (HOC-538)

As you already know, the tracking of self-reported volunteer hours is done in a special volunteer opportunity called "Self-Reported Volunteer Hours" that is created for each organization when new organizations are added to your data. The triggers that automatically create these opportunities have been significantly improved in two ways:

1) The trigger now only creates self-reported volunteer opportunities for accounts of record type 'nonprofit'.   Previously, all organizations were having self-reported opportunities associated with them (corporations for example), which was a wasteful use of data space (since you can only self-report service for active nonprofit partners).

2) The self-reported volunteer opportunities are now not created until you change the status of a nonprofit organization from pending to 'active partner'.   This makes it easier to merge organizations if duplicate organization records are created. It also means you don't have extra self-reported opportunities for nonprofit organizations that you aren't partnering with and for whom volunteers can't self-report anyway :-)

This change prepares the way for the following new feature:

HandsOn Connect 3.0 can run on the Household Account model instead of the Bucket Account Model

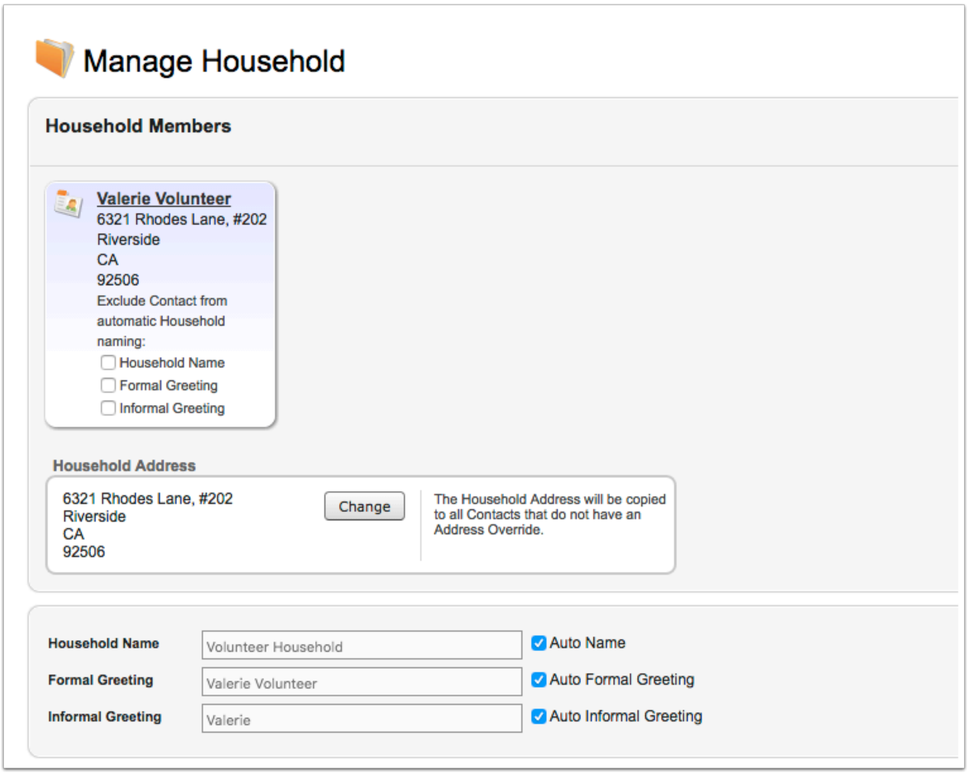
For the last 6 years, HandsOn Connect has run on what's called the 'bucket account' model. Each new volunteer is assigned to the bucket organization we call "Individual". This has been standard practice for nonprofits for many years.

For those of you wishing to add the NonProfit Starter Pack version 3to Salesforce, so that you can manage donations and other financial transactions - we have detailed instructions on installing the NPSP for the bucket model and configuring it to work smoothly with HandsOn Connect. We also offer a paid option via the HandsOn Connect AddOn Store for us to do the installation and configuration for you, as well as train you on the NPSP.

With the release of NPSP 3 - the Salesforce Foundation has stated a preference for nonprofit organizations to use the new "Household Account Model." In this model, a 'household account' is created for each contact, instead of using a separate household object (as they did in the past under the bucket model).

To pave the way for the future, HandsOn Connect has been made compatible with the Household Account Model, and under HOC 3.0 new HOC clients will automatically be configured to use the Household Account model.

It is not recommended or necessary for those of you already on the bucket mode to switch account models. An account model is usually set at the time an organization first starts using Salesforce and changing from one account model to another is a complex and time consuming process. However, after migrating to HOC 3.0 in the future, if you also wish to have your data updated and make the switch from bucket model to household account model, we will offer this as a paid data migration option.



Greater Local Customization of HOC now possible. Many previously restricted picklist values can now be edited to meet local business needs

We get many requests from HandsOn Network affiliate asking if they can make changes to picklist values such as "Impact Area" "Gender" "Interests" in their HandsOn Connect instance. Many picklists have been marked as "DO NOT EDIT" on the HandsOn Connect Complete Field List.   Some are marked do not edit, because the values are tied to coded system functionality, however many others have been marked 'DO NOT EDIT" due to the original data requirements for annual affiliate reporting to the HandsOn Network.

Many of the items originally required by the HandsOn Network are no longer part of annual affiliate reporting, and after discussion with Points of Light we've gotten permission to allow changes to be made to many more picklists so that HandsOn Connect can better reflect your local needs.

The following picklists (formerly restricted) are now allowed to be edited to meet your local business practices:

Contact Fields:

- Volunteer Type (however must keep "Volunteer" as one of the values
- Education Level
- Ethnicity/Race
- Gender
- Interests

- Marital Status
- Target Population
- Volunteer Activity Type

Connection Fields:

- Decline Reason

Volunteer Opportunity Fields

- Age Groups Served
- Genders Served
- Populations Servevd
- Primary Impact Area
- Secondary Impact Area
- Activity Type
- Training Type
- Volunteer Activity Type

Organization Fields:

- Age Groups Served
- Genders Served
- Impact Area
- Populations Served

Notes about changing picklist values:

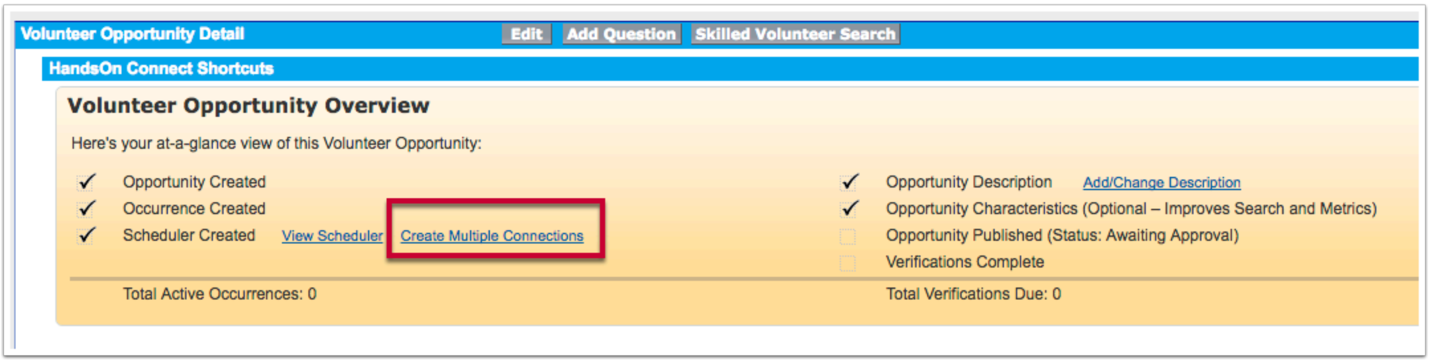
- Details on how to edit picklist values can be found in this article.
- For objects with multiple record types - you'll also have to edit the picklists for each record type as explained in the article linked above.
- If you delete existing picklist values, be sure to define a replacement value to avoid corrupting existing records that are using the value you're about to delete.
- Editing picklist values will NOT automatically update the volunteer opportunity wizard to reflect those changed values. The volunteer opportunity wizard would have to be customized to use your new value list. This requires working knowledge of editing flows, and your changes will be lost and need to be redone when future updates to the volunteer opportunity wizard are released. Premium support is available to update your volunteer opportunity wizard to reflect the changes you wish to make to opportunity / occurrence related picklist values. Premium support is also available to modify the object-based picklist values for you if you're not comfortable making these changes on your own.
- Changing the default values of Impact Area for Volunteer Opportunities may reduce effectiveness of search on All For Good and other external websites that won't have your custom impact areas / interests mapped in their search engines.

Fixed: Premium Partner Portal: Problems looking up contacts when administratively creating multiple ISO

connections (HOC-569)

The ability to "create multiple connections" for Individual Scheduled Opportunities has worked fine for internal users, but due to sharing issues with contacts in the 2.0 premium partner portal, Partner Organizations couldn't always administratively schedule the volunteers for ISOs.

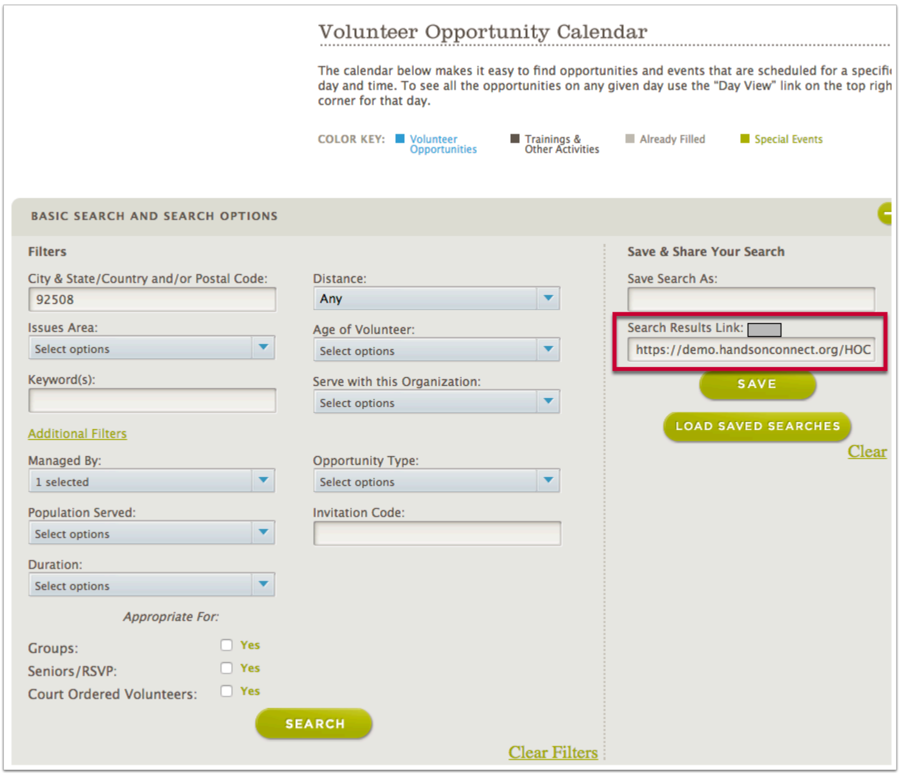
This has been corrected, and now partners can look up any of their contacts and administratively schedule them for multiple connections for their ISO opportunities. Individually Scheduled Opportunities continue to improve for partners. Be sure to encourage your partner organizations to start using ISOs instead of TBS opportunities for their opportunities that are not date and time specific!



Fixed: Saved search URLs for calendars not persistent (HOC-632)

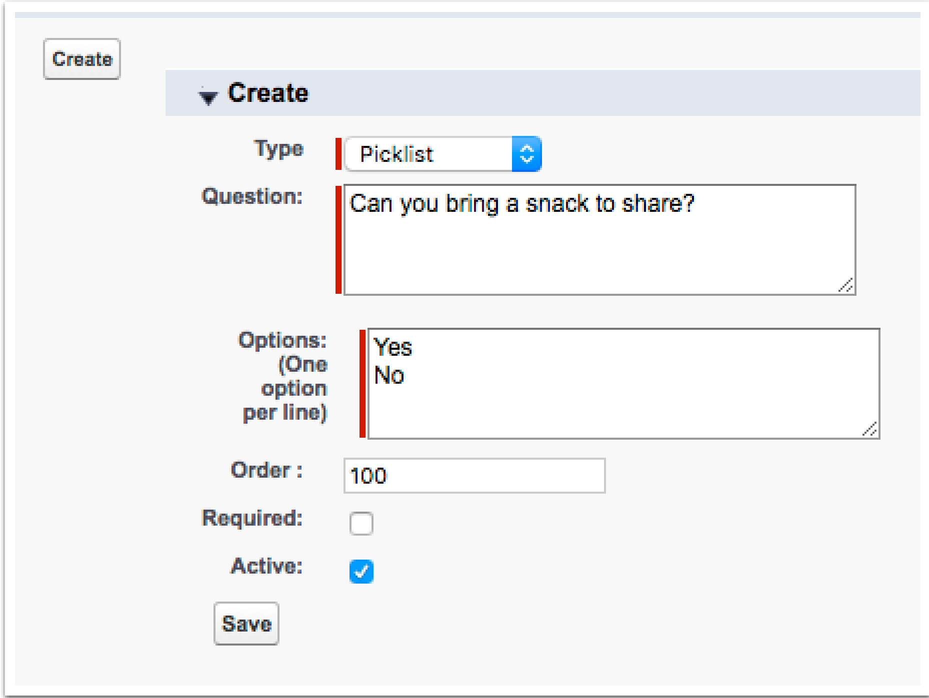
It was reported that the 'saved search' functionality that theoretically made it possible to have multiple 'saved' views of your opportunity calendar, did not work once you moved the calendar forward by one or more months. At that point, the filters were being lost and the unfiltered calendar returned for subsequent months.

This has been corrected - and saved search filters for calendars will be maintained as you move from month to month.



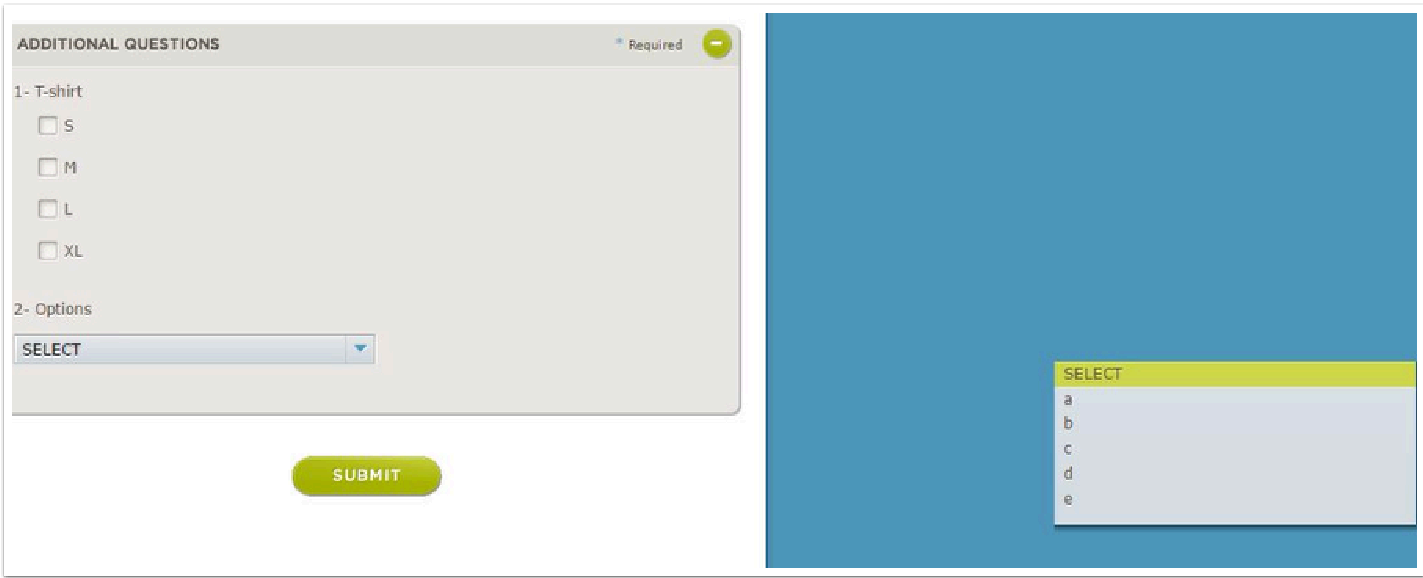
Fixed: Some Volunteer Opportunity Custom Questions not appearing on public website (HOC-677)

Some change in the Salesforce Spring '16 release caused a problem with creating Volunteer Opportunity custom questions of type = picklist. These questions were not appearing on the public site due to a missing bit of punctuation that this VisualForce page normally automates. This issue has been corrected.



Fixed: Display problems of picklist registration questions (HOC-685)

An additional item related to registration questions of type picklist -- they were appearing on the public site with the picklist values displaying over on the right edge of the page. This too has been fixed!



Oct 2016 Release Notes

The October Release is focused on launching the pilots of a number of HandsOn Connect add-ons and significant growth in HandsOn Connect 3.0. This month will mark the first one where selected 2.0 customers will begin their migration to HOC 3.0

New add-on features for HandsOn Connect, now in pilot include:

- New improved Check-In Kiosk (which includes configurations for team check-in, guest check-in, walk-in check-in, and check-in/check-out functionality.)
- Custom Theme Pilots (for 2.x customers migrating to version 3.0 this month)
- Verified Volunteers

HandsOn Connect 3.0 features coming out as part of the October release include:

- Team Functionality for HOC 3.0 customers (a cleaner, less confusing implementation of teams, with improved managing of restrictions during team signups)
- Additional functionality in Partner Portal 3.0 (editing of connections, improvements to lists, check-in sheets for occurrences, ability to email volunteers)
- Volunteer Leader beta (later this month)

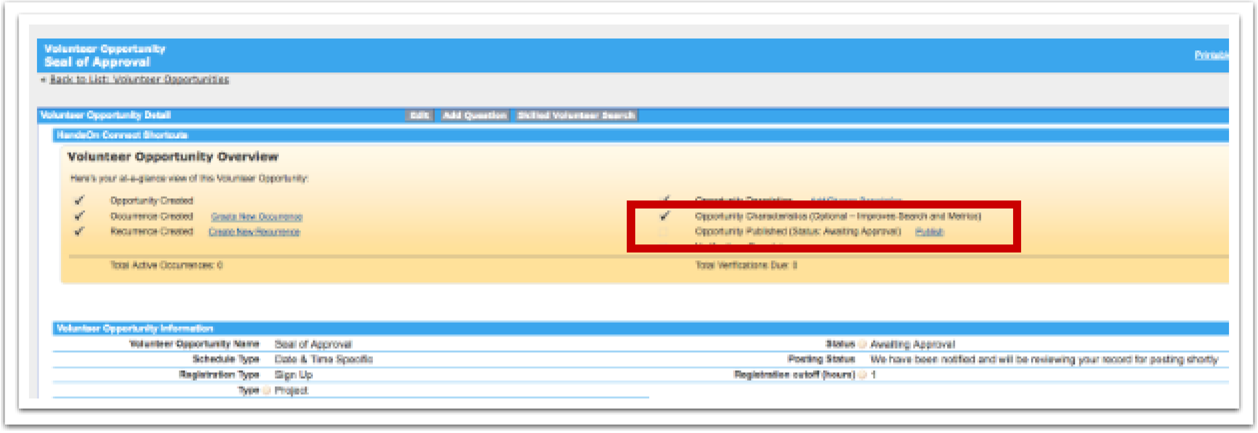
Here's a few notable bug fixes and improvements that all HOC customers will experience with this month's release:

Fixed: Auto-Approval of Opportunities for Partner Organizations (HOC-199)

We've had reports that the "auto-approve' option for Partners was no longer working. While most organizations always review and approve volunteer opportunities and occurrences before publishing them for their partners, some organizations allow trusted partners to publish volunteer opportunities directly when creating them in the partner portal. The auto-approval setting in the organization record was not functioning as expected - but has now been fixed. If you check the 'auto-approve' box in the organization record - partners will be able to publish their own opportunities without any review or approval from the opportunity approval manager. This fix applies to both HOC 2.x and 3.0 instances.

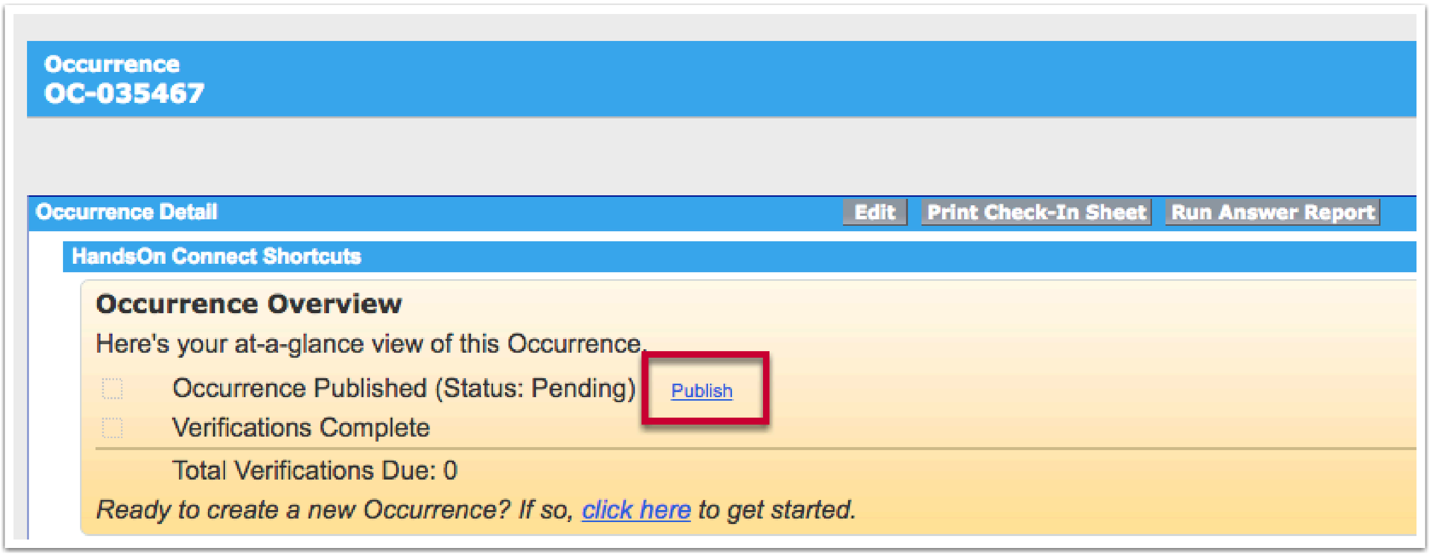
When auto-approve is active for a partner organization - the "publish" option is visible to them

When the opportunity is created, it is initially in awaiting approval status - however the partner has access to the "publish" link in the Volunteer Opportunity Overview and can self-publish the opportunity without waiting for the opportunity approval manager to approve it.



The same is true when a partner adds occurrences

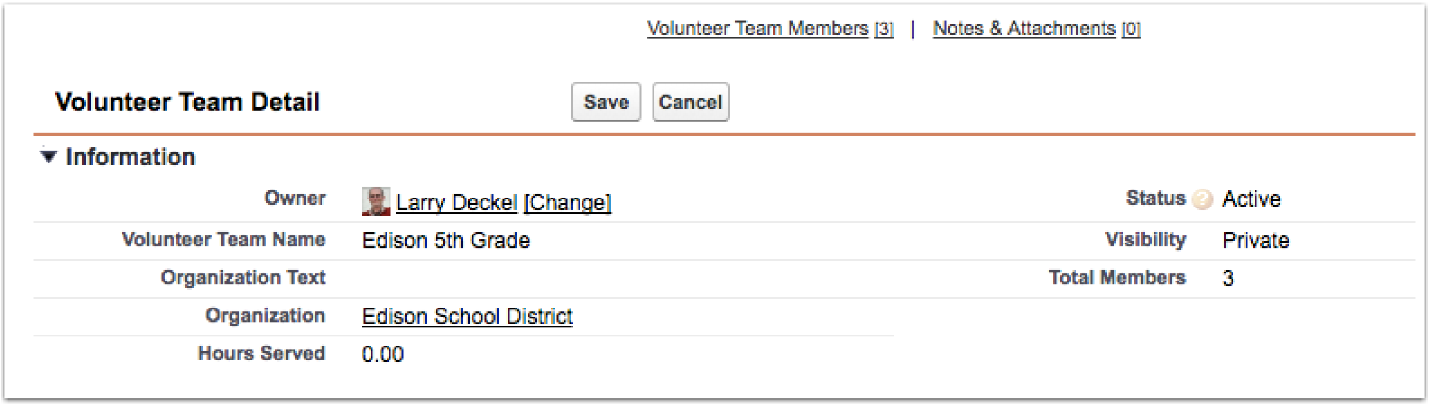
Once again, the 'publish' option is available to 'auto-approve' partners when they create new occurrences.



Teams: The field "Team Duration" has been deprecated from the system (HOC-681)

A pesky, required field on the Volunteer Team object has been removed from the system. There was a field called "Duration" that was required but not used by the system. (The picklist values were "Persistent" and "One-Time". Since all teams in HOC are Persistent - we've removed the field from page layouts to make it faster to administratively create or import a team into the system

This is a small part of the overall streamlining of teams for HOC 3.0 users. (Note: 3.0 customers do not need the field "Visibility", as in HOC 3.0 there are no public teams - so all teams that are created have a visibility of "Private". The field has been left visible since 2.0 customers may have one or more public teams in their data.



Improvements to auto-calculation of hours served for connections (HOC-715)

Over the last few months we've been improving the auto-calculation of hours for connections when connection records are administratively edited. This latest tweak improves the performance of auto-calculation for self-reported connections.

Architectural Improvements to Search (HOC-637)

Search 3.0 is being constantly improved resulting in faster, more accurate search results! Changes to search made each month are laying the groundwork for the recommendations engine and other new search functions that will be deployed in subsequent releases.

Improvements to Verified Volunteers add-on (HOC-647, HOC-681, HOC-707, HOC-714)

- Verified Volunteer tracking has been improved to manage the expiration of verifications. Email alerts have been added giving volunteers 30-day and 7-day notifications that their verifications are about to expire and encouraging them to update their verifications.
- Clearing messaging when a volunteer tries to sign up for an opportunity that requires a background check of a certain level:
- Corrected errors where Verified Volunteer pages and fields did not appear as expected on the public site).
- Improved integration with Verified Volunteer site to ensure verification results are fed back into HandOn Connect

Note: Verified Volunteers functionality is currently available for HOC 2.x customers. It is planned to be added to HOC 3.0 in the near future.

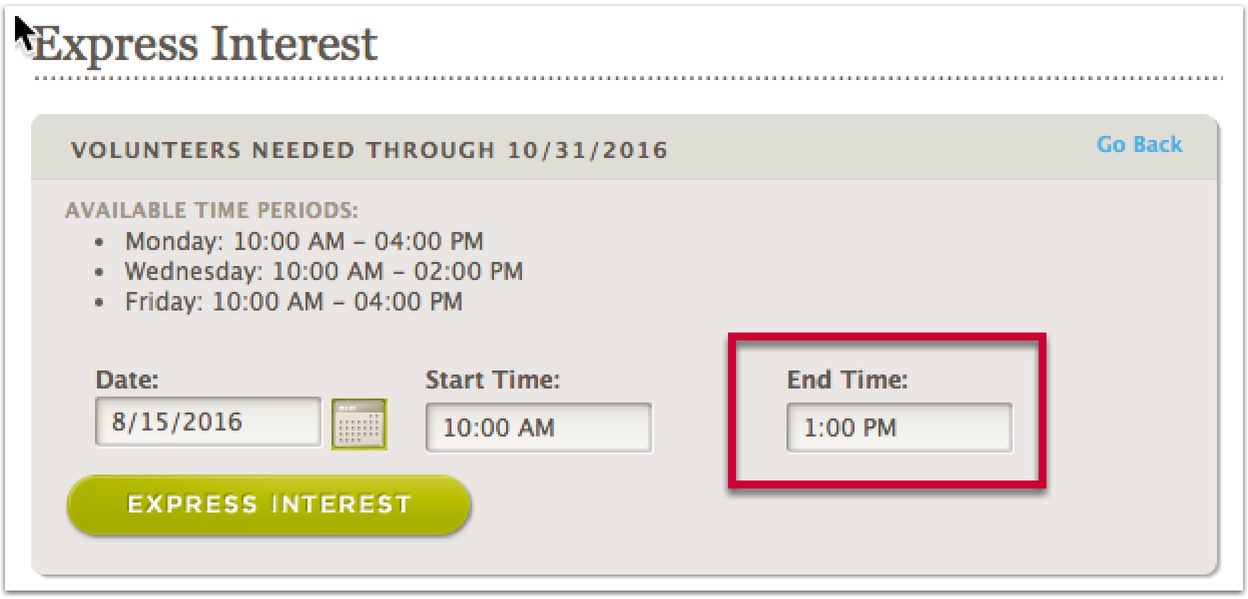
August 2016 Release Notes

This August our first international customer is piloting our new HOC 3.0 public site and volunteer portal and its multi-lingual capabilities. This paves the way for exciting new functionality that will be available to all customers in the coming months. Our August release also has a number of bug fixes and improvements.

The release will be deployed to all HOC clients between August 1 and August 5.

Improvement: Proposing a schedule for Individually Scheduled Opportunities no longer requires leading '0". (ISOs) - HOC573

On the public site, a volunteer Expressing interest in one or more connections for an ISO has to enter the start time and end time they'd like to volunteer. Previously, if you entered a time like 1:00 PM you would get a validation message saying that the time had to be in the format 01:00 PM (with a leading 0). This created a lot of unexpected, albeit minor, error messages for users requiring them to add the leading 0. The interface has been improved and streamlined and will now accept time entries like 1:00 PM or 9:00 AM and not ask for the leading 0. Thanks to Hostelling Int'l for suggesting this minor but welcome improvement.



Improvement: Behavior of Connections in Connection Grid and Attendance Due tab (HOC-595)

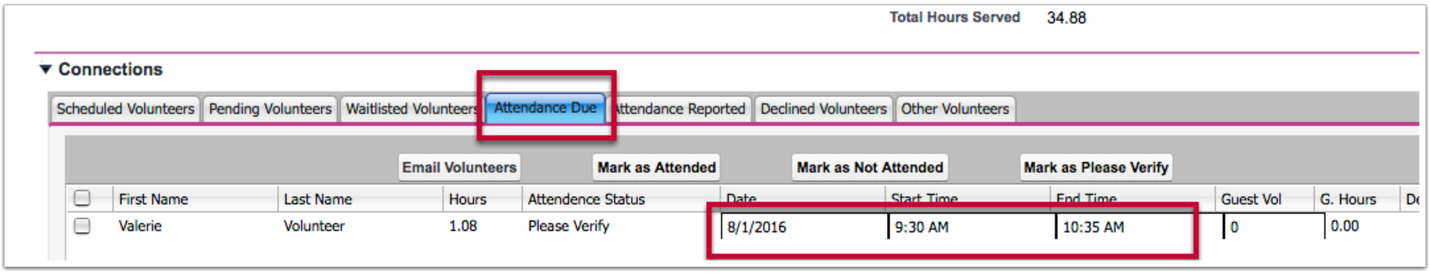
If a volunteer self-reported attendance, that took place on the same day they reported it, the connection was not showing up in the attendance grid.

Why was this happening? Because they didn't meet the criteria for 'scheduled volunteers" as the connection took place in the past (earlier that same day), and they didn't meet the criteria for "Attendance Due" - because the Attendance Due tab didn't show connections until the day after a connection took place.

Connections will now appear in the "Attendance Due" tab as soon as the Start Date and Time for the connection is in the past. So, for all connections, as soon as you are able to report attendance, the connection will be found in the Attendance Due" tab (including all self-reported connections, even if they are reported minutes after they took place that day!) (This will make it possible for partners to immediately verify attendance for volunteers who are using self-reporting as a way of 'checking out' as a volunteer).

(In the screenshot below - this self-reported connection was created on August 1 at 10:36 am and immediately shows up in the Attendance Due tab!

Thanks to Volunteer Center for Howard County for reporting this issue with freshly reported self-reported connections!

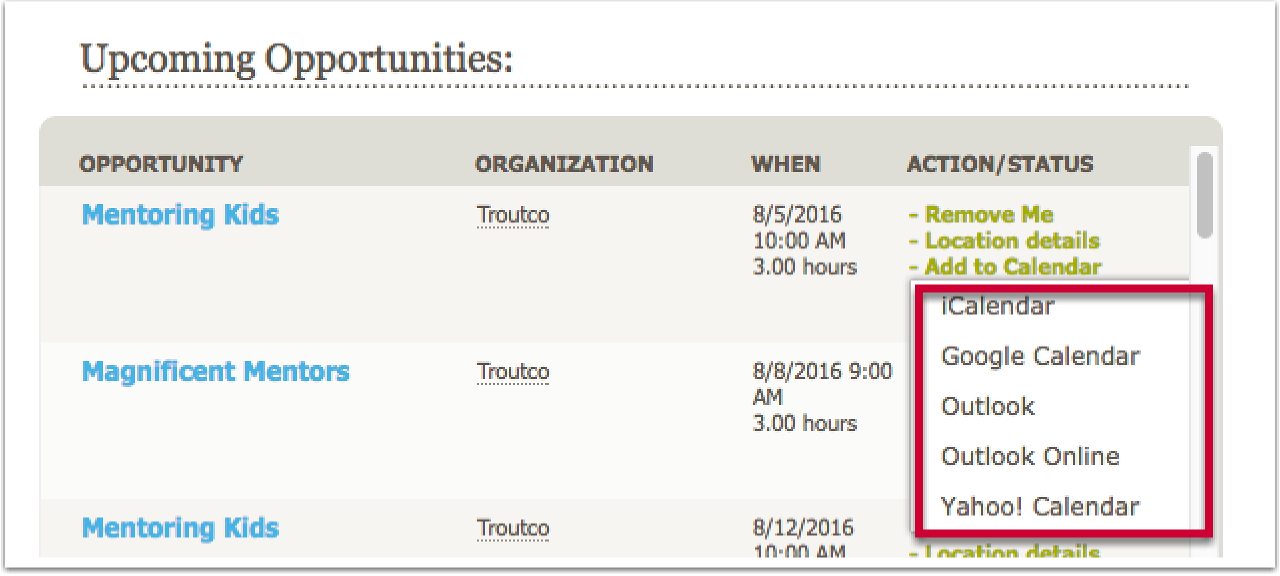


Improvements to Basic Portal sharing model (HOC-602)

There have been issues related to records not being shared appropriately for Volunteer Leaders using the Basic Portal. Improvements have been made to the sharing model to ensure sharing works more reliably and Volunteer Leaders are able to see the appropriate volunteer opportunities, occurrences and connections.

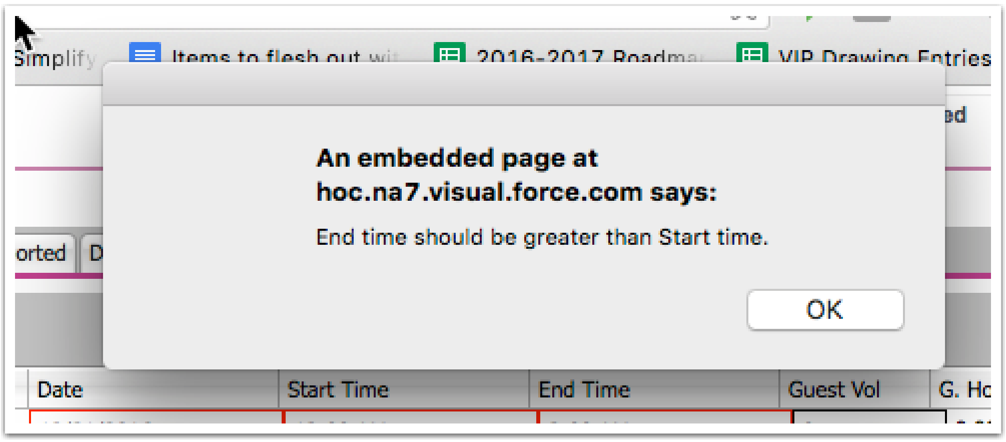
Fixed: Add to Calendar for ISO Connections (HOC-570)

The Add to Calendar functionality returned an error message when trying to add a confirmed connections of Individually Scheduled Opportunities (ISOs). The Add To Calendar functionality for ISOs has been cleaned up so once ISO connections are confirmed, a volunteer can add them to their personal calendar from the "My Upcoming Opportunities" section of their Account Overview.



Fixed: Inappropriate error message when editing start time and end time for TBS connections in connection grid (HOC-617).

Some users were experiencing error messages when editing the start time and/or end time of TBS connections in the connection grid. The following error message was presented, even when it wasn't appropriate. This turned out to be related to improper handling of connections with a start time between 12:00 am and 12:59 am (the default that is found in TBS connections until you actually properly confirm and schedule a TBS occurrence.) This issue turned out to be related to recent changes to make HOC support Internalization, and has been corrected. Users should no longer see this error message inappropriately when editing start time and end time for TBS connections.



Fixed: Registration Cutoff Defaults not populating from

Volunteer Opportunity to new Occurrences (HOC-577)

The default value for new volunteer opportunities for "Registration cutoff (hours)" is 1. This value can be edited at any time if you wish to cutoff signup earlier.   It was reported however that when creating new occurrences, all new occurrences were created with cutoff hours = 1 even if the value in the volunteer opportunity was something else. That made it necessary to edit this field for every new occurrence if you didn't want it to be a value of 1.   This issue has been fixed, and now, when creating new occurrences, the default value of registration cutoff from the volunteer opportunity, will be automatically populated when you save the newly created occurrence. (*Note: You can still override this value in the occurrence if you wish by placing any other value in that field).*

Fixed: Mobile Phone Validation Message (HOC-613)

As part of the upcoming AddOn Store option of adding text messaging (SMS) as a notification system for volunteers, we've added more robust phone number validation to the Registration form. Some users reported that this validation was creating occasional errors when entering mobile phone numbers on the volunteer registration form and/or personal information page. This issue has been fixed.

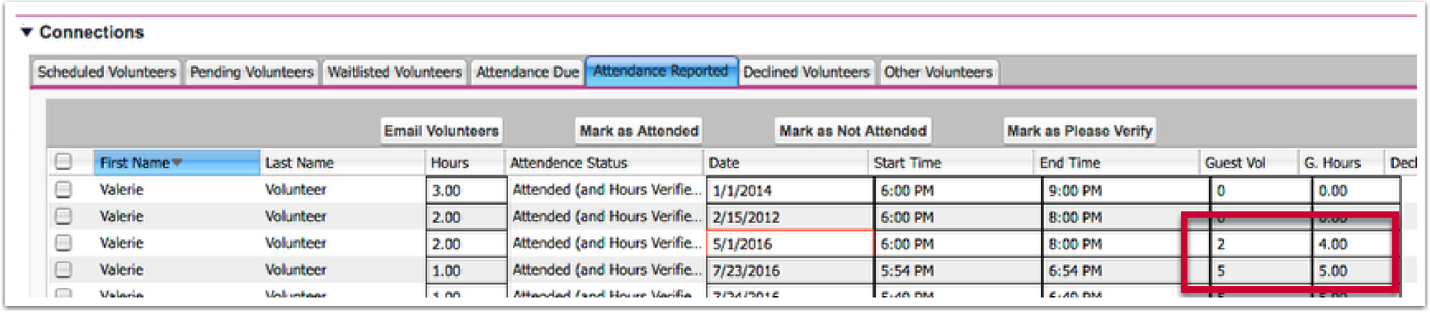
Fixed: Issue in Firefox where volunteers had difficulty signing up with a team (HOC-641)

Some Firefox users reported that drop down picklists did not function properly when signing up for a volunteer opportunity with a team. This has been fixed.

Fixed: Guest Volunteer Hours not calculating for TBS Opportunities when reporting attendance in connections grid

Some HOC users still making use of TBS opportunties have observed a recent regression in behavior when reporting attendance. If Guest Volunteers were added to a TBS connection and attendance was reported, the Guest Hours were not properly calculated. The guest hours remained 0.   This has been fixed and now guest hours will be properly updated.

Users aware of this have been manually updating the guest hours in the connection record itself, but this will no longer be necessary. The proper behavior in the connection grid has been restored.

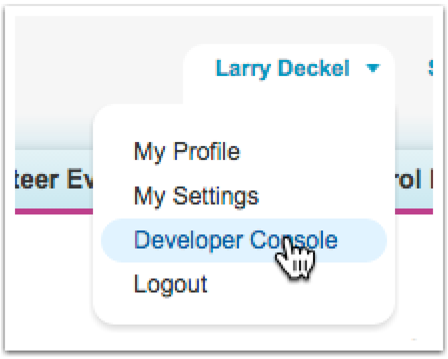


How to update previously incorrect data if you've experienced this problem:

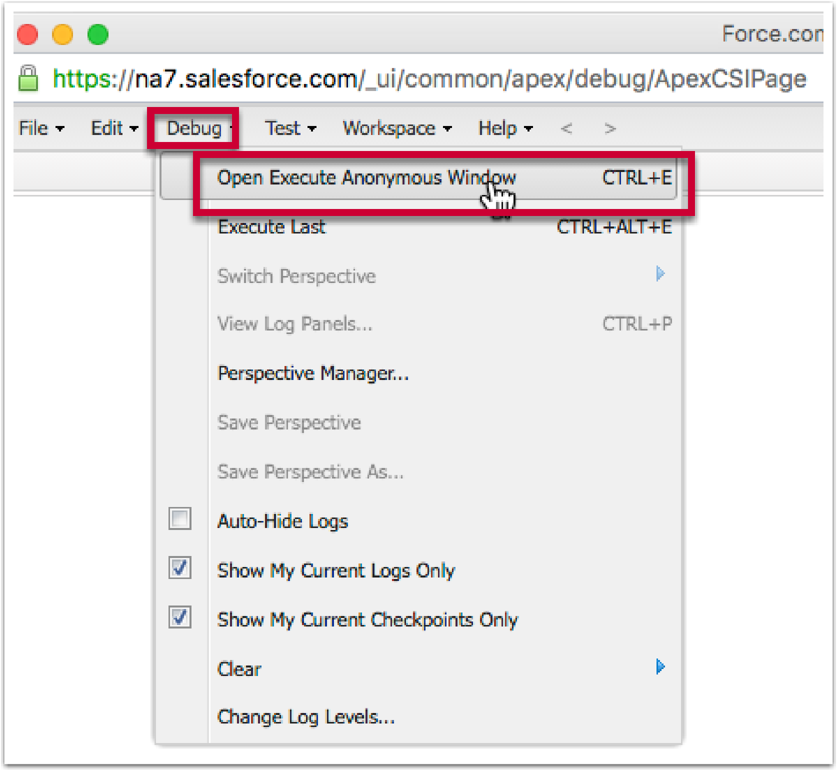
If you or your partners use TBS connections, add guest volunteers and report attendance, you may want to check to see if you have any connections where guest hours = 0 *(This should only have occurred in the last few months since this change in behavior started happening)*

To check if this is the case, create a view or report and look for any TBS connections where Guest Volunteer > 1, Attendance is Verified, and yet Guest Hours = 0.   If you have connections in this state, you can run a script that will update these connections. Here's how:

From the 'name' menu at the top of the page-- select Developer Console



In the popup window - click on Debug > Open Execute Anonymous Window



In the window that pops up "Enter Apex Code" paste the following code without changes, and click the execute button

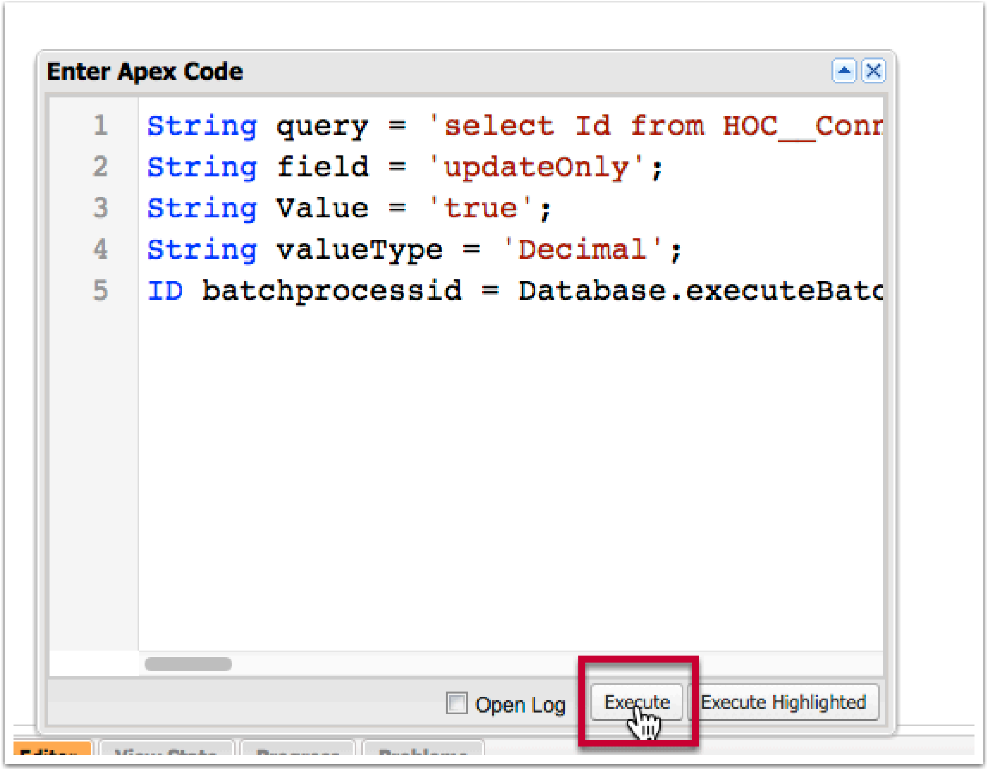
String query = 'select Id from HOC__Connection__c where HOC__Guest_Volunteers__c>0 AND (HOC__Status__c=\'Confirmed\' OR HOC__Status__c=\'Self-Reported\') AND HOC__Attendance_Status__c=\'Attended (and Hours Verified)\' AND (HOC__Number_Guest_Hours_Served__c=null OR HOC__Number_Guest_Hours_Served__c<=0)';

String field = 'updateOnly';

String Value = 'true';

String valueType = 'Decimal';

ID batchprocessid = Database.executeBatch(new HOC.cls_batchUpdateObject(query,field,value,valueType));



A request will be sent and any connections that have have attended connections, with guest hours = 0 will be updated to the correct values.

You'll only need to do this once to update past records. Going forward, guest hours will be properly updated!

Under the hood improvements: (HOC-582)

Improved code that was causing unexpected problems in the registration sign-up process when one or more email templates were unexpectedly missing from the system. (*Note: As always - we urge all system admins to avoid deleting anything in the system.Sometimes deleting something as seemingly inconsequential as an unused email template may cause conflicts* with the HOC code!) In any case -- the code has been updated so this particular missing email template won't cause problems should this happen in the future!

July 2016 Release Notes

The July release brings additional bug fixes and a new feature you'll see in your email later this month.   Behind the scenes, as announced and shared with those who attended the Points of Light Conference in Detroit, we have nearly finished the new public site and volunteer portal which will initially be made available to new customers and those who enrolled in the custom themes pilot.

The new public site and volunteer portal beta contains a new CMS system, supports multi-lingual content and internationalization, and higher levels of customization are possible. We'll be sharing more details in the near future on the new public site, including options and timelines for converting existing customers over to it.

Here's what's coming to existing customers this month as part of the July release:

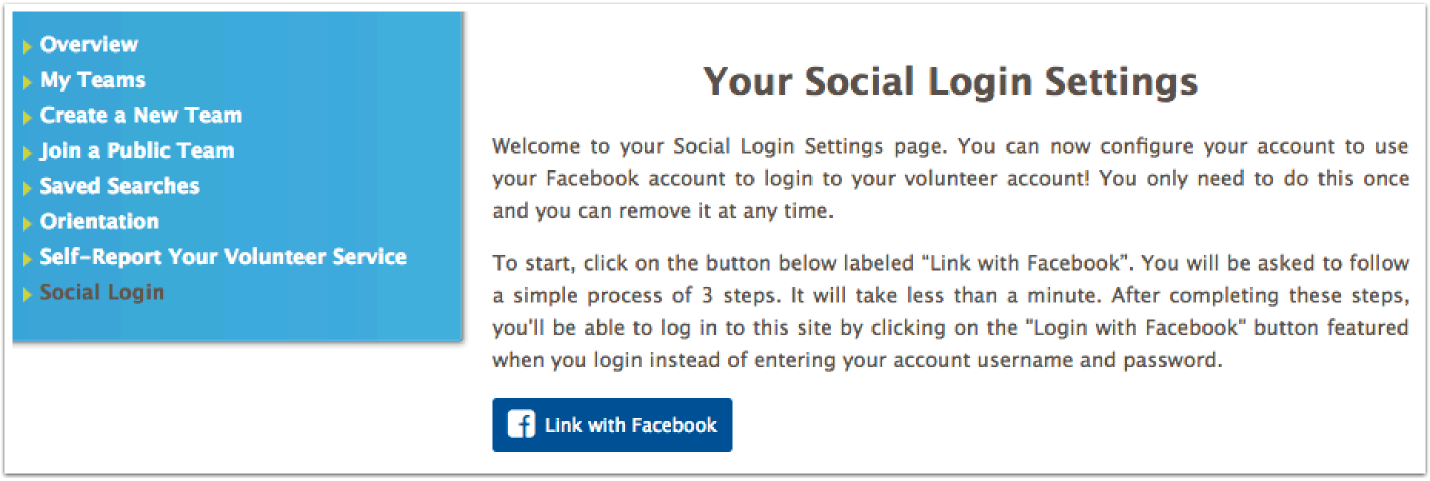
New Feature: Monthly Metrics Report via Email

Here's a surprise new feature rolling out later this month! We'll be starting monthly email delivery of a report of key metrics about your instance of HandsOn Connect. This will be sent to your organization's primary contact. Included in the report will be statistics giving valuable insight into what's been going on during the previous month. Among the data points that will be initially reported are:

- Number of active volunteers (This month vs last month)
- Number of active projects (This month vs last month)
- Number of searches, clicks and connections on your site (and % difference from previous month)
- Your five most active opportunities!
- Which day had the most connections last month.

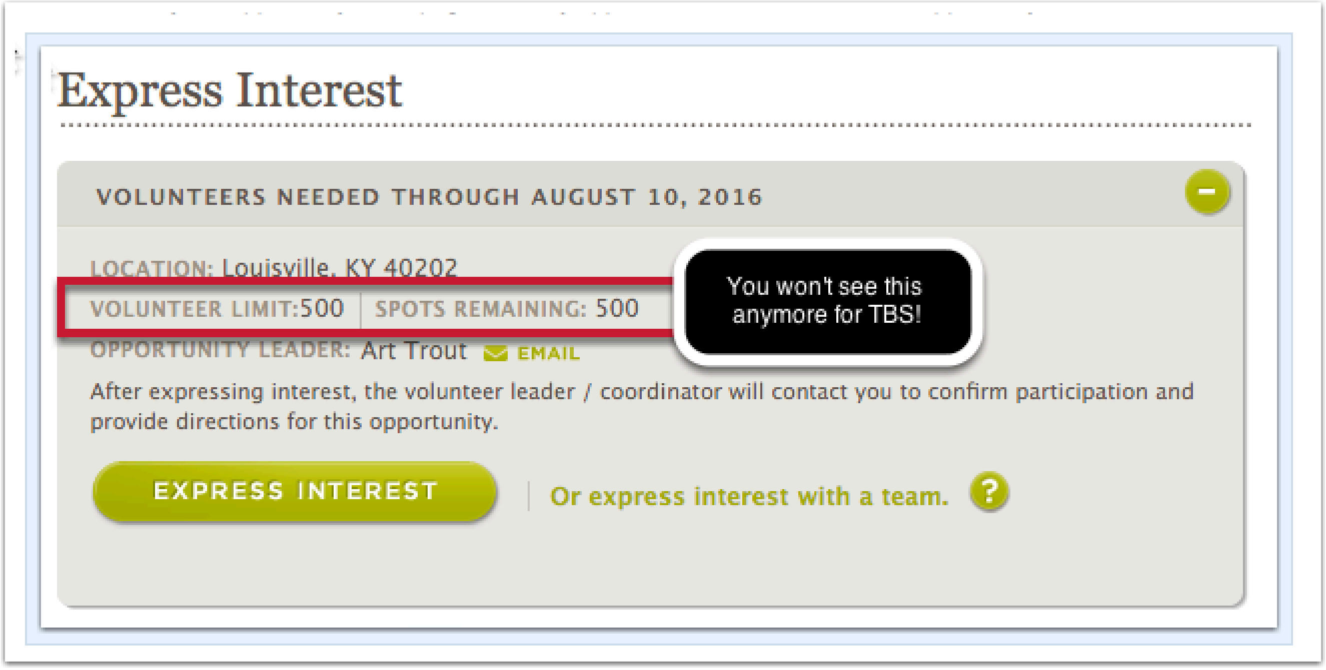
More stats will be coming as we continue to refine this tool. If there are additional stats you'd like to see each month, please let us know. Need custom metrics around your custom fields? Open a zendesk ticket and we'll discuss how we can help you gain deeper, customized analytics.

Update: Social Login is now out of Beta (HOCAVV-526)



The social login feature introduced in the Winter '2015 release has proved stable and reliable for those using it for simplified login via Facebook. As a result, we're removing the 'beta status' that was shown on the page "Social Login" (/HandsOn_Connect_SSO) where people associate their facebook account.

Page Enhancement: Opportunity Detail Page for TBS opportunities - volunteer limit and slots remaining removed (HOC-424)

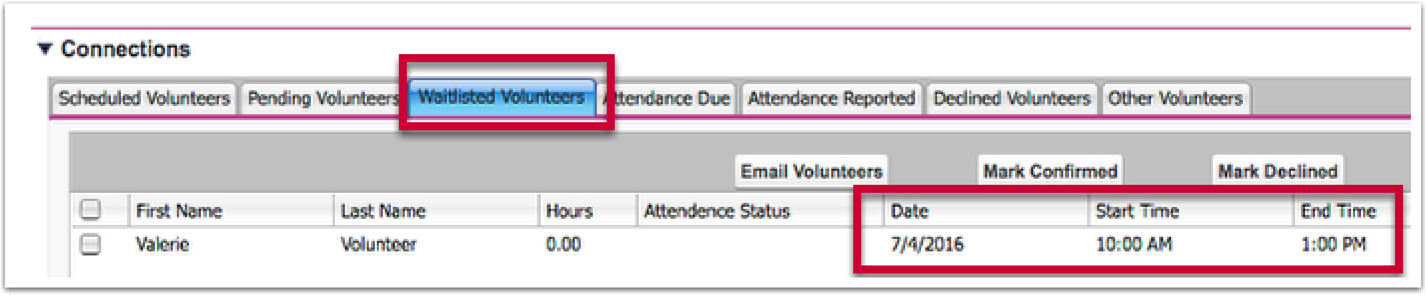


Customers have long-reported that the default value for To Be Expressed Interest opportunities, which is 500, makes no sense to display on the public site. (The limit is set so that a large number of connections can be associated with an express interest opportunity since its ongoing).

Effective with this release, the volunteer limit and spots remaining for TBS opportunities will no longer be displayed on the public site. (This is consistent with our not showing limits for Individually Scheduled Opportunities - our other type of 'ongoing' volunteer opportunity.

Volunteer Limit and Spots Remaining will be displayed only for Date and Time Specific Opportunities in which the maximum number of volunteers is relevant to each occurrence.

Bug Fix: Updating the date and time of Date and Time Specific Occurrences now updates waitlisted connections as well! (HOC-426)



In Spring '2016 we removed the need for the 'update all connections' field - and automated the process by which all connections would be updated for Date and Time Specific occurrences, and would not be updated for TBS or ISO occurrences. Works great!

However, an old bug that's been around for a while shows one more issue we needed to address.

If a Date and Time Specific Occurrence is updated, it is not updating waitlisted connections. (Only those that are confirmed). Waitlisted connections should be updated as well (with the new date and time) — since if space opens up, and the volunteer signs up - the waitlisted connection is reused and turned into a confirmed connection (but still had the old dates and times).

Now, if you change the date and time of a date and time specific occurrence - waitlisted connections will be updated as well!

Bug Fix: Posting Status was not always updating as expected. (HOC-537)

Improvements had been made to the accuracy of the field "Posting Status" in Volunteer Opportunities and Occurrences in the Spring 2016 release.

However, some customers reported certain circumstances in which the posting status of opportunities were reported as "This is not published. There are no upcoming, active occurrences." when this was not the case.

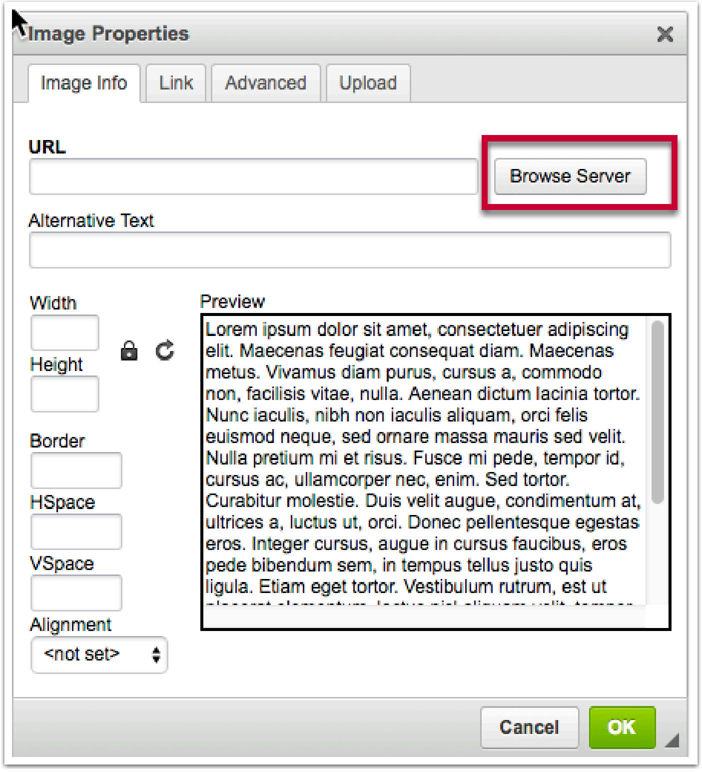
The factors that contributed to this problem have been identified, and posting status should once again be accurately updated each evening and other factors will not cause this field to become misrepresentative.

Please let us know if you encounter a volunteer opportunity or occurrence where the posting status is not accurate at any given time (within 24 hours accuracy), so we ensure that this field can be accurately relied upon.

Image Search and Insert improved (HOC-439, HOC-525)

In the new version of the WYSWYG editor, images uploaded to the image library were displayed with only 5 images per page when clicking on the 'browser server" button.

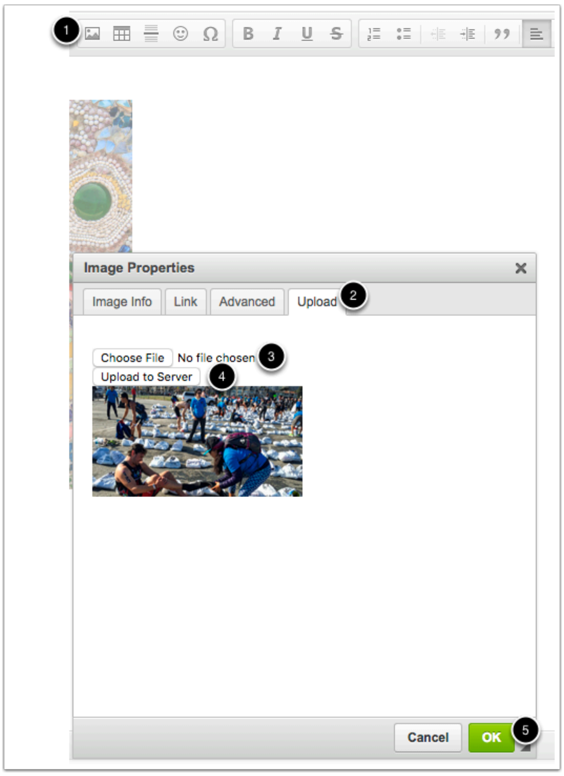
This has been improved and now you can view 100 images at a time



Also - performance has been improved when you upload an image to the server. To upload and insert an image:

1. Click on the 'Image' icon in the editor.
2. Click on the "Upload" tab
3. Click on 'Choose File" and pick a file off your hard drive (make sure its an optimized image!)
4. Click on "Upload to Server"
5. Click on OK
6. The image will be inserted with no further prompts or error messages and no need to browse images to find it!

Note: You can further edit the image if you desire, by clicking on the image in the editor, once again clicking the 'image' icon, and then you can edit its width, height, alignment, etc.



Basic Portal Bug Fix: Unable to search for volunteers with apostrophe in their name (HOCAVV-551)

In the Manage Volunteers navigation in the basic portal, searching for volunteers with an apostrophe in their name (like O'Connor) resulted in errors. This has been corrected.

Bug Fix: Login Errors occurring when external geolocation services are down (HOC-556)

HandsOn Connect uses an external service to geo-locate volunteers so that the default zipcode of searches is close to their logged in location. However, on those occasions when the external service was temporarily unavailable - users could experience difficulty in logging in and would be taken to the white "Authorization Required" page instead of the home page. This has been corrected.

Bug Fix: Fixed wordpress related bug that could break home page (HOC-536)

Some wordpress blogs were using URL schemes that could cause the homepage to not render correctly when publishing a wordpress blog feed on the home page. We've identified the cause and updated code so that this sort of wordpress blog posts would not negatively impact anyone's home page.

Bug Identified and resolution found: Problems editing styles in opportunity descriptions (HOC-529)

Some users experience issues when editing volunteer opportunity descriptions and adding styles to the CMS content. If this becomes a problem for you, please open a ticket in Zendesk and ask that the HOC-529 Volunteer Opportunity Wizard update be applied for you. This is a small change in the code we can apply, that will make it easier if you are using styles in your volunteer opportunity descriptions. It has to be done manually by us, and is not of concern to most customers...   but if you frequently edit your opportunity descriptions and use styles - then let us know and we'll apply the fix for you!

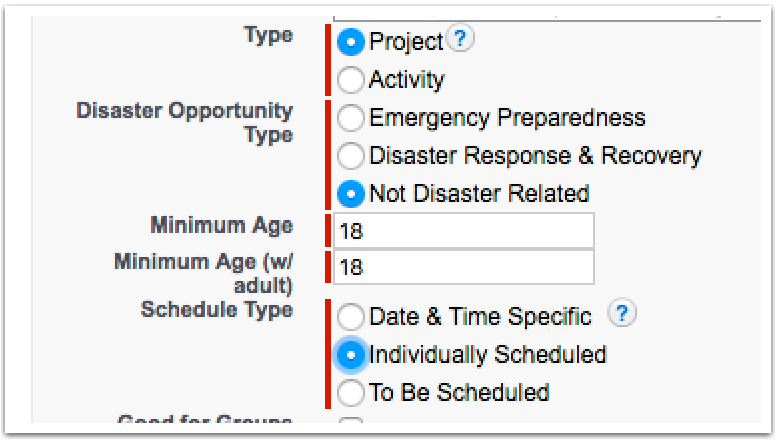
June 2016 Release Notes

The June release addresses several bugs and makes improvements to one-step attendance, the connections grid, and Individually Scheduled Opportunities which now comes out of beta and into wide-release.

Behind the scenes, the development team has started work on major features that will be part of the Summer '16 release. Join us at the Points of Light Conference for announcements of significant new features coming during the summer release quarter.

The June release will be pushed out to your instance of Salesforce between May 27 and June 3. Look for the Jun 16 logo!

Individually Scheduled Opportunities is out of beta and in general release.



All customers using the standard version of the Volunteer Opportunity Wizard will be upgraded to the new version which allows the creation of Individually Scheduled Opportunities (ISOs). The option to create and manage To Be Scheduled opportunities will remain for the near future - but we encourage partners managing ongoing volunteers to start using the improved Individually Scheduled opportunity type.

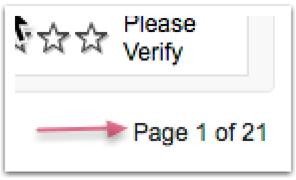
The Help Section in the Partner Portal has Quick Start videos and written documentation that will explain how to use this new opportunity type.

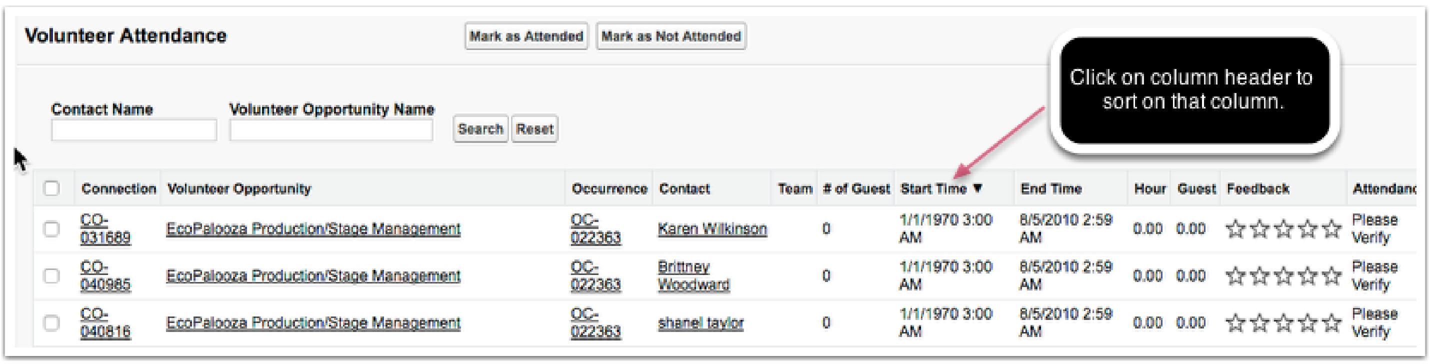
HandsOn Connect clients who have previously paid for customizations to their volunteer opportunity wizard will be contacted regarding timeline for adding ISOs to their customized wizards.

Improvements to One Step Attendance (HOC-497, 510, 498)

We've made several improvements to Spring's One Step Attendance Feature:

1. Affiliates who had a large number of overdue attendance connections were getting a Maximum view state size limit exceeded" error. If you have more than 500 overdue attendance connections, only the first 500 will be displayed when no filters are applied. This will prevent hitting the limits of how many connections can be returned in one search. (You'll be able to start marking overdue attendance on the 500 that are the first ones returned by the page). Use the filters (Contact Name and/or Volunteer Opportunity Name) to narrow down the list to less than 500 and find the ones you are looking for.
2. Pagination of pages is now correctly displayed.
3. The sort order for connections in the list was not working as expected. Clicking on a column head and sorting now works as expected, placing items in proper sort order.
4. Due to sharing issues in the partner portal, Partners were not always able to search and find connections for certain volunteers. This has been fixed. Partners should now be able to search by Contact Name and find any of their connections with attendance due for that contact.





Improvements to Connection Grid (HOC-480)

Connections for volunteers of occurrences that were cancelled, were appearing in the "Scheduled Volunteer" tab. Given that their attendance status gets automatically updated to 'cancelled", these connections will now be automatically displayed in the "Attendance Reported" tab - since the volunteers are no longer scheduled to attend, and their attendance has been fully reported.

Improvements to Individually Scheduled Opportunities (HOC-488)

Custom Questions are not compatible with Individually Scheduled Opportunities (ISOs) due to the fact that a single occurrence can have many connections by the same person. However it was possible to mistakenly add Volunteer Opportunity Questions (VOQs) to an ISO. A validation rule now prevents a user from accidentally adding VOQs to ISOs. (Is that enough acronyms in one sentence for you?)

Improvements to connection updates related to canceling an occurrence (HOC-481)

Normally one should have no reason to cancel a To Be Scheduled or Individually Scheduled Occurrence. The normal and proper way to stop publishing one of these occurrences is to make the occurrence inactive (which will remove it from the website for future signups).

Nonetheless, some people were marking these occurrences as cancelled, and as a result, all connections, past and present, associated with the occurrence were being updated to 'cancelled' and emails were being sent to the connected volunteers.

Now, if someone cancels a TBS or ISO occurrence, only the connections for future dates will be marked cancelled and notified that their upcoming connections are cancelled. (Connections for past dates will not be disturbed and have their prior attendance status and hours served changed).

Volunteer Registration Page bugs fixed (HOC-474, 522)

1. When making certain fields required in the "demographics and volunteer options" section of the registration form, the blue "* required" simple was not displaying in the section header. This has been fixed.

2. While we don't recommend using the "year of birth" option on the registration page (because the system can't accurately determine when a volunteer has turned legal age and it makes minimum age validations inaccurate by up to a year), for those using this option, we've made

sure that the registration form now says "Year of Birth" instead of "Date of Birth" when this option is enabled.

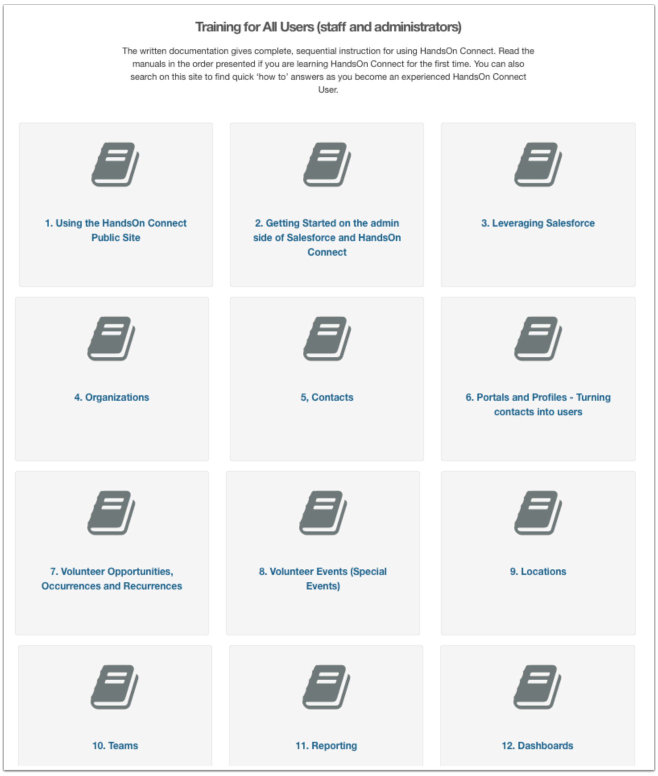
Basic Portal Improvements (HOC-524)

There were sharing issues when occurrence records were created without a volunteer leader, and a volunteer leader was then added to the occurrence. Sharing rules have been updated to improve sharing of opportunities, occurrences and connections to volunteer leaders.

Opportunity Detail Page formatting issue fixed: (HOC-496)

Fixed an issue where text was not always wrapping properly on opportunity detail pages. *Note: We are aware of some issues that are occurring when editing existing opportunity descriptions. This will be addressed in next month's release.*

A fresh, more modern look on our documents (training) page:



We've updated zendesk's documents tab (our training pages) to a more modern template. In the course of the next few months - stay tuned for a fresh new design and new features on our entire zendesk support site!

May 2016 Release Notes

This May Release brings long-awaited solutions to improve email deliverability, and further improvements and refinements to the new "Individually Scheduled Opportunity" type release in beta last month. (A small administrator action is necessary to enable the new feature).

There are also additional small improvements and bug fixes. Please be aware that administrative action is required to address the email deliverability problem. (Will take admins 15 minutes max and will solve the many requests related to emails coming from 'Affiliate Address".)

The May release will be rolled out to customers between May 3 - 9. Join us for a webinar on these new features and a walk-through of the administrator actions needed on Thursday, May 5 at 3:30 pm eastern. Click here to register for the webinar.

HandsOn Connect MAY 16 SPRING

1. Fixes for Email Deliverability Issues **(Administrative action required)**

Its been a long-known issue that emails sent from volunteers, volunteer leaders, and team captains who use @yahoo.com or @aol.com email addresses to communicate through HandsOn Connect were not being delivered. In June, this same restriction against sending email from certain addresses through third-party servers (such as Salesforce) is being extended to @gmail.com email addresses.

This has required us to take significant steps so that the FROM address in HandsOn Connect processed emails do not come from those domains. To this end we are converting many of the triggers that send email addresses to use an organization-wide email address instead of the user's email address as the "From" in these emails.

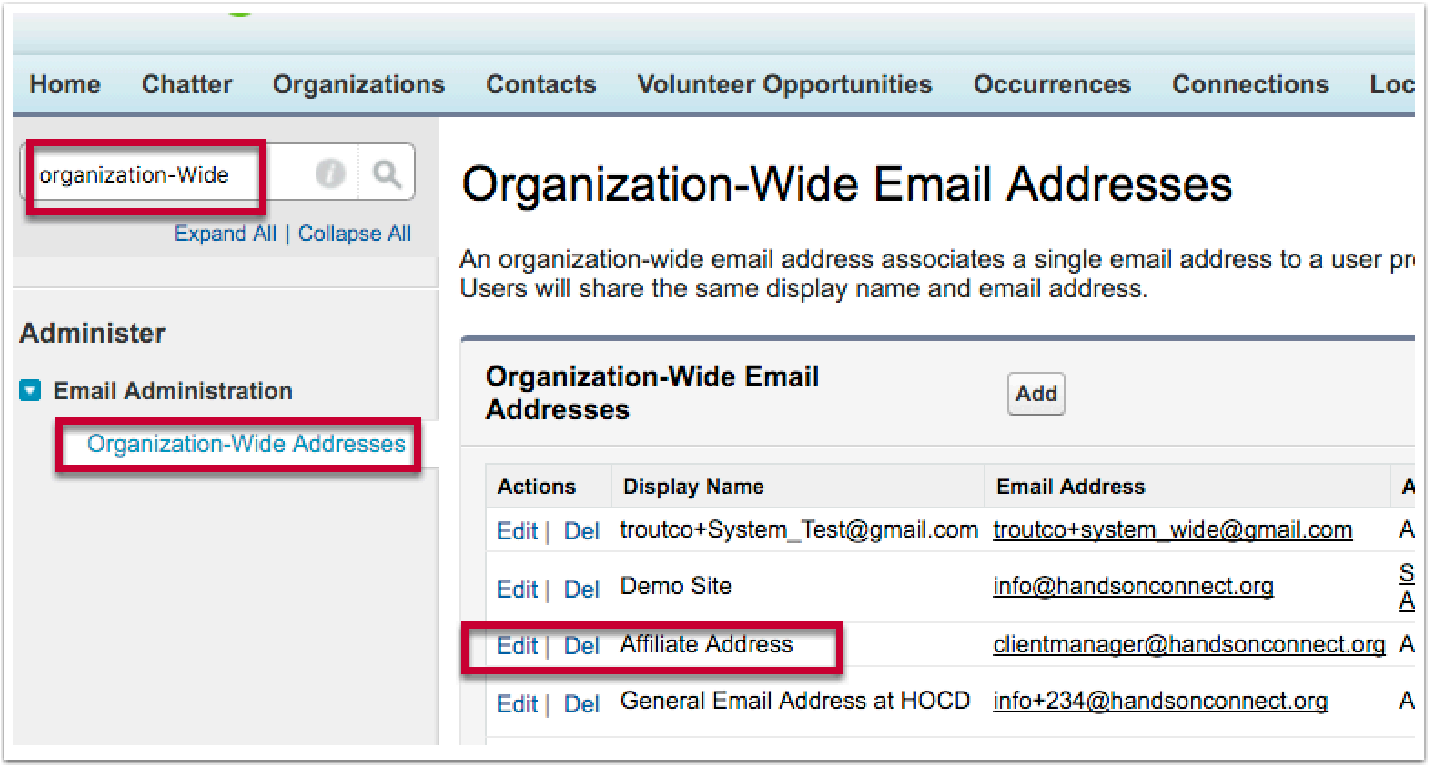
Previously, this organization-wide email address has been called "Affiliate Address" -- an issue that many people have reported as confusing. So here's the system-wide improvements that will correct this problem:

1.1. Ability to rename "Affiliate Address" (HOCAVV-363)

If you don't want your system emails to come 'from' Affiliate Address. You can now rename the sender name to something friendlier and more recognizable, i.e. From: HandsOn Atlanta. This requires a quick update by your system administrator. Here's how:

Go to Setup and type "Organization-Wide in the search box" click on the link for "Organize-Wide Addresses"

Click on edit next to the organization-wide email address with the display name "Affiliate Address"



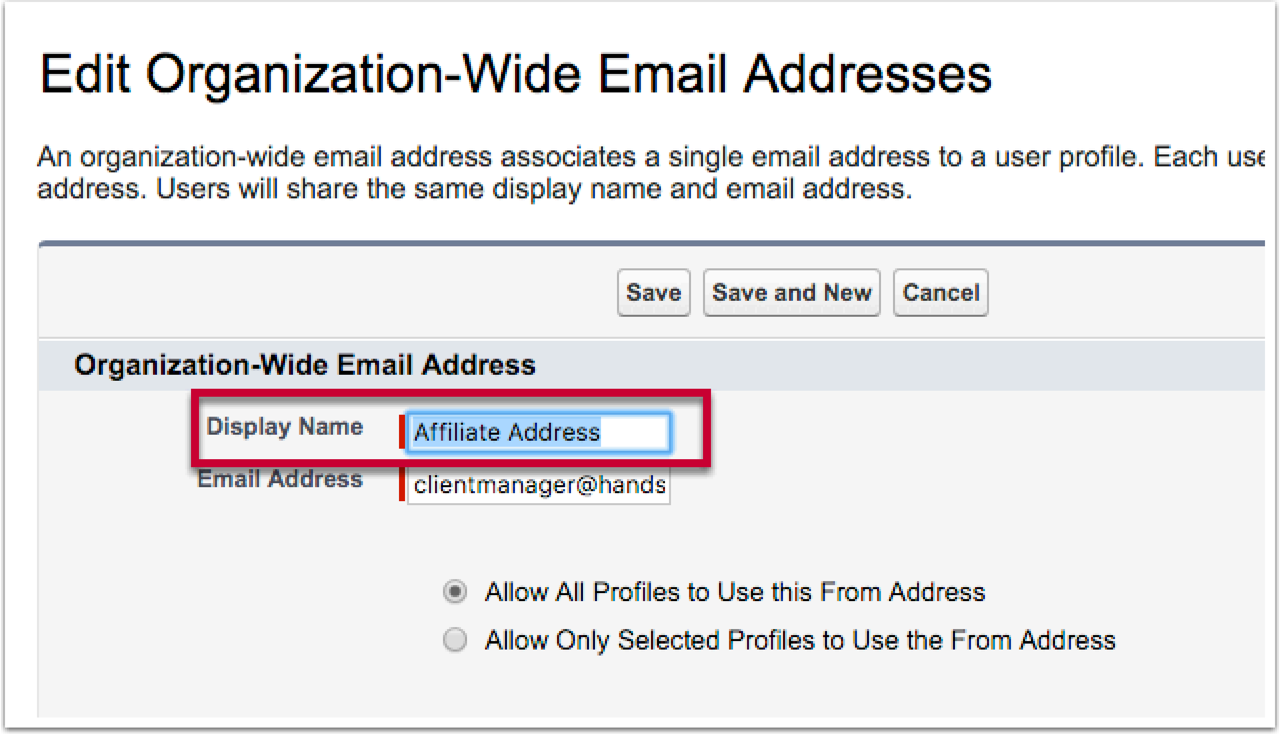
1.2. Change the Display Name to your preferred sender name

Here's where we'll edit the Display Name from "Affiliate Address" to HandsOn Connect Demo.

Retain the option to "Allow all Profiles to Use this From Address"

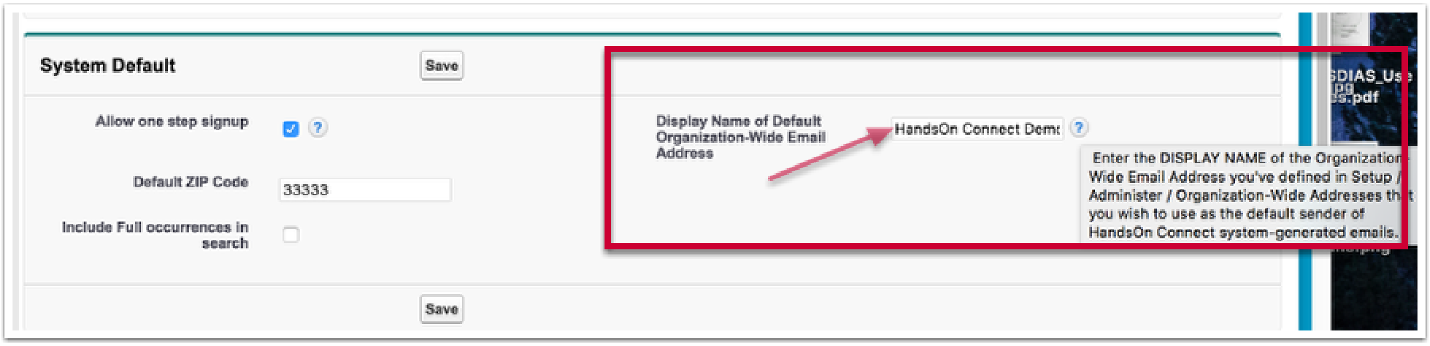
Click Save to save the edited Organization Wide-Email Address. Take note of the exact name and spelling of the Display Name you've chosen. You'll need that for the next step.

(Note: If you do not have a display name for 'Affiliate Address" - you can create a new organization-wide email address using these settings and the email address you want to use as your general default email address).



1.3. Go to Control Panel and enter the Display name in the System Defaults section

You need to enter this display name in the control panel, so the system knows which organization-wide email to use for trigger-generated emails.



1.4. Edit all workflow-based email alerts that use "Current User" as the "From Email Address"

Now you need to adjust the email alerts that are workflow actions, so that these emails come from the new default email address, instead of from the current user. (Since emails sent 'from' @yahoo.com @aol.com or @gmail.com will be blocked and not received.

Go to Setup / Build / Create / Workflow & Approvals / Email Alerts.

The following email alerts should be edited to change the "From Email Address" from 'Current User' to your default "Organization Wide Email Address" you defined in steps 1.2 and 1.3 above.

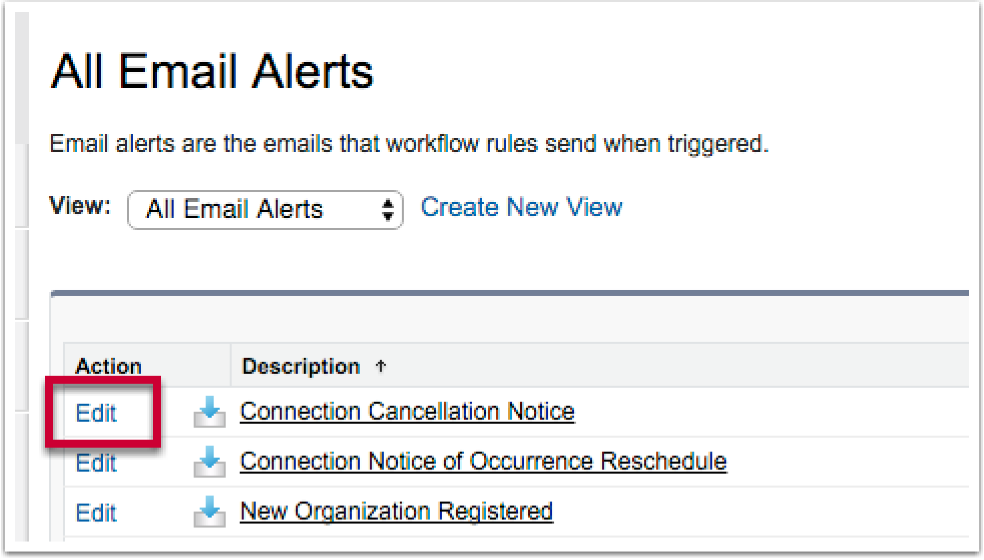
- Connection Cancellation Notice
- Connection Notice of Occurrence reschedule
- New Organization Registered
- New Self-Reporting Connection to Existing Organization
- New Self -Reporting Connection to Outside Organization
- Opportunity Sign-Up Confirmation - Affiliate Managed - Date and Time Specific - Expess Interest
- Opportunity Sign-up Confirmation - Affiliate Managed - To Be Scheduled - Express Interest
- Registration Confirmation
- Request Hours
- Teams - Invitation to join Team
- Teams - Notify member they have been removed
- Teams - This team has been disbanded
- This email is sent to a volunteer when a connection for an individually scheduled opportunity is administratively set to declined
- Volunteer Interest Notification
- Volunteer Status has been confirmed
- Volunteer Status has been declined

The following email alerts should optionally be edited if you have any partners who are using @yahoo, @aol, or @gmail.com email addresses to log into the partner portal. (They do not need to be edited IF the partner portal users all use their own domain names in their email addresses)

- Occurrence Approval Requested
- Organization Profile updated Notification
- Recurrence Approval Requested
- Volunteer Opportunity Information Edited

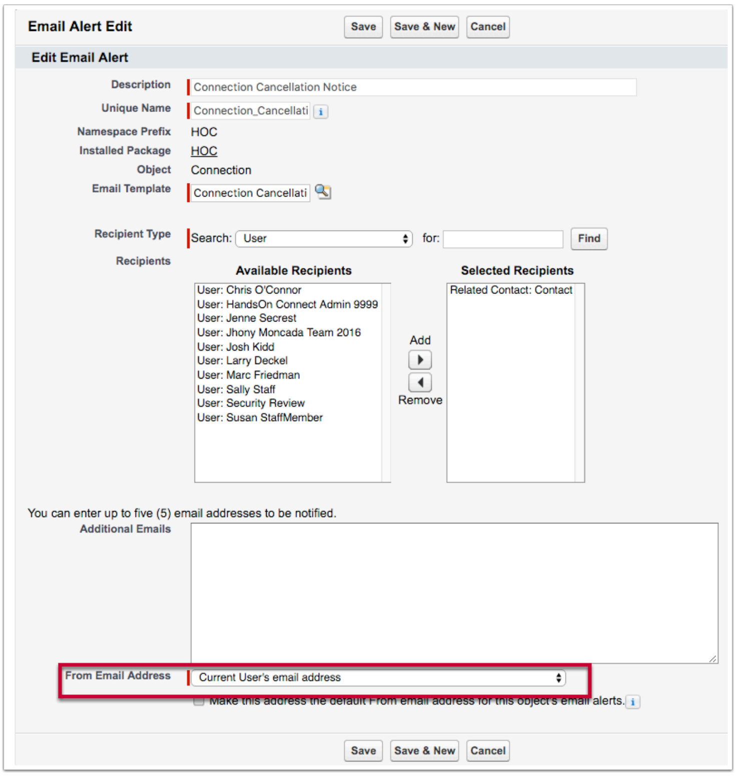
Click on EDIT next to each email alert listed above. We'll show this for the first 'Connection Cancellation Notice"

Note: If any of your internal users (system admin, staff) is using a @gmail.com, @yahoo.com, or @aol.com email address for their Salesforce login), you need to update EVERY email alert that uses 'current user' as the from address - as your internal emails will not be sent either. We assume however that most SF users are using their organizations domain name for their Salesforce login.)



1.5. Look at the 'From Email Address" field

Unless someone has changed it, the 'from' listed on each of the email alerts above will be "Current User's Email Address".

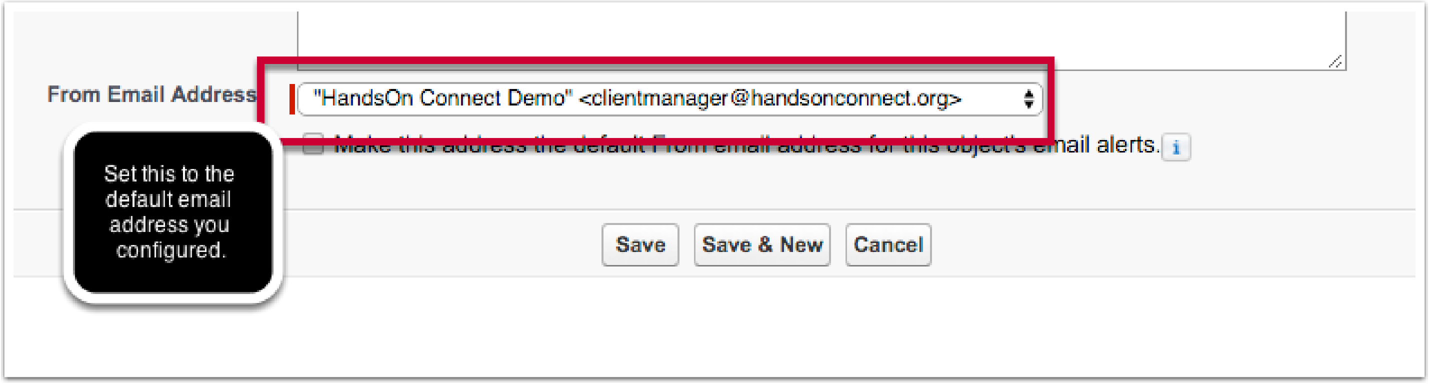


1.6. Change the 'from' to your newly named default organization wide-email address

Change the "from email address" from Current User's email address to the new default organization-wide email address you defined in steps 1.2 and 1.3 above and click Save.

Now repeat this for all the email alerts listed in step 1.4.

Your emails will now all go through and not be blocked. (We've updated all the trigger-managed emails that are sent out to use the new default email address you set in the control panel).



2. Added reply-to fields for trigger managed emails (HOC-68) (HOC-387)

Because hitting 'reply' on many HandsOn Connect emails will now go back to the default email address rather than the volunteer who initiated the email being sent, a 'reply to' field has been added to all the trigger-managed emails sent by HandsOn Connect. This should allow Partners and Volunteer Leaders to more easily reply directly to volunteer in response to emails such as Notification of Volunteer signup, removal, etc.

This reply to improvement was added to the emails that are sent from a team captain to their team members, as well as other trigger-based email alerts.

Please be aware however, that in some cases where previously you could hit 'reply' and reply directly back to the volunteer or volunteer leader, users may now have to directly send to the email address listed in the content of the email Reply to fields are only available via Salesforce triggers and can't be used in conjunction with the emails sent via workflow and email alert. We recommend you monitor your default organization-wide email address - and see if replies intended for volunteers are being sent there. If so - you may want to update the messaging in the email templates to more strongly warn people not to hit reply to these emails, and to address emails directly to the volunteer or volunteer leader indicated within the email content itself.

3. Improvements to new Connections Grid and One Step Attendance Reporting

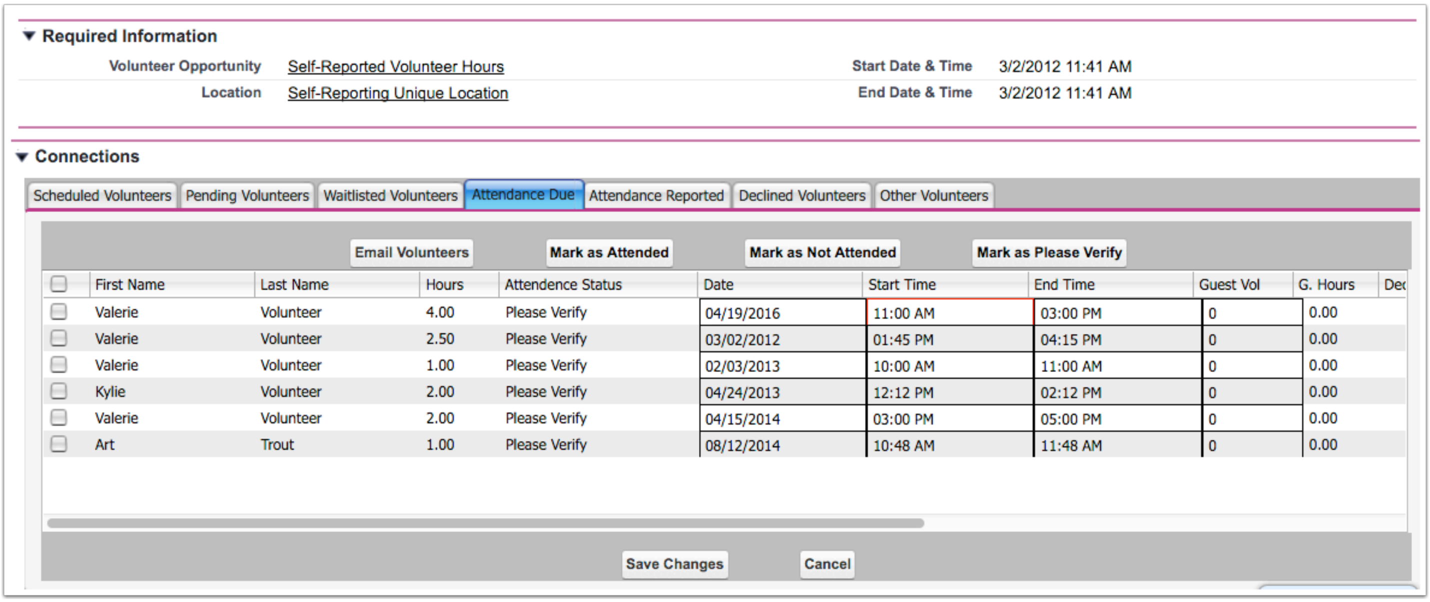
In the Spring 2016 release we introduced a new, easier to use Connections Grid that subdivided confirmed connections into those that were upcoming (scheduled), past (attendance due), and past with attendance already reported (Attendance Reported).

There were however a few oversights in the transition to the new connections grid, which are corrected with this months release!

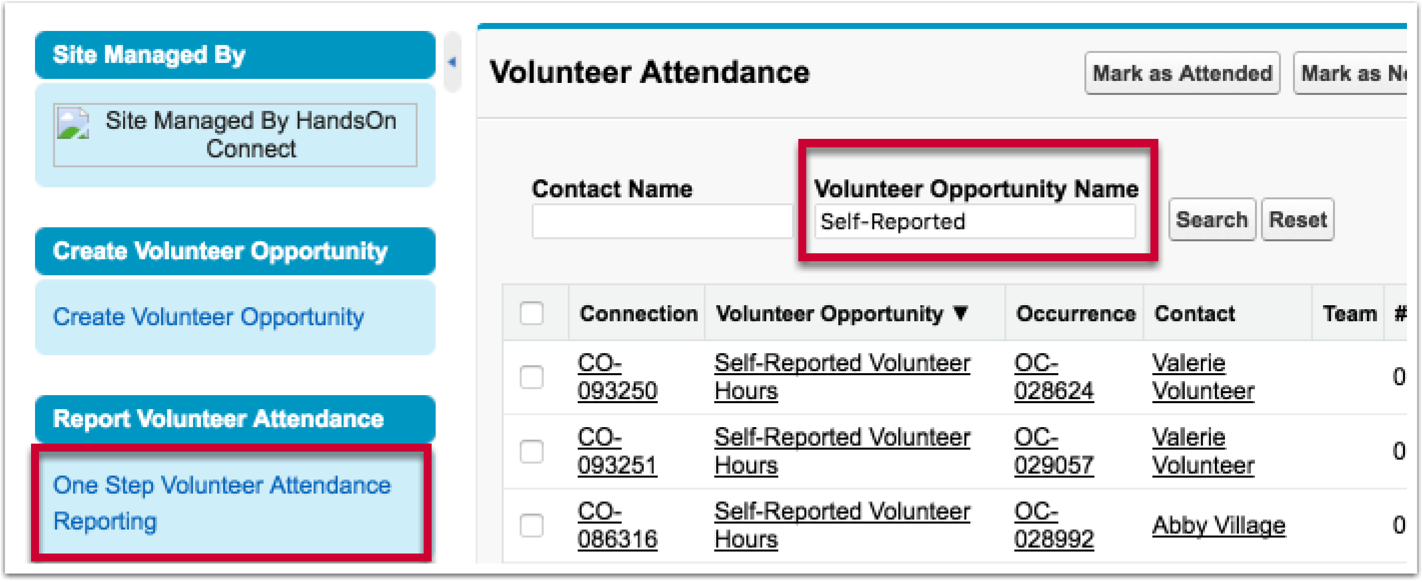
3.1. Self Reported Connections now appear in the connections grid and One-Step Volunteer Attendance Reporting (HOC-433

Self-Reported Connections will now appear in the connection grid for the occurrences of Self-Reported Volunteer Hours. Because self-reported connections are always for past dates - look for them in the "Attendance Due" tab. (After you verify them as attended or not attended - they will appear in the :Attendance Reported" tab.

We've also updated the new "One Step Volunteer Attendance Reporting" page so that it includes all Self-Reported Connections that have not yet had attendance reported (HOC-447),

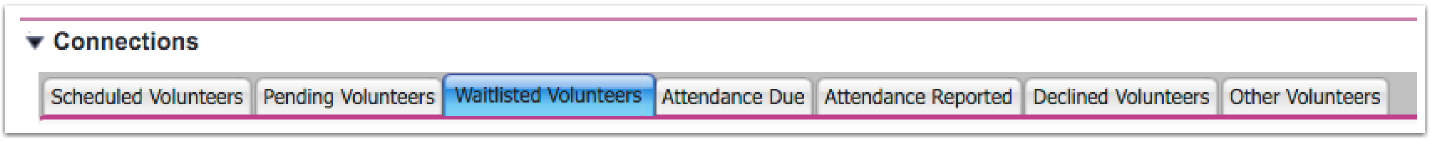


Note: partners only see their own self-reported opportunities. Staff and Administrators will see unreported attendance for ALL occurrences across all partners. You'll need to know which occurrence ID is associated with your organization's self-reported volunteer hours and the one for all non-partner organizations if you wish to report only your affiliate's self-reported volunteer hours from the one-step volunteer attendance reporting grid.



3.2. Waitlisted Volunteers tab added to all 'Express Interest" occurrences (HOC-421)

By popular demand - the waitlist tab is back for Date and Time Specific Express Interest occurrences and To Be Scheduled Opportunities. (Last month, the waitlisted volunteers tab only appeared for full sign-up opportunities.)



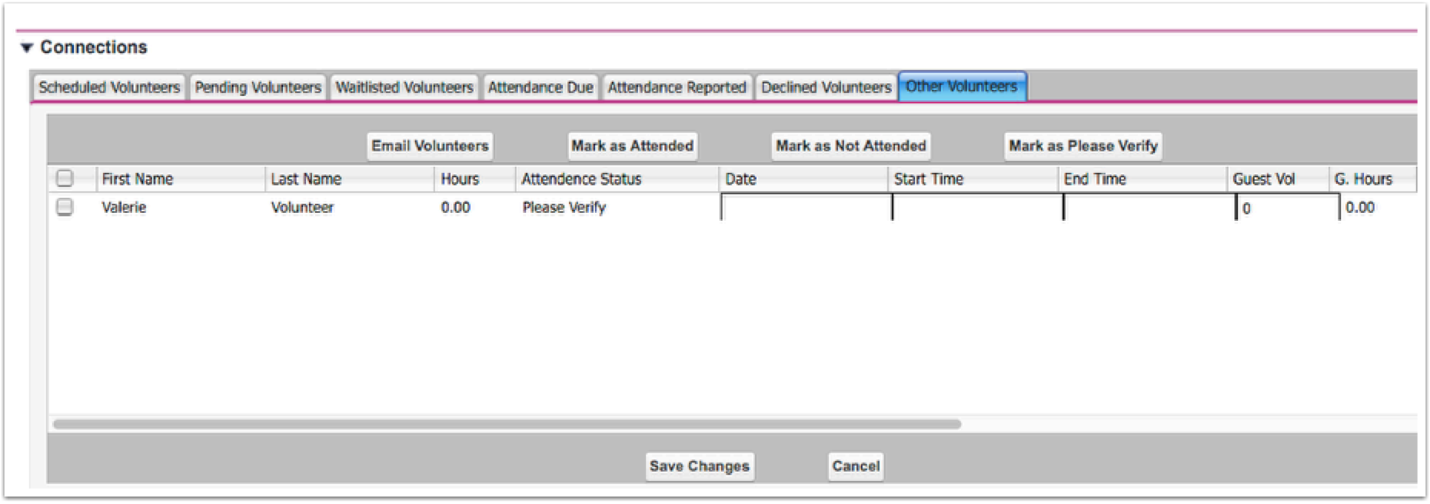
3.3. New "Other" Tab added to connections grid (HOC-422)

Several HandsOn Connect customers expressed concerns that 'some of our connections are not appearing in the new connection grid". Well - while we thought we had built tabs for everything, we hadn't considered a tab for connections with bad data :-(Here's an example that was reported. One affiliate had a lot of TBS connections that were saved without a start date and time or an end date and time. With these fields missing, these connections have no way of showing up as scheduled, attendance due or attendance reported. They had no relation to time at all.

We recommend that you and your partners should always enter a start date and time for connections, but for connections with awkward, bad data in them, we've added the "Other" Tab, so that you can edit the connections from within the connections grid, save the changes, and then have the connection moved to the correct tab based on whether its a future connection or a past one. Can't find a connection? Look in the "Other" tab :-)

In the screen shot below we see what happens if someone confirms Valerie Volunteer for a TBS opportunity but removed the Start Date, Start Time and End Time. If you want to resurrect this connection, enter a start date, start time and end time, and click 'Save changes". The connection will then be moved to the appropriate tab (scheduled, or Attendance Due". In the attendance due tab you'll be able to mark the connection as attended or not attended. (*Note: It's not possible to verify attendance for a connection that doesn't have a start date and time and end time*.)

If you see a lot of connections showing up in the "Other Volunteers" tab -- you may want to talk to your partners about how to correctly confirm and schedule a TBS connection. (Better yet -- switch to the new Individually Scheduled Opportunity type - where the date, start time and end time are already filled out for you by the volunteer who expresses interest!)



3.4. Fixed odd tab appearance in basic portal (HOC-391)

In the basic portal - some of the tabs in the connection grid rendered a bit oddly. This has been fixed and now the tabs appear more legibly.

Improvements to Individually Scheduled Opportunities

Last month we introduced the new Individually Scheduled Opportunities (ISOs) as a beta feature. This month is the final month for the beta (before rolling it out for all customers next month). We urge HOC users to encourage staff and partners to create new ongoing opportunities as "Individually Scheduled" instead of "To Be Scheduled". The new scheduling type is easier to confirm, and allows partners to easily manage volunteers on an ongoing basis for a flexible schedule. To opt into the ISO Beta, have your system administrator make a request in the HandsOn Connect AddOn Store

Here are additional elements introduced this month to make transitioning to using this improved opportunity schedule type easier for your staff and partners:

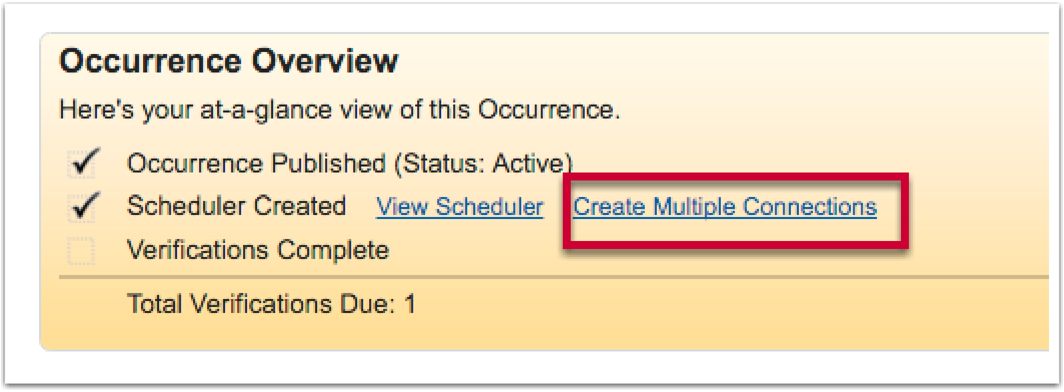
4. Admins and Partners can now create recurring connections for ISOs administratively!

As introduced last month, with Individually scheduled opportunities volunteers can create multiple connections on the public site. As a reminder, See this video demonstrating how a volunteer expresses interest in specific dates and times to volunteer on a flexible schedule. or read about it here.

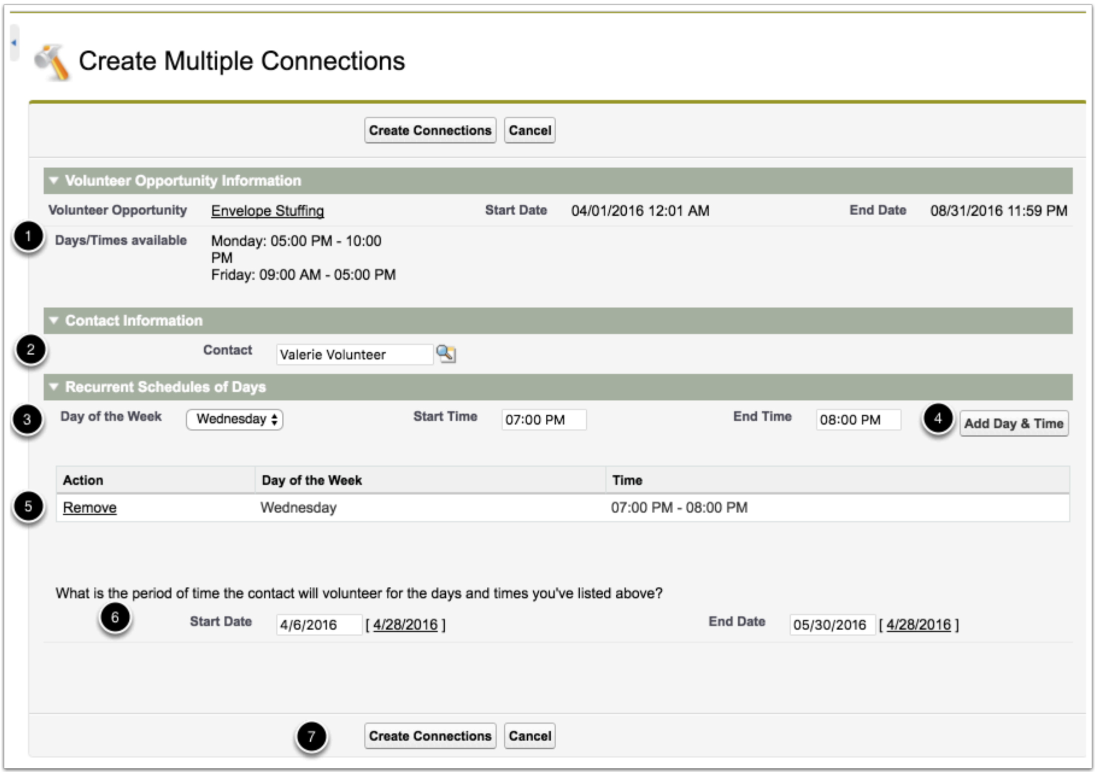
Now, with the May 2016 release - Admins and Partners can also administratively create **multiple** connections to an Individually Scheduled Opportunity for a volunteer (without logging in as the user and using the public site interface). This new administrative tool makes it fast and easy for administrators to quickly create multiple connections so they can manage and track attendance for each of their ongoing volunteers. Here's how the administrative version of Individually Scheduling ("Creating Multiple Connections") works:

NOTE: Administrators will need to take an administrative action to enable this functionality -- see item 5 below.

4.1. Click on the "Create Multiple Connections" link on the opportunity or occurrence overview



4.2. This opens the "Create Multiple Connections" page for that To Be Scheduled Volunteer Opportunity



You can create multiple connections for a volunteer by doing the following:

1. This section tells you the details of the volunteer opportunity you've selected, including its schedule and start and end date.

2. Use the lookup icon and choose the volunteer you wish to schedule

3. Pick a Day of the week, Start Time and End Time for the connections you wish to create.

4. Click the "Add Day & Time" button to add that day of the week to the schedule you are creating which appears below (5).   You can add additional days and times to the schedule by picking additional days and times, and clicking on "Add Day & Time" each time until you have the full weekly schedule for the volunteer.

Note: *Even though the published scheduled here is for Mondays and Friday only, you can administratively create connections for any day of the week, giving you the flexibility to schedule volunteers outside of the published weekly schedule.*

6. Indicate the start date and end date of the recurring connections defined in 5.

Note: *You can create connections that occur in the past or in the future or both at once. But you cannot choose dates that fall outside the start date and end date of the volunteer opportunity / occurrence as shown in the summary in section 1. If you wish to schedule outside those dates, you'll* *need to go to the occurrence record and adjust the start date and/or end date of the opportunity/ occurrence.*

7. Click "Create Connections" and the connections will be created for you and appear in the connections grid. All connections created will be in 'confirmed' status. Those for future dates will appear in the "Scheduled Attendance" tab, or any past connections will appear in the "Attendance Due" tab where you can then mark the volunteer as attended.

Note: *You cannot create more than 50 connections at one time. If you need to schedule a volunteer for more than 50 connections at once, create 50 and then create 50 more separately.*

5. Quick Start videos and documentation are now available in the Partner Portal for creating and managing ISOs.

We've added Quickstart videos to the partner portal that show partners how to create and manage the new Individually Scheduled Opportunity type. [Click here to access the quick-start videos] and check out new video 1B. We've also updated video 2 to show how to confirm pending volunteers with the new connections grid, and video 3 on verifying volunteer attendance has been updated to include info on the new One-Step Volunteer Attendance Reporting.

Once you opt into the beta - just point your partners to the quick-start video page and they'll be up and running with the new opportunity type in no time! The written documentation in the partner portal has also been updated to include information about the new Individually Scheduled Opportunities, using the new connections grid, administratively scheduling volunteers, and one-step attendance reporting. All these new tools should make a much improved experience for your partners.

6. Opportunity Calendar: Fixed issues with 'see more' button and hover display not working for future months.

Several affiliates reported strange issues that were occurring for future months on their calendar:

- Hovers with opportunity detail were not appearing
- The "More" link did not appear on calendar dates when there were, in fact, more opportunities than fit in the space.

The culprit turned out to be connected to using the arrow buttons on either side of the month name on the calendar to advance to the next month. (These problems did not occur when you switched months using the "Jump to" picklist at the bottom of the calendar.

The calendar has been updated so that using the arrow buttons will take you to the next month without any functionality being missing.

7. (Admin Action Required) Resolved browser issues and security warnings when accessing partner help in partner portal (HOC-395)

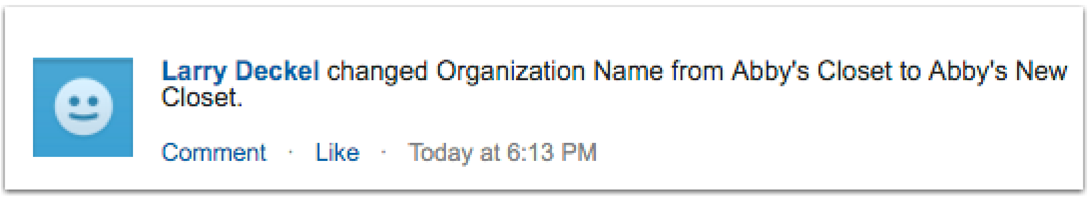
The Partner Portal is a secure site, however our help documentation lives on a non-secured site that doesn't require a log-in. This was causing many browsers to block access to the Partner Help pages in the partner portal unless users manually allowed their browsers to access the 'insecure content".

We've updated the URLs and security for our help site so that portal users will no longer encounter mixed content warnings and can easily get to partner help pages.

You DO however need to take a small administrative action to use the new URL. See this post for the steps to take. (5 minute update!)

8. Fixed: Self-Reporting breaks when organization name is changed (HOC-343)

You can now change the name of an organization without it breaking self-reporting functionality for that organization!



9. Small bug fixes and updates:

- Resolved profile permissions issues related to Individually Scheduled Opportunities (HOC-441)
- Removed "Log in with facebook' button from Organization Registration Page. (HOC-319).
- Corrected grammatical error in text of Volunteer Skills Page (HOC-334)
- Removed "Add to Calendar" link from opportunity detail page for Individually Scheduled Opportunities (HOC-470)
- Fixed Search results display for Individually Scheduled Opportunities so that date appears as "open" (HOC-469)
- Improvements to pagination and column width issues in basic portal (HOC-321)

How volunteers Express Interest for Individually Scheduled Opportunities

Individually Scheduled Opportunities appear on the pubic site as 'express interest' opportunities.

There are two types of Individually Scheduled Opportunities (ISO)

ISO with Schedule - volunteers are shown when volunteers are needed, and can sign up for one or more dates that fall within the announced schedule of volunteer needs. They are in pending status for these proposed 'connections' until the Opportunity Coordinator confirms their proposed volunteer schedule.

ISO express interest Only -- An Express Interest button appears, but there is no info on when volunteers are needed. This type of opportunity just allows a volunteer to inform the posting organization that "I'm interested". This is great for broad opportunities like "Become a Board Member" or "Keep me notified of upcoming disaster response opportunities" or Virtual Opportunities.

These opportunities don't need to have a location, as they are just an expression of interest. What the Volunteer Coordinator chooses to do with this information is up to them, and volunteer's do not see these opportunities in their upcoming opportunities (as they don't take place at a specific date and time - Unless the opportunity coordinator decides to administratively schedule them to attend.)

Individually Scheduled Opportunities do not appear on the public site calendar - but do appear in search list view. (They can't show up on a calendar, because they don't take place at a specific date and time -- but rather, allow the volunteer to schedule themselves, subject to the organization's approval.

In search, Individually Scheduled Opportunities appear as "Open"

This is because they don't take place at a specific date and time. (They are flexibly scheduled for each individual)

After School Mentors	Troutco	Riverside	Open	0 miles
Front Desk Support	Troutco	Riverside	Open	0 miles
Help Around the Office	Troutco	Riverside	Open	0 miles

Individually Scheduled Opportunity - Express Interest with Schedule

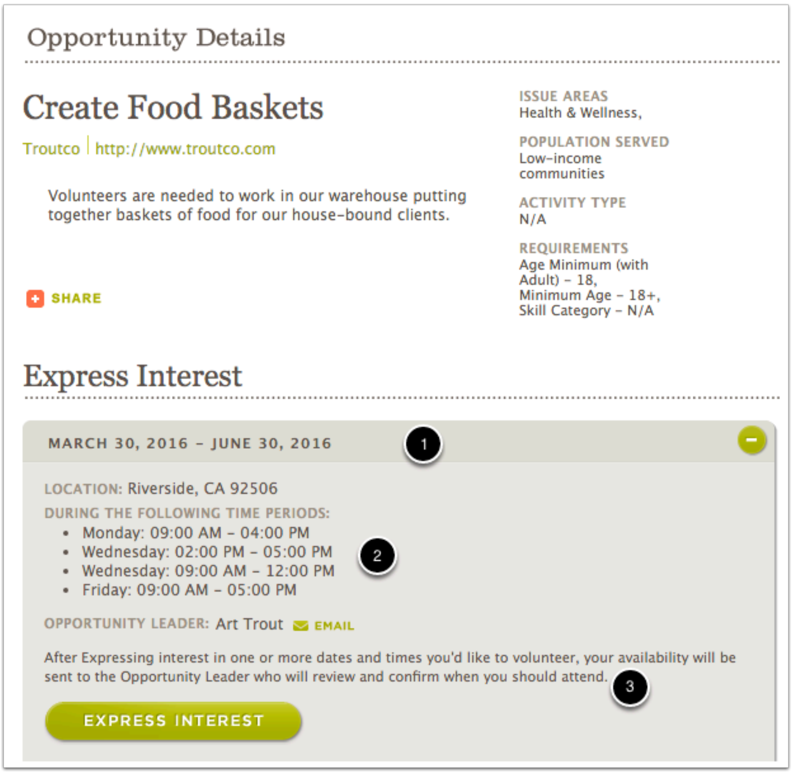
The Opportunity Detail Page provides specific information about when volunteers are needed.

1. The dates when volunteers are needed are displayed. If start date is in the past, then the text will read "Volunteers needed through...." (see 2nd screenshot)

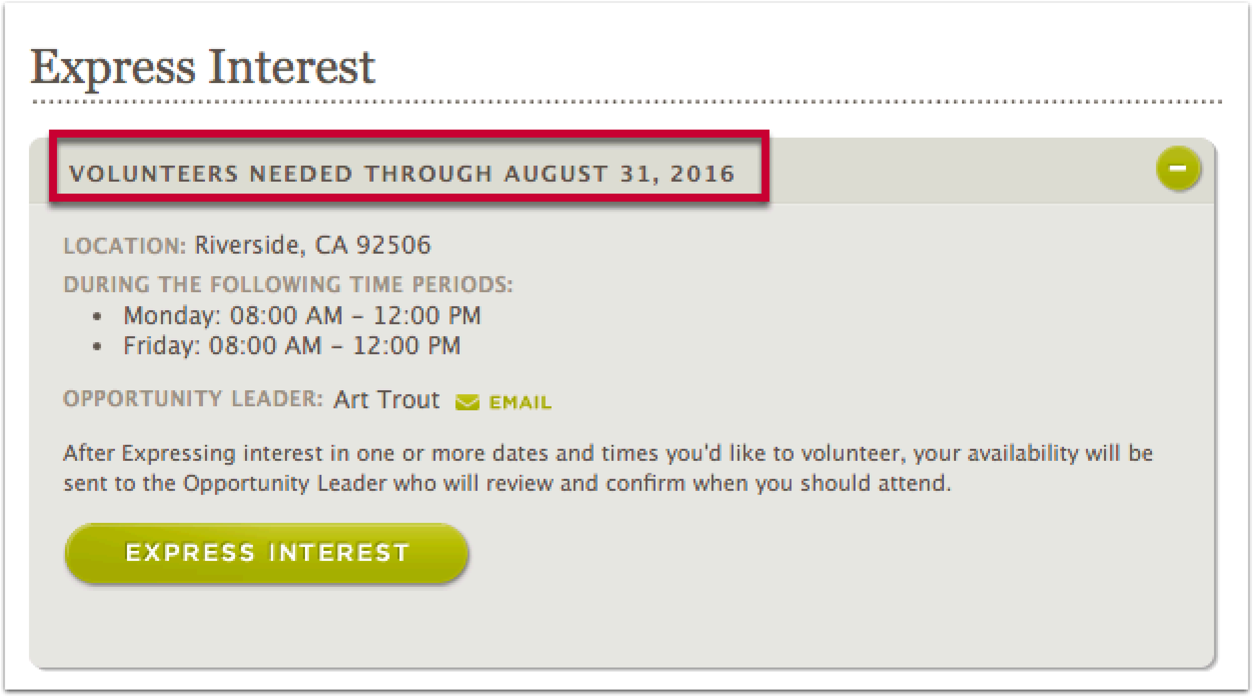
2. The schedule you created is displayed so volunteers know what days and times you need volunteers each week.

3. Messaging makes it clear that volunteers will be proposing their availability and the Opportunity leader will review and confirm the dates they wish you to attend.

A volunteer clicks on "Express Interest" to proceed.

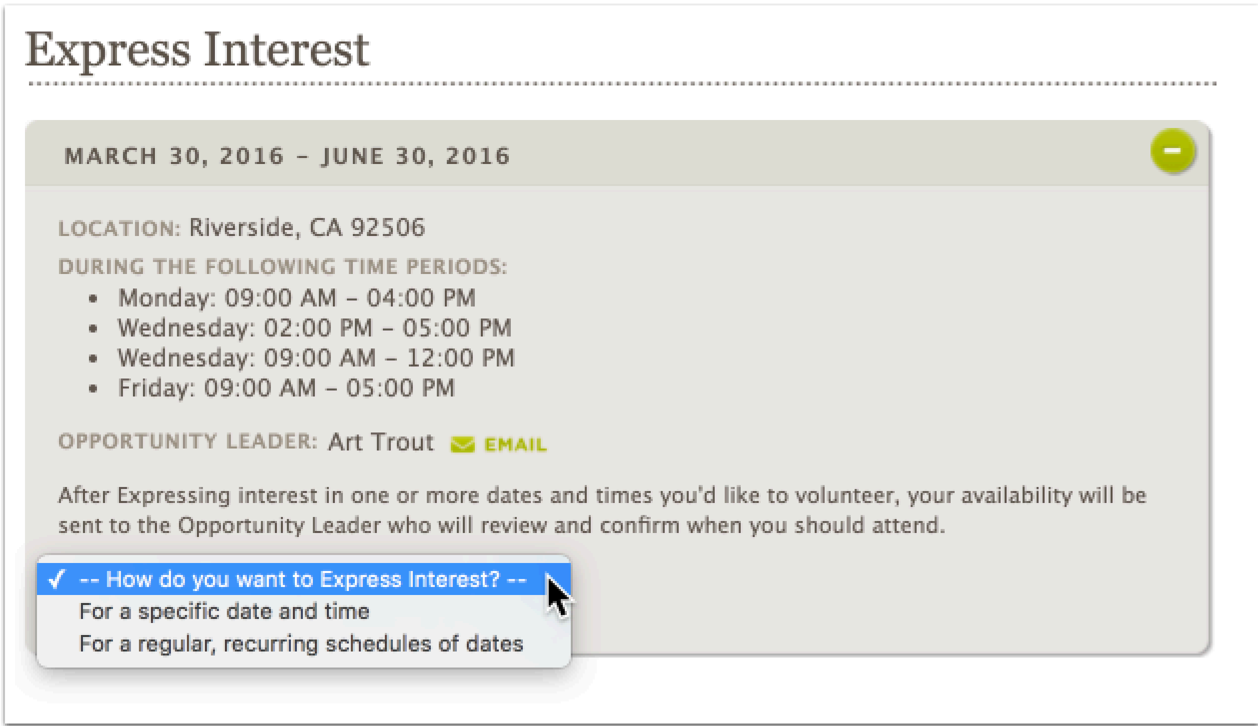


How the dates needed appear after the start date has passed.



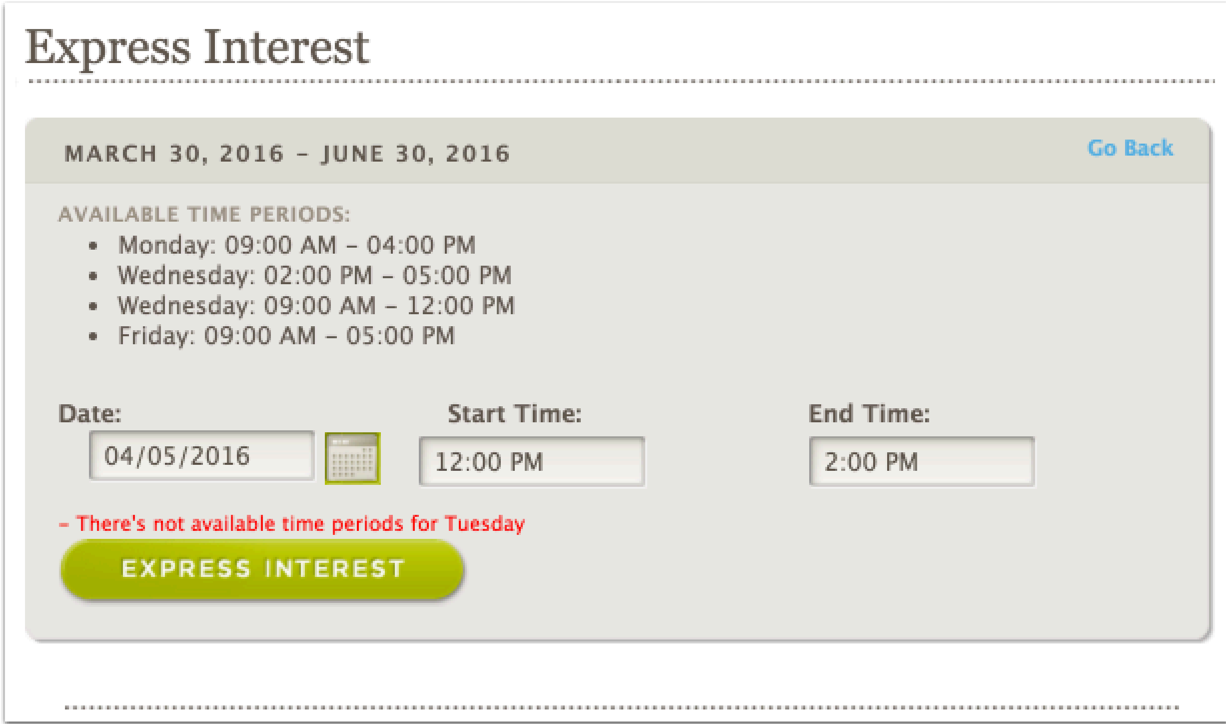
After clicking the Express Interest Button

You are asked "--How do you want to Express Interest?--"   and have two options:



Choosing "For a specific date and time"

Allows you to create one date and time you wish to volunteer.   The time you choose must be within the schedule that has been listed for this opportunity. If you propose a time outside the schedule you'll get a clear message explaining that its not a valid time.



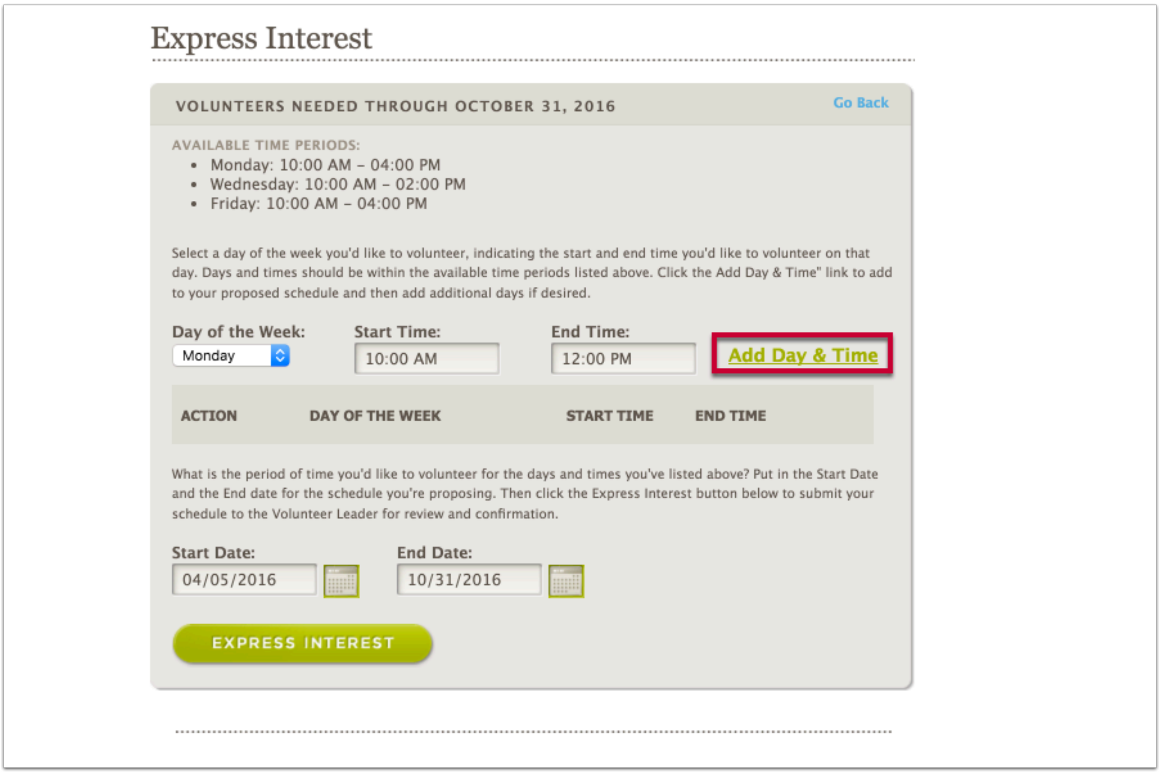
Choose a date and time within the 'available time periods" and click express interest and you'll reach the opportunity sign up Success Page.

Expressing interest in a recurring pattern of dates (multiple connections)

When a volunteer selects "For a regular, recurring schedule of dates" they have an interface where they can select a day of the week, a start and ending date, and a start and End time. They then click 'Add Date & Time" to indicate availability of that day of the week, at that time, for that period of dates.

The Day of the Week selector is 'smart' and only shows days that are part of the schedule for this opportunity. The default dates and time period are pre-populated but can be edited by the volunteer so that they can self-schedule for any period of time within the time period you need volunteers.

Here the volunteer has chosen Monday, from 10:00 a.m. - 12:00 p.m. as the recurring day they wish to schedule. Once they click "Add Day & Time" it will be added to the schedule section below.



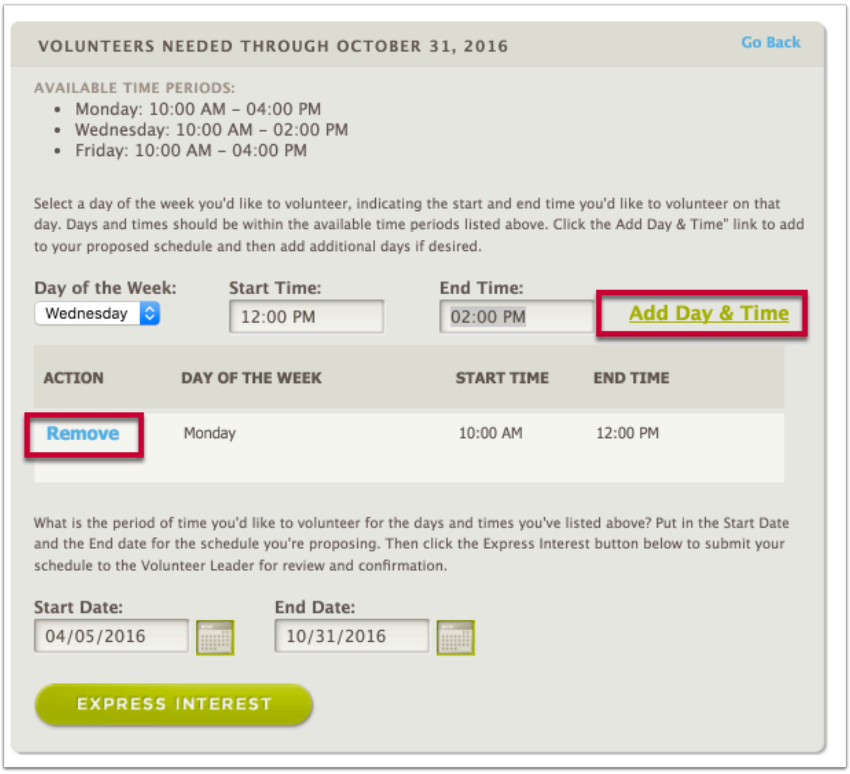
After clicking 'Add Date and Time" you can add additional schedules if you wish

In this case, the volunteer also wishes to volunteer on Wednesdays! And on Wednesdays they'd like to volunteer from Noon - 2 pm.

Again they click, 'add date & time"

If they wish to change a schedule, they can click 'remove'.

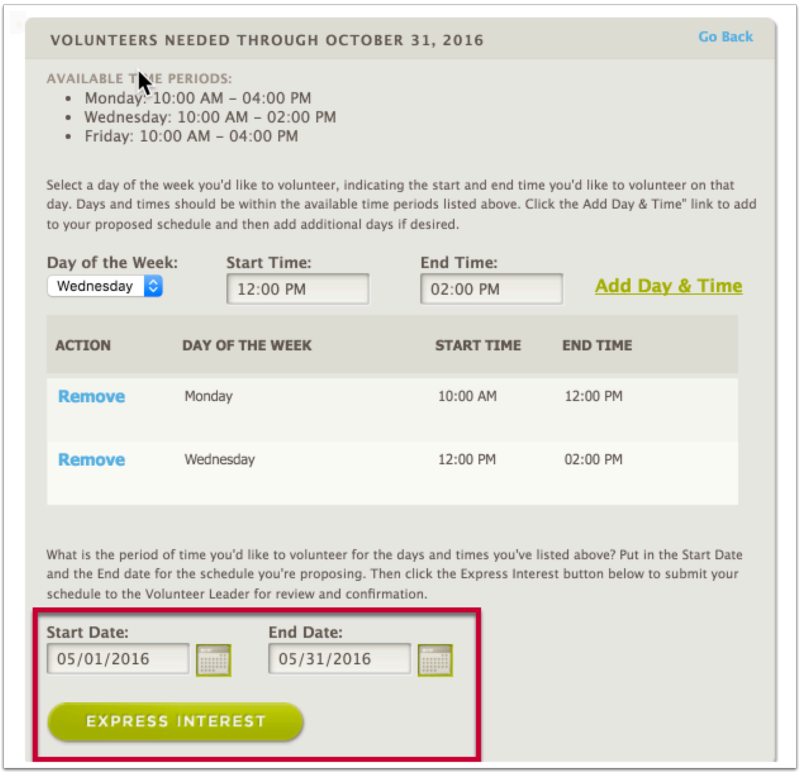
This allows a volunteer to see all the days and times they are proposing before they submit the schedule duration.



When the schedule is complete, set the start date and end date

The start date and end date are automatically populated from today until the end date of the opportunity - but in our case we only want to volunteer on Mondays and Wednesdays through the month of May, so we update the Start Date and End Date to reflect the duration of time we wish to volunteer for the schedule we're submitting.

After setting the Start Date and End Date - click the Express Interest button to submit your proposed scheduled to the Opportunity Leader. The opportunity leader will then review the submitted connections and confirm , decline, or reschedule them.

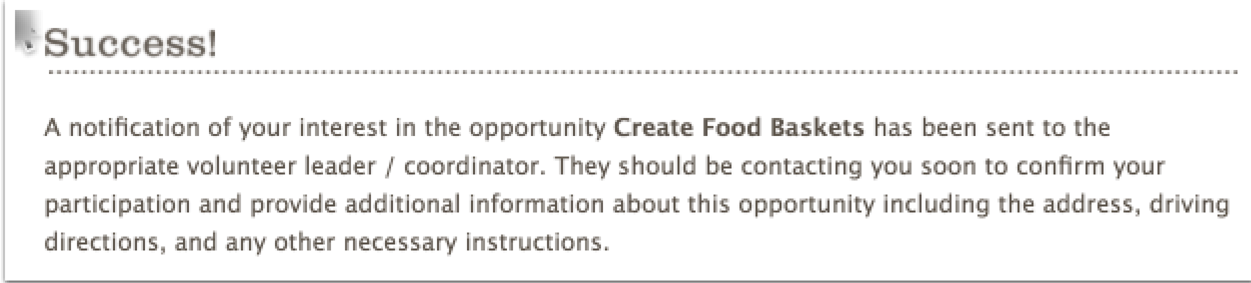


The Volunteer will then reach the 'Success" page

The volunteer will receive only one email notification that the connections they created have been submitted for approval. (They will not get one for every connection they create during one submission).   The email template with the messaging to the volunteer can be found in setup / administration setup / communication templates / email templates.   This template is called: "Opportunity Signup Acknowledgement for Individually Scheduled"

The opportunity coordinator will get only one email saying that the volunteer has expressed interest in one or more dates and is awaiting confirmation. The opportunity coordinator can then log in and review the connections that have been created and simply confirm or decline them without having to contact the volunteer as to when they wish to volunteer. The email template for this notification can be found in setup / administration setup / communication templates / email templates. This template is called: "Volunteer Interest Notification for Individually Scheduled"

[See this next article on how to review and confirm volunteers for their individually scheduled connections.]



Individually Scheduled Opportunity - Express Interest Only

These opportunities do not have a schedule - so volunteers are just able to express interest. When they express interest, the Opportunity Coordinator is notified. The volunteer receives an email letting them know they will be contacted if anything further is required of them.

Creating Individually Scheduled Volunteer Opportunities

In the Spring '16 release of HandsOn Connect we introduced a new type of Volunteer Opportunity Schedule: "Individually Scheduled"

A quick guide to HandsOn Connect's three ways of scheduling volunteers.

Here's information about which type of schedule to use when creating a volunteer opportunity.

Date and Time Specific

Use when you need a certain number of volunteers, all of whom will be volunteering on the same date, start time and end time. You can create one or more ‘occurrences” of dates and times for this opportunity. Use this type of schedule if you need, for example, 5 volunteers every Monday from 6:00 pm - 8:00 pm. Date and Time opportunities can be full sign-up (volunteers who meet age and other restrictions are automatically confirmed) or you can make it ‘express interest’ where you can review and manually confirm the volunteers for the occurrence’s specific date and time. When a given occurrence is full, volunteers have an option of being added to a wait list in case space opens up. Best schedule type for multiple volunteers at a specific time, and easiest for both volunteers and administrators.

(*New) Individually scheduled

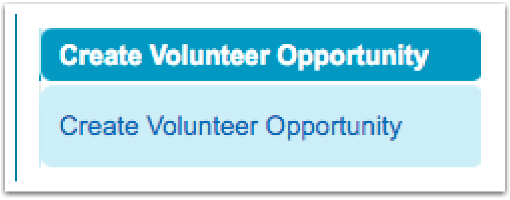
Use when you have a flexible schedule of when you need volunteers. You define a range of times when volunteers are needed (i.e. Monday - Friday 9 am - 5 pm) on an ongoing basis. Volunteers can express interest in the opportunity and propose one or more times they are available to attend within the schedule you’ve defined. You then simply confirm the volunteer if you approve of their proposed schedule. No need for phone calls or emails to arrange schedules. Each volunteer for this opportunity can be scheduled to attend on a different date and time based on their availability. Volunteers can express interest for this opportunity as often as they like making this ideal for ongoing volunteers when scheduling can be flexible. Starting by mid-year, you'll also be able to create schedules for volunteers administratively if you prefer. This schedule type is best for scheduling ongoing volunteers on a variable schedule, and makes managing individual volunteer schedules easy! (*Note: volunteers must express interest individually, team signup is not included in this schedule type).*

To Be Scheduled

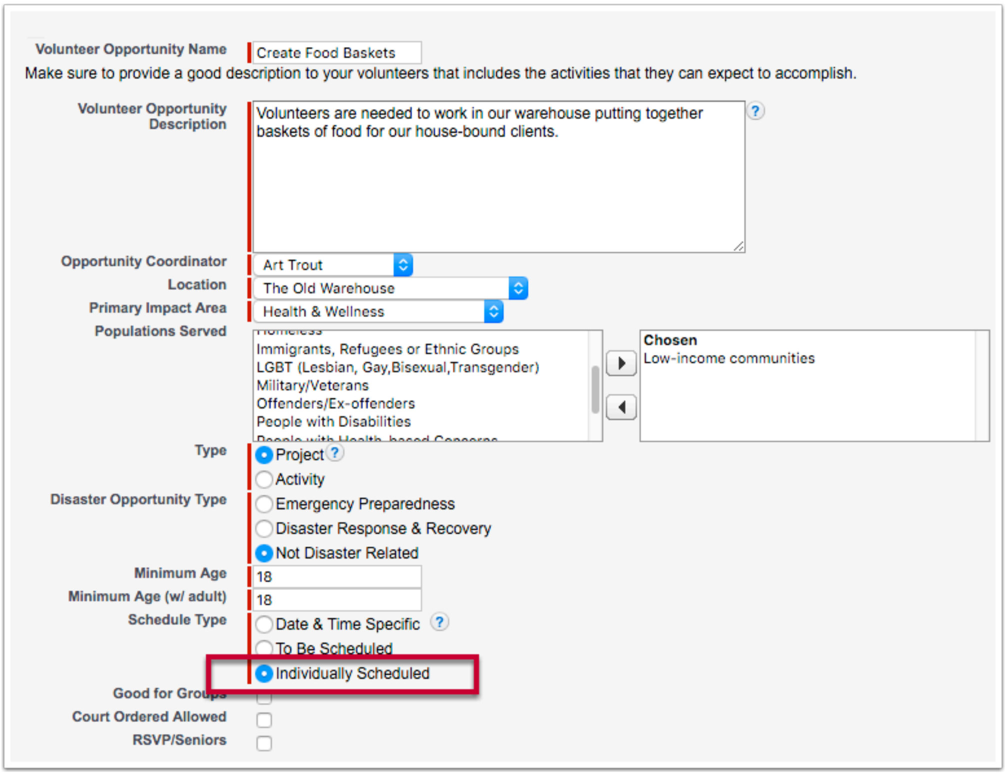
Our legacy version of individual scheduling. You are alerted that a volunteer has expressed interest, but details of when and how often the volunteer will attend must be worked out by you via follow-up phone or email to the volunteer. Volunteers can only express interest one time in a “To Be Scheduled” opportunity, so subsequent tracking of this volunteer has to be managed by you administratively. We recommend reposting your previous ‘To Be Scheduled” opportunities with our new improved “Individually Scheduled” type, but this remains an option if you don’t wish to track and manage your volunteers and their schedule.

Creating an Individual Scheduled Opportunity (ISO)

Use the "Create Volunteer Opportunity" link in the left sidebar to create a new volunteer opportunity.



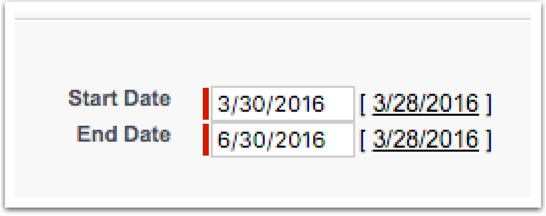
Choose "Individually Scheduled" as the Schedule Type



Set the start date and end date of when you need volunteers

If you set a start date for the future - the opportunity will be published, and volunteers can express interest, but they cannot propose dates to volunteer earlier than the start date.

We recommend not setting the end date more than 6 months in the future (you can always extend the end date later on). This will prevent volunteers from making committments too far into the future that they may have to change or cancel.   Click Next



On this screen you begin to set the schedule of when you need volunteers:

Choose a day of the week, and the time range during which you need volunteers and click **next**. You'll have the option to add additional days and times so that you can specify each day of the week / time span when you need volunteers and they can propose their availability.

Example: if you say you need volunteers

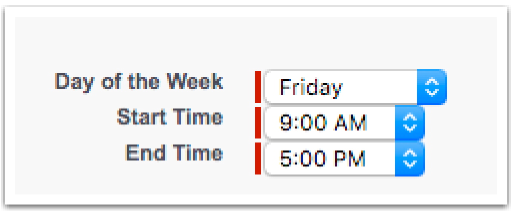
- Mondays: 9:00 am - 5:00 pm
- Wednesdays: 12:00 - 5:00 pm
- Fridays: 9:00 am: 5:00 pm

Then a volunteer could propose their interest in volunteering:

- On a Monday from 11:00 am - 1:00 pm
- Every Wednesday from 12:00 - 2:30

Volunteers would NOT be able to propose volunteering:

- On a Tuesday
- Wednesday from 4 pm - 6 pm

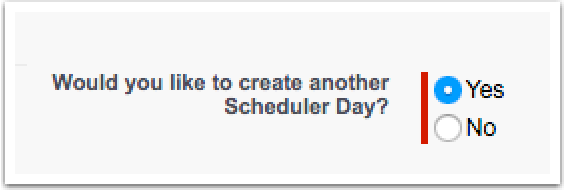


Add as many days / time ranges as you like to the schedule for

this opportunity

To add another day or time range on the same day - answer YES, and click Next. You'll be taken back to the previous screen to add another day / time range.

When your schedule is complete, choose NO and click next.



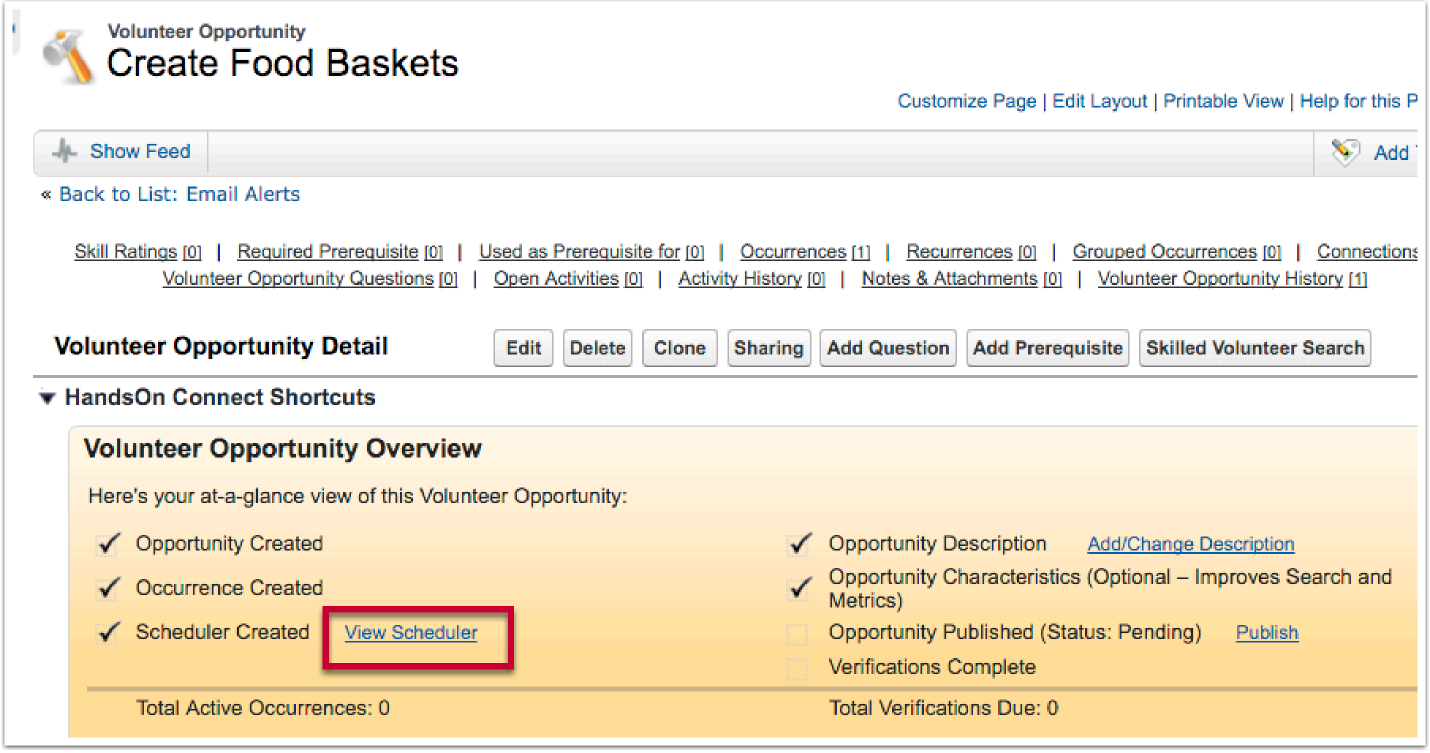
After choosing no, you're opportunity is created and complete. Click Finish.

You'll then be taken the Volunteer Opportunity Page

Editing the schedule:

If you wish to review and/or edit the schedule of when you need volunteers, you can do so from the Volunteer Opportunity Page.

Click on "View Scheduler"

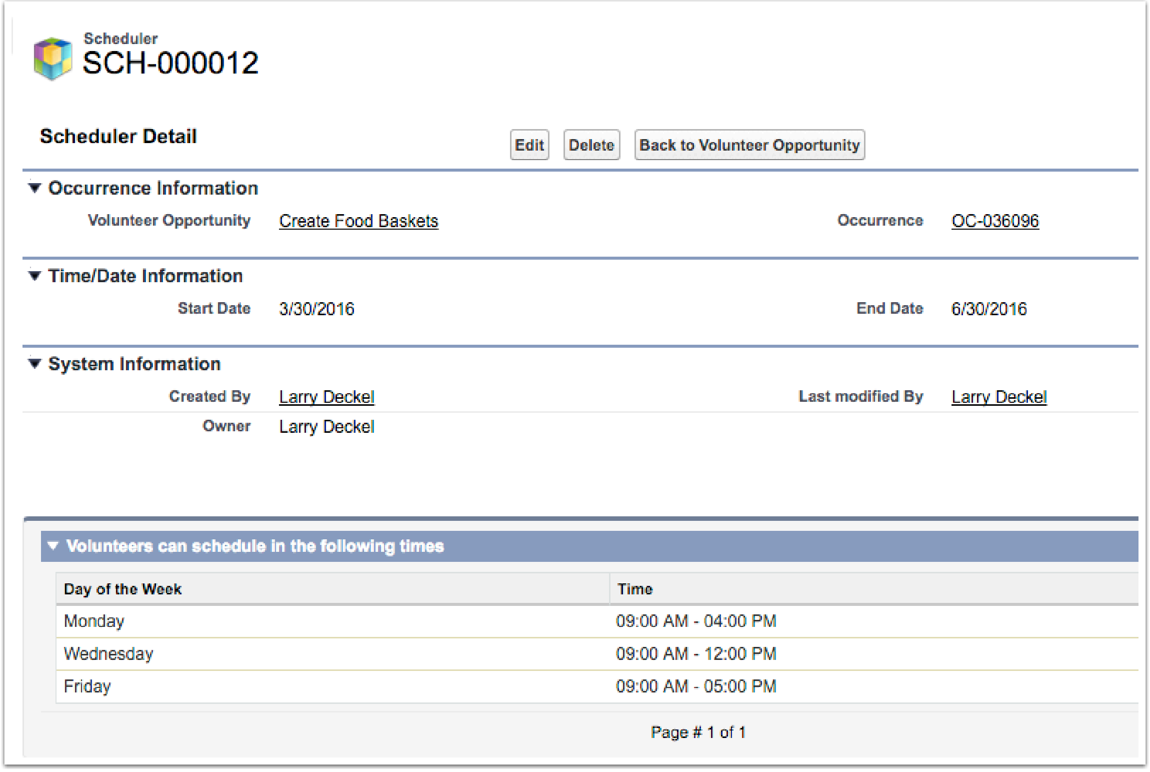


Scheduler Page

On the Scheduler Page you'll see the Start and End Date of the Individually Scheduled Volunteer Opportunity, and the days of the week / time ranges when you need volunteers. This schedule page controls when volunteers can and can't offer to volunteer. You can edit the schedule at any time by clicking on "Edit".

This is where you can change the days and times volunteers are needed. Editing the days and times will not affect existing connections that have been proposed by volunteers, but will define and limit when volunteers can propose a schedule in the future.

Click on Edit to make changes to the schedule:

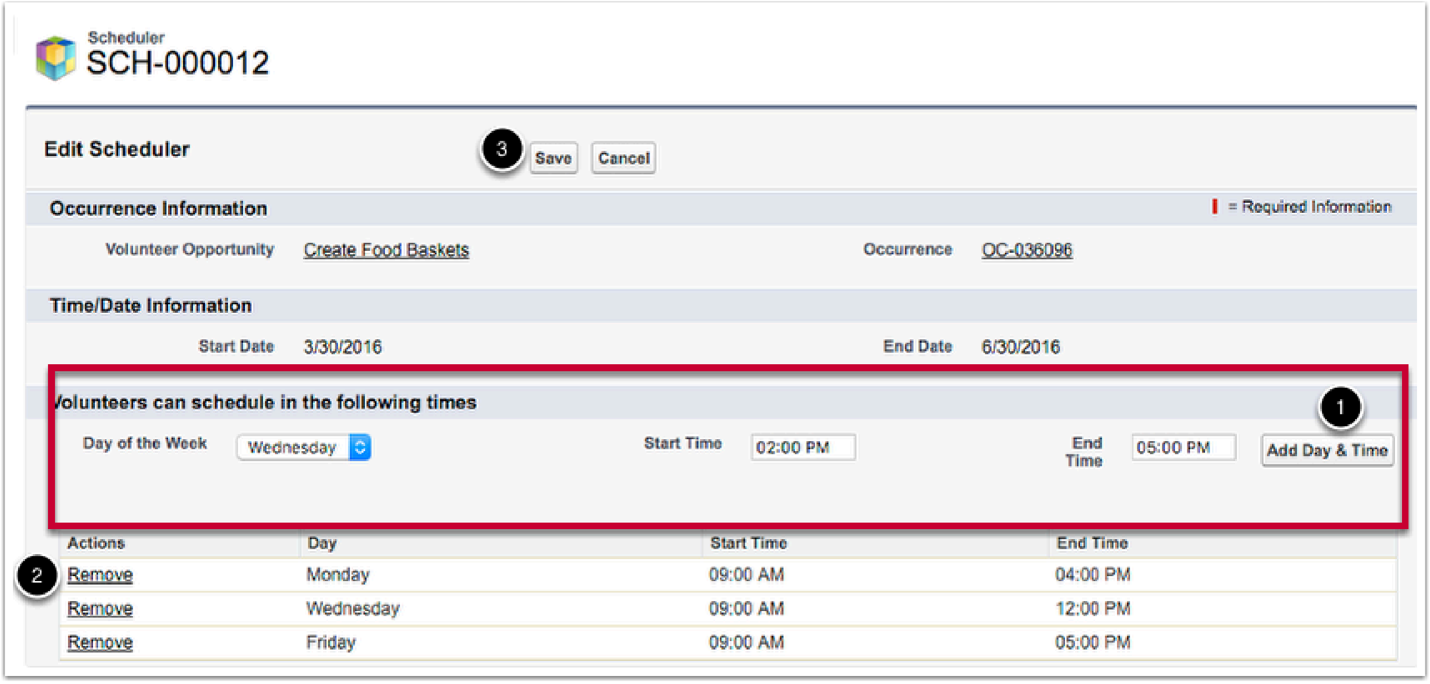


Scheduler Edit Page

1. You can create new schedule days / time spans by clicking Add Day & Time. Here I'm going to add an additional schedule for Wednesday. (notice that there is already a 9 - noon schedule -- but we're taking two hours off for lunch, so we don't want volunteers from noon - 2. You can add multiple schedules on this page by adding additional days and times.

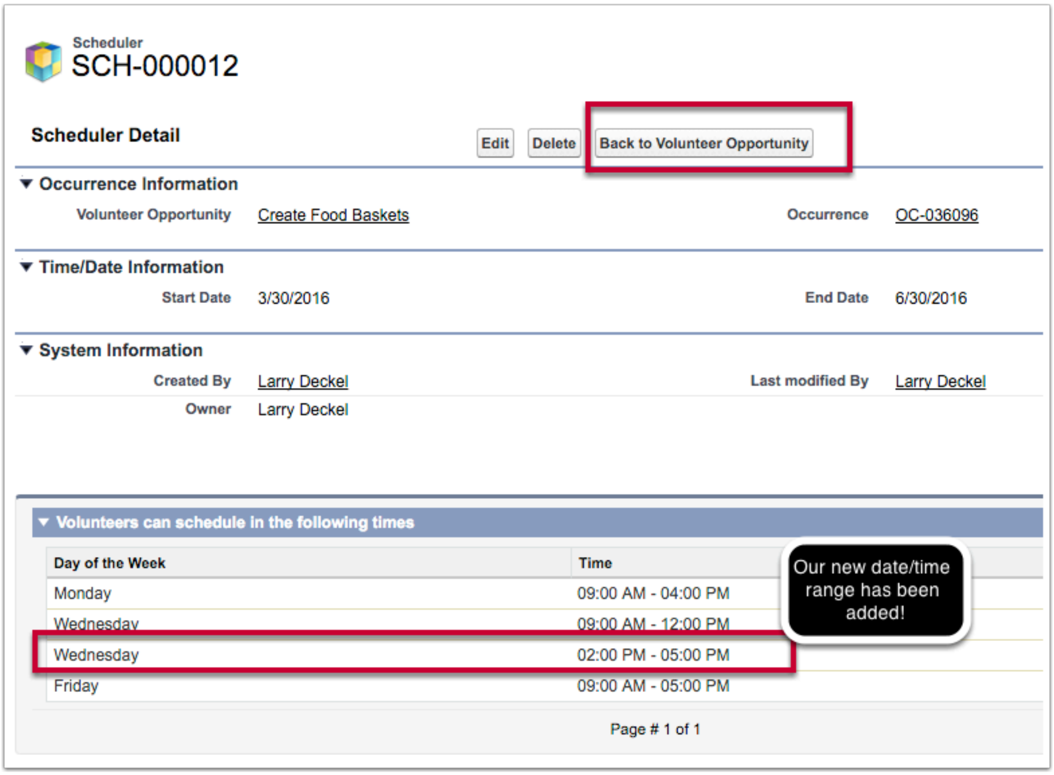
2. You can remove existing days / times by clicking "Remove"

3. Click Save after you've edited the schedule.



Saved view with new schedule added.

Click on "Back to Volunteer Opportunity" to go back to the Volunteer Opportunity record.



Notes about Individually Scheduled Opportunities

Individually Scheduled Opportunities are for individuals, not teams

Individually Scheduled Opportunities are likely to have a lot of connections associated with them since a volunteer could potentially schedule themselves for up to 50 connections at a time. For this reason, we are not permitting team signups for these opportunities at the time. (A Team of 40 people signing up for a schedule with 30 dates would result in 1200 connections! That's not something we want to permit at this time.

Individually Scheduled Opportunities do not allow for custom questions.

Custom Volunteer Opportunity Questions in HandsOn Connect were designed to get an answer for one-time volunteers. Since Individually Scheduled Opportunities are intended to allow a volunteer to express interest in many different dates over time, we don't want them asked the same question over and over again. It would also generate many many of the same answers. At this time, Volunteer Opportunity Questions cannot be added to Individually Scheduled Opportunities. (Depending on demand, we may find a solution in the future where a question would be asked only one time over the entire engagement with this opportunity).

Spring 2016 Release Notes

Spring is here! And the HandsOn Connect bunny has a lot of treats for you in our Spring Release Basket! We have a number of new features that have been high on the New Feature Request Forum, bringing some new and exciting functionality to HandsOn Connect. Some features provide greater ease of use, some offer advanced functionality for those who choose to deploy it.

We're also offering public betas of our most exciting new features:

Individually Scheduled Opportunities (ISO) - This is the much improved scheduling type for managing ongoing volunteers. It is intended to replace and improve upon our legacy "To Be Scheduled" volunteer opportunity schedule type. TBS opportunities will remain available - but we expect that after you've seen the improvements with ISOs that you and your partners will see this as a better and easier way of scheduling volunteers on a flexible schedule.   (More on this will appears later in this article)

HandsOn Connect AddOn Store

The Spring release will be rolled out to customers between April 4 - April 15. (It's a long release window as it's a very large release, so the roll-out will take longer to reach all instances)   Look for the Spring Release logo in the upper left hand corner of your instance and you'll know you have been upgraded to the Spring 2016 version!

And don't forget to join our preview webinar on Tuesday, April 5 at 1 pm eastern, to see a demo of all the new features and functionality.

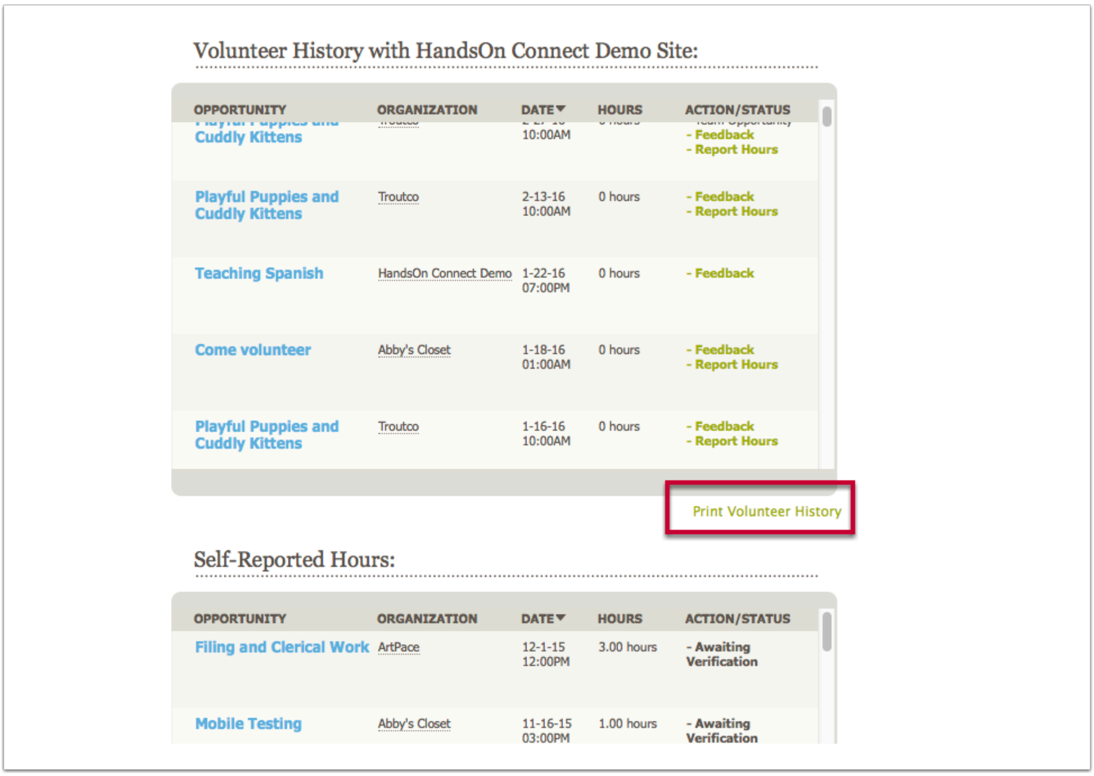
Here are the details of our Spring Release.

1. Civic Transcript (Volunteer History) now available on public site. (HOC-168)

Volunteers will now be able to easily export their complete volunteer history as a .pdf that can be either printed or downloaded and emailed as proof of their volunteer service.

A link to "Print Volunteer History" will appear just below the volunteer history grid on the My Accounts Page.

Clicking on the link will open a .pdf which will summarize a volunteer's history. This .pdf can be printed or exported and saved from your browser using your browsers standard print and save as .pdf options.

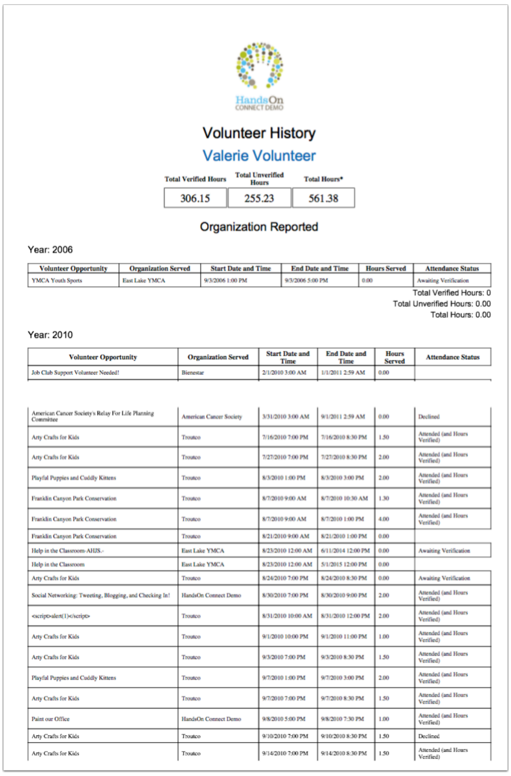


1.1. The .pdf opens in a new tab

The report features your logo, the Volunteer's name, and a summary of their overall hours, verified and unverified.

The first part of the report is all the "Organization Reported" opportunities (from you and/or your partners), summarized by year, and with subtotals of hours for each year. (Everything in the "Volunteer History" grid above.

The second part of the report includes all "Self Reported" hours, from the grid below the link. (most of these will be unverified, but they will be labeled as such and also subtotaled by year).



Volunteer History

Valerie Volunteer

Total Verified Hours	Total Unverified Hours	Total Hours*
306.15	255.23	561.38

Organization Reported

Year: 2006

Volunteer Opportunity	Organization Served	Start Date and Time	End Date and Time	Hours Served	Attendance Status
YMCA Youth Sports	East Lake YMCA	9/3/2006 1:00 PM	9/3/2006 5:00 PM	0.00	Awaiting Verification

Total Verified Hours: 0
Total Unverified Hours: 0.00
Total Hours: 0.00

Year: 2010

Volunteer Opportunity	Organization Served	Start Date and Time	End Date and Time	Hours Served	Attendance Status
Job Club Support Volunteer Needed!	Bienestar	2/1/2010 3:00 AM	1/1/2011 2:59 AM	0.00	
American Cancer Society's Relay For Life Planning Committee	American Cancer Society	3/31/2010 3:00 AM	9/1/2011 2:59 AM	0.00	Declined
Arty Crafts for Kids	Trouteo	7/16/2010 7:00 PM	7/16/2010 8:30 PM	1.50	Attended (and Hours Verified)
Arty Crafts for Kids	Trouteo	7/27/2010 7:00 PM	7/27/2010 8:30 PM	2.00	Attended (and Hours Verified)
Playful Puppies and Cuddly Kittens	Trouteo	8/3/2010 1:00 PM	8/3/2010 3:00 PM	2.00	Attended (and Hours Verified)
Franklin Canyon Park Conservation	Trouteo	8/7/2010 9:00 AM	8/7/2010 10:30 AM	1.30	Attended (and Hours Verified)
Franklin Canyon Park Conservation	Trouteo	8/7/2010 9:00 AM	8/7/2010 1:00 PM	4.00	Attended (and Hours Verified)
Franklin Canyon Park Conservation	Trouteo	8/21/2010 9:00 AM	8/21/2010 1:00 PM	0.00	
Help in the Classroom-AHJS.-	East Lake YMCA	8/23/2010 12:00 AM	6/11/2014 12:00 PM	0.00	Awaiting Verification
Help in the Classroom	East Lake YMCA	8/23/2010 12:00 AM	5/1/2015 12:00 PM	0.00	
Arty Crafts for Kids	Trouteo	8/24/2010 7:00 PM	8/24/2010 8:30 PM	0.00	Awaiting Verification
Social Networking: Tweeting, Blogging, and Checking In!	HandsOn Connect Demo	8/30/2010 7:00 PM	8/30/2010 9:00 PM	2.00	Attended (and Hours Verified)
<script>alert(1)</script>	Trouteo	8/31/2010 10:00 AM	8/31/2010 12:00 PM	2.00	Attended (and Hours Verified)
Arty Crafts for Kids	Trouteo	9/1/2010 10:00 PM	9/1/2010 11:00 PM	1.00	Attended (and Hours Verified)
Arty Crafts for Kids	Trouteo	9/3/2010 7:00 PM	9/3/2010 8:30 PM	1.50	Attended (and Hours Verified)
Playful Puppies and Cuddly Kittens	Trouteo	9/7/2010 1:00 PM	9/7/2010 3:00 PM	2.00	Attended (and Hours Verified)
Arty Crafts for Kids	Trouteo	9/7/2010 7:00 PM	9/7/2010 8:30 PM	1.50	Attended (and Hours Verified)
Paint our Office	HandsOn Connect Demo	9/8/2010 5:00 PM	9/8/2010 7:30 PM	1.00	Attended (and Hours Verified)
Arty Crafts for Kids	Trouteo	9/10/2010 7:00 PM	9/10/2010 8:30 PM	1.50	Declined
Arty Crafts for Kids	Trouteo	9/14/2010 7:00 PM	9/14/2010 8:30 PM	1.50	Attended (and Hours Verified)

2. One Step Volunteer Attendance Reporting (HOC283)

HandsOn Connect just got easier to use! To speed up the ease of reporting attendance, we're introducing a new home page component with a link called "One Step Volunteer Attendance Reporting".   You can still report attendance one occurrence at a time via the occurrence's connection grid - but now staff and partners will be able to see all confirmed connections in 'please verify' status that are in the past and now ready to have attendance verified. You'll be able to verify attendance for all your occurrences across multiple volunteer opportunities, all from one page!

By default, we have installed a new home page component "Report Volunteer Attendance". It has been added to the home page layouts for System Admin, Staff, Partner Staff and Volunteer Leaders.

Click on the link "One Step Volunteer Attendance Reporting" to launch the new one-step attendance reporting page.

2.1. The One Step Reporting Page

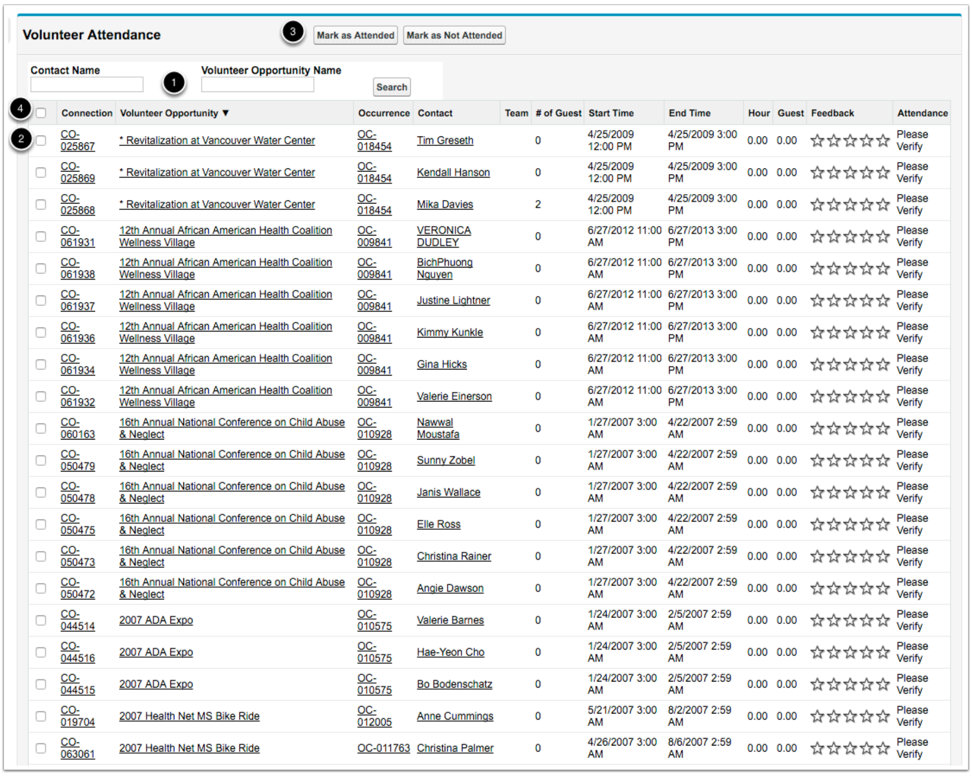
By default, all past connections in confirmed / please verify status will appear. (As an affiliate admin, you'll see ALL of these which will probably be quite a lot!), as a partner you'll only see those where the Volunteer Opportunity is managed by your organization.

Features:

1. Use search filters to narrow the connections shown. You can search for all the connections for a contact, or all the connections for a Volunteer Opportunity. (*Note: the * character isn't used for search here. If you put in Valerie for a contact name, you'll get anyone with the name Valerie. If you type in 12th for Volunteer Opportunity Name - you'll get any opportunity with the word 12th in it.)*

2. Select one or more check-boxes to select connections and then 3) click on Mark as attended or Mark as Not Attended.   The connections will be updated and removed from the list of volunteer attendance awaiting verification.   (If no search results show up - then ALL your connections are verified!)

4. Click the top box to select all the connections currently visible on the page.



Volunteer Attendance

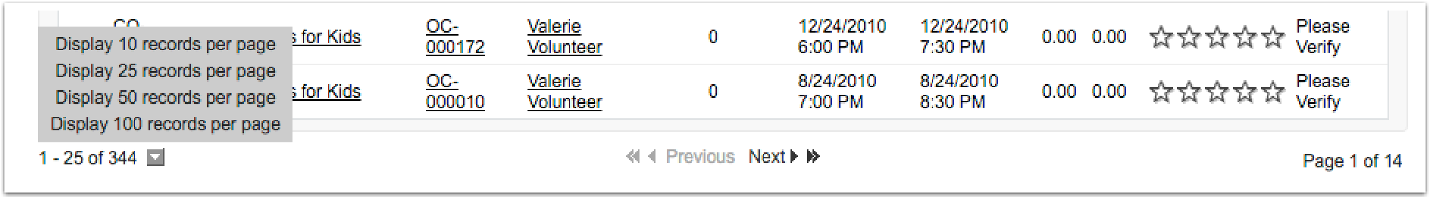
3 Mark as Attended | Mark as Not Attended

Contact Name | 1 | Volunteer Opportunity Name | Search

Connection	Volunteer Opportunity ▼	Occurrence	Contact	Team	# of Guest	Start Time	End Time	Hour	Guest	Feedback	Attendance
CO-025867	* Revitalization at Vancouver Water Center	OC-018454	Tim Greseth		0	4/25/2009 12:00 PM	4/25/2009 3:00 PM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-025869	* Revitalization at Vancouver Water Center	OC-018454	Kendall Hanson		0	4/25/2009 12:00 PM	4/25/2009 3:00 PM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-025868	* Revitalization at Vancouver Water Center	OC-018454	Mika Davies		2	4/25/2009 12:00 PM	4/25/2009 3:00 PM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-061931	12th Annual African American Health Coalition Wellness Village	OC-009841	VERONICA DUDLEY		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-061938	12th Annual African American Health Coalition Wellness Village	OC-009841	BichPhuong Nguyen		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-061937	12th Annual African American Health Coalition Wellness Village	OC-009841	Justine Lightner		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-061936	12th Annual African American Health Coalition Wellness Village	OC-009841	Kimmy Kunkle		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-061934	12th Annual African American Health Coalition Wellness Village	OC-009841	Gina Hicks		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-061932	12th Annual African American Health Coalition Wellness Village	OC-009841	Valerie Einerson		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-060163	16th Annual National Conference on Child Abuse & Neglect	OC-010928	Nawwal Moustafa		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-050479	16th Annual National Conference on Child Abuse & Neglect	OC-010928	Sunny Zobel		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-050478	16th Annual National Conference on Child Abuse & Neglect	OC-010928	Janis Wallace		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-050475	16th Annual National Conference on Child Abuse & Neglect	OC-010928	Elle Ross		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-050473	16th Annual National Conference on Child Abuse & Neglect	OC-010928	Christina Rainer		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-050472	16th Annual National Conference on Child Abuse & Neglect	OC-010928	Angie Dawson		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-044514	2007 ADA Expo	OC-010575	Valerie Barnes		0	1/24/2007 3:00 AM	2/5/2007 2:59 AM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-044516	2007 ADA Expo	OC-010575	Hae-Yeon Cho		0	1/24/2007 3:00 AM	2/5/2007 2:59 AM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-044515	2007 ADA Expo	OC-010575	Bo Bodenschatz		0	1/24/2007 3:00 AM	2/5/2007 2:59 AM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-019704	2007 Health Net MS Bike Ride	OC-012005	Anne Cummings		0	5/21/2007 3:00 AM	8/2/2007 2:59 AM	0.00	0.00	☆☆☆☆☆	Please Verify
CO-063061	2007 Health Net MS Bike Ride	OC-011763	Christina Palmer		0	4/26/2007 3:00 AM	8/6/2007 2:59 AM	0.00	0.00	☆☆☆☆☆	Please Verify

2.2.

5. You can choose to display 10, 25, 50 or 100 connections at a time. (Bottom of page). No more than 100 connections can be updated at one time.

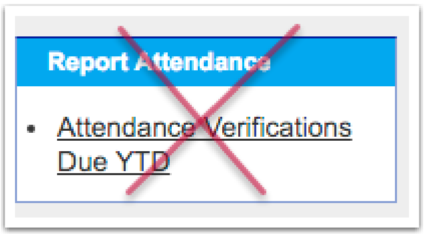


2.3. System Admin Action (Optional):   Remove any older home page components or links in partner portal for attendance reporting

One of the temporary improvements to the partner portal for many customers was to add a Home Page Component (or a link) to a report that showed all "Attendance Verifications Due..."

Now that One Step Volunteer Attendance Reporting is available -- the link to this report is no longer necessary. If you had a home page component called "Report Attendance" we've turned it off and added the new "Report Volunteer Attendance" component.

We recommend Double-checking your partner portal though and making sure you no longer have a component or link that goes to the old "Attendance Verifications Due YTD" report.   If you find it, remove it. (It won't hurt anything if its still there - but may be confusing to your partners why there are two links related to reporting attendance).

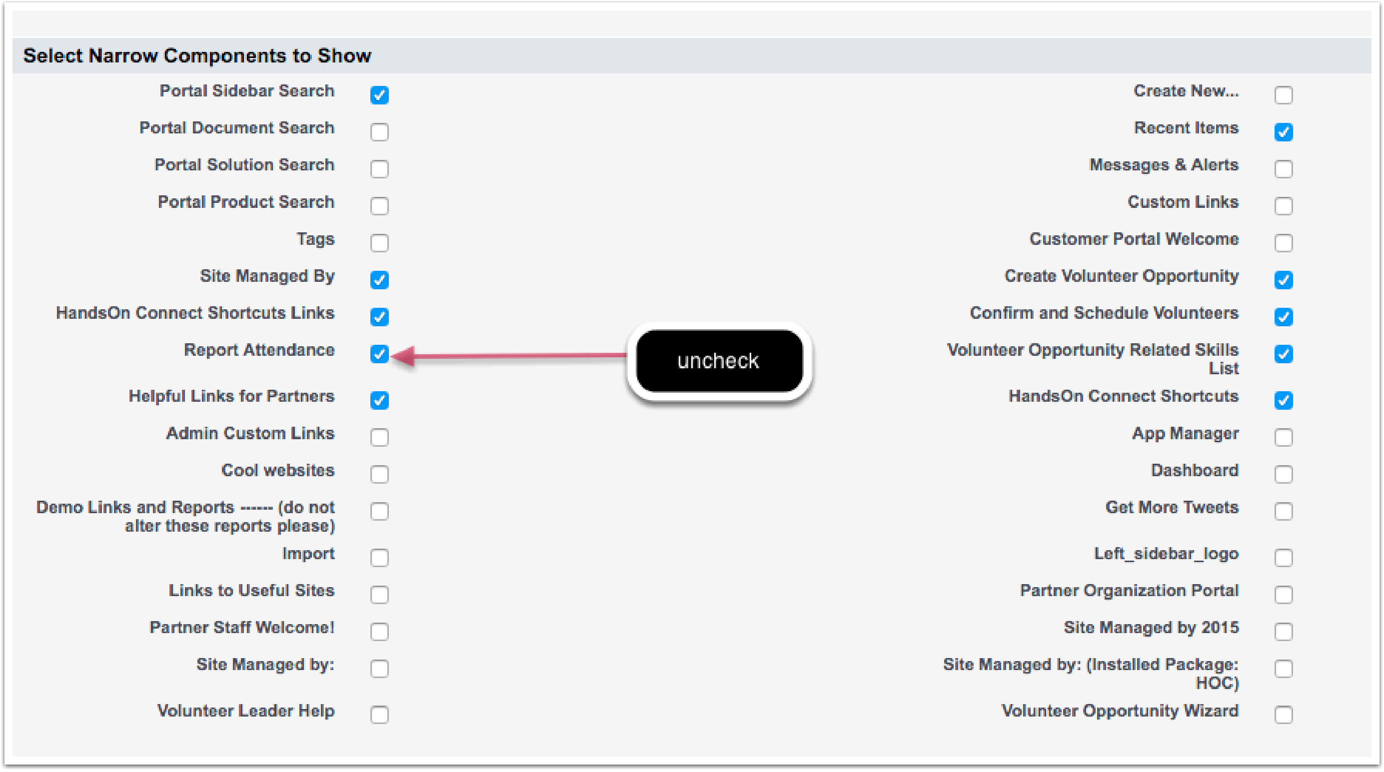


If you are seeing the old "Report Attendance" component in the partner portal:

Go to setup / Customize / Home / Home Page Layouts

Choose Partner Staff Home Page Layout. Click Edit.

Uncheck the box for "Report Attendance" (or whatever your version of this component is called, click 'next' and then Save.



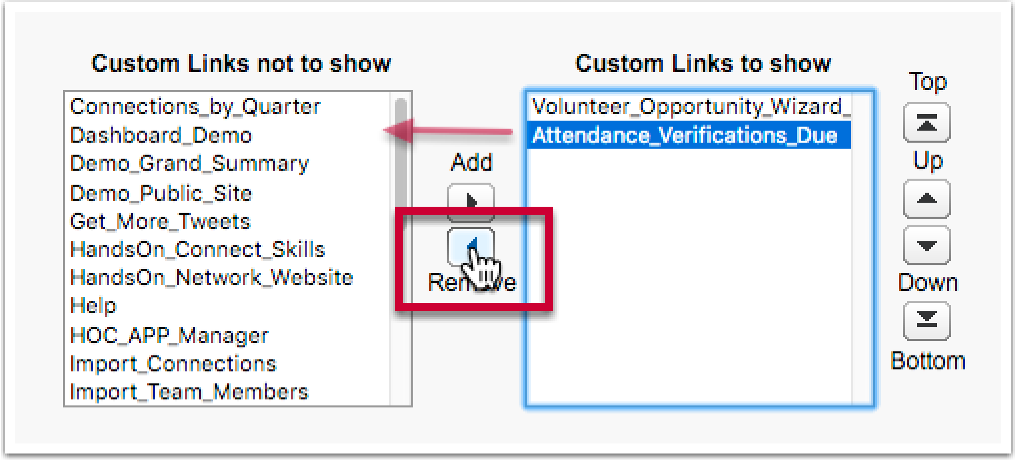
2.4. If your link to 'report attendance" is in a component with more than one link....

Some folks have this link in a component with multiple shortcut links. If that's the case, go to Setup / Customize / Home / Home Page Components and select the component the link is contained in.

Click Edit.

Remove "Attendance Verifications Due" or "Report Attendance" from the 'custom links to show" and then click Save.

When you're done. The only link related to reporting attendance should be the new "Report Volunteer Attendance" component and its "One Step Volunteer Attendance Reporting" link. This is going to greatly speed up and improve reporting attendance!



2.5. We recommend you contact your Partners and/or Volunteer Leaders and let them know about this new feature!

Let your partners and VLs know that this new feature is available for them to use.   To help you with communicating this, we've updated training documentation in the Help Sections, so you can send them to this link for instructions on how to use the new feature (though its quite self explanatory :-)

Partners: http://partners.handsonconnect.org/m/11500/l/515596-one-step-volunteer-attendance-reporting

Volunteer Leaders: http://leaders.handsonconnect.org/m/leaders_premium/l/515596-one-step-volunteer-attendance-reporting

3. Public Beta: New "Individually Scheduled" volunteer opportunity type (HOC258, 278, 281, 289, 290, 300)

A new, powerful type of Volunteer Opportunity Schedule is now available as a beta. This new opportunity type makes it easier for volunteers to be scheduled for ongoing opportunities where each volunteer is scheduled to appear at a different date and time, and where they may continue to volunteer for that opportunity over an extended period of time.

This is intended as an improvement, and eventually a replacement, for the original "To Be Scheduled" volunteer opportunity schedule.

Individually Scheduled volunteer opportunities offer:

- More specific information about when volunteers are needed for an ongoing opportunity.
- A way for volunteers to express interest in specific days and times they'd like to volunteer via the public site.
- Faster confirmation and scheduling of ongoing volunteers for Opportunity Coordinators
- A quick view of volunteers who are confirmed and scheduled to attend
- Easier attendance reporting

We will be adding training to the partner portal help, and creating some quick-start videos for partners so that they can quickly adapt to the new volunteer opportunity type.

During the months of April and May we are looking for affiliates who wish to be beta testers and who will make this new opportunity type available to themselves and their partners. Look for an announcement in the next couple of weeks for how to request to be part of the beta for this much improved volunteer opportunity type.

Notes:

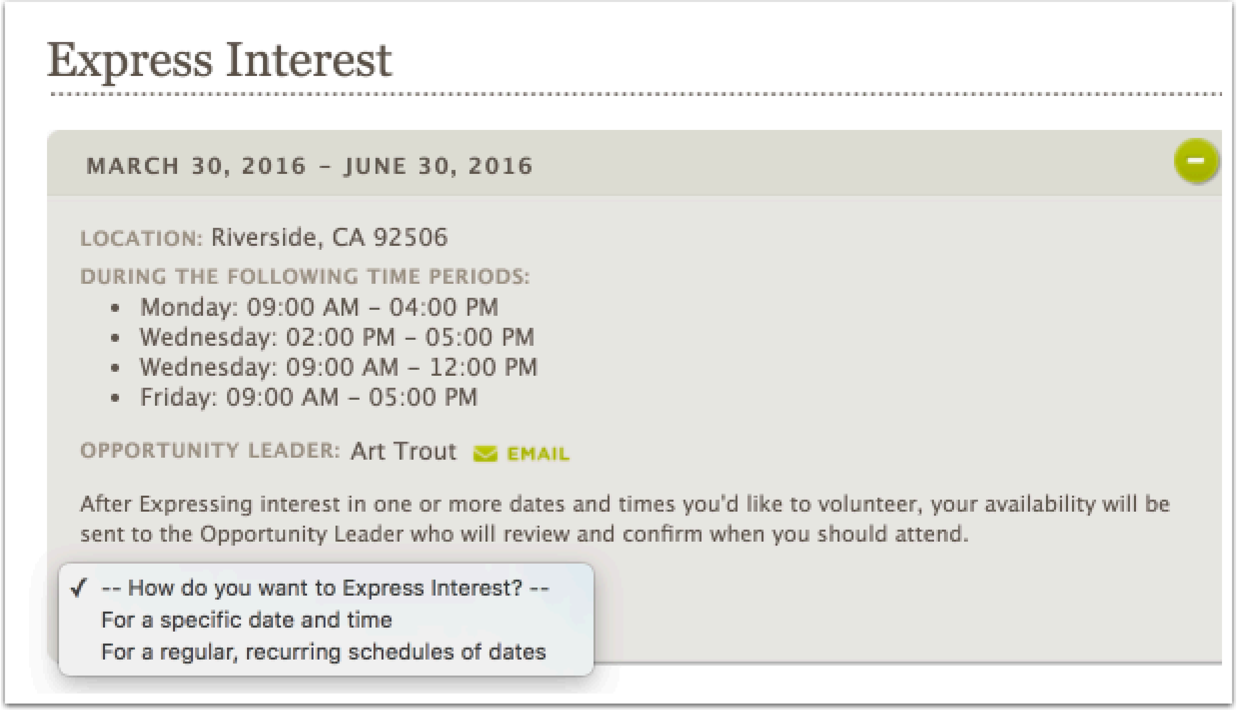
1. The legacy "To Be Scheduled" volunteer opportunity type will continue to be available so that existing ongoing opportunities do not have to be recreated.
2. If and when you want to only allow for "Individually Scheduled" opportunities and no longer allow the creation of new "To Be Scheduled" opportunities, we can update the volunteer opportunity wizard to remove the legacy "To Be Scheduled" opportunity type as an option. (Date and Time Specific will remain an option in all versions of the wizard).
3. The new opportunity type will become available to all by June, after the beta testing period.
4. Individually scheduled opportunities are not intended for team signups and do not permit custom questions (since these opportunities create multiple connections you wouldn't want to ask the same question again and again and again). These features may be added in the future if there is sufficient need.

Click here to see how the new Individually Scheduled Volunteer Opportunities work:

- Creating Individually Scheduled Volunteer Opportunities
- How volunteers sign up for Individually Scheduled Opportunities on the public site
- Managing volunteers with the new Connections Grid in the Occurrence Record.

A version of the above documentation will be created and made available to partners later this month.

Note: Individually Scheduled Opportunities, once you participate in the beta or next month when it is widely released to all, are for internal users and premium partner portal users. ISOs are not available yet for basic portal users. It will become available in the basic partner portal later this year along with a redesign of the basic partner portal.



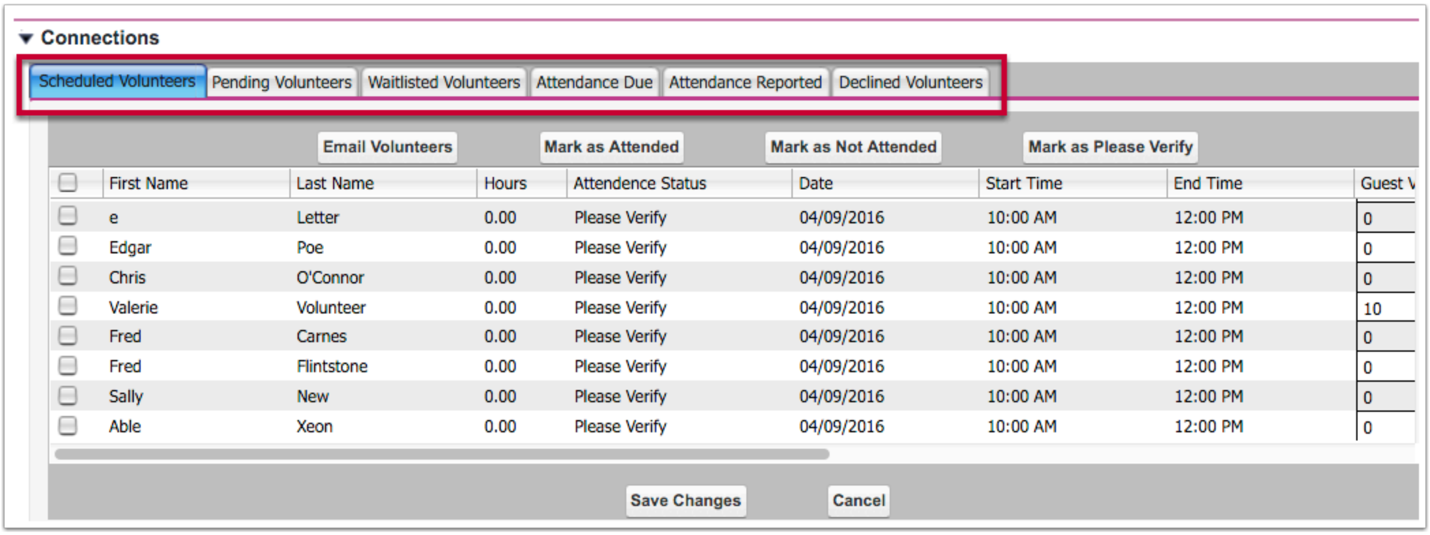
4. Improved Connections Grid in the Occurrence Record

We've made significant improvements to the connections grid on the occurrence record page. It will make managing the new "Individually Scheduled" opportunities faster and more powerful, and will also improve management of "To Be Scheduled" connections.

In the old grid, it was difficult to manage To Be Scheduled connections because the 'confirmed' tab had a confusing mix of verified volunteers, upcoming volunteers, and past volunteers where attendance was due. The new grid breaks each of these types of confirmed volunteers out in a separate tab!

- Scheduled Volunteers - shows all confirmed volunteers for connections that have not yet taken place.
- Pending Volunteers - shows all connections in pending status (used for express interest opportunities, where this tab will be selected by default for your convenience!)
- Waitlisted Volunteers - show all connections on the waitlist. (Note: This tab does not appear for To Be Scheduled or Individually Scheduled as they don't have waitlists)
- Attendance Due - shows all confirmed connections in the past, where attendance status is "please verify"
- Attendance Reported - shows all confirmed connections where the attendance has been reported (this is essentially, the volunteer history for this occurrence)
- Declined Volunteers -- shows all connections with status "Declined"

Click here to see additional details of the new Connections Grid. and how to use it in conjunction with Individually Scheduled Opportunities.



4.1. This update will also happen in all partner and volunteer leader portal - so we recommend you announce this to them.

The use of the new connections grid is self-explanatory but it may nonetheless come as a surprise to your partners and volunteer leaders. So we recommend you announce this update to them and to make it easy for you to share the news, we've added documentation to the partner and volunteer leader portals on how the new grid works.

Partners: http://partners.handsonconnect.org/m/11500/l/515574-managing-volunteers-with-the-connections-grid-in-the-occurrence-record

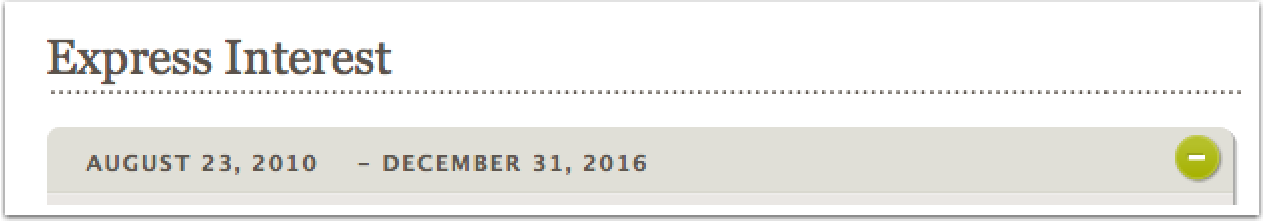
Volunteer Leaders: http://leaders.handsonconnect.org/m/leaders_premium/l/515574-managing-volunteers-with-the-connections-grid-in-the-occurrence-record

5. Improvement to date display of TBS and Individually Scheduled Opportunity detail page

People have long been confused about the date displaying for To Be Scheduled Opportunities on the opportunity detail page. It always listed the opportunity date as beginning on the start date of the opportunity.

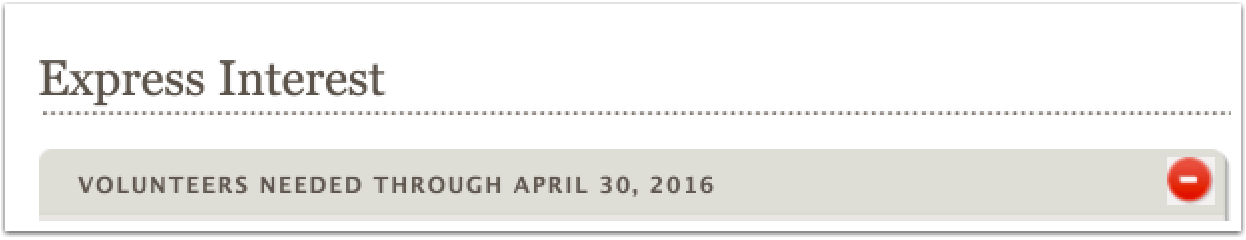
5.1. How Ongoing opportunities USED to appear:

2010? Really?



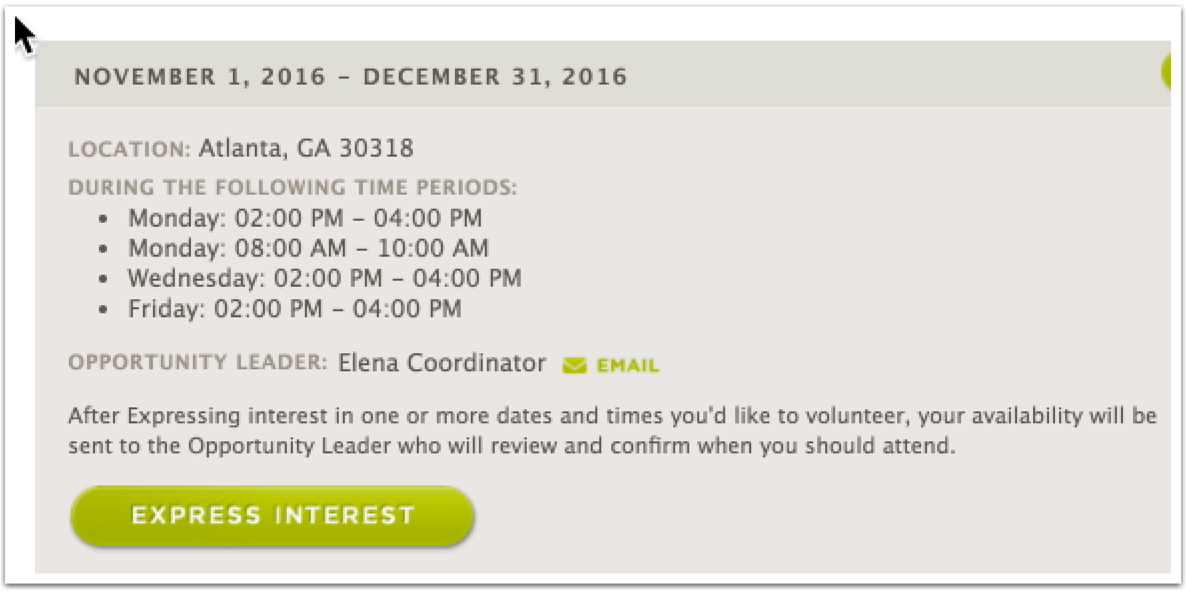
5.2. How they'll now appear:

Start date doesn't appear IF the start date is in the past.



5.3. And for Individually Scheduled Opportunities with future start dates:

If, the start date is in the future (which is possible with the new Individually Scheduled Opportunities) then the Start Date will appear so that volunteers know they can only schedule themselves during that time period:



6. Easier Editing for Occurrence Records HOCAVV-272 (***Administrative Action Recommended)

One of the more confusing fields in the occurrence record has been the field called "**Update all the existing connections?**" which required a value of Yes or No when you edited a connection.   In version 3 of the occurrence page layout, we recommended labeling this section "Update all connections when editing date and time specific occurrences (not TBS)" so users would make the correct choice for this field.   This helped - but still was relatively confusing. People invariably forgot to pick a yes or no value for this field, and would get a reminder message telling them it was required.

In this release we've automated the process by which connections are appropriately updated (or not) when editing an occurrence. So this confusing field is no longer needed!!   Hurrah! Now, when you edit a date and time specific occurrence the connections will automatically be updated to be in tune with the changes. To Be Scheduled (and our new "Individually Scheduled") connections, will not be wrongly updated.

What this means to you is: This field no longer does anything and is not needed on the page layout. We recommend, for simplicity sake, that all system admins remove this field from the page layouts where this field is present. No one will miss it!

Administrators: Here's what you need to do to remove this deprecated field from your page layouts:

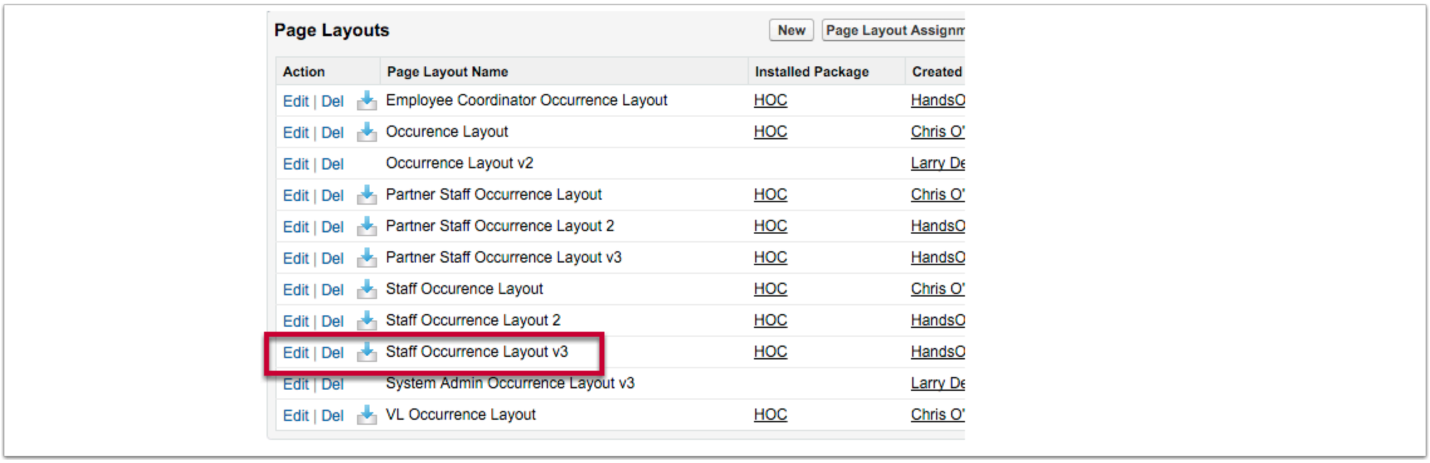
6.1. Administrative Action: Go to Objects / Occurrence

Go to the Page Layout section and select **Staff Occurrence Layout v3.**

(*Note: If your profiles are not using the v3 page layouts, now's a good time to upgrade these. We recommended your making this change a couple of years ago! It makes your page layouts much easier to use!*   *See this article on how to start using the v3 page layouts for occurrences, connections and volunteer opportunities.* *if you are still using the original or v2 page layouts for Occurrences, Volunteer Opportunities and Connections. If you are still using the old layouts because you weren't comfortable upgrading the page layout on your own - open a zendesk ticket and request that we update you to the v3 page layouts - we'll be happy to take care of this for you.)*

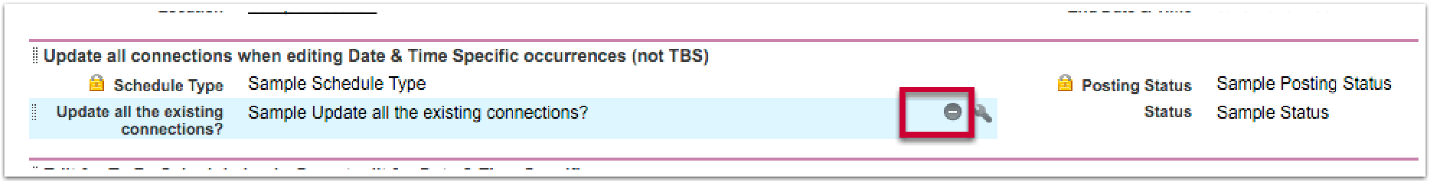
If f you have your own custom page layouts for occurrences, then make the appropriate change to the occurrence page layout you are using.)

Click on the edit link.



6.2. Delete the field "Update all the existing connections?"

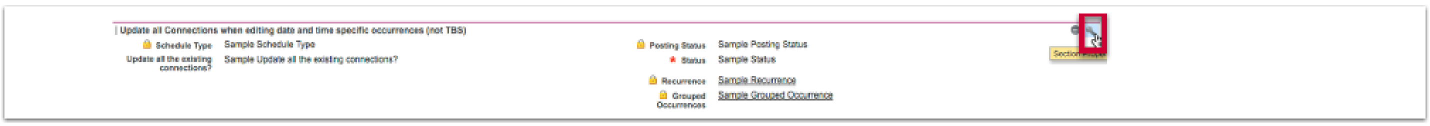
Click on the Minus button to delete the field from the layout.



6.3. Rename the section called "Update all connections when editing Date & Time......"

We no longer need this name. Let's name it something simpler. To do this:

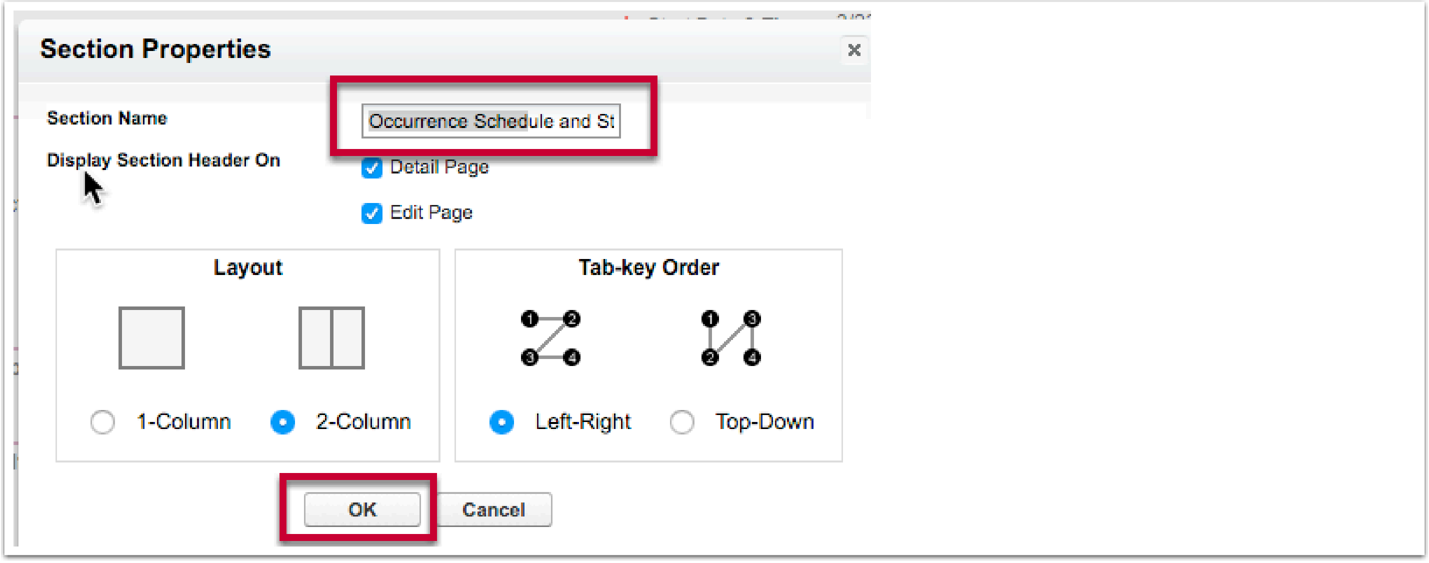
Click on the wrench to the extreme right of the section title:



6.4. Edit the section name and rename:

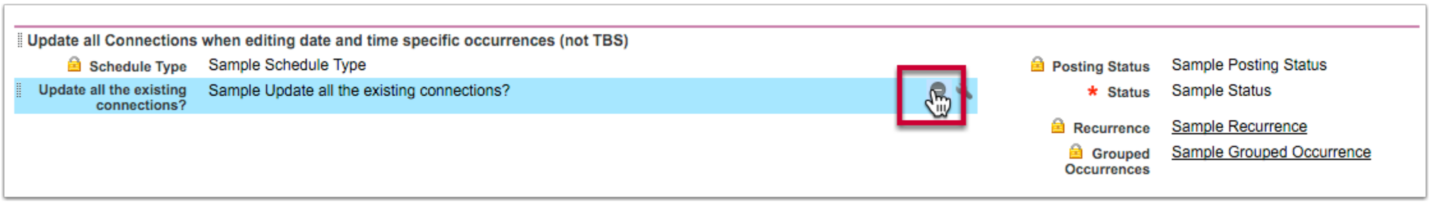
Rename the Section: Occurrence Schedule and Status.

Click OK.

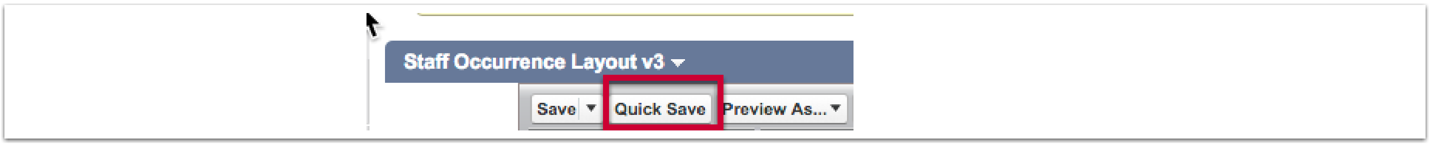


6.5. Remove the field "Update all the existing connections?" from the page layout

Drag it off the layout or hit the minus sign to delete it from the layout.



6.6. Click on Quick Save on the top of the page.

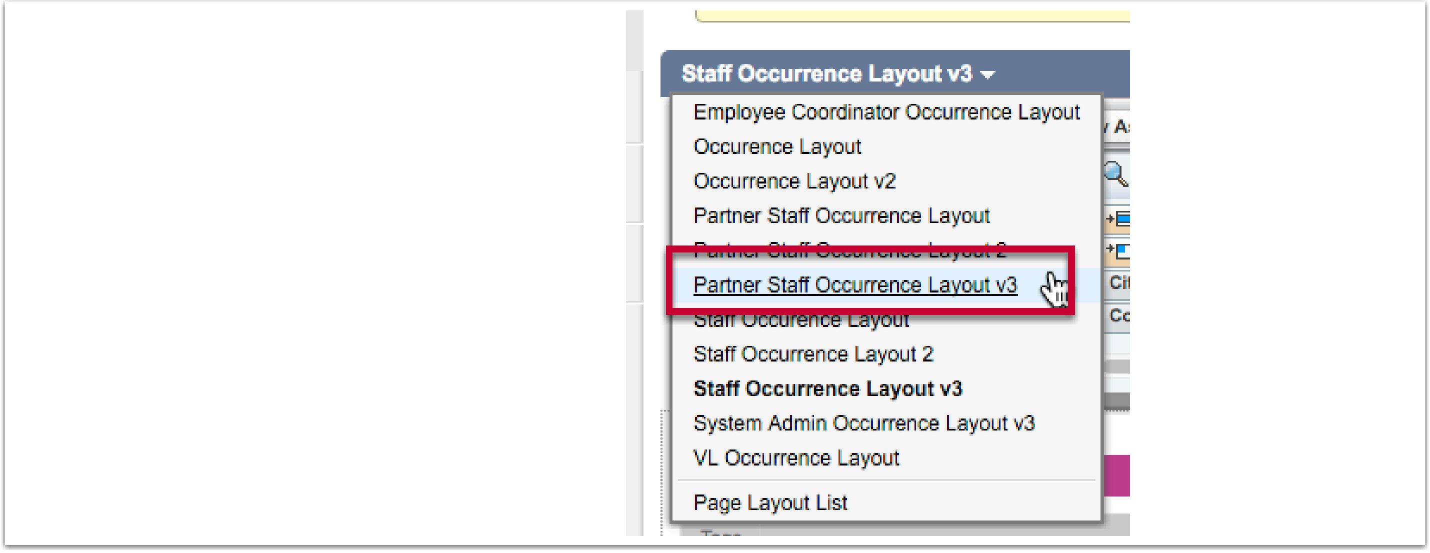


6.7. Select the layout "Partner Staff Occurrence v3"

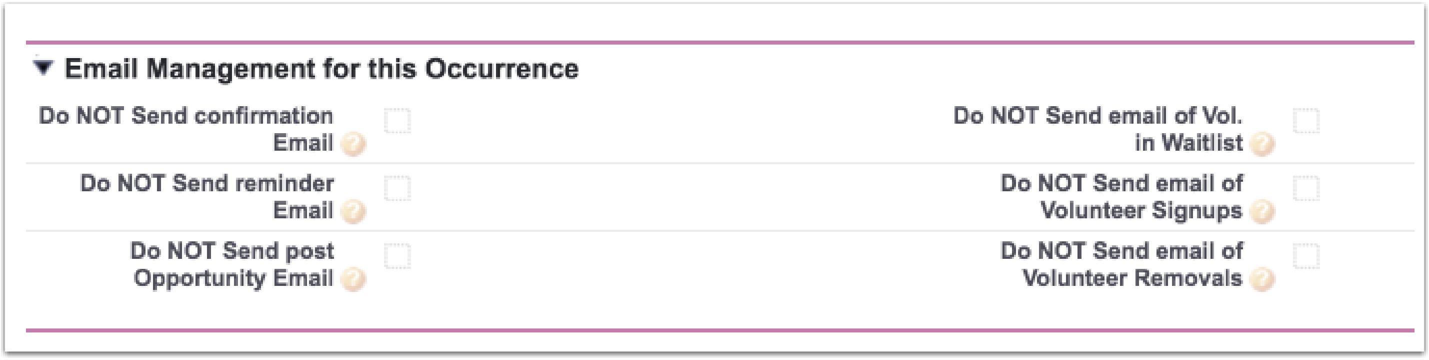
Click on the triangle next to the layout name, and select "Partner Staff Occurrence v3"

Make the same changes to this layout. Click Save when finished (or update any other occurrence layouts you are currently using, and then click Save.)

Your finished page layouts will no longer have this confusing, and now unnecessary, field. HandsOn Connect is now even easier to use for your staff and your partners!



7. Advanced controls over the sending of automated emails (HOC-169)



The ability to turn on or off email triggers for specific projects has been a top feature request of advanced users in the feature forum for years. It's also the subject of a lot of zendesk tickets. Users have asked if there was "a way to stop the automated email from being sent" so that Opportunity Coordinators or Volunteer Leaders could send their own personalized emails instead of the automated ones.

Up to now, its been possible to suppress the sending of certain automated emails system-wide. You can turn off workflows sending emails to volunteers, and you can use the control panel to turn off email notifications to Opportunity Coordinators. However -- this meant turning off these emails system-wide. There was no way to disable emails send to one opportunity coordinator without turning it off for everyone! There was no way to say that for occurrences of an ongoing opportunity, you didn't want reminder emails sent to volunteers for every connection they had to this same opportunity.

Effective with the Spring 2016 Release it will be possible for System Administrators to enable advanced functionality, at the occurrence level, to suppress the sending of the following emails:

Emails sent to Volunteers:

- Confirmation Email sent when signing up or expressing interest in an opportunity
- Reminder Email
- Post Opportunity (thank you and feedback) email.

Emails sent to Opportunity Coordinators

- Notification of volunteer sign ups
- Notification of volunteer removals
- Notification of volunteer added to waitlist.

If you don't need to use this functionality, no action is needed on your part, but its available for advanced system admins who wish more detailed control over the emails sent for individual occurrences. For most users - this isn't something you'll need -- but its there for use in the future if and when you want more control over email notifications.

If you DO wish to enable this feature for your system admin and staff, see this article for instructions on enabling this by editing the occurrence page layout. (It's also possible to enable this for Partner Staff and Volunteer Leader, though if you opt to do this, we recommend using permissions sets so only selected partners and VLs have access. In the hands of someone who doesn't understand the ramifications of disabling auto-emails, it could be detrimental. The two articles linked here have more detail on who should and shouldn't give access to, if anyone :-)

See this post for instructions on using these fields once they are enabled in your instance.

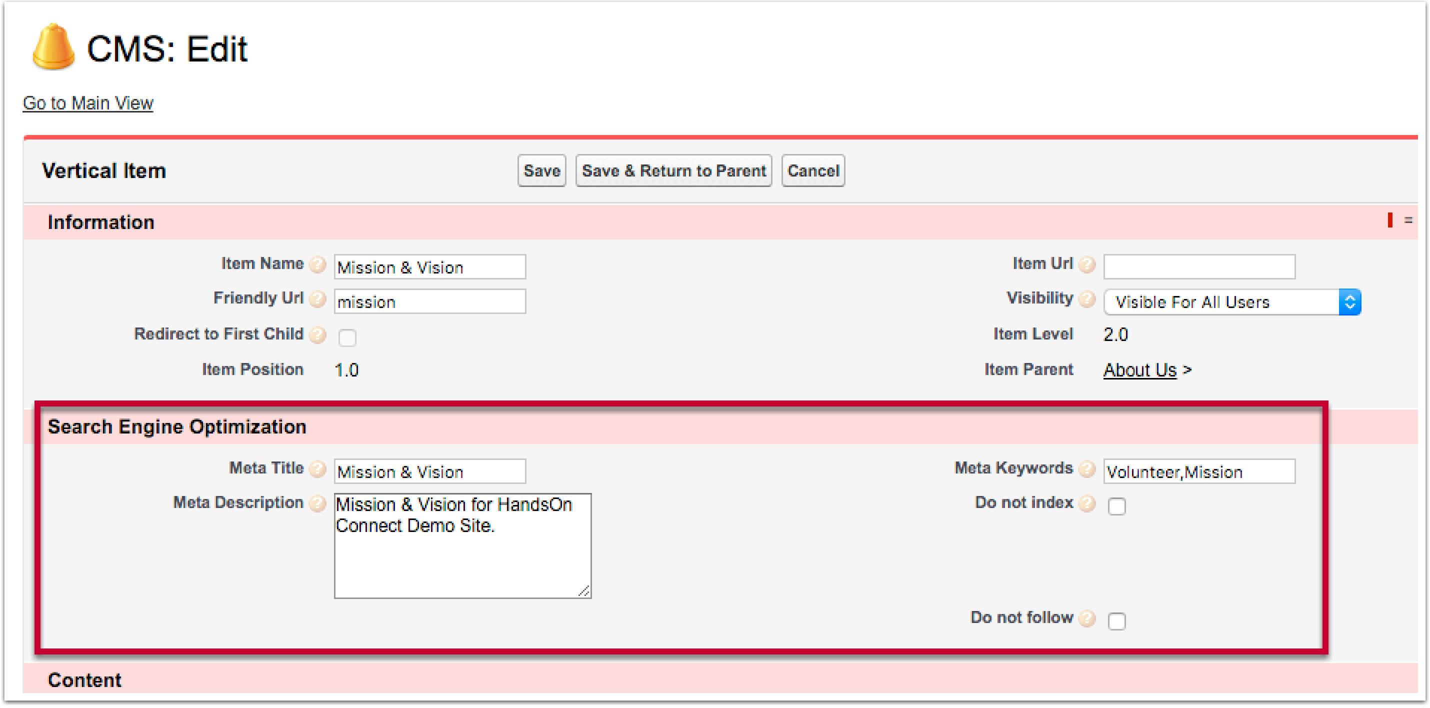
8. Meta Tag Access for CMS pages (HOC-189)

This feature has been much-requested by Search Engine power users: The ability to create meta-tags for individual HandsOn Connect CMS pages!

Now when you create or edit a page in the CMS, you will see new fields and options for the meta-tags, which include:

- **Title**: This is the title a search engine will use to index the page. It should be descriptive and specific to the page, and include, if possible, the main keyword or two that represent the content of the page. It is best if kept to less than 60 characters.
- **Description**: Contains the text that that describes your page to most search engines. Best if kept to less than 150 characters.
- **Keywords**: Best if keywords are specific to this page and are in the content of the page. Too many keywords and non-relevant keywords will hurt your search engine optimization. Not all search engines use this meta-tag. Keywords are single words with no spaces. Separate keywords with a comma. Example: Volunteer,Mission
- **Do not index**: Select this option if you do not want this page indexed by search engines.
- **Do not follow:** Select this option if you do not want search engine crawlers to follow any links on the page, though the page itself will be indexed.

If you are unfamiliar with Search Engine Optimization you can certainly leave these fields blank and ignore them. When blank, the normal search parameters used by the site are in effect. These fields just give you more control over how search engines treat a specific page within your public site. You can also choose to use these options selectively on some pages and leave them blank in others.

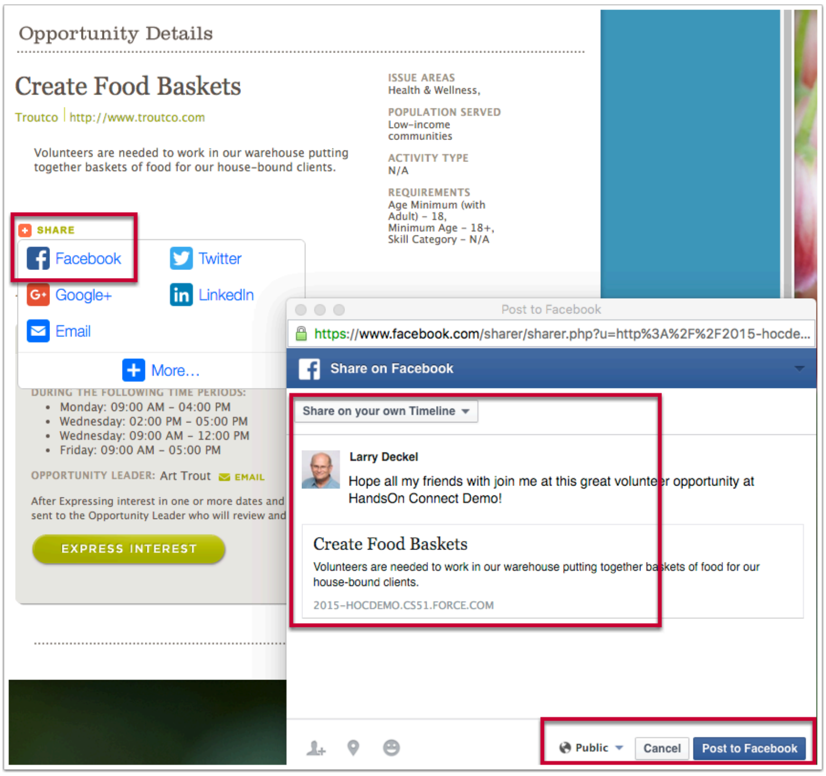


9. Social Media Integration Improvements (meta tags - and improved social sharing) (HOC-165)

This improvement is for those of you looking to optimize your content when shared with social media sites such as Facebook, Google and Twitter. This will give you more control of how your content appears on these social media sites. It will also improve how your website is indexed and ranked by search engines, such as Bing, Google and Yahoo.

The Social Media Integration Improvements include:

1. We added social meta tags for Facebook, Google+, and Twitter. These are tags that are hidden from plain site but provide valuable information to social media sites when content is shared from your site.
2. We've updated the share button on volunteer opportunity detail pages, so that you and your users have more control over what you share about the opportunity with social network sites. You'll be able to comment on the material you're sharing, and fine tune who it is shared with.

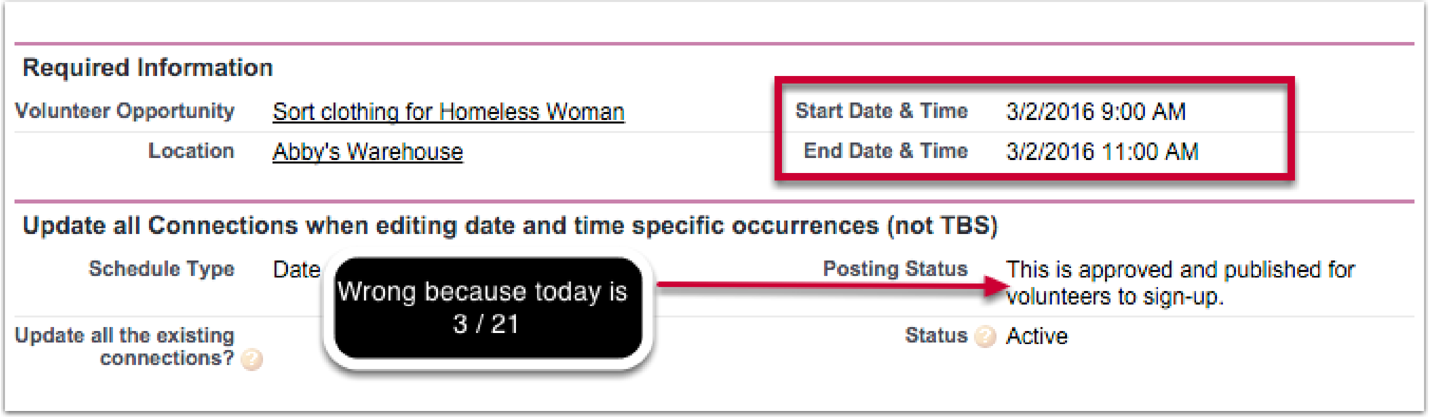


10. "Posting Status" field on Volunteer Opportunity and Occurrence records will now be updated and accurate each day! (HOC-252)

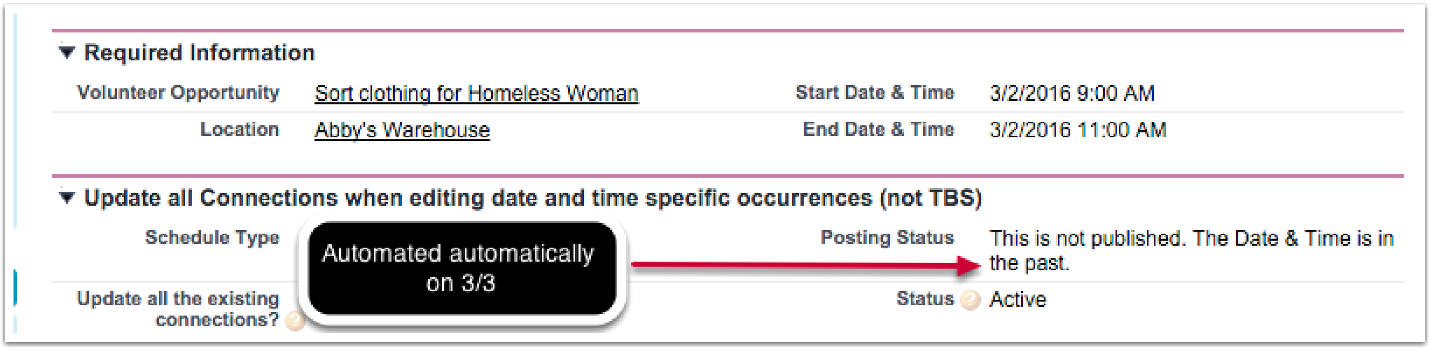
The "Posting Status" field in volunteer opportunities and occurrences was added to HandsOn Connect because the 'status' field had little to do with whether or not a volunteer opportunity was actually appearing on the public site. It told you if the opportunity was now published and available for sign-up, and if not, why it wasn't appearing.

However -- as many of you have reported, it wasn't always accurate. The field updated itself whenever you edited the volunteer opportunity record, but if the date of the last occurrence went by, it still indicated that the opportunity was published. There were a number of scenarios in which the posting status field was out of synch with the status of its occurrences or the current date. You had to manually update the volunteer opportunity to get it to refresh and indicate the current posting status. so the field was sometimes inaccurate - because dates changed, even if the opportunity record wasn't edited.

A new automation has been added to HandsOn Connect which will run a nightly update of all occurrences and volunteer opportunities, ensuring that the posting status is accurate and up to date each day. This will make this field a much more useful piece of information for partners, admins, and for use in reports and views.



After Spring Release '16



11. HandsOn Connect Add-On Store. Public Beta.

We are excited to launch the new Add-on Store for HandsOn Connect, a one-stop interface to see all the compatible additions and solutions that can be optionally added to HandsOn Connect and Salesforce. You will find add-ons that that you can install with a couple of clicks, by following the instructions, or you can request that our team install them for you. We will periodically be adding more add-ons and updates.

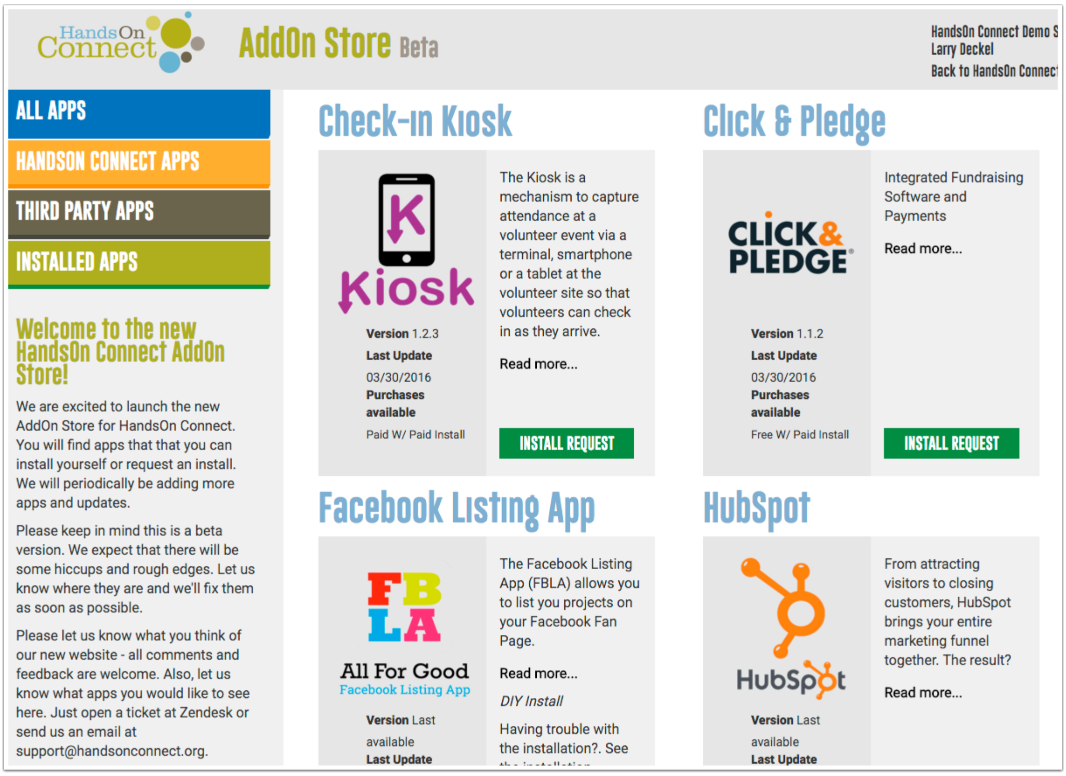
Please keep in mind this is a beta version. We expect that there will be some hiccups and rough edges. Let us know where they are and we'll fix them as soon as possible.

We are starting with a couple of add-ons, but we will be adding more on an ongoing basis. These are the add-ons included in the first release of the HandsOn Store:

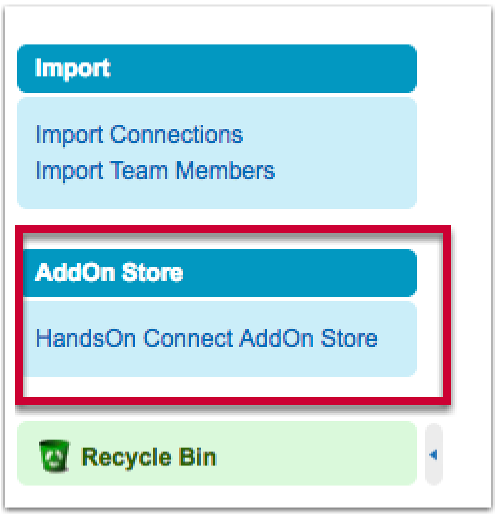
- **Check-in Kiosk**: A mechanism to capture attendance at a volunteer event via a terminal, smartphone or a tablet at the volunteer site so that volunteers can check in as they arrive.
- **Click & Pledge**: Integrated Fundraising Software and Payments.
- **Facebook Listing App**: Allows you to list you projects on your Facebook Fan Page.
- **HubSpot**: From attracting visitors to closing customers, HubSpot brings your entire marketing funnel together.
- **Nonprofit Starter Pack 3 (NSPS)**: Helps you manage individual donors and their donations, memberships, relationships and company affiliations.

- **Optimizely**: Optimized experiences, powered by data Create and deliver the best digital experience for each customer across devices.
- **Social Login**: Social Login allows your volunteers to login using their Facebook account.
- **SSL Certificate Installation**: An SSL (Secure Sockets Layer) certificate helps secure the connection between your users and your website.
- **Zopim**: Award-winning Live Chat solution. The fastest way to engage your customers

The Add-on Store is available to users with Salesforce System Administrator rights.



11.1. System Admins will find a widget to access the AddOn Store in the left sidebar



Look at the bottom of the left sidebar (just above the recycle bin) for the link to the AddOn Store

12. NPSP 3 compatibility (HOC-266)

The ability to use version 3 of the NonProfit Starter in conjunction with HandsOn Connect has been on many organization's wish lists.

We have tested and resolved issues related to using both apps in one instance of Salesforce and completed documentation on the custom install and configuration process for using NPSP3 with HandsOn Connect.

We will be providing documentation for those who wish to self-install and configure the NPSP. It takes 6-10 hours to fully install and configure. Our new Add-On Store also has an option where we will install and configure NPSP for you, as well as provide data import services if you've been using another donation tracking system.

Documentation for self-upgrading NPSP 2 to NPSP 3 will be added by summer. (It's a more complicated process than installing NPSP 3 from scratch.)

13. Bug Fix: Inappropriate email(s) sent when changing a contact's organization (HOC-224) (HOC-318)

The fix that was released in February turned out to be only a partial fix, and we turned off last months fix to prevent problems for users.

We've gone back and fixed this and also tackled a related bug (HOC-318) wherein users were getting emails telling them they had registered on the public site when a change was made to their contact record administratively. Thanks to HandsOn Richmond and United Way of Greater St. Louis for giving us details on what causes these events to occur.

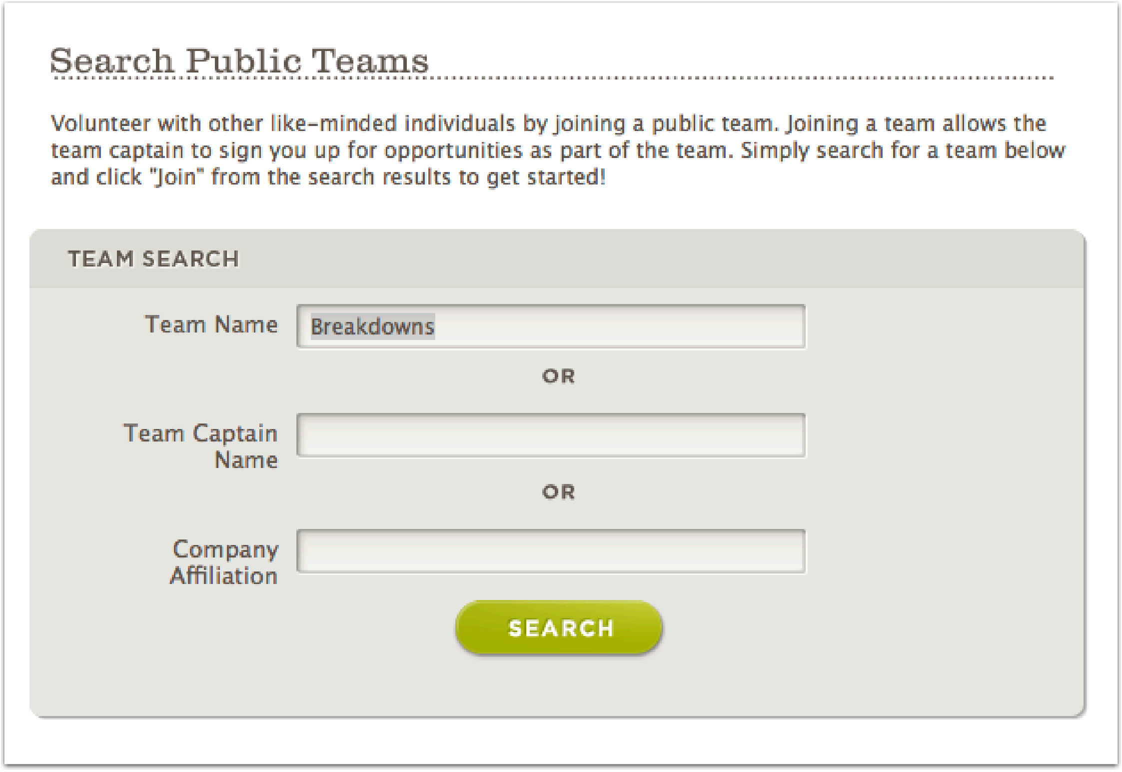
In this release we've done the following to address this. (This is strictly FYI -- no action is needed on your part), but for those of you who tinker with workflows and such...

1. Updated the managed workflow "Volunteer Registration Activation", so emails about successfully registering on the pubic site are only sent when a new contact is created via the public site.
2. Deprecated the workflow "Volunteer Registration" and turned it off in your instance. This pesky workflow has been replaced by a trigger. Please do not reactivate this workflow again ;-)

We think this resolves it once and for all. But if you encounter any other issues where 'volunteer account has been created' emails are being sent to contacts for any other than the correct reasons -- please let us know. (Boy - this has been a slippery bug to resolve!)

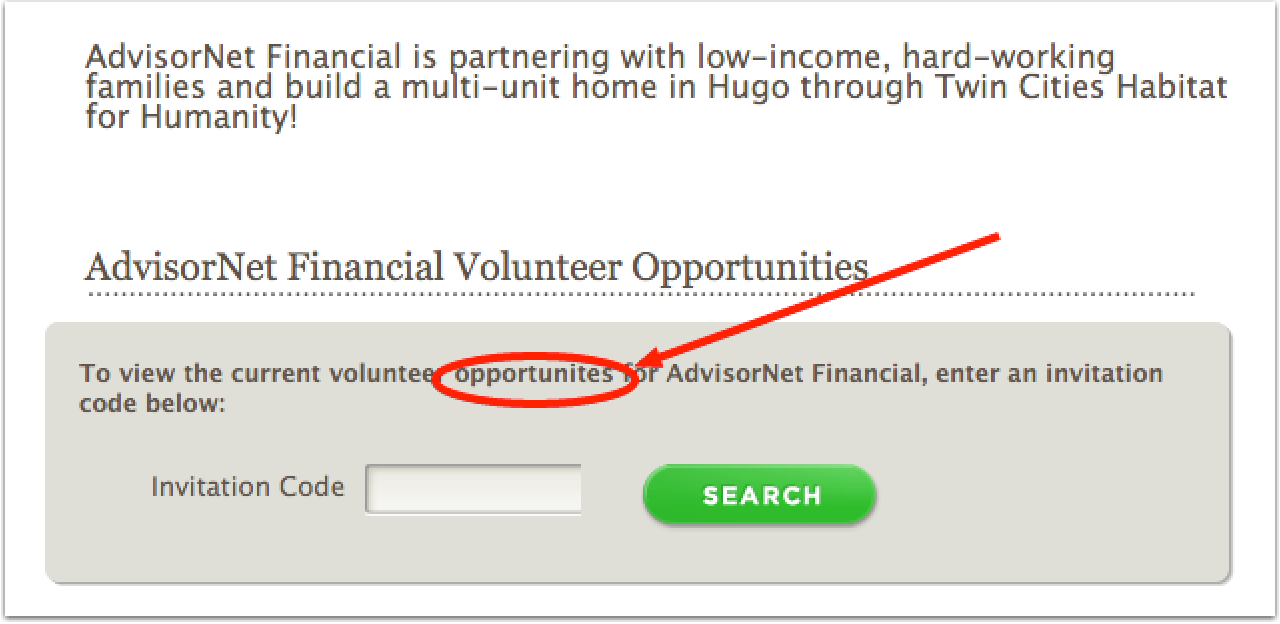
14. Bug Fix: Fixed search for Public Teams on Public Site

HandsOn Nashville discovered an issue where a public team that was created was not found when searching for public teams by team name on the page: HOC__Search_Public_Teams_Page. This has been fixed.



15. Bug Fix: Typo

There was a typo of the word "opportunities" on the business page search box. This has been corrected.



16. Coming Soon:

We have several features that were in development for this release but which are not yet ready to release. Stay tuned in the next couple of months for the following:

- Ability to administratively create multiple connections for volunteers.
- Faster, easier creation of new connections administratively.
- A solution to the increasing problem of deliverability of emails from Volunteers and Volunteer Leaders with AOL, Yahoo, and (starting in June) Gmail email addresses.

February 2016 Release Notes

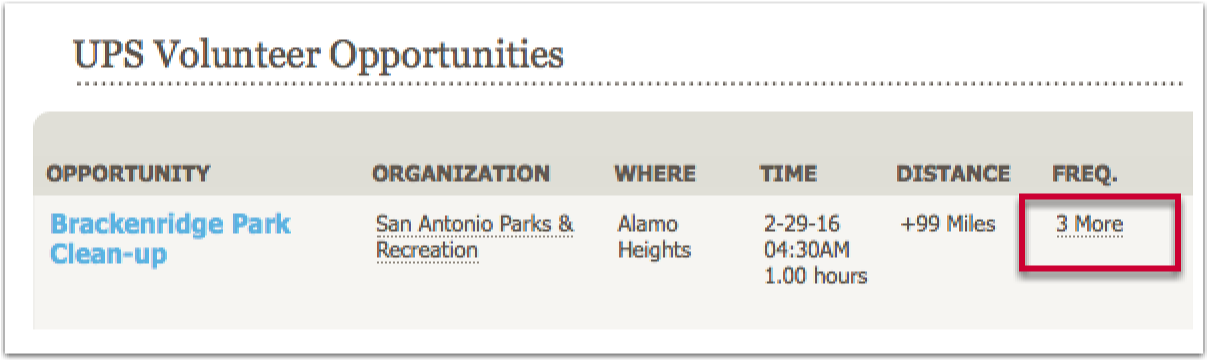
The February 2016 release will be made available to all HandsOn Connect clients during the one week release window of February 22-26. The release contains a number of bug fixes and improvements to new features that were part of the Winter 2015 release in December.

You'll know you've received the February release when the Feb 16 logo appears in the upper left corner of your instance of HOC.

Here are the details of this month's release:

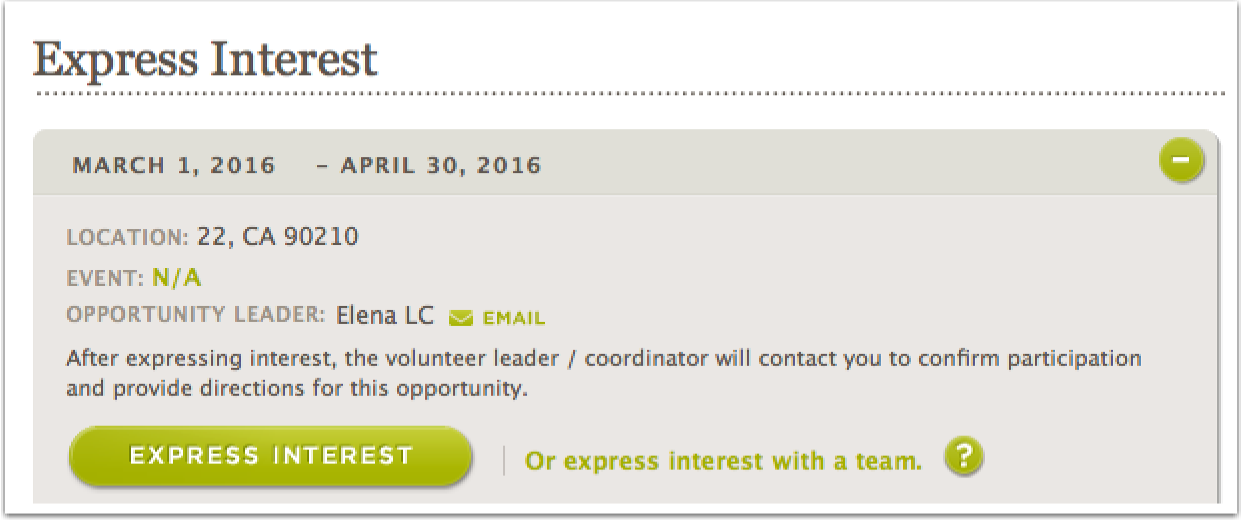
Fixed: Search results via invitation code and on business page (HOC-187)

A long-standing bug made search results based on an invitation code appears in the incorrect format. A single opportunity would be listed multiple times - one for each occurrence. Now search results are consistent with the normal search pages - listing a volunteer opportunity only once. Clicking on the opportunity will display all its related occurrences as expected.



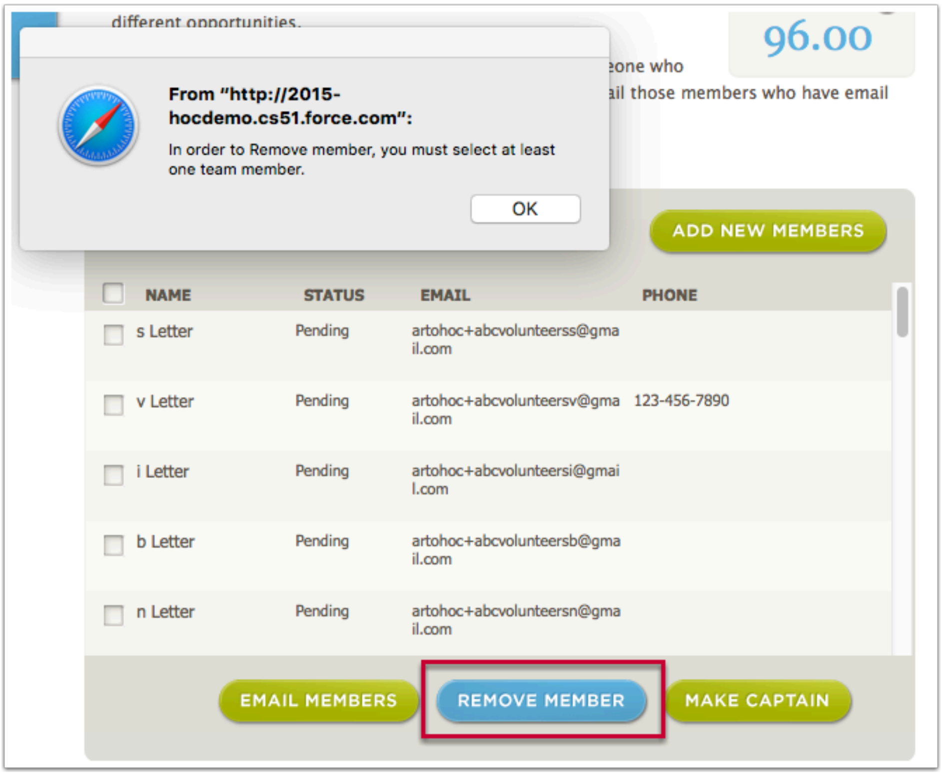
Fixed: Volunteers who remove themselves from Express Interest confirmations, unable to sign up again. (HOC 198)

Further improvements made to the flexibility that allows volunteers to 'change their mind' when they make a connection. Volunteers who remove themselves from an express interest occurrence, and then decide they really DO want to make the connection will now be able to sign up again.



Fixed: Inappropriate 'please wait' screen when failing to select team member while managing team (HOC206)

In the "My teams" section, iff a team captain clicks on "Manage Team" iand then clicks on either "Remove Member" or "Make Captain" with no team member selected, a "Please Wait" dialog was appearing. Now, instead of a 'please wait' screen, an appropriate error message appears.

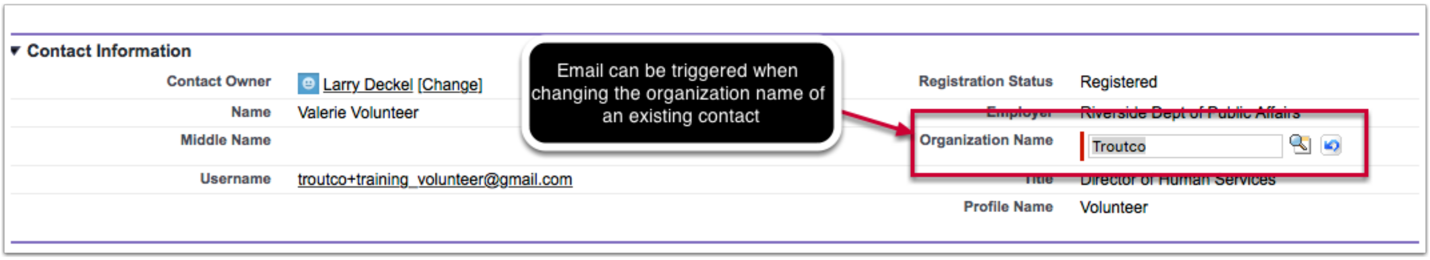


Fixed: Inappropriate email sent when changing a contact's

organization (HOC-224)

The Issue: -- Some organizations have reported that when changing the organization associated with a contact from **Individual** to another organization, or **vice versa** -- the Contact is sent an email notifying them that "A volunteer Account has been created for you". This occurs even if the contact already has a volunteer account. It can also occur when partners have their partner profile deactivated, and then they are moved to organization Individual.

The managed workflow that is responsible for this has been updated and will be activated for you. If a 'workaround' unmanaged workflow had been added to your instance by support - the unmanaged workflow will be deactivated for you to ensure that two emails are never sent :-)



Fixed: Errors when logging out of public site (HOC-235)

Some volunteers have reported that they get an error message when logging out of a HOC public site. Logging out should now safely return a volunteer to the home page.

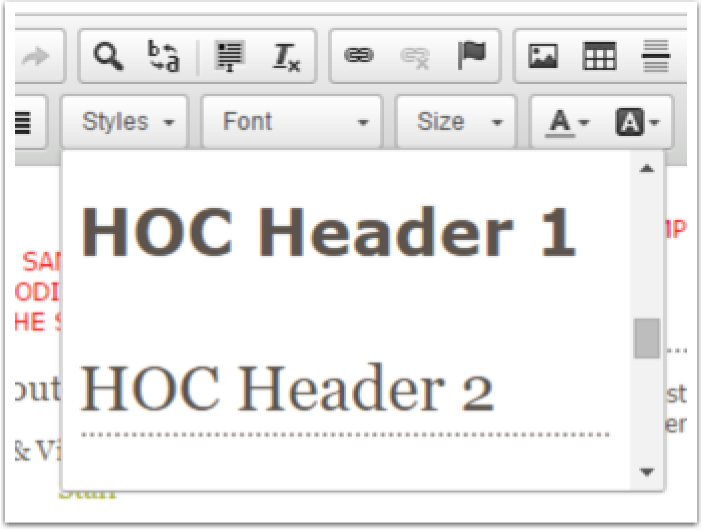
Improvements made to new WYSWYG editor (HOC-243)

The new version of the WYSWYG editor released in the December release, was missing styles (formats) previously found in the old version of the WYSWYG editor. They were previously known by the style names "Header1 Static - Title" "Header2 Static - Title - etc....

These styles are now available in the new WYSWYG editor again - but have been renamed to "HOC Header 1" "HOC Header 2" etc.... They can be found in the editor under the format icon.

You'll now be able to select these styles again. (Note: Your previous content and styles will not be affected by the name change in the WYSWYG editor for these styles).

For a full guide to styles that can be applied via the WYSWYG editor -- see this style guide.

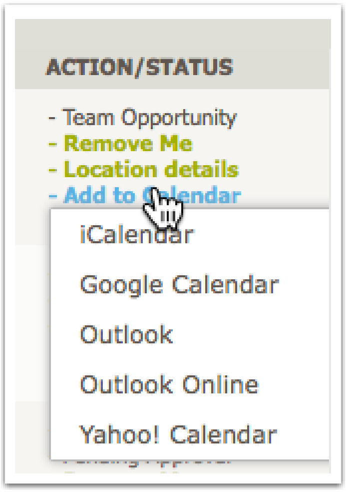


Fixed: Volunteer Opportunity Question answers not being captured when person connects as part of a team. (HOC-244)

It was discovered that when a team member signs up for an opportunity as part of a team, and the opportunity had custom questions, the answers to those questions were not being captured. This has been corrected.

Fixed: Visualforce error occurring when volunteer uses "add to calendar" link and tries to add to to Icalendar or Outlook (HOC245)

This was caused by a permission error in some instances, that did not grant appropriate access to the VisualForce page that generates the .ics file used by ICalendar and Outlook. When you receive the release - this permission error will be corrected for you and volunteers.



Fixed: Improved display and appropriate functionality for Team History in "My Teams" (HOC246)

In the December release it became possible for Team Captains, even those not signed up for an opportunity, to manage the signups of their team members. This can be done on the "My Teams" page. It was discovered that this new functionality also inadvertently made it possible for team captains to edit the signups for past occurrences. This has been corrected.

When looking at your team's history, you'll see all the opportunities they've participated in -- but the "Participants" and "Remove Team" links will only be visible for upcoming opportunities. The rest, as they say, is history :-)

Fixed: Improvements to Populations Served Search filter in Volunteer Opportunity Calendar (HOC255)

It was discovered that 'Populations Served" filters that is now available in the "Advanced Filters" of the Volunteer Opportunity Calendar, was not using the same logic as the one on the Search page. This has been corrected. Only populations served that are associated with active opportunities will appear as choices in the list.

Fixed: Level 2 navigation disappears after removing oneself from an opportunity (HOC273)

When a volunteer removed themselves from an existing opportunity on the Account overview page, the 2nd level navigation became invisible! This has been fixed!

Fixed: Opportunities sometimes appeared twice in 'upcoming opportunities" (HOC274)

The ability to remove oneself from an opportunity and then sign-up again was sometimes causing an opportunity to appear twice in a volunteer's "Upcoming Opportunities". This has been fixed.

Fixed: Google Maps not displaying on location detail pages for secure sites (HOC279)

It was discovered that the embedded google map on the location detail page was not displaying on sites that had been upgraded to https://

This has been corrected and now Google Maps will display correctly whether the site is secure or insecure.

Fixed: Share button in volunteer opportunity detail pages not working properly for secure sites (HOC-228)

The share button volunteer opportunity detail pages was not behaving properly on sites that were upgrade to https://   This is because the 'add to any' widget used here integrates with an external, non-secure service. This has been corrected so that site security is maintained.

Improvements to 'behind the scene' architecture

A handful of critical issues that appeared after the January release were quickly patched and fixed prior to this release. These included some Visualforce Errors that were experienced on the public site, and some issues affecting logins. These are already corrected for all instances of HOC.

A number of issues in the architecture of HandsOn Connect have been addressed in this release that will improve overall responsiveness and functionality of HOC.   Groundwork has also been laid to support some of the new features for next month's Spring 2016 release.

We continue to add improvements to search responsiveness and are have further isolated the occasional behavior where the current day's projects on the calendar do not appear as expected. If you experience an occasion where the current day's projects do not appear as expected - please open a Zendesk ticket in urgent status so we can observe this during the short window in which it is occurring. Thanks!

January 2016 Release Notes

The January 2016 release will be made available to all HandsOn Connect clients during the one week release window of January 25 - 31. The release contains a number of bug fixes, and as a bonus, has four new features as well!

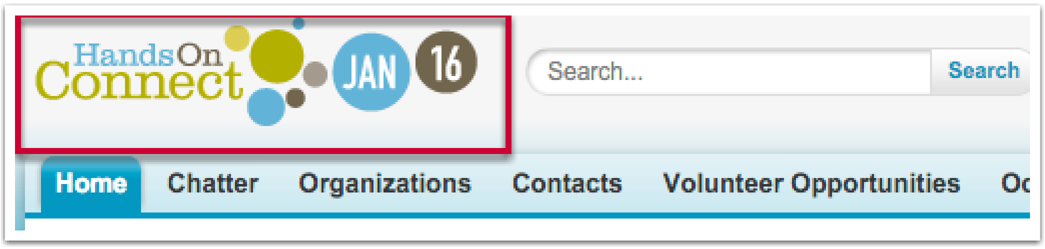
Starting this month and going forward, HandsOn Connect releases will be deployed over a deployment window (usually one week), so that different customers will receive the release on different days. This will allow us to capture any unexpected bugs and fix them before deploying to all customers. (If you're interested in being in the first wave and having first shot at new features for future releases - let us know! We're looking for folks who really monitor their site and will report any bugs or unexpected behavior the day of the release!)

Here are the details of this month's release:

How will I know when I've gotten the new release?

So you can always identify when the new release has been deployed to your organization, we're initiating the use of Release logos. That way you'll always know which release you're in and what features and fixes are available to you!

When you release the January 2016 release, you'll see this logo in the upper left corner of your screen!



New Feature: More robust filtering for Calendar allows you to create 'saved' custom calendar views!

All experienced HOC users have created saved, filtered search views as a way to quickly allow navigation to a filtered search result. But the calendar view has only had limited filters available. That means you couldn't, for example, create a calendar view that showed just the opportunities for one partner organization, or just opportunities good for groups or seniors.

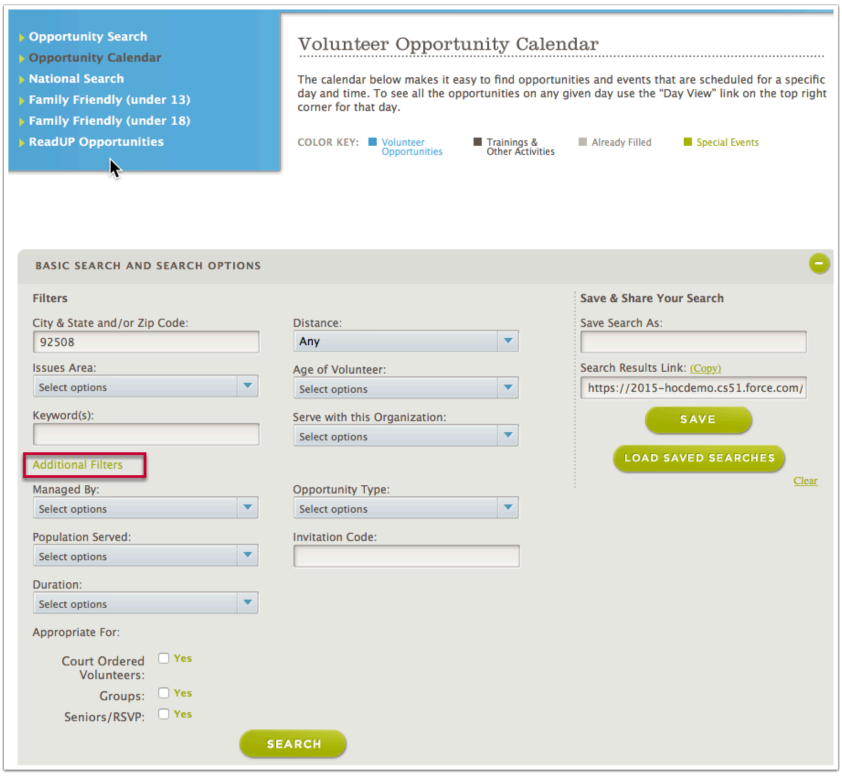
With the January 2016 release - now you can! Introducing advanced filtering for the Volunteer Opportunity Calendar.

The new calendar is divided into 'basic search' and "additional filters" to avoid things getting cluttered. Clicking on the 'Additional Filters" reveals additional filters.

New filters added to the calendar include:

- Serve with this Organization (Meaning you can search for just the opportunities for one partner!)
- Populations Served
- Duration of Project
- Appropriate for filters (Court Ordered, Groups, Seniors / RSVP)
- Invitation Code!!! (yes, you can now create a 'private' calendar for a business that shows only their projects!

Use these filters to produce the calendar you want, and then save the search. Copy the Search results link and you have the link to a custom calendar. Send out the link to people you want to access that calendar, or add a new CMS item with that URL and it will open the filtered (custom) calendar view!



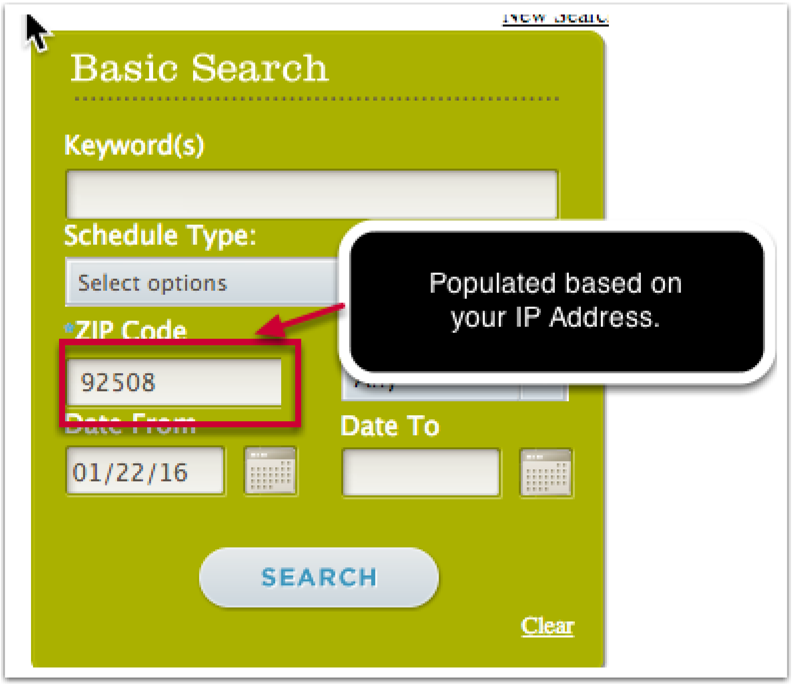
New Feature: Search results are sorted by distance based on the users location! (IP-based geolocation)

HandsOn Connect Opportunity Searches have been made geo-location aware based on the IP address of the person using search.

This means that default searches will always be relevantly sorted to bring the closest opportunities to the user to the top of the list. This is particularly useful for organizations that have volunteers in multiple counties or states, as results will now no longer be always displayed based on the old "Default Zip Code" in the control panel setting.

Notes about this feature:

1. The Default Zip Code field in the control panel should remain populated. That zip code will be used as a fall-back for sort if for any reason the geolocation API doesn't return a result.
2. IP Geolocation doesn't usually find your exact zip code -- but it WILL find a zip code close by and relevant to you. Users will still have the option to put their own zip code (or any zip code) into search and get results for a zip code they request.



New Feature: Most Recent Connection Field available for contact record

A much requested support item has been this: "How can I create a report that shows me everyone who hasn't volunteered in the last six months" or "How can I create a report of volunteers who have registered last month, and not created any connections?" And it has never been possible (or at least not easy).

What's been needed is a field on a contact record that tells you the last time a contact created a connection, and it hasn't existed. Until now!

We've added two new fields to the contact record that will give you significantly increased reporting power on your volunteers:

The two new fields are:

Most recent Connection Date: Displays the date and time of the last connection created by or for the contact. (Populates when a volunteer signs up or expresses interest on the public site, an administrator creates a connection administratively, or a team captain creates a connection for a team member).

Most recently created connection: Populates a hyperlink to the most recently created connection (in case you want to look at that record for some reason).

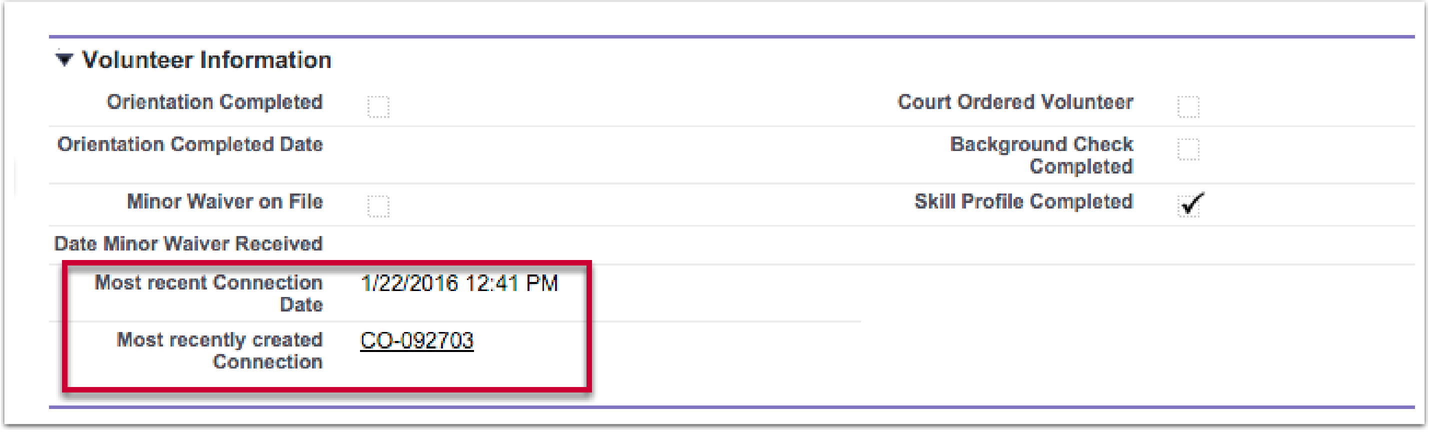
These two fields are available for all administrators in the January 2016 release. **However, to fully take advantage of this the following administrative actions are recommended for all System Admins.**

(Optional) Add one or both fields to contact page layouts if desired

Choose which contact page layouts you want to add the fields to, and add one or both fields to your page layout(s) for contacts. You can place the fields wherever you like, but a good choice might be to move the fields to the "Volunteer Information" section of the page layout:

Decide whether or not you want these fields visible for partners and/or Volunteer Leaders, or just for internal users.

[See these instructions on how to modify page layouts.]



(Optional) Add both fields to any custom report types that include fields from the contact record

The new fields will automatically be available in report types like Contacts & Organizations. And that may be sufficient for your reporting needs down the road.

But if you wish to use them in any of your custom report types you'll need to edit the custom report type and add the new fields to the report types. (examples: HOC_Connections and Contacts, HOC Contacts without Organizations, HOC Organizations Contacts and Connections, and any other custom report types you may have created that involve contacts.

See this post for instructions on adding fields to custom report types.

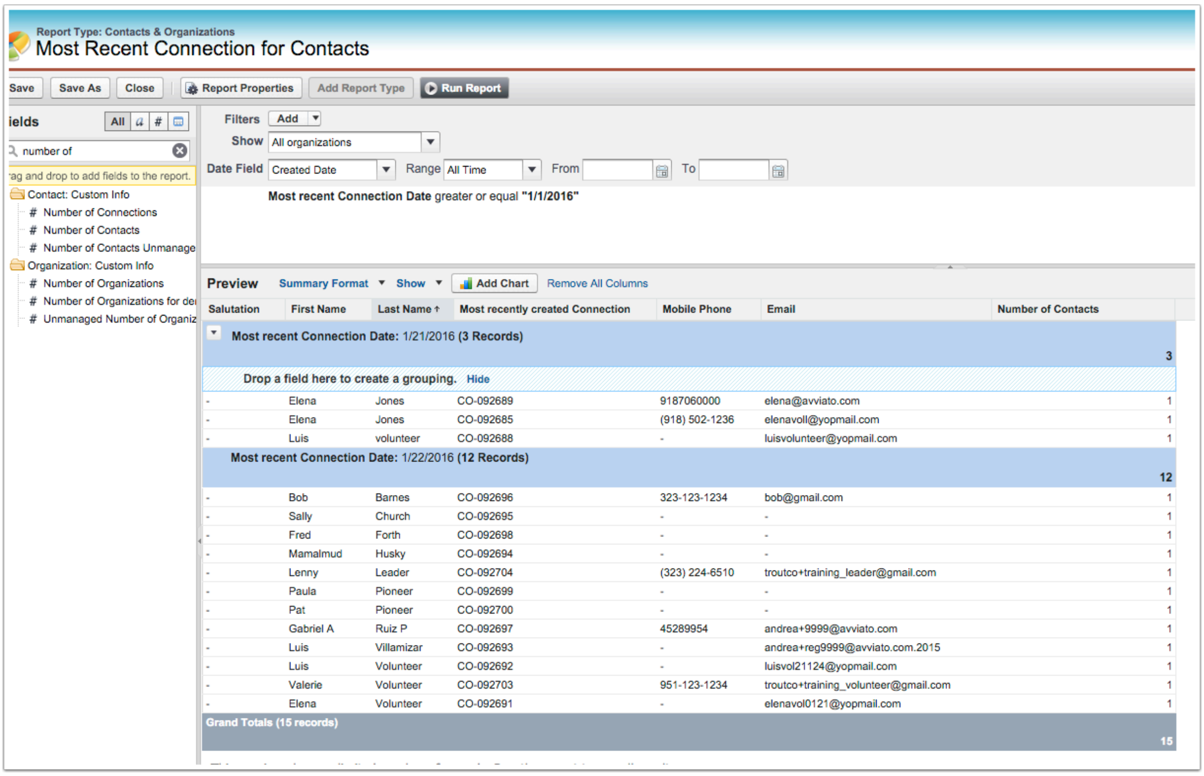
Here's a quick peek at a custom report you can create using the new fields

Here we've used the report type "Contacts &* Organizations" and filtered to show only contacts who "most recent connection date" is greater than 1/1/2016.

In the report, we've grouped the records on the field "Most recent Connection Date" so that each date shows up in its own group. (You can also group by month, year, etc.)

A report like this will enable you to list volunteers who have not used the site in the last year, haven't made a connection after registering, etc.

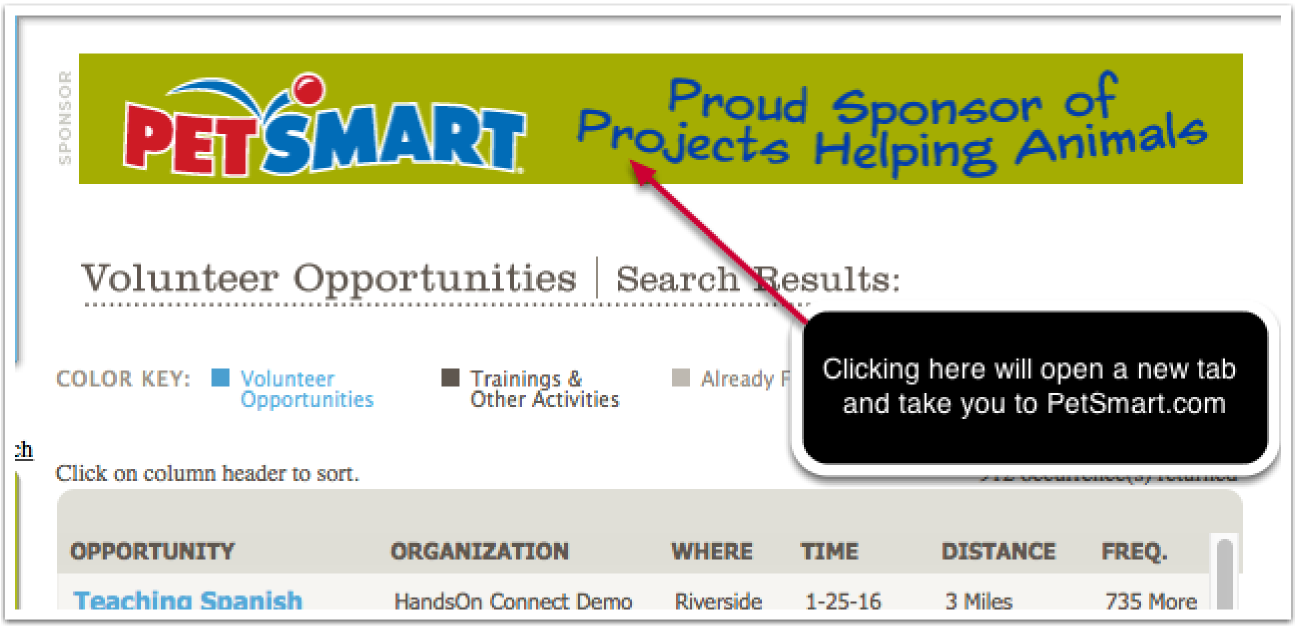
If you need assistance creating new reports using this field - pop into one of our daily labs!



New Feature: Banner Ads can be linked to external sites

[With 29 votes in the feature request forum](), this is one of the most requested new features: When users click on a banner ad, users will have a new tab opened up with a URL that you have specified. This makes your sponsor ads more valuable to your sponsors!   (HOC-143)

Here's how to use this new functionality:

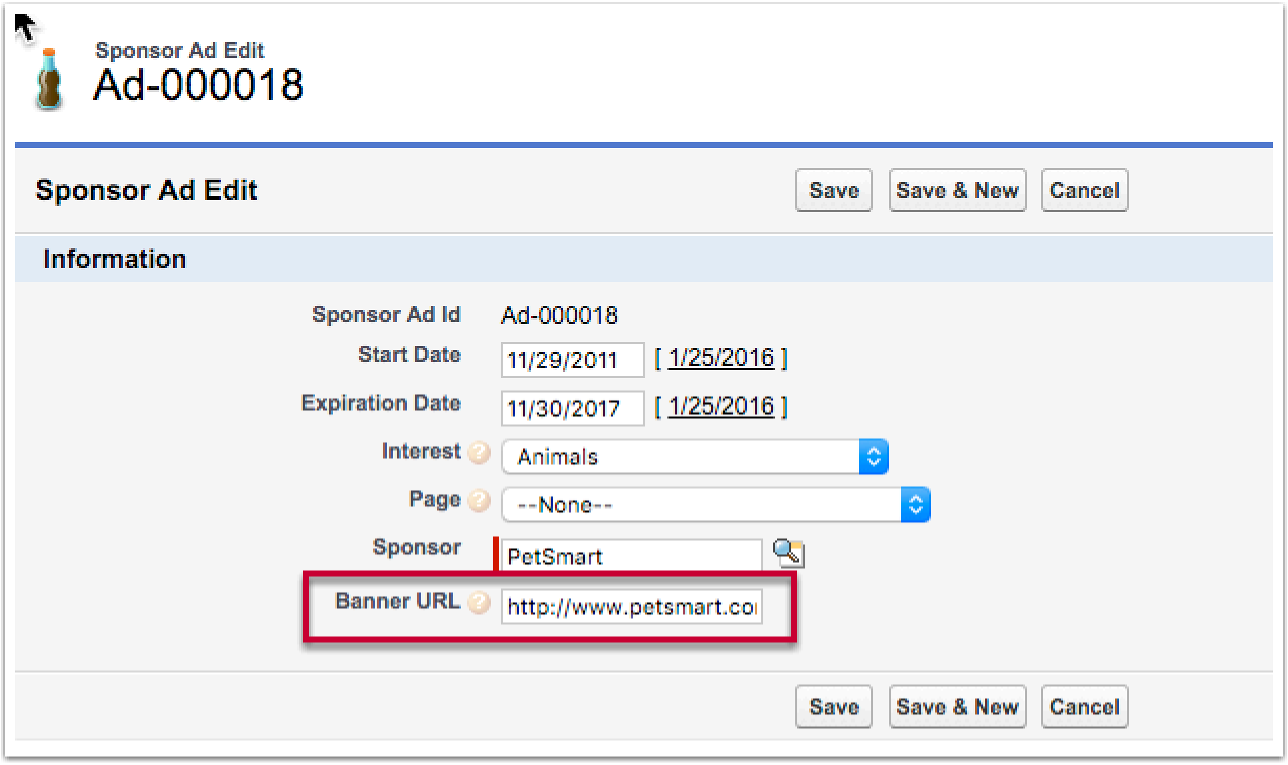


Go to Control Panel / Sponsor Manager

1. Click edit on any existing sponsor ad, or create a new one.

2. Put the URL in the new field "Banner URL".   Use the format http://{Full URL}

3. Click Save.   The banner ad will now open that URL in a new tab!



Fixed Bug: Banner Ads not alternating when multiple sponsors associated with a search page

A bug was preventing the display of more than one banner ad for a sponsored page, (search or project detail page).   With the fix, when more than one active sponsor ad is assigned to either the search page or opportunity detail page, the different ads will be alternated each time the specified page is accessed. (HOC-141)

This makes it possible once again for you to sell multiple ads to these pages.

Improvements: Mobile Responsive Sites

A number of issues reported by early users of the Mobile sites on phones and tablets have been resolved and improved.

- Fixed issue with Safari and Chrome in IOS 9 zooming on the display of drop-down menus. (HOC-176)

- Improved layout and increased font sizes for various pages on mobile for increased legibility and clarity.   (HOC-123)
- Addressed issues where custom colors were not appropriate on mobile sites (HOC-99)
- Addressed freezes in Safari browser in IOS (HOC-114)
- Make Opportunity Links more clearly visible in mobile site (HOC-95)
- Powered By image on home page had ragged edges - this has been corrected. (HOC-100)
- Improvements for Google Forms (HOC-105)
- Prevent hidden links from appearing (HOC-115)
- Font issues addressed (HOC-120)
- Calendar View now jumps to current day (HOC-122)
- Resolved log-in issues where 'apex' was inadvertently added to URLs. (HOC-174)
- Corrected miscellaneous, such as the display issues for some specific custom content on individual sites

Improvement: Team Management

In the Winter 2015 release we added a new feature where a team captain, whether or not they were signed up to participate in an opportunity, could go to the "My Teams" page, look at their team, and see all opportunities any team member was signed up for. By clicking on the "Participants" linked, the team captain could still see the current team members signed up, and add or remove team members from that opportunity.

This worked fine for 'sign up' opportunities.... but express interest connections were not visible here. We've improved the functionality so a team captain can now see and modify which team members have expressed interest in an express interest opportunity, and remove or add team members who wish to express interest in the opportunity.

Note: It's not a best practice for you to allow team signup for express interest opportunities, as the team captain has no way to know whether or not the team members have been confirmed or not. If you do have team members signed up for express interest opportunities, we recommend you call the team captain to let them know which team members have or haven't been confirmed by you, and (if its a TBS Opportunity) when each team member is scheduled to attend.   If you decide NOT to confirm team members (or reject some or all of them) - the opportunity coordinator should call or email the team captain and let them know the status of their team.

You can disable team signup for express interest opportunities by checking the "Turn off Teams" box in the occurrence record. See this post on how to add the "Turn off Teams" feature to your occurrence records if its not already been enabled by you. (Superuser Tip: Savvy system admins could even write a workflow to automatically turn off teams for any occurrence that's part of an express interest opportunity :-)

(When we re-examine team functionality in Summer '16 - we'll re-examine how the system can better support teams and express interest opportunities.)

Teams: Fixed warning pop-up that confused team captains

In the "My Teams" section, when a team captain managed the participation of a team for a specific opportunity, and removed themselves, a warning pop-up appeared saying "Are you sure you want to remove your team?"

Removing oneself from the opportunity does not, in fact, remove the whole team, so this message will no longer appear :-)   (HOCAVV-131)

Corrected log-in behavior

Logging into the public site was no longer taking a volunteer to their 'my account' page. This has been fixed and returned to its original behavior. (HOCACC-167)

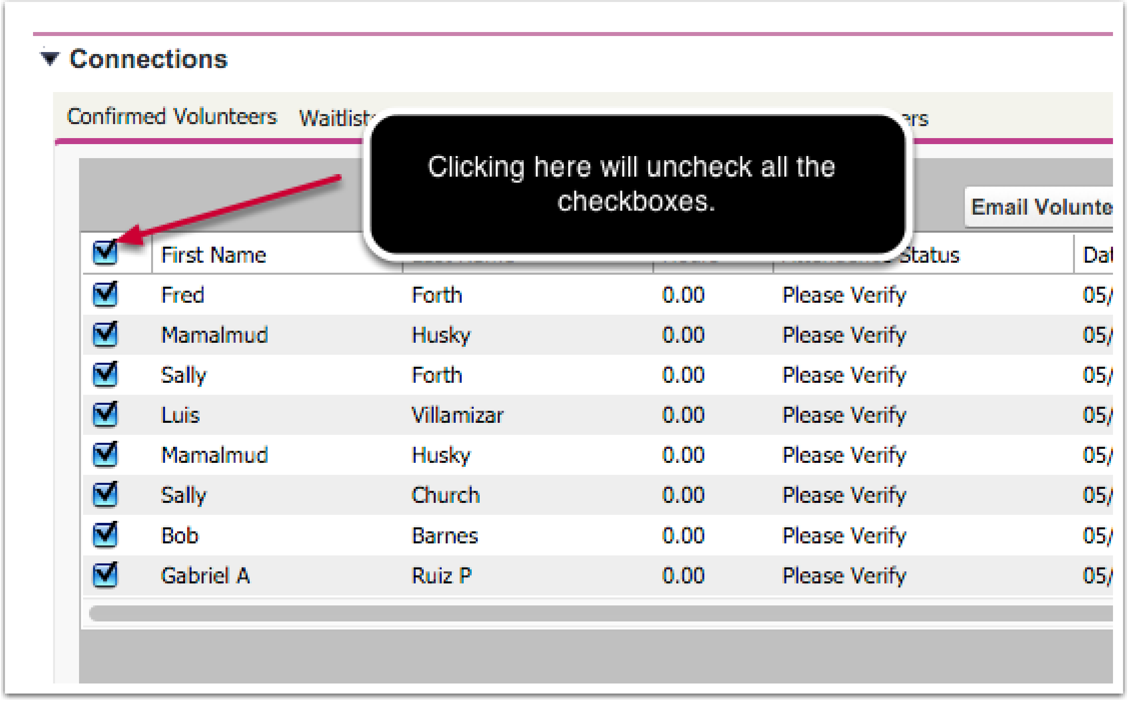
Fixed: Administratively updating a connection to attendance status "Attended.." didn't populate hours served

Some customers reported circumstances where creating a new connection with attendance status of "Attended (and Hours Verified)" was not automatically calculating the "Hours served" field. Some customers experienced this by reporting attendance directly in the connection record (as opposed to via the connections grid in the occurrence record).   Now, editing or creating connections with "attended (and Hours Verified)" will automatically calculate the hours served for that connection. (HOC-182)

Checkboxes in connection grid on occurrence record now work as expected

Sometime last year, the 'select all' checkbox on the occurrence record stopped working when you wanted to uncheck all the connections. This meant that if you selected all connections, and then decided you wanted to unselect them, you had to unselect them one by one.

Now clicking on the 'select all' checkbox at the top of the connections grid will UNCHECK all records as expected.



Fixed Visualforce error message on public site that occurs when too many occurrences are listed on one page

There have been reports of Volunteer Detail pages on the pubic site displaying the Visualforce error message "Maximum view state size limit exceeded". This occurs when too much content is trying to be published on one page. In the reported case, the one opportunity had over 600 occurrences on the same page.

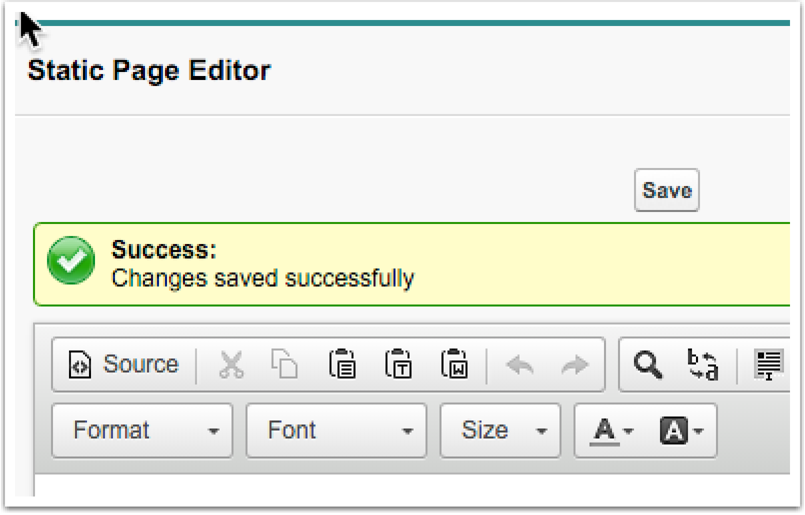
The system has been fixed so the VF error will not occur.   (HOCAVV-135)

But on the non-technical side, as a business practice, we'd suggest that publishing over 600 occurrences for a single project that are all available for sign-up is not a great idea :-)   The odds that you won't have to change details of occurrences taking place so far into the future are slim -- and it'll just make extra work for you down the road. While we don't encourage you to try to publish occurrences for 2021 on your public site at this time, the system will now avoid presenting an error on the page preventing volunteers for signing up for tomorrow's occurrence on long, long, long pages like this :-)

Success message now appears when editing in the static page editor

Fixed an issue where saving changes in the new WYSIWYG editor in the Control Panel / Static Page Editor did not display a confirmation message.

Now you'll see a confirmation message and know your changes have been saved!



Improved validation in the "Login with Facebook" option

Improvements made in Social Login via Facebook.

Remember: When you convert your site to a secure log-in, you can also opt-in to allowing volunteers to log in via Facebook. **We strongly recommend that all clients make the request to convert to a secure site.** Please see the Winter 2015 release notes, items 2 and 3 for more info about secure sites and social login. Use this form to request Avviato to convert you to a secure site and enable social login.

Improvements to speed up search updates

We continue to tweak and improve the speed at which edits and changes to volunteer opportunities will be updated in the search. This release improves situations when a lot of search changes are created all at once (i.e. when you create a lot of occurrences through a recurrence). (HOAVV-32).

Fixed an issue earlier this month where the January 2016 calendar was not showing up

This was fixed and patched when reported after the December release so that January did exist as expected :-)

Critical Updates Addressed

For system admins who don't like being constantly reminded about Salesforce "Critical Updates" -- you can now safely activate the following three critical updates if you wish. (Note:

No action needs to be taken, Salesforce will eventually automatically activate these features. Activating them yourself just removes the nagging pop-up reminder :-)

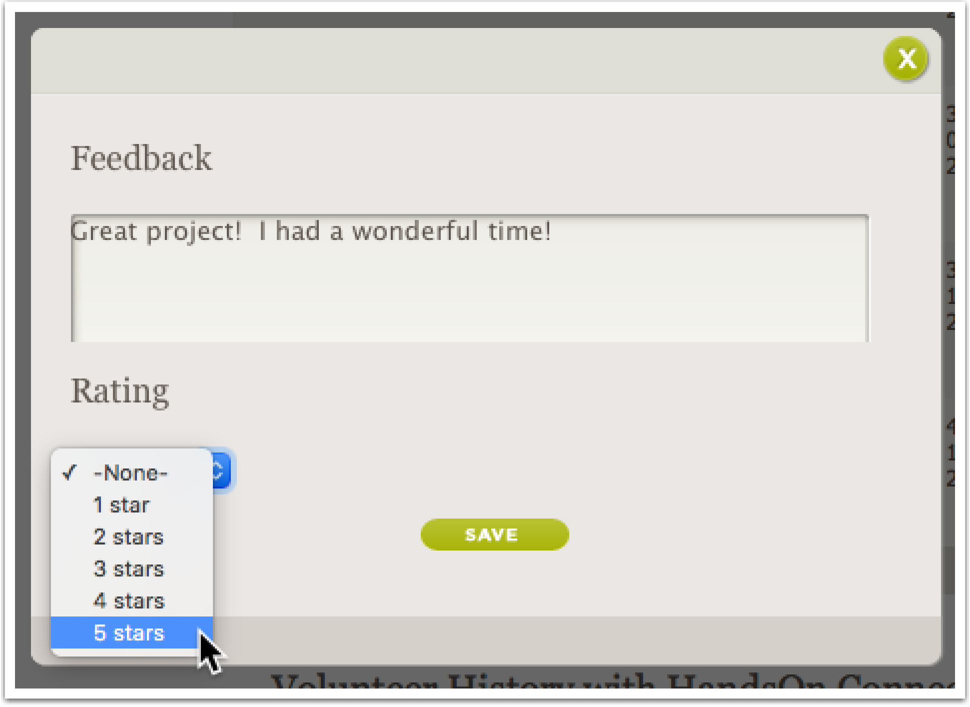
OK To activate:

- Serve Static Resources from the Visualforce Domain
- SMS Identity Confirmation
- PageReference getContent() ....

Improvement: Rating made clearer in "Feedback" popup (HOC-157)

This was fixed and pushed with the January release, but didn't make the first publication of these release notes. But here's another little improvement to volunteer feedback:

Previously, on the feedback link in 'my accounts' the ratings dropdown picklist had the numbers 1, 2, 3, 4, 5 but it wasn't clear if 1 was better than 5 because they were just numbers. To clarify this - the ratings now indicate that they are the number of Stars you award to the project.. Clearly 5 stars is better than 1 star. This will make for more accurate ratings from volunteers who rate the projects they attend when giving feedback.



Best Practices for Making Your Content Mobile Friendly (Winter 2015 Release)

With the Winter 2015 Release, HandsOn Connect introduced, as a public beta, Mobile Responsive Design for the public and volunteer pages. This means that these pages will “adapt” to smaller devices, such as smartphones and tablets. But sometimes the content itself (e.g., text, images, videos, forms, buttons) is not all that mobile friendly. Here are some best practices for when you are adding content via the Content Mangement System (CMS) to make sure your content is mobile responsive too!

The key to mobile responsive content is simplicity and structure. Since the content needs to be able to work gracefully on multiple devices, resolutions, and orientations (i.e., landscape, portrait), it is best to keep it simple. This goes for both your copy and resources, as well as the underlying HTML.

On mobile devices, you are not only trying to have your pages to look good, but also to provide the user with a good experience. Hence, the page needs to load quickly, and the site must be easy to interact with and to navigate. Keeping your content layout simple, structured and consistent, and your copy to a minimum, will make the user experience a lot better. It also makes your site more compatible across more devices and browsers.

We recommend that you:

- Lay out your content using standard headers, paragraphs, and inline images or videos.
- Keep your copy and resources (e.g., images, videos, forms) to a minimum. For example, if an image is not adding value, remove it. Mobile connections tend to be slower. You do not want a user to wait for an image or large chunks of content that are not adding a lot of value.
- Use standard fonts and check that they are readable on small screens. Try to avoid over stylizing fonts with colors, different sizes, various types, etc.
- If you work with HTML directly, remove any unnecessary tags and avoid inline styles and absolute placements of objects, as well as fixed widths, if possible.

Here are some recommendations for particular pieces of content:

Images

As we mentioned above, images should be used prudently and when used, minimized to have the smallest possible file size. Reducing the resolution and dimensions of your images is essential to improving the response times when on a mobile device. A few more recommendations:

- Use standard image formats: JPEG, GIF, and PNG.
- Avoid using the texts on the image, since it will be scaled down and possibly made illegible when on a mobile device
- Avoid defining fixed sizes in the HTML tags

Embed Third-party Resources Responsively (e.g., videos, Google Maps, Instagram)

When you embed a resource on your page, such as a video from YouTube or a Google Map, it can be tricky because they use what is called an "iframe," which does not always play nice on mobile devices, so it requires some coding work. Luckily, there is a nifty tool called *Embed Responsively* that you can use. Go to:

http://embedresponsively.com

If you search the web, you will find others too, as well as how to manually do your own responsive coding, for you HTML and CSS Jedi masters!

Third Party Forms (e.g., Formstack, Clicktools)

Formstack recommends that you use the Javascript embed option since it is the "best at retaining adaptive size in the browser."   You can also use the iframe version, but we recommend that you use embedresponsively.com and select the Generic iFrame option.

Sponsor Image

For the mobile version, the sponsor image on footer was hidden, given that the image was too wide and resizing it for mobile version distorted the image. Administrators can:

1. Create a new image for the sponsors with the appropriate size for mobile, with a maximum width 300px
2. In Salesforce save the new image under Images folder in Documents tab. The image must be named "sponsorlogos_mobile".

As more users use mobile responsive, we are sure other issues will surface. We will add recommendations on how to best address these as we run across them.

If you need support in making your content more mobile-friendly, please contact us via Zendesk. Send is the URL of the page and device you are using to view it. If you can send a screenshot, that is a plus!

Lastly, remember that the current mobile responsive, which we launched in Winter 2015 Release, is in public beta. This is the version after the private beta, where we received feedback from a subset of users. We understand it still has some rough edges. We ask you to report any issues you find and for your patience.

Thank you!

How to Install an SSL Certificate on Salesforce

As part of the Winter 2015 Release, HandsOn Connect is now Secure Sockets Layer (SSL) friendly. This means that your site works securely with an SSL certificate. SSL encrypts the connection between your website and your user's browser. We consider this a major requirement for all instances of HandsOn Connect, to help secure your and your user's data.

The Winter 2015 Release also includes the new Social Login with Facebook feature. This allows your users to link their HandsOn Connect account to Facebook to be able to use Facebook to login. This feature requires that your site is secured with an SSL cert.

To install the SSL cert in your HandsOn Connect instance, you will need to purchase one from a vendor such as GoDaddy, RapidSSL, GeoTrust, Verisign or other. To intall the SSL yourself, follow these steps:

1. Follow the instructions provided by Salesforce in the document Setting Up Custom Domains for Salesforce Sites and Setting up HTTPS Support for Branded Custom Domains.
2. Test and confirm using: https://cryptoreport.websecurity.symantec.com/checker/views/certCheck.jsp .

We are offering to do this for a fee of $150, which includes the cost of the SSL Certificate for two years! Yes, this is crazy cheap. Why are we doing it for so little? We want to encourage everyone to have their site with SSL. A secure website is more important than ever. To request that we do this installation, please go to this webpage and complete the form:

https://handsonconnect.formstack.com/forms/ssl_email_install_request

Implementing Sender Policy Framework (SPF) and DomainKeys Identified Mail (DKIM)

Although Salesforce provides top-notch infrastructure to deliver emails, since it sends them on behalf of your Organization's custom domain, many email providers flag these as spam. To improve deliverability, a few additional configurations steps are necessary. These steps are to implement two of the most common mechanisms to identify Salesforce as a trustworthy sender of your custom domain emails. Sender Policy Framework (SPF) and DomainKeys Identified Mail (DKIM)

Implement Sender Policy Framework (SPF)

Under this policy, a record is added to the domain DNS declaring Salesforce as a trustworthy sender for your custom domain.

In order to implement it your system administrator must create or modify a TXT record in the DNS of your custom domain name. Here are the instruction to set it up at most popular DNS providers.

If the record doesn't exist, create it using:

v=spf1 include:_spf.salesforce.com ~all

If the record does exist add the following to the existing record:

include:_spf.salesforce.com

In order to confirm that it was properly set use a tool like http://mxtoolbox.com/spf.aspx

Here is an example of the test using handsonconnect.org.

Here is the official Salesforce documentation Sender Policy Framework (SPF) - Salesforce SPF Record

Implement DomainKeys Identified Mail (DKIM)

Under this policy, emails are signed by Salesforce. To accomplish this, a record is added to your domain DNS with a public key that is used to verify those signatures. This makes Salesforce a trustworthy sender for your custom domain.

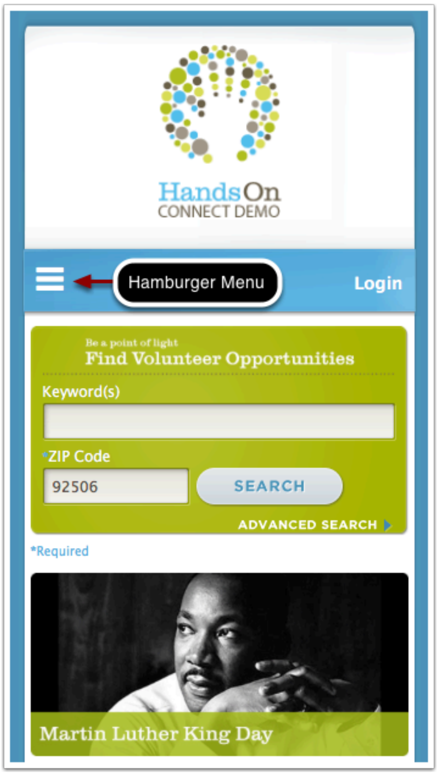
To implement, your system administrator must create or modify a TXT record in the DNS of your custom domain name. Here are the instruction to set it up using the most popular DNS providers.

1. Setup Salesforce DKIM following these instructions to create a DKIM Key
   1. For **Selector** name use **hoc**
   2. For **Domain** name use: **<Custom Domain>**
   3. For **Domain Match** pick from the drop down : **Exact domain and subdomains**
   4. DO NOT activate
2. Setup DNS TXT record using:
   1. host: **hocd._domainkey.<Custom Domain>**
   2. v=DKIM1; k=rsa; p=<Public Key>
3. Test DKIM configuration using http://dkimcore.org/tools/keycheck.html
   1. Selector: **hoc**
   2. Domain: **<Custom Domain>**
4. If test is successful activate DKIM in Salesforce. From Setup, enter DKIM Keys in the Quick Find box, then select DKIM Keys, click on the **hoc** selector set **Activate**.

Winter 2015 Release Notes

We are excited to provide these notes on our first Quarterly Feature Release. The Winter 2015 release will be deployed to all HandsOn Connect Customers on the evening of Monday, December 21. These notes detail the features that are part of this release and any actions you need to take to enable them.

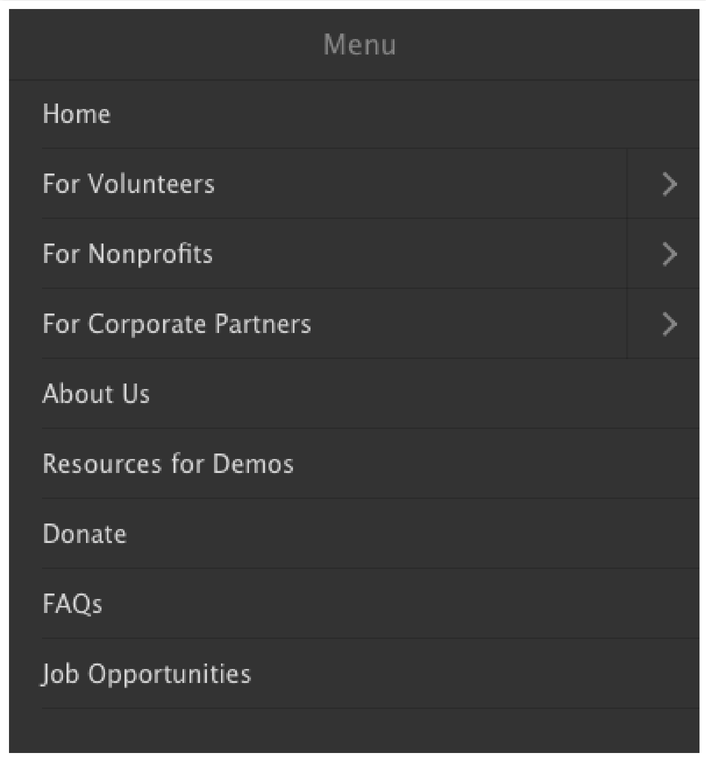
1. HandsOn Connect is now mobile responsive



The HandsOn Connect public site and volunteer portal are now mobile responsive! This means that volunteers using the site on smaller screens, tablets and phones will have a greatly improved user experience on those devices.

In the phone version of the site, HandsOn Connect uses the standard navigation system used by mobile devices. The upper left "Hamburger" menu, is used to reveal the site navigation. which slides open to provide navigation.

Mobile navigation (when clicking on the 'hamburger' menu on a page.



Thanks to all our beta testers who helped us refine this release and improve the mobile usability. We have addressed as many of your comments as possible in this release and are very excited about the ease of the use of HOC on mobile devices. Right now, the overall functionality of HandsOn Connect is currently available through the mobile version of the site:

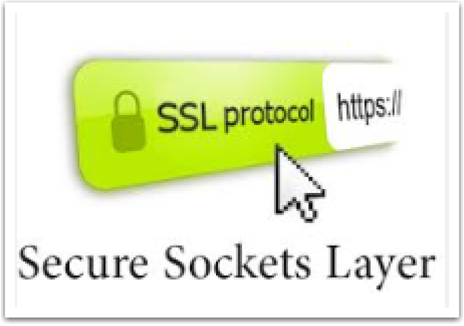
- Registration
- Log In
- Search and Sign-Up for Volunteer Opportunities
- View and manage your account and volunteer sign-ups.

That said, due to the individual site customizations possible through the CMS, there may be some limitations or issues with your organization's flat content pages when rendered on mobile. You may want to make changes to your larger images and custom forms you may have created to perform better for mobile users.

We will be publishing shortly, as a comment to these notes, a best practices document on how you can ensure your site is as mobile responsive as possible for your custom content.   But for basic functionality - HandsOn Connect is now far easier to use on mobile devices!

We welcome any feedback or issues you discover on your mobile site. Just open a Zendesk ticket. There will be continued improvements to the mobile site in future releases based on your feedback.

2. Improved Security and Email Deliverability



HandsOn Connect has been upgraded to make it possible to convert your public site to a secure site using Secure Sockets Layer, which changes your site from http:// to https:// and encrypts all transactions on the site.

To convert your site to a secure site, you must purchase an SSL certificate for your instance and configure your site for security. Converting your site to a secure site is required if you wish to enable another new HandsOn Connect Feature - Social Log In (see item 3 below).

We have also identified configuration steps that will improve the deliverability of emails sent through HandsOn Connect.

If you have IT Support or a technical consultant familiar with working with DNS records, then you can enable both these features yourself.

To make these improvements accessible to those of you without skilled technical staff at your organization, Avviato will take care of the whole process for you if you wish. For a very nominal $150 fee, Avviato will purchase a two-year SSL certificate for you (the certificate alone will cost about $100) and handle all the technical configurations for you.

(Note: After two years you'll be sent a reminder and instructions on renewing your certificate to keep your site secure!)

To initiate a request for Avviato to upgrade your site to SSL and configure your email deliverability through your domain provider, please use this form:

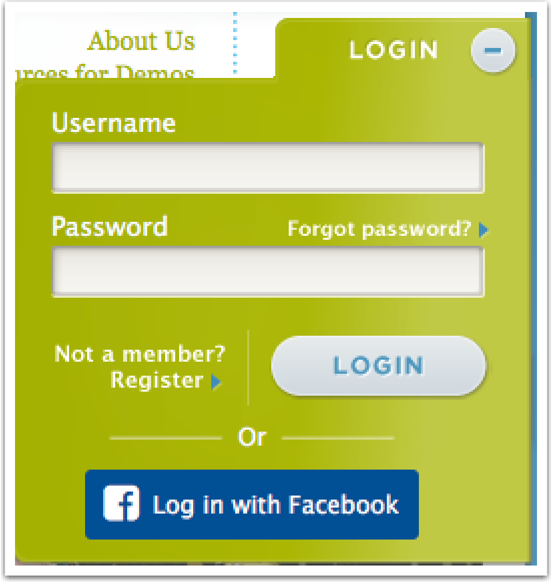
HandsOn Connect Winter 2015 Release Request Form

For those of you who wish to purchase your own SSL certificate, and configure Salesforce to make your HOC site secure here is the documentation on how to do this, as well as the documentation for updating your DNS and SalesForce for better email deliverability:

Implement SSL for HOC Sites (self-configuration)

Improve HOC email Deliverability (self-configuration)

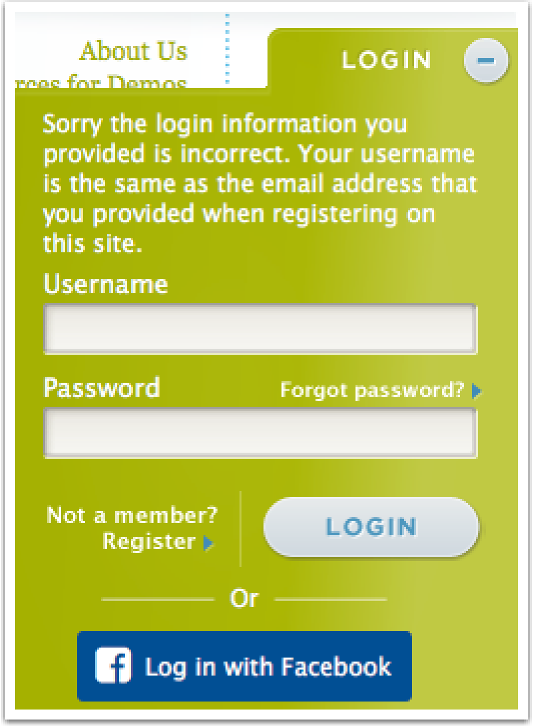
3. Improved Public Site Login Experience and Social Login with Facebook



Several improvements have been made to the login experience on the public site making it less confusing and easier for volunteers and partner staff to log in!

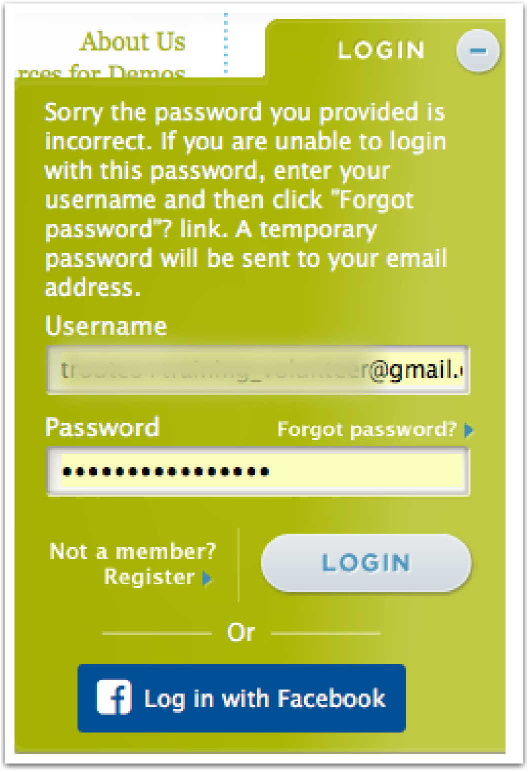
- If the user puts in the wrong username, they get an improved error message identifying that they are using the wrong username.
- If the user puts in the correct username but the wrong password, they get an improved error message explaining they have the wrong password and advising on how to reset the password if necessary.
- For sites that have been upgraded to SSL - users can link their account to Facebook and subsequently will be able to log in quickly via their Facebook account

3.1 If a user puts in the wrong username - error message



Note: The Login with Facebook option only appears if you've converted your site to SSL and requested we enable the Social Log In Feature.

3.2 If the user puts in the correct username but the wrong password - error message



If you put in the wrong password, your username will remain populated so you can try again with your password, or click on the Forgot Password link to have a reset password email sent to you.

3.3 Social Login via Facebook (Beta)

HandsOn Connect now offers its first Social Login option - logging in with Facebook This is being released as a public Beta Feature and is available only to sites that have been upgraded to SSL

(*The fact that it's a Beta indicates that there are still some rough edges on the social integration, but rather than delay its release, we are following the practice of many organizations, and making this available as a public beta. This lets your users know that the feature will be undergoing improvement over time.*)

Here's how Social Login works:

Before using the "Log in with Facebook" button, a user must link their HandsOn Connect account and their Facebook account.

3.3.1 How to link your HOC login with your Facebook Account

Before being able to use the Login with Facebook button, a volunteer must associate their HandsOn Connect account with your Facebook account. To do this a user should do the following:

1. Log into HandsOn Connect normally.

2. In "My Account" click on the new menu option called "Social Login Settings" in the left navigation.

(*Note: this menu item can be seen in the CMS system. It is associated with a new page in HandsOn Connect called* /HOC__Connections that describes the process for associating your accounts, explains that this is a Beta feature at this time, and leads you through the process). Do not rename this navigation as it is referenced in the error message that appears if you try to login via facebook before connecting your accounts

Social Login Settings page

After reading the info, users click the "Link with Facebook" button to associate their accounts:

They'll be walked through the steps to link their facebook account to their HandsOn Connect account.

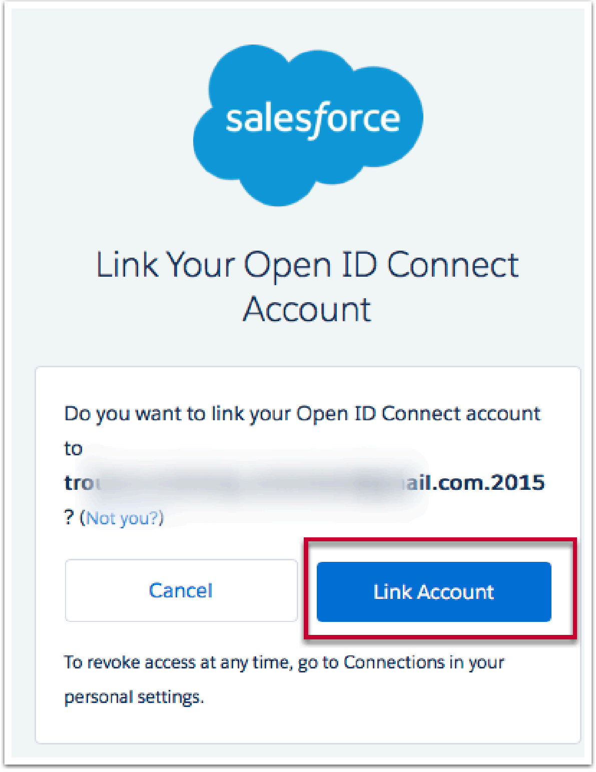
Once that's been done once. They'll be able to login by clicking on the "Login with Facebook" button on the login widget on your site!

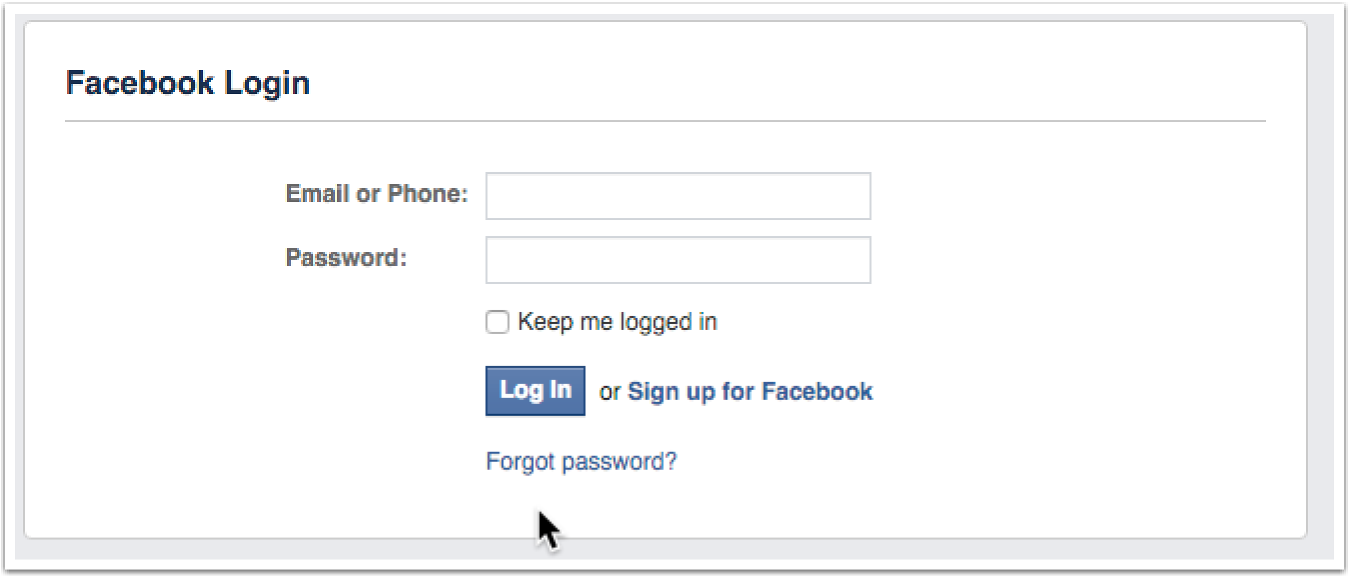
Clicking on "Link with Facebook" will take the user to a Salesforce page to create an Open ID Connect account"

If they are not already logged into Facebook when they click "Link with Facebook" - they'll first be taken to a Facebook login page.

If they are already logged into Facebook they will be taken directly to the screen shown below.

Clicking on "Link Account" will complete the process and the volunteer will now be able to use the "Login with Facebook" button in the login widget for future logins!





Once a user has associated their HandsOn Connect account with their Facebook account, they'll be able to use the new Login with Facebook button on the login widget.

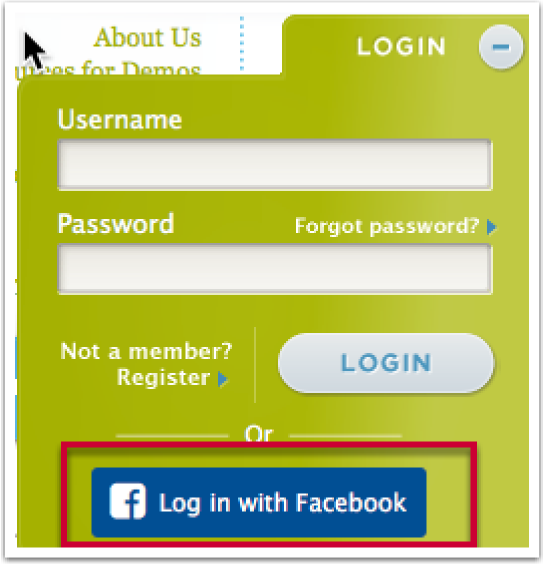
Clicking on Log in with Facebook on the login widget will do one of two things:

- If you are not currently logged into Facebook on your computer, you may be asked to log into your Facebook account.
- If you're already logged into Facebook, you'll be taking to the "Continue as ...." screen.

3.3.2 Logging in via Facebook after your accounts are

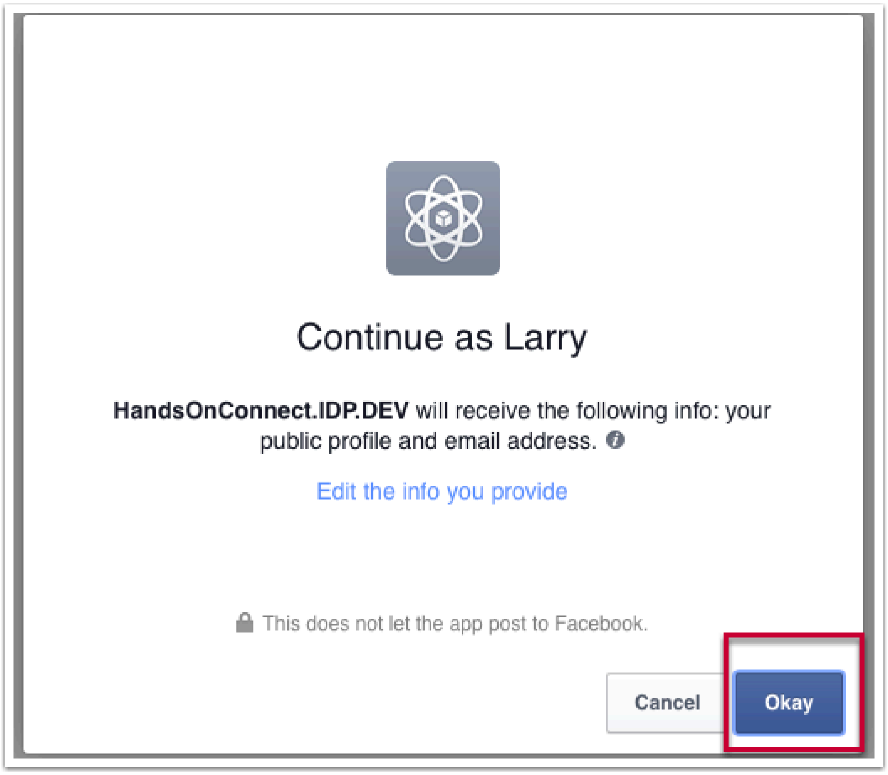
linked

Now that your accounts are linked - you'll be able to click on the Log in with Facebook button and quickly be logged into HandsOn Connect with no password required.



Continue as confirmations screen

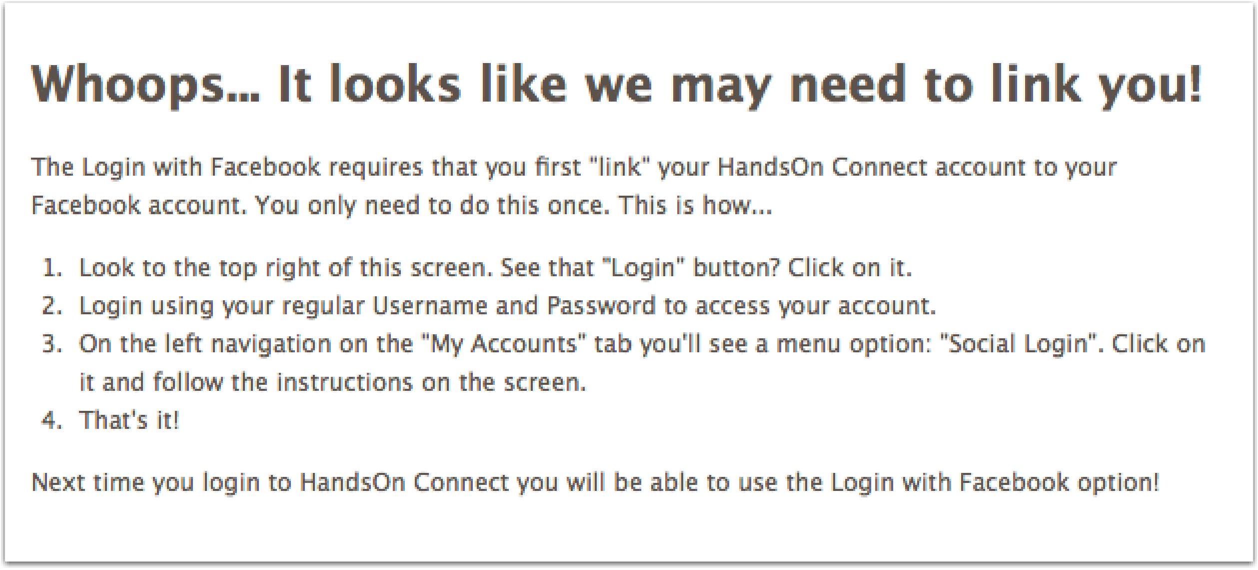
You'll be presented with a "Continue as...." screen. Click Okay and you'll be logged in to HandsOn Connect.   That's it!



3.3.3 What happens If a volunteer tries to login with Facebook, before they have linked their account?

If a volunteer clicks the Login with Facebook button before they've linked their account, they will be asked to login to facebook and continue - but upon doing so they will see an error message:

The error message will explain to them the process for linking their account:



3.3.4 How to enable Social Login with Facebook in your HandsOn Connect instance

This is a feature that must be setup and enabled on a site by site basis for you, so you'll need to make a request that we enable this feature for you. It can only be done for sites that have SSL enabled.

You'll have the option of requesting that social login is enabled when you request that Avviato enable SSL and Improved Email deliverability on your site.

If you have self-enabled SSL, you can use this same link above to request that Social Login for Facebook be enabled after you've converted your site to SSL.

Recommended Action: Once Social Login has been enabled for your site - we recommend that you email your volunteers and partners and let them know how to link their accounts and start using social login!

4. Integration with Outlook, Google, Apple Calendar and other Calendars

Volunteers will now be able to easily add their confirmed connections to volunteer opportunities to their personal calendar.

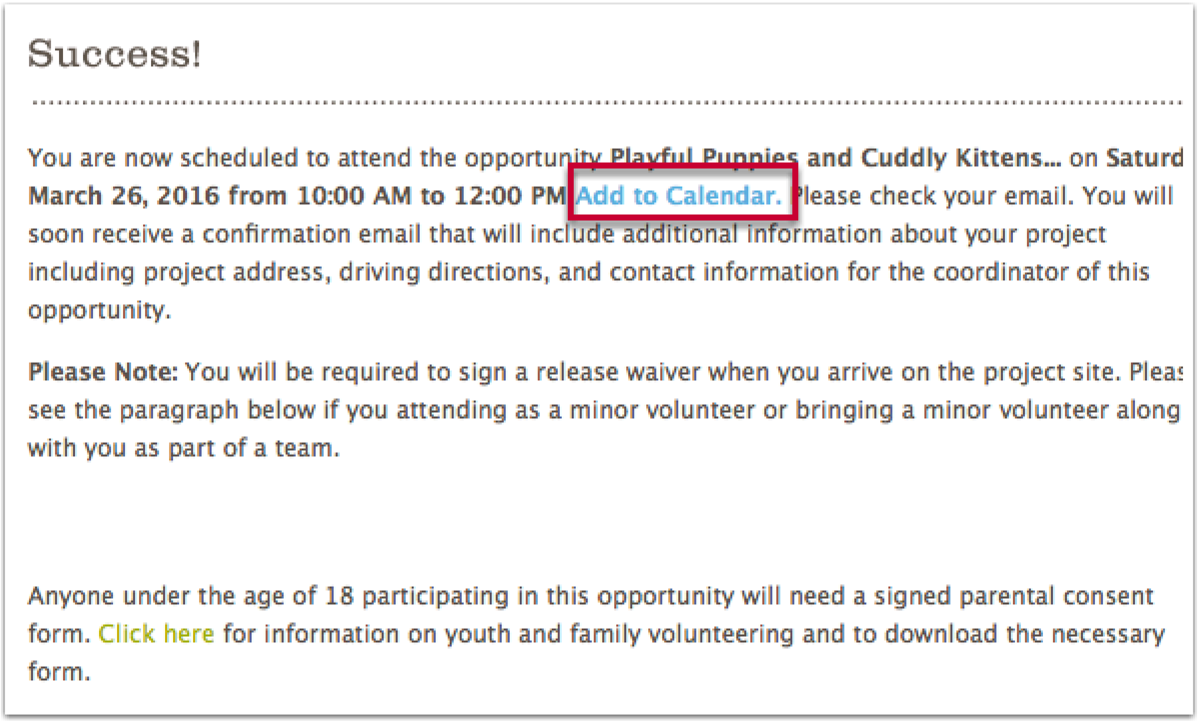
Links to add an opportunity to your calendar will appear in three places:

- On the **Success Page** after signing up for an opportunity (for full sign up opportunities, not for express interest)
- On the **My Account / Upcoming Opportunities** grid for all confirmed connection
- On the **Project Detail Page** for date and time specific occurrences that you are already signed up for and confirmed.

Here's how each of these will look and work:

4.1 On the Success Page of full sign-up opportunities

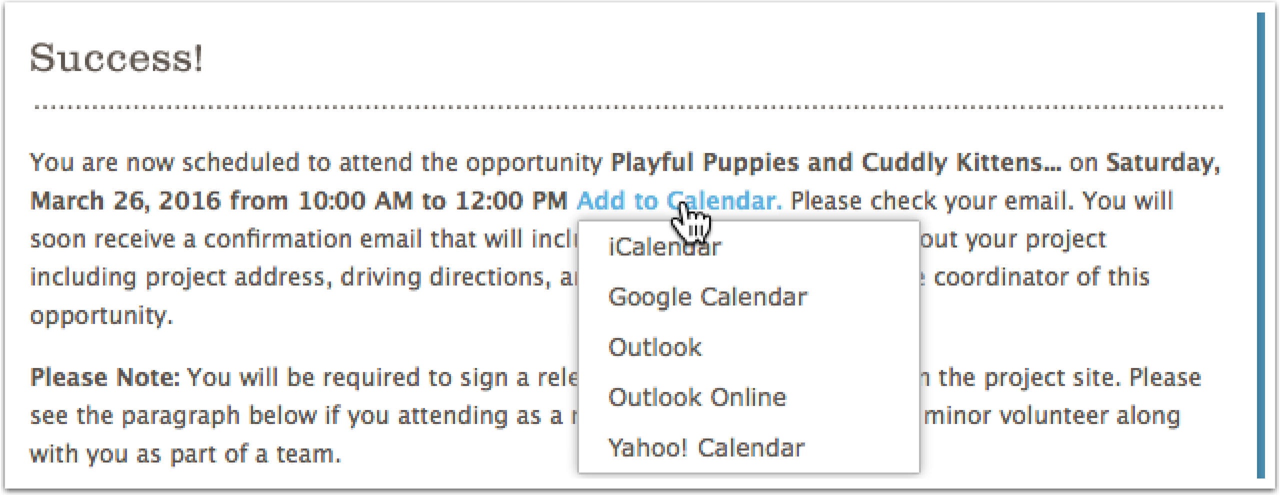
A link to "Add to Calendar" will be visible on the Success Page after you sign up for a full sign-up opportunity. (Expressing interest will not present the link, as you don't want volunteers putting dates onto their calendar until they have been confirmed as volunteers.)



Clicking on the 'Add to Calendar' link will provide a choice of calendar formats:

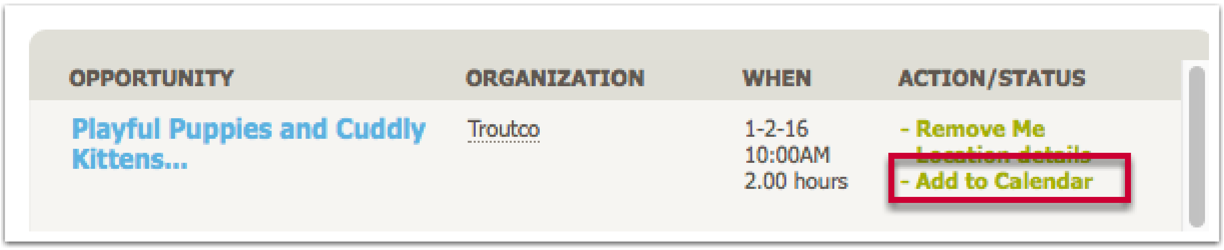
Selecting ICalendar or Outlook will generate an attachment which, when clicked on, will add an item to your calendar. (ICalendar is an .ics file, used by Apple Calendar and a number of other calendar applications).

Selecting Google Calendar, Outlook Online, or Yahoo! Calendar will take the user to their online calendar with an option to save it.



4.2 In My Account / Upcoming Opportunities

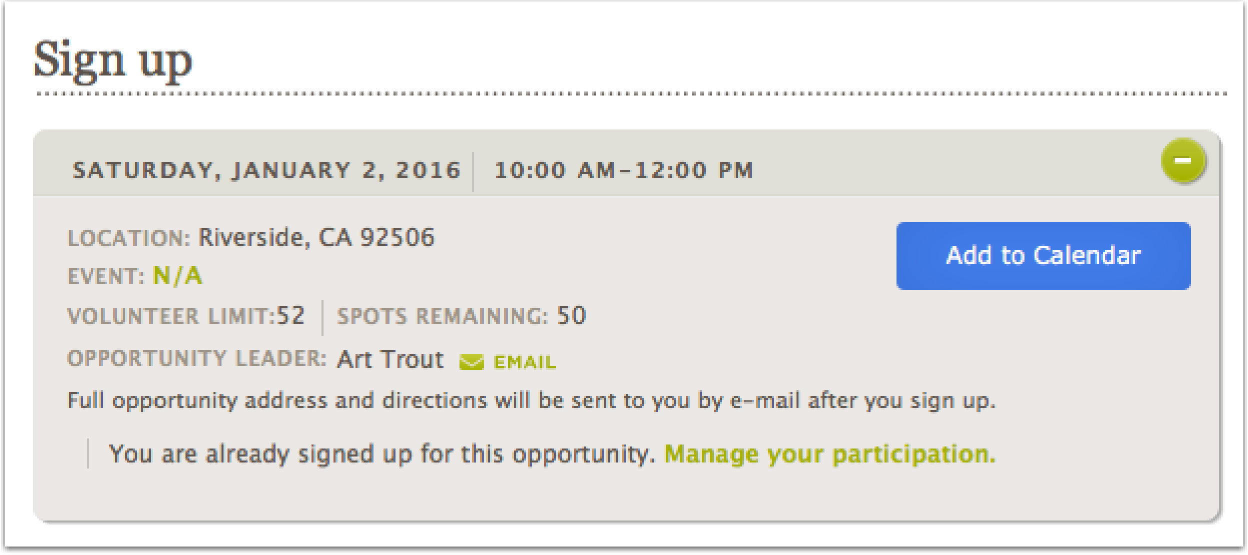
Confirmed connections on the My Account / Upcoming Opportunities page will have the "Add to Calendar" link available.



4.3 On Opportunity Detail Pages

If you're already signed up and confirmed for a date and time specific opportunity - the Add to Calendar button will be shown for those occurrences, along with the message "You are already signed up for this opportunity."

The Add to Calendar button will not be present on To Be Scheduled Opportunities because a volunteer may have multiple connections for TBS opportunities. They will however have the option to add to calendar on their my account page where each occurrence is listed separately.



A note about To Be Scheduled Opportunities:

The link to add to calendar will appear for all confirmed TBS opportunities in the "My Accounts" page. Caution your partners that when they confirm a volunteer for a TBS opportunity, they should be sure to set the start date and time and end date and time for that connection. Otherwise, the volunteer is confirmed for the entire span of the TBS opportunity - and the calendar link will create a rather long-term event on someone's calendar.

We recommend reminding your partners to always set the correct time span when confirming TBS connections. (We plan to make this easier for partners in the Spring '16 release. Stay tuned!)

5. Improvements to Team Functionality

In this release, we've addressed two of the most requested improvements to team functionality! We've also fixed a few smaller items that will make managing teams clearer and easier for volunteers.

5.1 A Volunteer can create a team connection, even if they were previously signed up as an individual.

If a volunteer has already signed up for an opportunity as an individual, and then wishes to switch to a team connection they can now do so. (Previously, once you had declined your individual connection you could not sign up again.)

To change from an individual connection to a team connection a volunteer simply needs to:

1. Go to "My Accounts" and remove themselves from the occurrence (this will mark them as declined for the individual connection)
2. Go back to the opportunity and click "Sign Up with A Team"

The volunteer will now be able to create a new team connection and the former connection will be updated as confirmed and be associated with the team!

This update also allows volunteers to change their mind about signups in other ways. If a volunteer removes themselves, changes their mind, and then decides to sign up again, the system will now permit this. As long as the decline reason in the connection is "removed themselves" - volunteers can sign up again.

Note: if the volunteer is in declined status for any other decline reason (i.e. the opportunity manager has declined them for failing a background check or not having needed skills), they will not be able to sign up again.

5.2 Clearer naming conventions for managing teams and who on the team is participating in a given occurrence

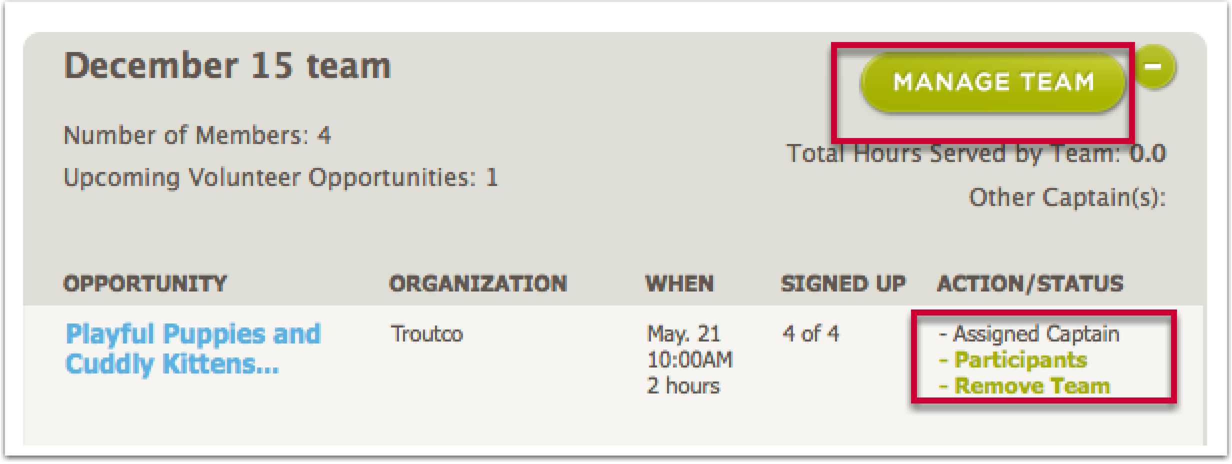
In the past there has been confusion about the difference between managing your team (i.e. adding, removing or emailing team members) and updating who on the team will be participating in a given occurrence.

In My Account / Upcoming Opportunities - for any connection a team captain has, they will see it labeled as a team opportunity, and there will be a link to "Participants" - that shows who is signed up. (Previously this link was labeled "Manage my Team" which is not what the link really did.)

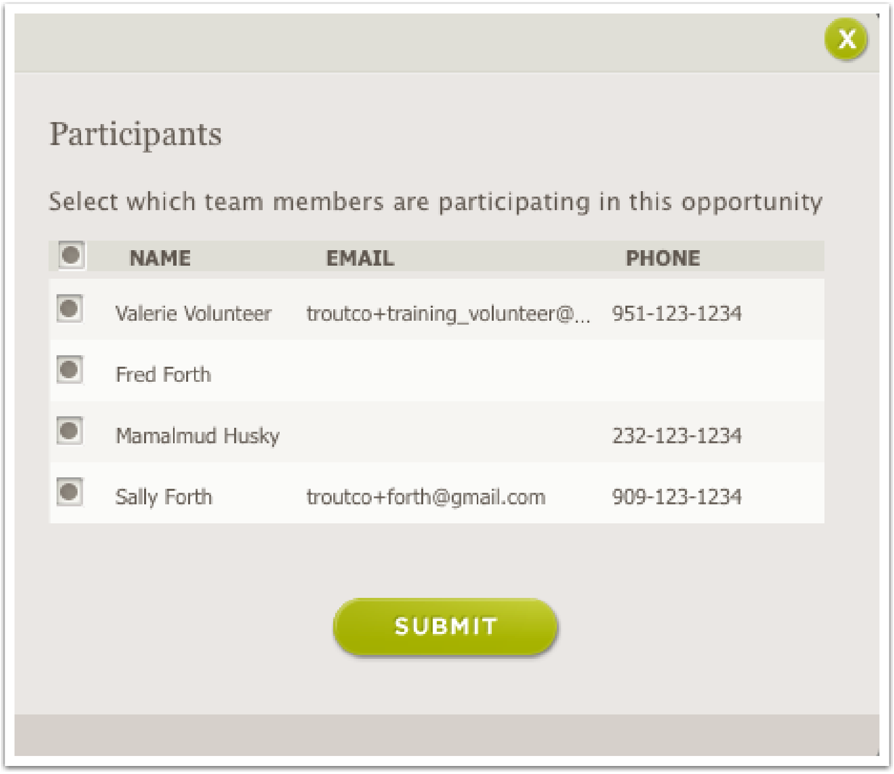
Clicking on Participants allows the team captain to change who is signed up for that occurrence.

On the "My Teams" page

On the My Teams page, captains will see any opportunities their team is signed up for (whether they as a captain or signed up or not!), and can modify the team sign up by clicking on the Participants link.   To Manage the team membership or email team members, click on the "Manage Team" button.



The Participants pop-up screen has clearer language



5.3 Team Captains can manage team signups, even if they are not connected themselves!

Previously, if a team captain signed up a team but did not have a connection themselves, there was no way for them to manage the team's signup any longer. Now team captains can manage the participants for an occurrence even if they are not connected themselves!

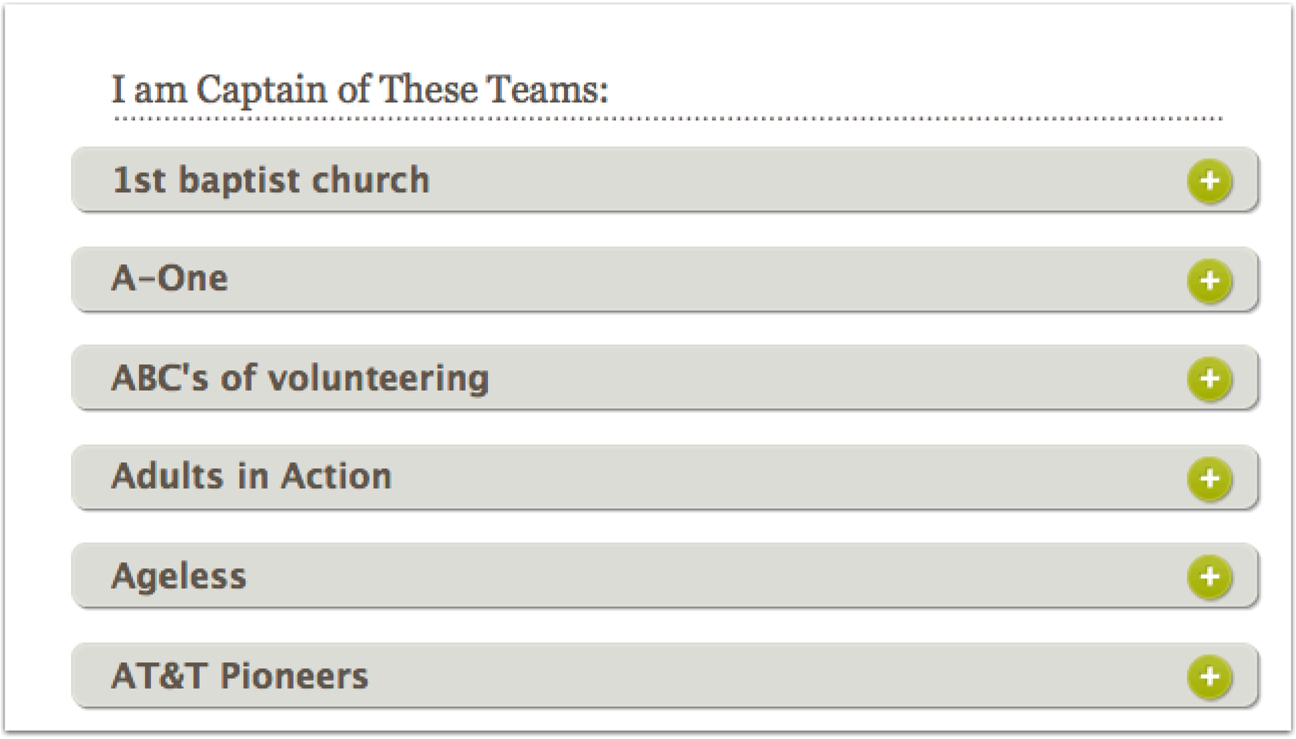
On the My Account / Upcoming Opportunity page, a team captain will see the 'participants' link for any opportunity that they are signed up for.

Any team captain however, can go to the "My Teams" page, click on the team name and they will see any opportunity their team is signed up for, whether or not they themselves are signed up. The captain can then click on the Participants link and manage the team signup for that occurrence.

In short: If you, as a team captain have signed up team members, but not yourself. Go to "My Teams" and you'll be able to edit the participants for any occurrence your team has team members signed up for!

5.4 Team Names now appear in Alphabetical order on the teams page

For volunteers belonging to or managing many teams - team names now appear in alphabetical order making it easier to find the team you're looking for!



6. WYSWYG Editor Improvements

The WYSWYG editor in HandsOn Connect has been modernized and improved in the following ways:

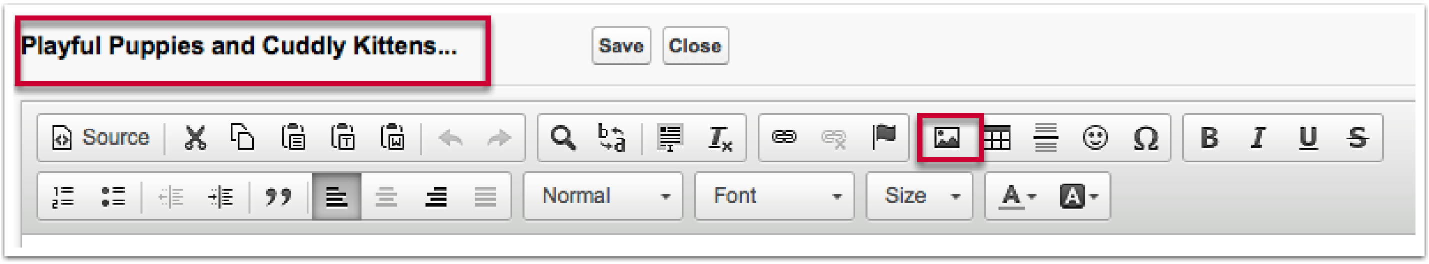
1. The editor has been modernized for improved browser compatibility correcting a number of limitations some users have experienced.

2. Previously there were different editors in different parts of HOC. Now, the same editor is used throughout HandsOn Connect:

- CMS pages
- Static Page Editor
- Volunteer Opportunity Description
- Special Event Description
- Business Description

3. When the editor is open, you'll see the name of the record you're editing.

4. System admins and staff can now upload images frviaom the "Image" icon in all spots the editor is used. (At last: you can add images quickly when editing volunteer opportunity descriptions, business descriptions and special events!)



A note about Images and the Partner Portal.

In the partner portal - there is no access for partners to upload images for volunteer opportunity descriptions. (This is intentional, as they may upload overly large images which will affect your data storage, and their images would be shared by other users.)

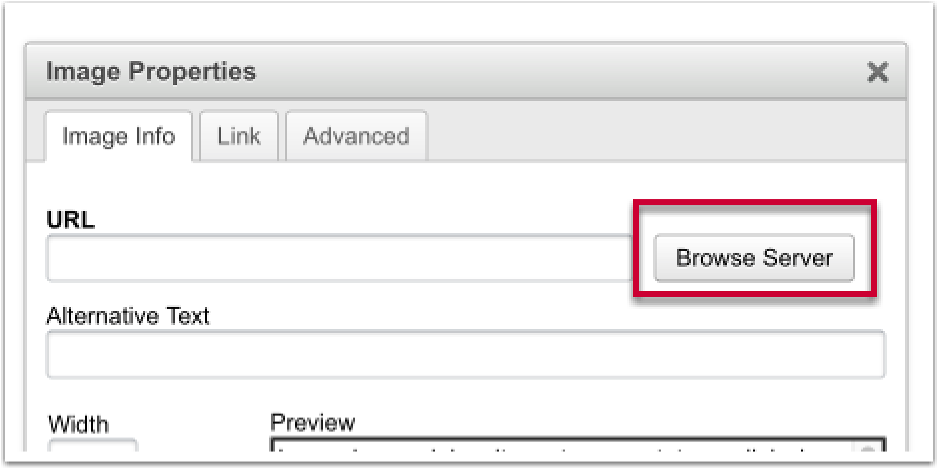
If partners want to use images in their opportunity descriptions, they can do that by providing a URL from another site where they are storing their images. See this post for details on how a partner can do this.

The "Browse Server" button IS visible to all partners, in case you want to allow them access to use images you've uploaded for use on the site. By default however, access is restricted and the partner will get a permissions error if they use the "Browse Server" button. This prevents them from accessing your library of images.

If you DO wish to allow partners to browse and use the images you've uploaded you can grant permission for partners to Browse the Server by doing the following:

- Go to Setup / Develop / Visualforce Pages
- Look for the VIsualforce Page "SiteFileBrowser" and click on the security link
- Add the Partner Staff Profile to the Enabled Profiles list.

It's up to you organizationally whether or not you wish your partners to be able to view and use the images you've uploaded to the server.



7. HandsOn Connect is now Salesforce Communities compatible

As a first step in the continuing movement by Salesforce to Communities - we've made HandsOn Connect communities compatible.

This means that in the future, instead of using your current licenses for volunteers, volunteer leaders and partners, you could switch to the newer Salesforce Community-based licenses, which will make it possible to use community-based features like Chatter.

At the present time we do not recommend switching to communities for the following reasons:

- Community licenses are more expensive than the current licenses you are using with HandsOn Connect
- Switching to community-based licenses would not yet give you access to any additional features within the HOC public site and volunteer portal.

We are currently in discussions with Salesforce about community license costs for HOC users, and if we feel the pricing barrier can be overcome, will begin development on integrating chatter and other community features into the public site.

For the time being, we recommend customers continue to use their existing SF licenses. But, the groundwork for an eventual conversion to communities has been laid! Stay tuned for further news on communities in the coming year.

Enjoy the new release!

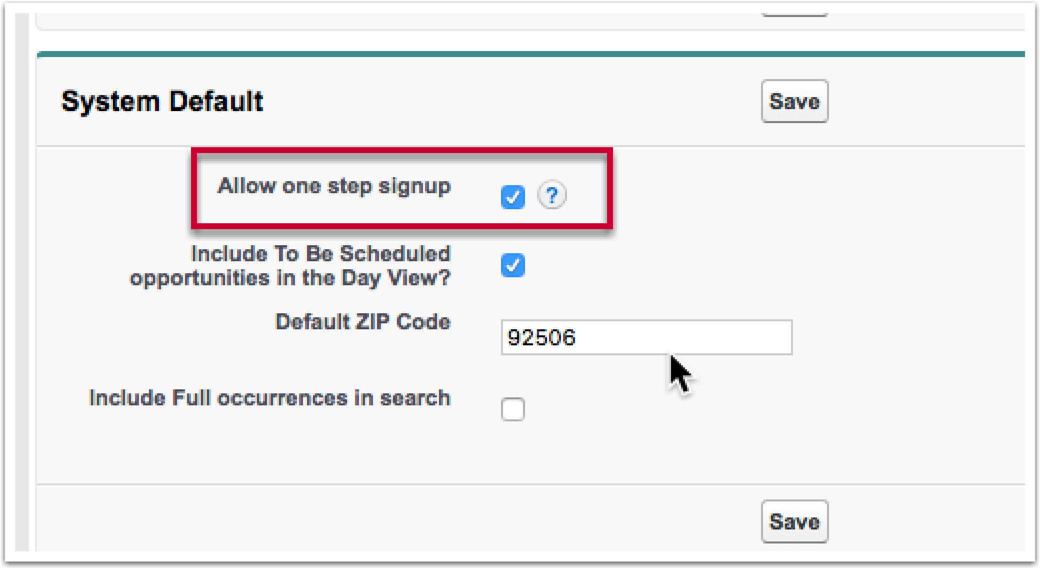
If you have any questions about the new release or encounter any issues - please open a ticket in Zendesk or come to lab and let us know!

Happy Holidays to all our users and we hope you enjoy this holiday gift of new HandsOn Connect functionality!

November 2015 Monthly Release Notes

The November 2015 maintenance release was dispatched to all HandsOn Connect customers on November 24, 2015. In addition to bug fixes, it included two new features. Here's the details on new features and the bugs that were addressed:

Feature 1: One Step Project Sign-up for new and unlogged volunteers

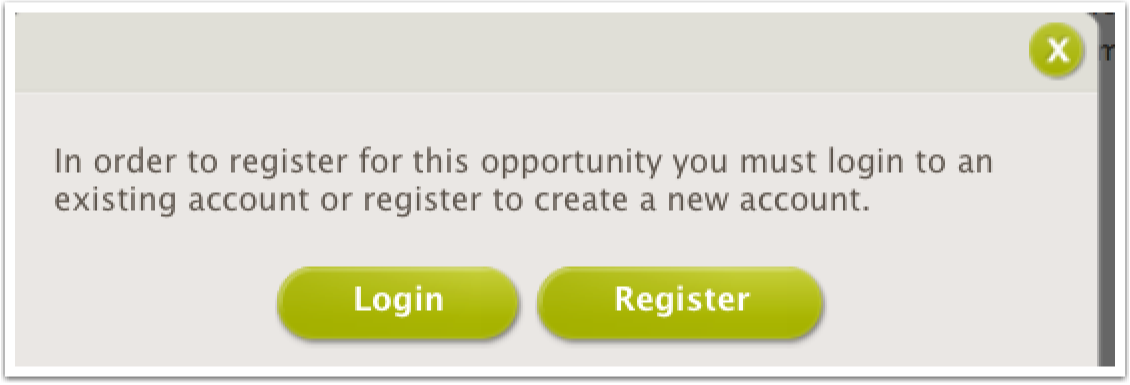


The new one-step sign up functionality is controlled in Control panel / Site Configuation / System Default.   It replaces a setting that was here previously labeled "Re-direct to Opportunity Detail Page" If you previously had "re-direct to opportunity detail page setting checked, one-step signup will now be enabled instead for you instead. If the box was unchecked previously, one-step signup will not be enabled at this time. You can manually update this setting based on your business needs.

For existing volunteers - signup and login will be one-step, no matter which setting you choose. However, for new volunteers who register, the system will perform differently depending on the setting:

Here is the functionality this setting controls:

If "Allow one-step Signup" is checked:

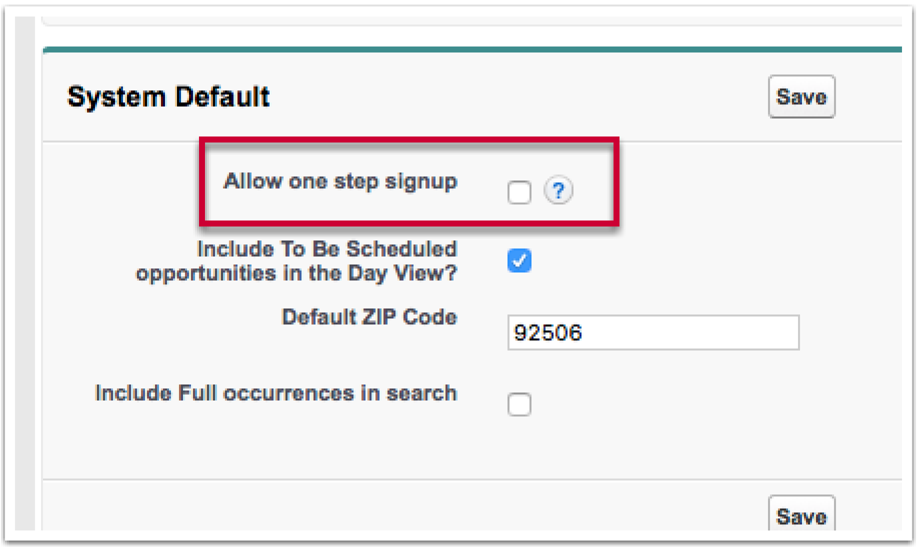


When this setting is set to true (checked) - and a volunteer clicks a "Sign Up" or "Express Interest" button (or the equivalent sign up with a team links) - the system will, as before, prompt them to either login or register.

If you log in: Successfully logging in from this widget will both log you in AND trigger the sign-up button as if you had been logged in when you first pressed it. You will be prompted with custom questions, team sign-up steps, or a sign up success page. There will be no need to press the sign up button again.

If you click on Register: You will be taken to the registration page, and upon completing and submitting the registration form, instead of being redirected to the sign-up page (as before), the sign-up button for the opportunity you had clicked on will be triggered and you will proceed automatically with the remainder of the sign-up process (custom questions, team selection) or simply reach the Project Sign Up Success Page. There will be no confusion or need to once again click sign-up after you complete the registration.

If "allow one-step Signup" is unchecked

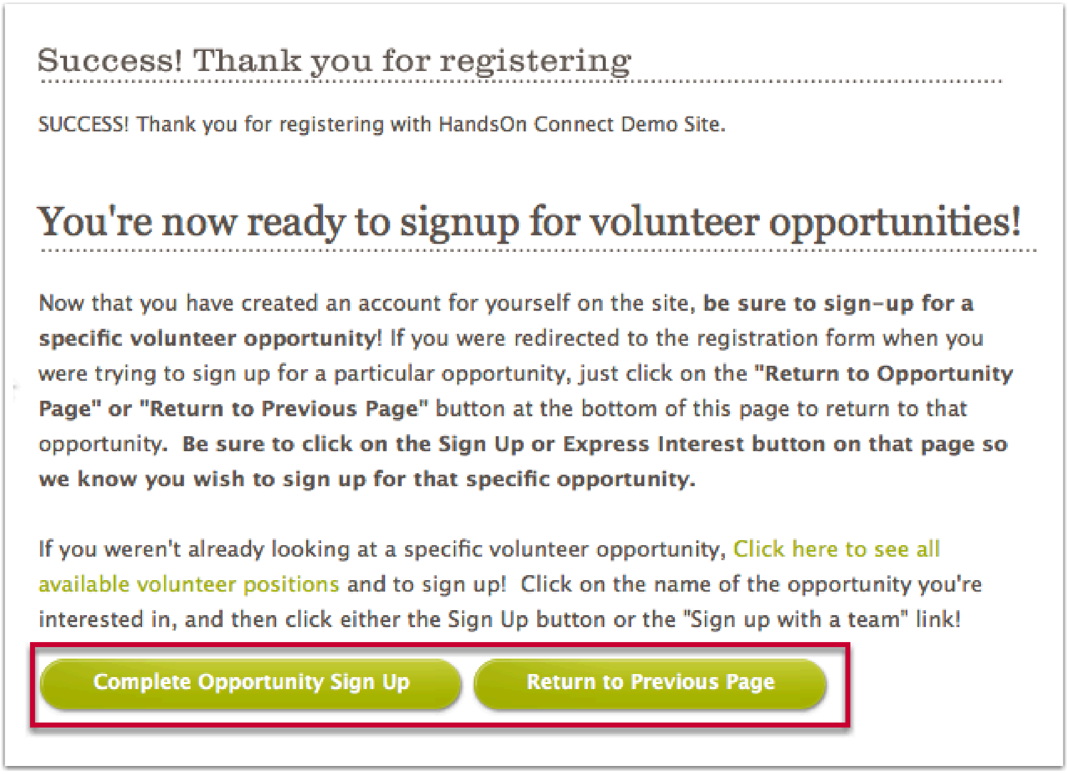


When this setting is set to false (unchecked) - and a volunteer clicks a "Sign Up" or "Express Interest" button (or the equivalent sign up with a team links) - the system will, as before, prompt them to either login or register.

If you log in: Successfully logging in from this widget will both log you in AND trigger the sign-up button as if you had been logged in when you first pressed it. You will be prompted with custom questions, team sign-up steps, or a sign up success page.   There will be no need to press the sign up button again.

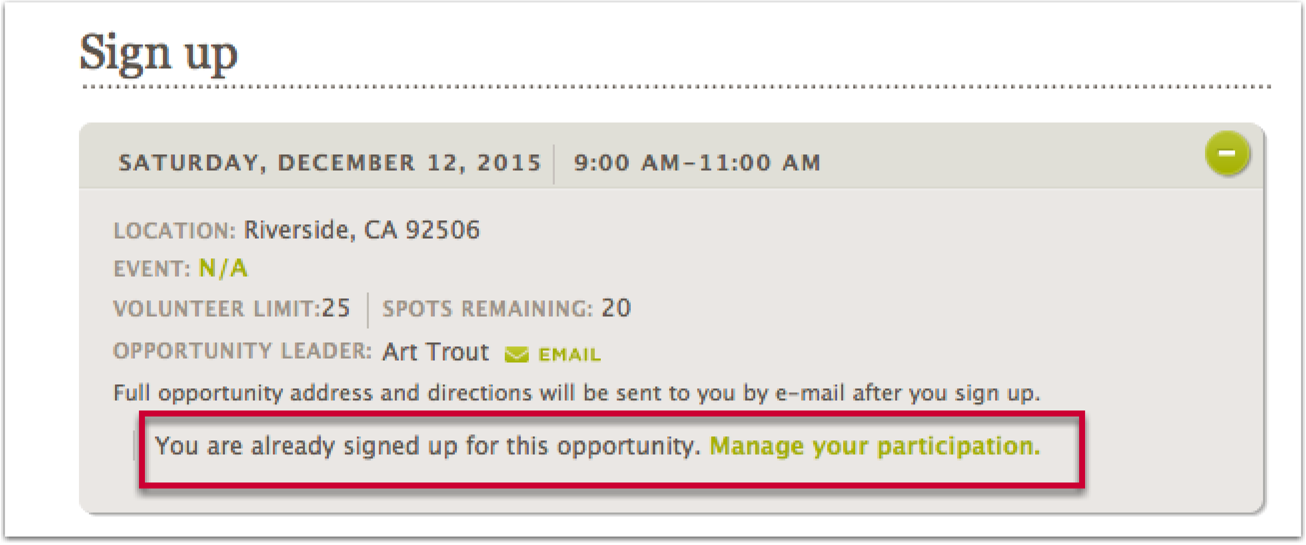
If you click on Register: The user will be taken to the volunteer account registration page, and after submitting the registration form, the user will be taken to the Volunteer Registration Confirmation Page.   Any custom instructions you've provided to volunteers will be displayed here.   From this page the user will have the option to return to the 'previous page' they were on before registering or to "complete signup".   Clicking on complete sign-up will take them back to the opportunity to continue the sign-up process.

NOTE: *The help text for this setting wasn't updated to reflect the new functionality. The text in help still refers to redirecting to the previous page (it's old functionality). This help text will be updated in the next release.*



The buttons that appear on the volunteer registration confirmation page will vary depending on how the volunteer arrived on the registration form.

Feature 2: Sign up button no longer appears to a logged in user if they are already signed up for an occurrence.



Previously, volunteers who were signed up for an occurrence,still saw a sign up or express interest button, even if they were already signed up for an occurrence. Clicking on the button returned a pop-up error message.   Now, as shown above, user will see a message indicating they are already signed up, and a link will allow them to go to 'my account' where they can manage their existing sign up.

Bug Fixes in November Release:

Fixed: Creating connections administratively for a partner managed opportunity did not always send sign-up notifications to the Opportunity Coordinator.

Request Fulfilled: Hitting the enter key on registration page for volunteers or organizations, did not submit the form. You had to click on the Submit button. The Enter Key will now submit the form.

Request Fulfilled: Hitting the enter key on Business Page invitation code field did not submit the form. You had to click on the Search button. The Enter key will now initiate the search.

Fixed: Creating custom skills or skill categories created odd spacing in the names of new skills and categories. Normal spacing will now result.

Improved: Basic portal error messages were obscure and not understandable to users. New error messages have been added that will clarify errors when they occur. Additional usability fixes in basic portal to prevent double submitting forms. (Note: If you encounter any error messages you find particularly cryptic, please open a zendesk ticket with the details and we will continue to refine error messages in the portal).

Fixed: The registration page for volunteers has been retitled "Register for a Volunteer Account" - to avoid confusion between "Signing up for a volunteer opportunity" and "Registering as a volunteer."

Improvements to 'real time' search publishing. Fixed a number of scenarios where publishing an opportunity or occurrence would not update search until overnight. Opportunities published will now appear in search within 10 minutes. (Note: Please report circumstances for any scenario where opportunities or occurrences do not appear in search. Open a zendesk ticket with as much detail as possible on how the opportunity or occurrence was created and/or edited, with the URL from the admin site of any opportunity or occurrence that is not appearing in search as expected. Thanks!)

Under the hood improvements to prepare for December's mobile-responsive site release.

2.5 Release patches 6 & 7

These two patches during April, 2015 focused on improving system security and the HandsOn Connect Sharing model, as well as support for the new Volunteer Opportunity Wizard and some minor bug fixes.

Support for new Volunteer Opportunity Wizard added to HandsOn Connect

A much improved version of the Volunteer Opportunity Wizard was made available to be integrated into HandsOn Connect and is now widely available for all customers. We recommend that all customers install the new wizard or request that the support team install it for you.

The standard version of the new wizard is easily installed within 10 minutes, and can be optionally customized to meet specific business requirements if desired. Custom versions of the wizard can be requested via premium support or can be customized by a system administrator well-trained in the Salesforce's "flow" functionality.

[Click here for general announcement of new wizard and links to videos]

[Click here for instructions on Installing the new wizard]

Support for :15 and :45 time increments in recurrences

Added the ability to choose recurrence start times and end times on the quarter hour. (Previously only :00 and :30 times were possible for recurrences). The X:15 and X:45 increments automatically appear as options when using the new volunteer opportunity wizard when its' installed.

System admins who wish to add the :15 and :45 increments to the recurrence object itself (for the creation of additional recurrences), can now do so if desired. (See steps below)

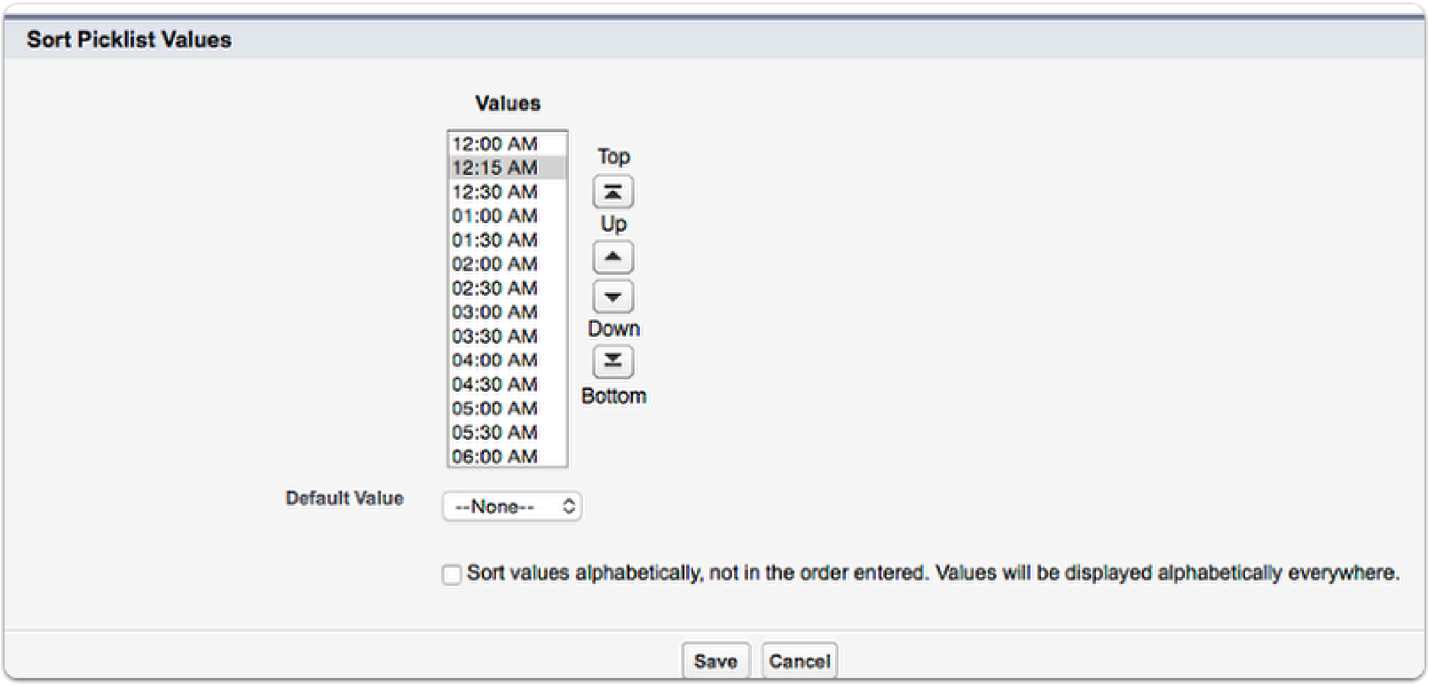
To add :15 and :45 increments to the recurrence object (optional system update)

1. Go to Setup / Objects / Recurrence and click on the field name "Start Time"

2. Scroll to Picklist Values and click on the "New" button and add the values 12:15 AM, 12:45 AM, 01:15 AM, 01:45 AM, etc... and save the added 48 new picklist values. (After 11:45 AM the next in the sequence will be 12:15 PM, then 12:45 PM, 01:15 PM, etc...)

TIP: You can use the text file "15 and 45 minute increments.txt" which is attached in the comment below , to copy and paste the new values you need!

3. Click on the "Reorder" button and place the values in the correct order (moving each :15 and :45 minute value up from the bottom of the list, to the correct place in the list chronologically. Save.



4. Repeat the process for the field **End Time**

Random html characters appearing on public site have been removed

Updated and removed strange html characters that were showing up in place of quote marks on several pages on the public site, including:

- Calendar Page
- Success page after a team is created
- Join a Public Team page.

Security and Sharing Updates

Salesforce has made a number of changes to improve security in its Winter and Spring Releases.

The HandsOn Connect development team has been working directly with Salesforce to implement improved security features in the HandsOn Connect application and to update our sharing models to remain compatible with the latest Salesforce upgrades. These 'under the hood' updates to HOC will ensure continued compatibility and increased security for all HOC users.

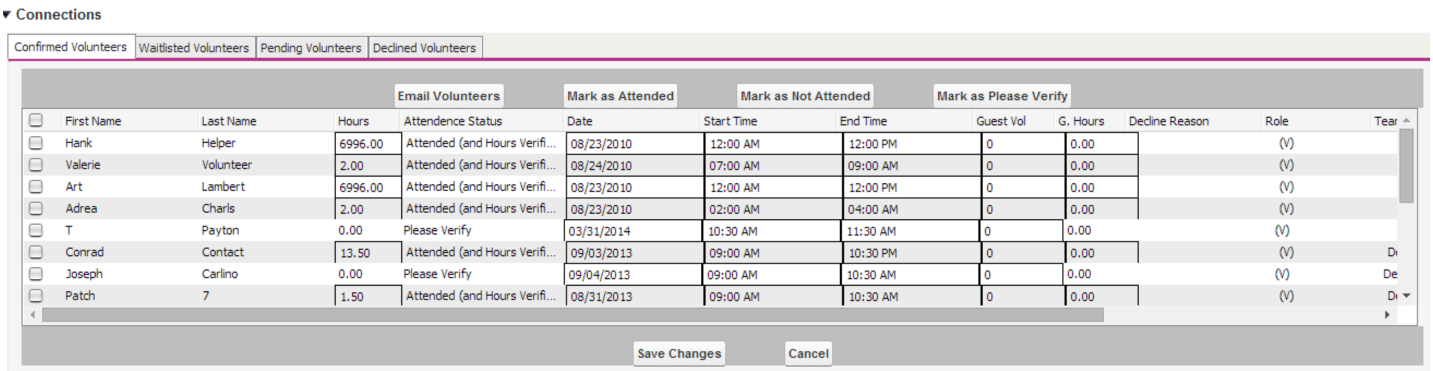
2.5 Release Patch 5

2.5 Release Patch 5

This release focuses on usability enhancements for Basic Portal customers and some usability and bug fixes for all customers.

Improvements for All Customers

Connection Grid Order



Based on feedback received from customers we improved the order of the columns in the Connection Grid as follows:

- Last Name
- First Name
- Hours
- Attendance Status
- Date
- Start Time
- End Time
- Guest Vols
- Guest Hours
- Decline Reason
- Role
- Team Name
- Rating
- Created Date

Team Sign-ups

There was a limitation on the number of team members that could sign up for an opportunity at a single time of 35. We have increased the limit and now a team captain can sign up up to 100 Team members at once for a given occurrence.

Recurrence Object

Previously a recurrence and the related occurrences could only be created using the Visualforce Page associated with the recurrence object. We improved the Apex Classes and Triggers associated with recurrences to allow for the related occurrence to be created every time a recurrence record is added, even when not using the visualforce page. This will allow customers to develop new visualforce pages or forms for creating recurrences.

Thank you to Nashville for your support of this enhancement.

Sharing of Contacts with Partners

Although contacts and connections have been properly shared with Partner Staff, some contacts would not appear in views and reports because of a visibility limit on the record. The visibility has been removed and all contacts that are shared with a Partner Staff will appear in views and reports.

Other Bug Fixes & Improvements

- The "Managed By [name of HOConnect Customer] was added back to the Hover over on the Opportunity Calendar page.
- Improvements were made to the "Volunteer Interest Notification," "Opportunity Sign-up Confirmation - Affiliate Managed - To Be Scheduled - Express Interest," and "Opportunity Sign-up Confirmation - Ongoing Opportunity" workflow rules to not send when a connection is created in Status= Confirmed.

There were a few improvements to the Setup that the support team has deployed to improve your instance:

- Outbound Messages - The Staff profile was granted the permission to send outbound messages. This is used to send out the real-time updates when a Staff users makes a change.
- Sharing rules for custom objects - As a back-up for customers that remove the "Delete" permission from the Staff profile, the team added sharing rules for the custom objects in HandsOn Connect so that Staff could still have access to the records to make edits.
- Email Deliverability - Email Security Compliance was enabled to improve email deliverability.

- Organization Overview - this panel that was present at the top of the Organization page layout allowed a user to grant portal access to all associated contacts. This shortcut was creating errors in the sharing of records so we removed the Overview panel. Portal access should be granted through the Contact Overview panel on the contact record.

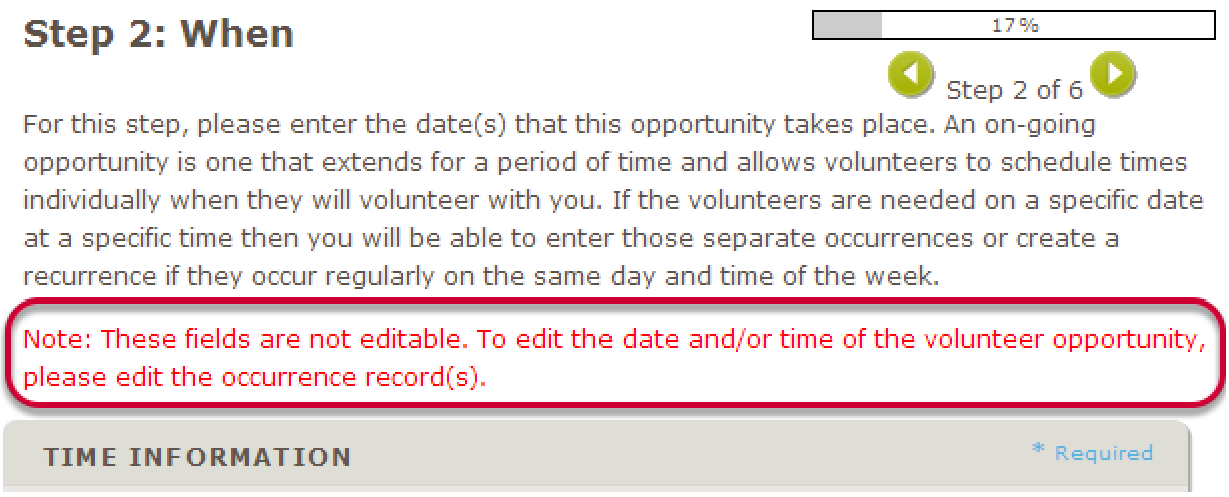
Basic Portal Improvements

The following are improvements that only impact customers utilizing the HandsOn Connect Basic Portal

Contact Search

When using the look-up for contact related fields, the search filter only applied to the page one we currently viewing. This has been improved to search across all the contacts available in the look-up.

Volunteer Opportunity Creation Wizard Improvements



- A Partner Staff can assign another contact within their organization as the opportunity coordinator
- When creating a Volunteer Opportunity with custom question, the related questions are not longer created in duplicate when the record is edited.
- When editing a custom question, it moved the status of the volunteer opportunity to "null" which is not a valid status. Editing the custom question does not change the status.
- Days & Times Needed is now captured in the Salesforce instance for To Be Scheduled opportunities.

Schedule a Volunteer Improvements

There were a number of improvements to the Schedule a Volunteer page:

- When a connection is created, the connection is created in Confirmed status, even for express interest volunteer opportunities.
- Connections created for past occurrences or past dates & times are set to Attendance Status = Attended (and Hours Verified)
- Can now schedule up to 52 connections at once.
- When creating a connection for a To Be Schedule volunteer opportunity, the End Date is now shown in the Occurrence grid so you don't create a connection beyond the end date of the occurrence.
- Messaging added to Step 2 when editing the volunteer opportunity telling user to make changes to the dates and times at the occurrence record(s)
- Error message clarified when scheduling a volunteer and not selecting a date or time.
- After scheduling a volunteer and closing the page, user is returned to the opportunity detail page instead of the manage volunteers page.
- List of available volunteer opportunities was improved to remove opportunities that are in pending or awaiting approval status.

Occurrence Related Improvements

- Partner Staff users are now able to edit an occurrence record.
- On the Occurrence detail page, the answers to the custom questions are now present when you expand the custom question.
- Success message displayed after creating a new occurrence
- When canceling an occurrence you are now presented with a confirmation message in order to cancel.
- Guest Volunteer fields is properly displaying what is in the Occurrence record in Salesforce.
- View on Public Site button takes user to the Opportunity Detail Page instead of the search page to see all the available occurrences.

Other Improvements and Bug Fixes

- Under Manage Opportunities, the "Active Opportunities" was updated to only show volunteer opportunities with an active and upcoming occurrence. Those that were active, but no longer appear on the public site have been moved the the renamed "Expired and Pending Opportunities" grid
- Checkboxes and Select All on the Verify volunteers page have been fixed so that they update correctly when checked.
- When a new Organization Contact is added, they are no longer given a Volunteer license and the Partner Approval Manager for that organization is notified.

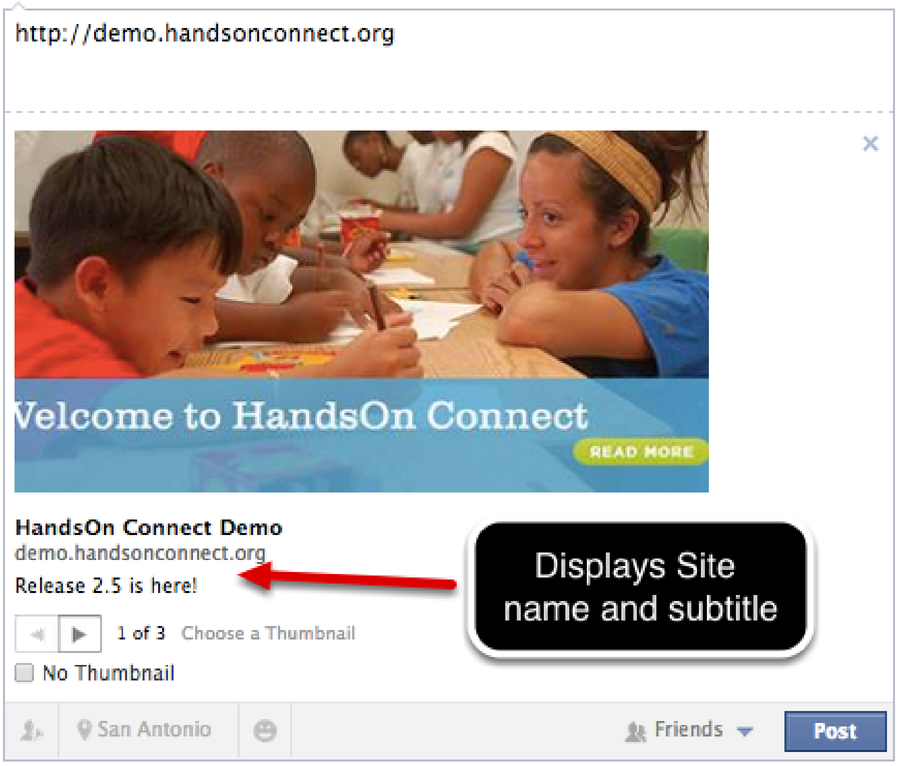
- Mark Inactive has been removed as an action option. Submit for Approval action only appears for non-active opportunities
- The Action column on the Manage Volunteers page was moved to the first column of the grid and the search filter on that page was improved.
- On the Manage Volunteer page the age column was replaced with Over 18? to maintain volunteer's privacy and the columns were improved so that first name appears first and is used for the sorting.

2.5 Release Patch 4

This includes the information on 3 items that were corrected in the HandsOn Connect package and deployed overnight on Wed. Nov, 27, 2013.

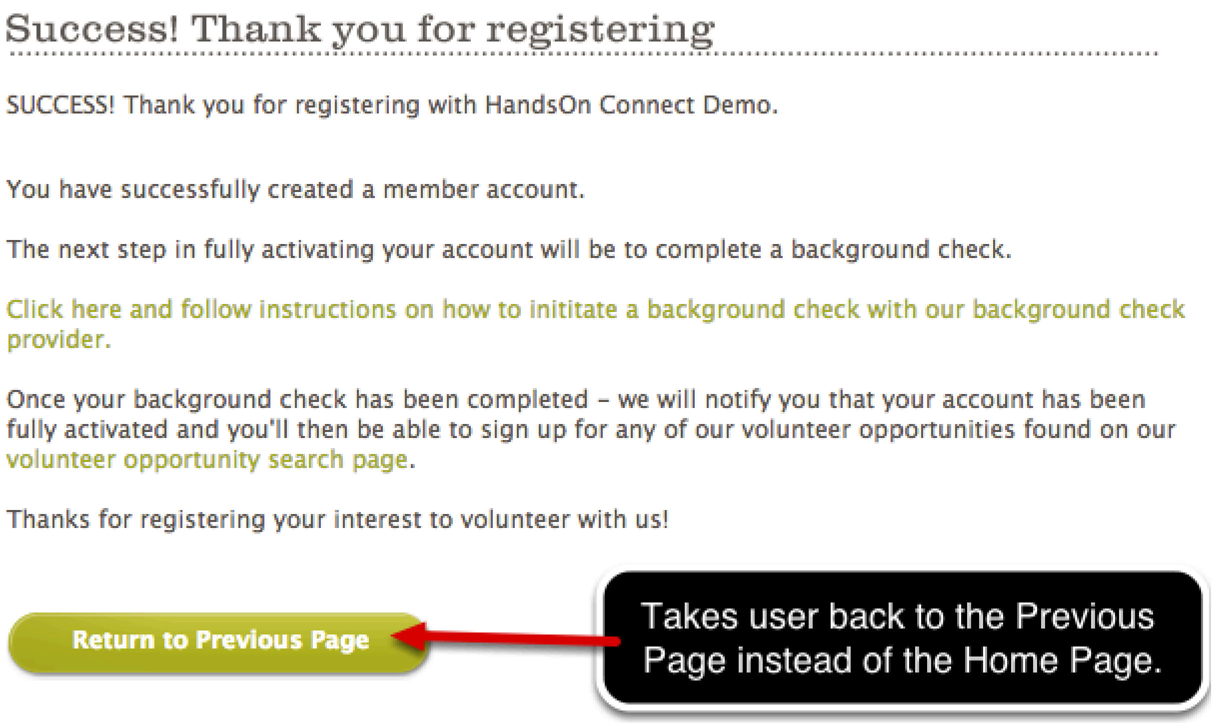
Day View - Showing Slots Available and Times

Facebook Sharing



When posting your organization's website or a volunteer opportunity, the default text has been corrected to remove references to prerequisites and Volunteer Centers of Michigan.

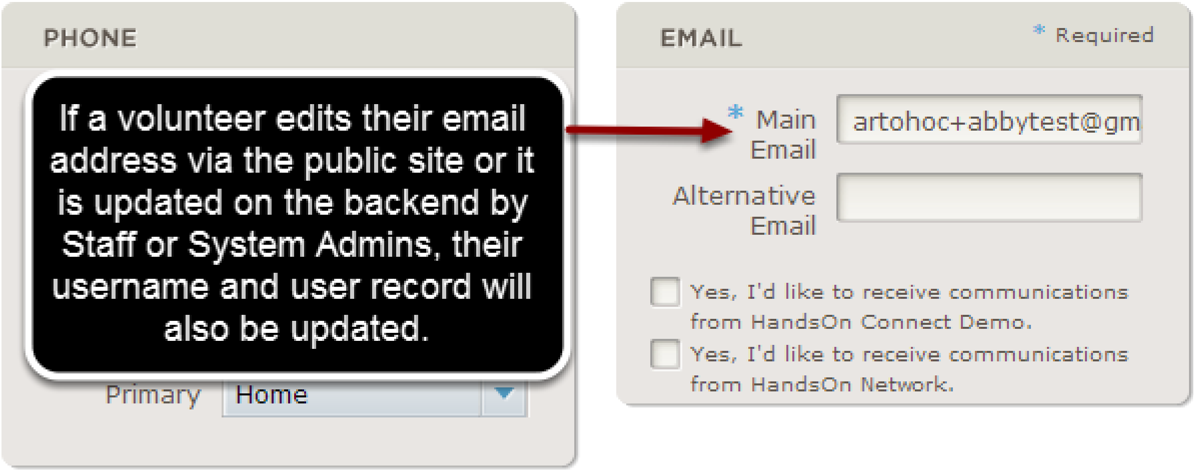
Return to Previous Page



2.5 Release Patch 3

This article contains the improvements made as part of the 2.5 Release Patch 3.

Username now changeable by Volunteer

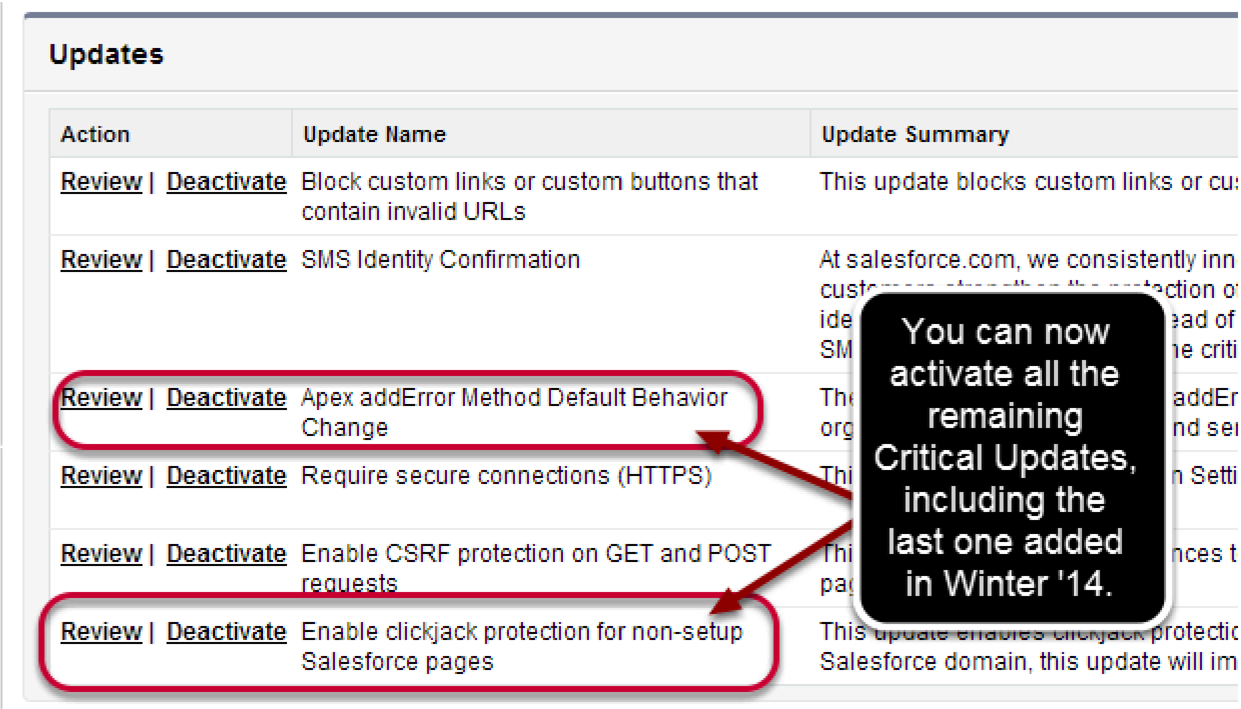


In the past, once set the username could only be changed manually by Staff or System Admins. Moving forward, to update a contact's username all that is necessary is to update the email address in the contact record, and the change will be pushed to the other three fields:

- Contact record: Username (this field was recommended to be removed from the page layout so it may not be visible. If desired System Admins can add it back)
- User record: Email
- User record: Username

As part of this change the Validation Rule "CheckUsername" associated with the contact record was also updated to allow for the username field to be edited.

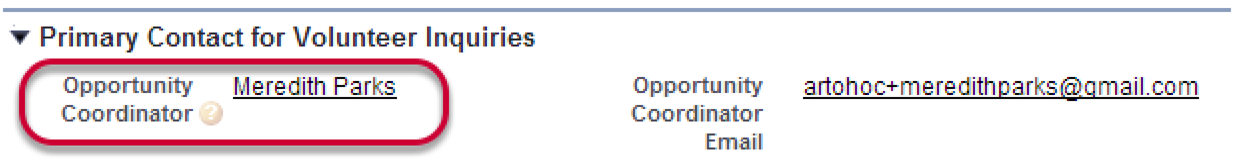
Salesforce Critical Updates & other Salesforce Related Improvements



With this patch, changes have been made to the HandsOn Connect product to be compatible with the Critical Updates issued by Salesforce.com. All Salesforce.com related Critical Updates can now be enabled for your instance.

A number of visualforce pages were also updated to adapt to changes introduced by Salesforce.com that were negatively impacting the Personal Information page, Occurrence Look-up for batch create Connections, and other issues reported by customers.

Opportunity Coordinator in the Organization Record (Recommended Admin Action)



With this release we have improved the process for the Organization Registration process.

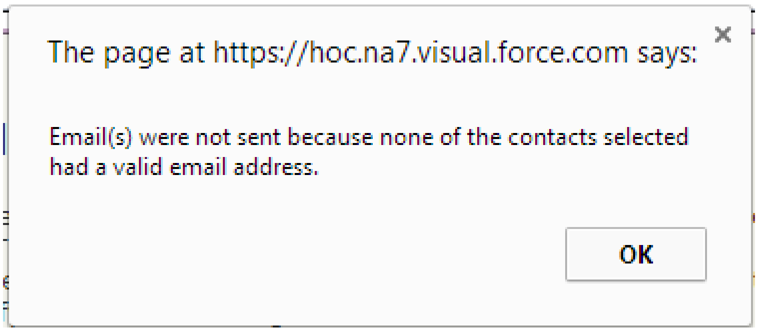
When a new Organization registers via the public site, the contact that is identified as the "Primary Contact for Volunteer Inquiries" will now be populated in the Opportunity Coordinator (look-up field). This field will then be used to populate the Opportunity Coordinator Name and Opportunity Coordinator email field.

The Opportunity Coordinator (lookup field) is also the field that is displayed on the My Organization page in the Partner Portal. This change will now populate this field when a new organization registers making it easier for partners to manage their organization's information.

Admin Actions:

1. The Opportunity Coordinator (look-up field) will NOT be populated for existing Organization records. The support team is working on a batch update that can be run for your instance to populate these existing records. If you would like this to be executed for your instance, please open a support ticket.
2. We recommend that you update the Organization page layouts for "Admin Account Layout (Nonprofit)" and "Staff Account Layout (Nonprofit)" to swap out the Opportunity Coordinator Name field for the Opportunity Coordinator (look-up field). For steps on how to update the page layout click here or attend one of the open labs.

Invalid and Missing Email Addresses



There have been some issues with email addressed that have bounced or contact's that don't have an email address. To help with this, the following changes have been made.

- When using the "Email Members" option in the Occurrence. Bounced emails will not prevent the emails being sent to valid emails. If no contacts selected have a valid email address the message shown above will be displayed.
- If a waitlisted volunteer has a bounced email address, it will no longer prevent a volunteer from removing themselves and the space is now available email from being sent to the other waitlisted volunteers.
- Skilled Volunteer Search will have now filter out contacts that do not have an email address, since an invitation wouldn't be able to be sent to them.

Error signing up for opportunities with Waitlisted Volunteers

Two issues with volunteer sign ups have been addressed:

- When Turn off Waitlist is checked, volunteers were prevented from registering for an opportunity even when space was available.
- When a waitlisted volunteer received the "Space is Now Available" email and returned to the Opportunity Detail page to sign up, they were prevented from doing so and received a message that they had previously registered and were not approved and needed to select another opportunity. This also caused volunteers to remove themselves and re-signed up for the opportunity which would cause other issues.

These have been corrected and volunteers will be able to sign up when space is available and waitlisted volunteers will be able to update their connection from waitlisted to confirmed.

Other Magical Improvements

- The logic for the Source field in the Connection record was improved so that individual and team member connections created via the public site are marked as Public and created by Staff, System Admins, Partner Staff, or Volunteer Leaders via the backend or respective portal are marked as Admin.
- Profile Name field in the Contact record is updated if the contact's profile is changed. The usual process for promoting a Volunteer to a Volunteer Leader or Partner Staff is still followed. But now the Profile Name field that is visible in the Contact record for quick reference is properly updated to reflect the correct profile assigned to that contact for reporting, etc. Please note that deactivating a contact's user record will not update the Profile Name field.
- When a Opportunity Coordinator's contact record's email address is updated, the change is now pushed to the Opportunity Coordinator Email address field in the Occurrence record.
- Connection Validation rule "chk_EndDate" Validation rule was updated to allow for TBS connections to be created beyond the Occurrence End Date since TBS connections can often extend beyond the public recruitment period.
- Opportunity Calendar - Managed By [Affiliate Name] was added back to the pop-up on the Calendar for Affiliate Managed opportunities.
- When adding team members, the phone number is populated in the Home Phone field instead of the Business Phone
- Basic Portal issues with the Occurrence Detail page have been corrected so that the Occurrence Start & End Times are now displayed in the correct timezone.
- Improvements made the the visualforce pages to improve custom .css compatability and page attributes.
- Basic Portal conflicts with deactivated user records have been corrected.
- On the Volunteer Registration Confirmation page, the text for the return to Volunteer Opportunity Detail page was changed from "Return to Volunteer Opp Page" to "Return to

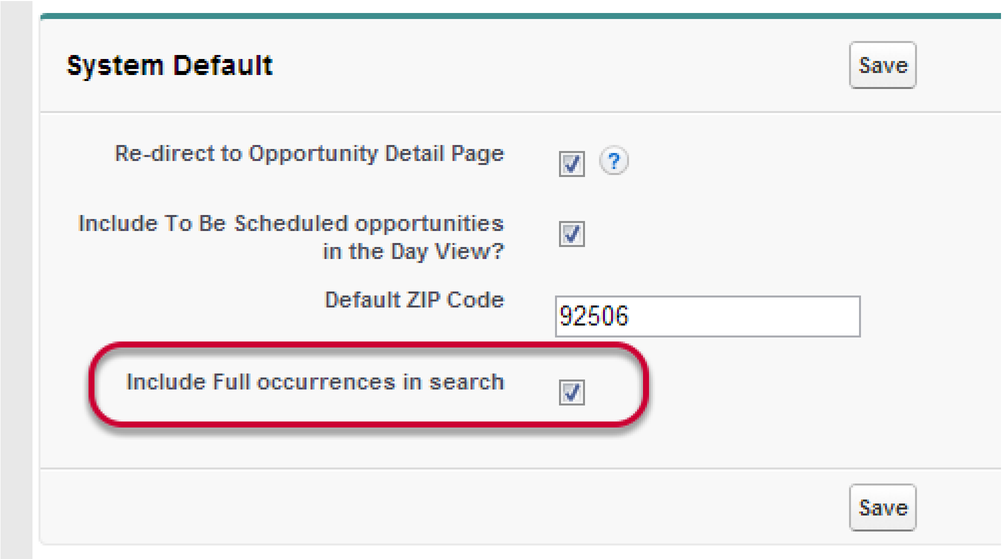
Opportunity Page". Issues with this button have been improved so that volunteers redirect to the correct page when the user clicks on the button.

- Updated error message when a team member without an email address is made a team captain to note that an email address must be provided.
- Opportunity Description pop-up window is updated to be compatible with Internet Explorer 10
- When using the Occurrence URL on the backend to go to the Volunteer Opportunity Detail page, the related Occurrence, when upcoming, will be expanded as is experienced when usually arriving at the page from the search results or opportunity calendar.
- When the "Re-direct to Opportunity Detail Page" is checked, it was redirecting all volunteer registrations to the previous page by-passing the Volunteer Registration Confirmation page. The logic was improved so that this only happens when the volunteer starts at the Opportunity Detail page. If they start from any other page in the system, the user will still go to the Volunteer Registration Confirmation page and see the "Return to Opportunity Page" button.
- All for Good search page in HandsOn Connect was hitting a size limit due to the number of projects in the feed. The limit was increased to avoid this issue and the Authorization Required error that was displayed.

2.5 Release Patch 2

This article contains information about the enhancements released on Sept 10 for the 2.5 Release Patch 2 (Patch 1 was integrated into the release during deployment and is reflected in the 2.5 release notes.)

Exclude Full Occurrences from Search Results



A System Admin can now have the options to remove Full Occurrences from Search Results on the standard search page **and** Business Pages.

In the 2.5 Release we added the color key to the search results page to gray out the occurrences that were full. With this enhancement you can now remove them from your search results completely. Please note that the Full occurrences will still appear on the Calendar and Day View as "Already Filled."

When Full Occurrences are excluded from Search results one of two things will happen.

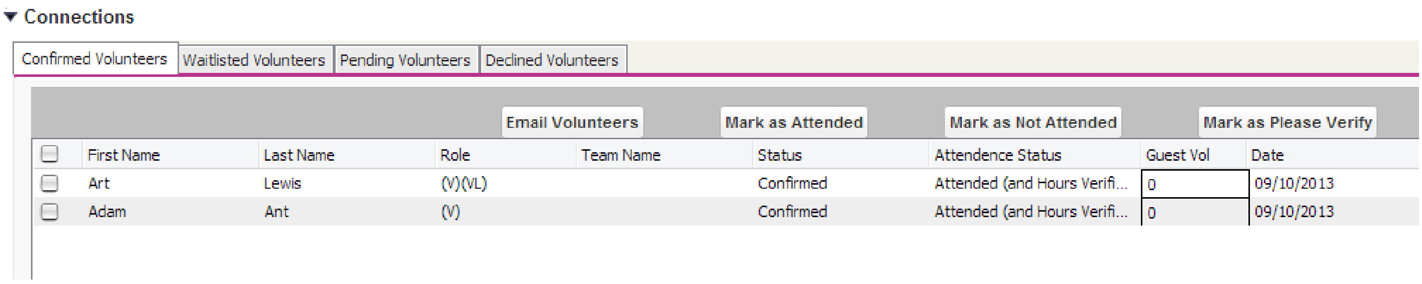
A) If it is a date and time specific occurrence, then the next active, upcoming occurrence with slots available will be shown in the search results. For example, if I have a Food Bank project that takes place Sept 13, 20, and 27th and the 13th and 20th are already filled, then the Sept 27th occurrence will be that one that appears in the search results.

B) if there are no other active, upcoming occurrences with slots available or if the To Be Scheduled occurrence is full, then the volunteer opportunity will no longer appear in search results. The project will still be active on the site and accessible via the Opportunity Calendar, Day View, My Account page for registered volunteers, and direct links, but it will no longer appear in the search results.

ADMIN ACTION

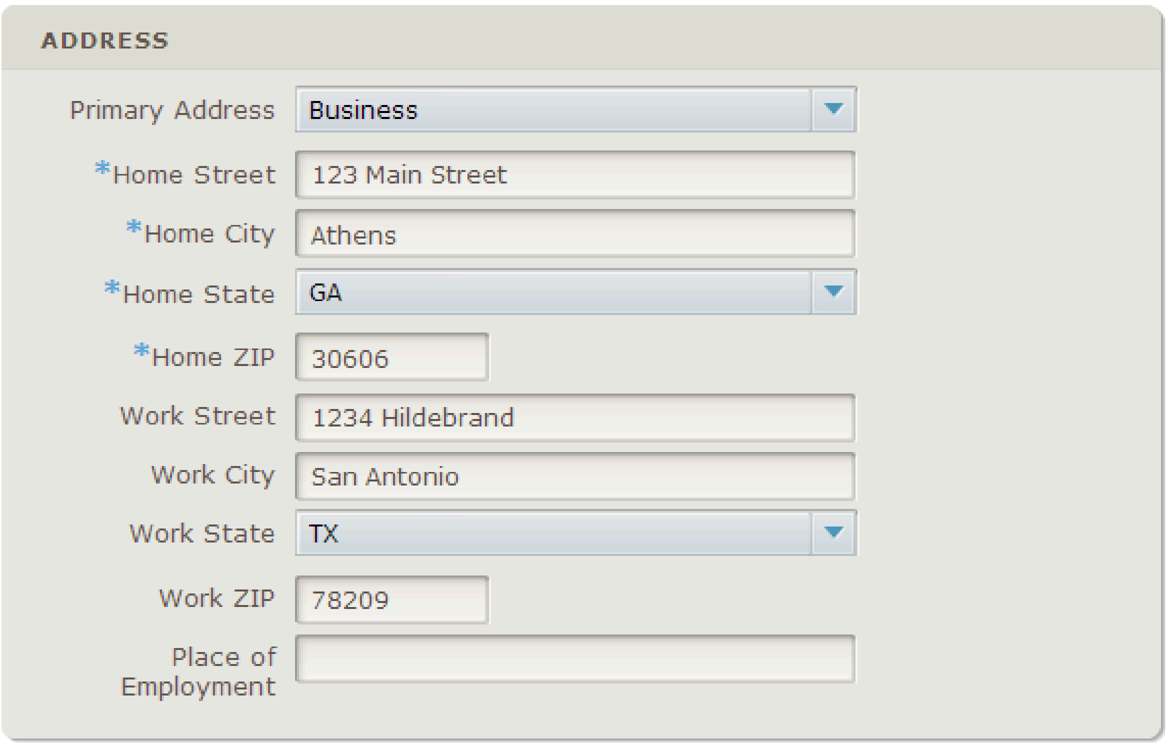
By default, Full Occurrences are included in the search results. A System Admin that want to remove them can go to the Control Panel - Site Configuration and scroll down to the System Defaults section and uncheck the box for Include Full occurrences in search

Same Day Attendance Reporting



We have improved the validation rule to allow for same day reporting of attendance. Any Connection that has an end date & time less than or equal to TODAY can be marked as Attended or Not Attended. This means that if your Opportunity Coordinators have a computer or tablet and are logged into the basic or premium portal, then can now report attendance as volunteers **arrive on site**. No more having to wait until the next day to report the attendance!

Volunteer Registration and Personal Information



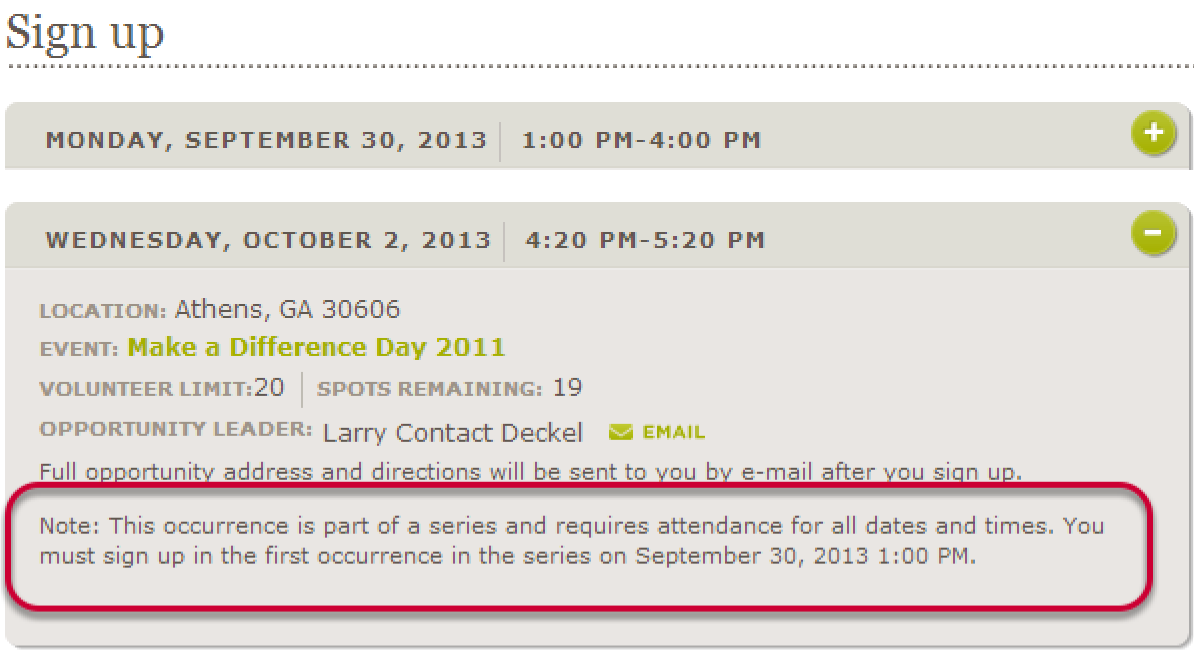
Personal Information page address fields updated to utilize the same look and feel as the registration form with a single block for address, including the ability to ask for which is the Primary Address.

Also enabled the ability to ask for Alternative Email address on the initial Volunteer Registration form.

No Upcoming Occurrences

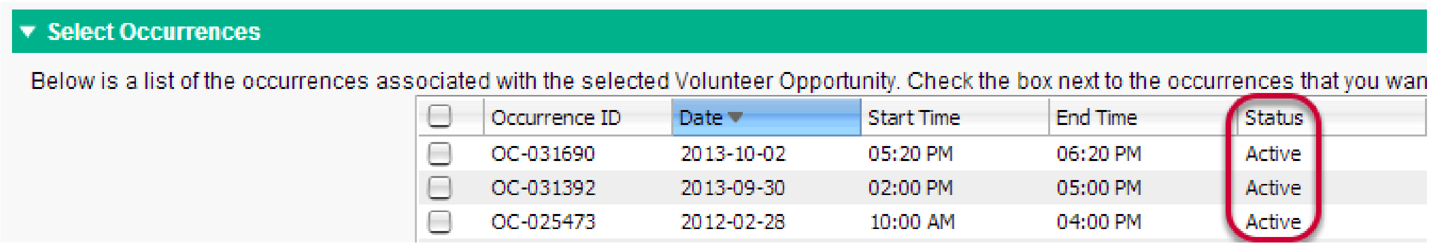
New messaging displayed when there are no upcoming occurrences.

Grouped Occurrences - Register for All



Sign Up/ Express Interest Button is removed from the occurrences when a volunteer must register for all. Only the note is displayed to let them know which occurrence they must first register for.

Grouped Occurrences Improvements



1. The Select Occurrence grid for Grouped Occurrences now filters out Inactive and Canceled Occurrences. If an Occurrence was already included in a group occurrence series that has since become inactive or canceled they will still appear in the list when editing the existing Group Occurrences, but will not appear when creating new Grouped Occurrences.

2. When administratively creating a connection for a Grouped Occurrence series, connections will be created for the occurrence selected and all other occurrences that take place after the selected occurrence, including past occurrences. For example if you have a series of occurrences such as:

- Aug 23
- Aug 30

- Sept 6
- Sept 13
- Sept 20
- Sept 27

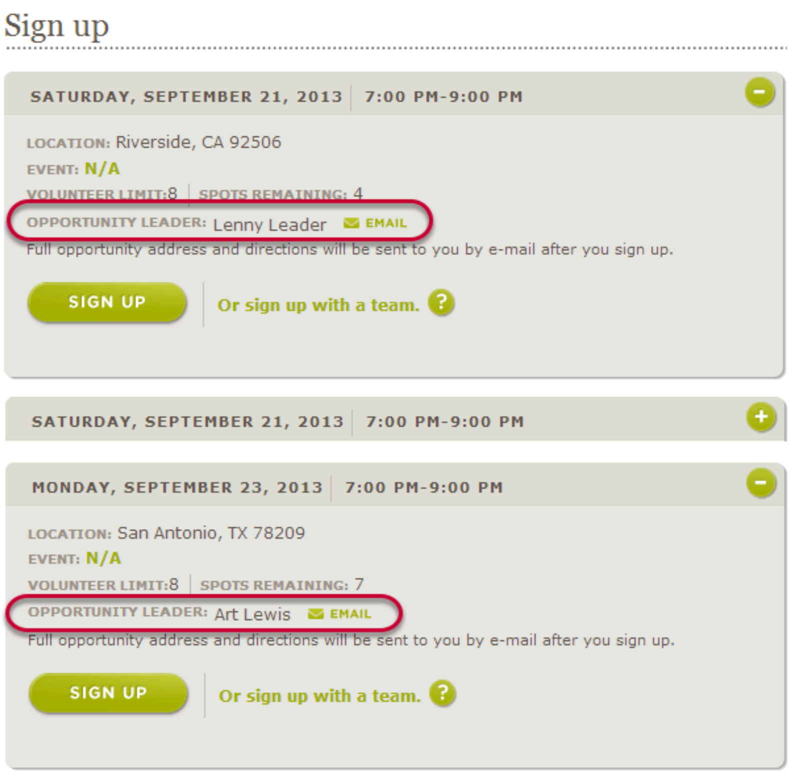
If you create a connection for the Aug 30th Occurrence, a connection will be created for all the occurrences after Aug 30th, including the Sept 6th occurrence. It won't create one for the Aug 23 since that occurs before the selected occurrence so make sure that you create the connection for the first occurrence in the series if you want them for all the occurrences. Remember as an Admin, even if the Grouped Occurrence is marked as "Register for All" Staff, Admin, and Premium Portal customers are able to create connections for only a portion of the series.

3. If you have a Grouped Occurrence that doesn't require that a volunteer register for all, if a volunteer registers for the 3rd occurrence of 5 and then comes back and registers for the 1st in the series it won't create duplicate connections for the 3rd, 4th, and 5th occurrences for which they were previously registered. Same for Admin created connections.

Batch Create Teams Members and Connections

After adding Team Members or Connection using the new batch create and import options in the 2.5 release you are now taken directly to the Volunteer Team or Occurrence record, respectively, after clicking Create.

Different Opportunity Coordinators

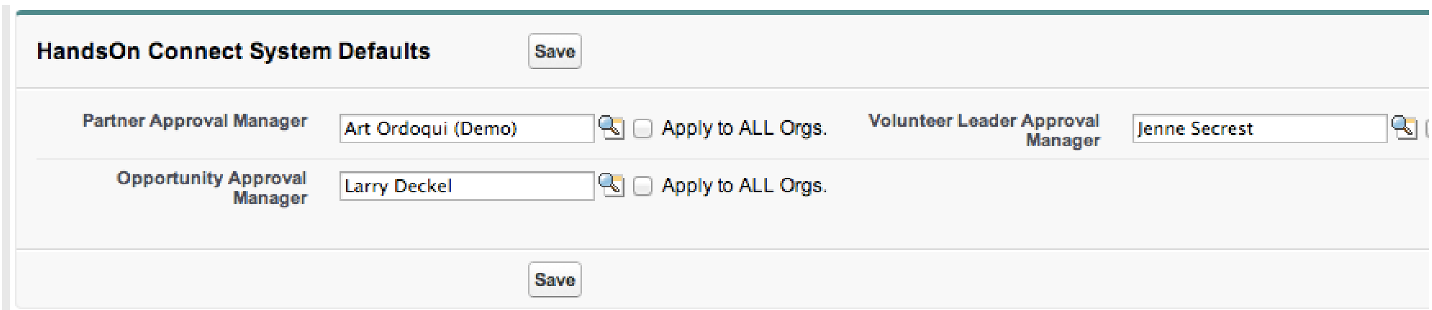


Opportunity Detail Pages now reflect the Opportunity Leader based on the occurrence, even when there are different opportunity coordinators for each occurrence.

Business Page Improvements

The Business Pages now utilize the default zip code in your Control Panel to determine the distance for the opportunities listed. We also improved the capitalization of the city names.

Approval Managers



Improvements were made to the process of assigning Approval Managers in the system.

Whether you are using the Control Panel (pictured above) or modifying the Organization record directly, the following will occur:

Organization record is updated to reflect the new respective Approval Manager.

Volunteer Opportunity: ALL Volunteer Opportunity records associated with the updated organization record will have the Opportunity and Volunteer Leader Approval Manager updated, if updated, as well as the related Email Address fields. (NOTE: Self-Reported Volunteer Hours opportunities will not be updated)

Occurrences: ALL Occurrence records with an End Date & Time greater than NOW will update the Opportunity Approval Manager Email field to reflect the correct email. Past Occurrences will not be updated.

Recurrences: ALL Recurrence records with an End Date greater than NOW will update the Opportunity Approval Manager Email field to reflect the correct email. Past Recurrences will not be updated.

Other Improvements

- Saved Search links improved to reflect terms with & and spaces.
- Opportunity Detail Pages can now list 365 upcoming occurrences. (58 Occurrence limit removed)
- IE9 Browsers will no longer display the "createContextualFragment" error
- Corrected issue with username field in contact record populating which is used for the Opportunity Coordinator lookup
- Addressed duplication of volunteer opportunities in the HOC aggregator which manages past occurrences for the Opportunity Calendar.
- Select All works when filtering the contacts on the "Add to Campaigns" page.
- Please Wait loading bar now appears when users are registering for Grouped Occurrences to prevent double clicks while signing up for a series of occurrences.
- When Editing an Occurrence that is part of a Recurrence, the warning message has been updated to reflect that the advanced options (Turn off Teams, Waitlist, etc.) added in the 2.5 release will not break the recurrence.
- When using the Move/Copy Connections option you can now paste the OC-##### ID in the Occurrence field without needing to use the look-up.
- Other minor improvements made.

2.5 Release Notes

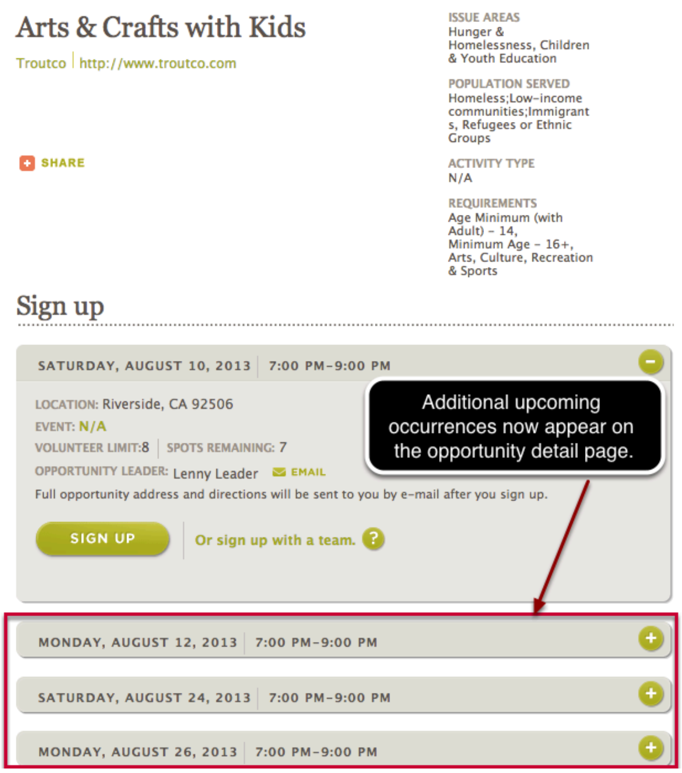
This post contains notes about the 2.5 release of HandsOn Connect as well as links to additional documentation for implementing the referenced functionality.

Click here to see the schedule of Trainings related to this release.

Generally Available Functionality

The functionality listed below is generally available to all users and deployed with little if any admin action needed.

Opportunity Detail Page Enhancements

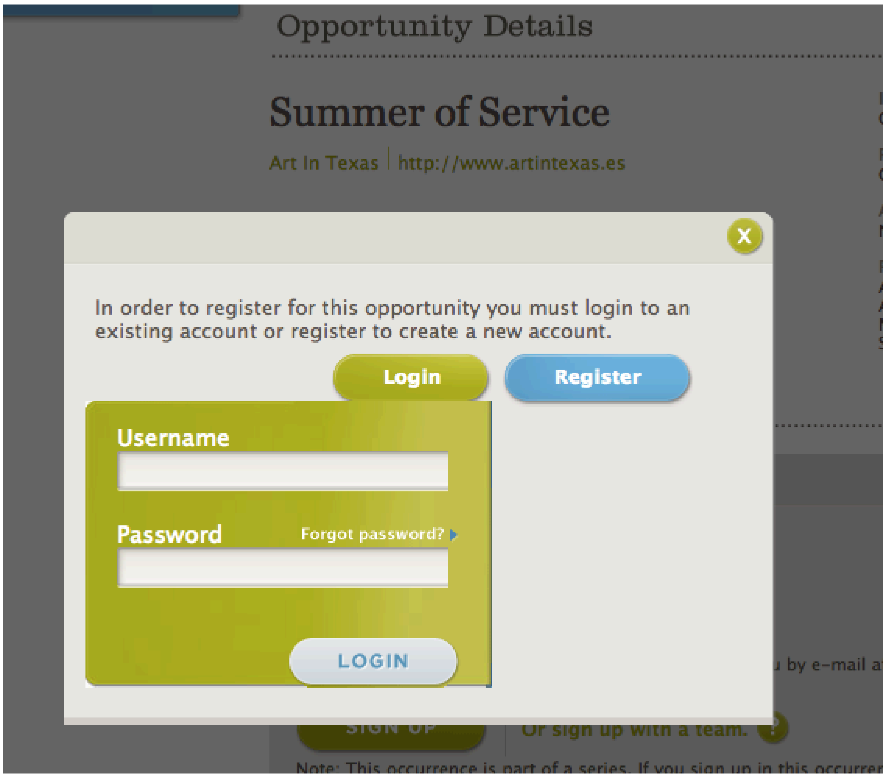


The opportunity detail page now displays the upcoming occurrences for an opportunity **with a maximum of 58 Upcoming Occurrences**. The occurrence selected either from the search or the opportunity calendar will be the one expanded by default, but volunteers can expand any of the dates available to sign up.

If the Volunteer is using an old Occurrence Link, it will take them to the Opportunity Detail Page and display the upcoming occurrences that are now available instead of the past occurrence.

Since all upcoming occurrences are now shown on the page, the "To see Other Dates and Times Click Here" link has been removed from the Sign Up/ Express Interest box. Volunteers can still access the list of available occurrences from the Search Opportunities grid using the ## More link in the Freq column.

New Login/Register Window for Volunteers

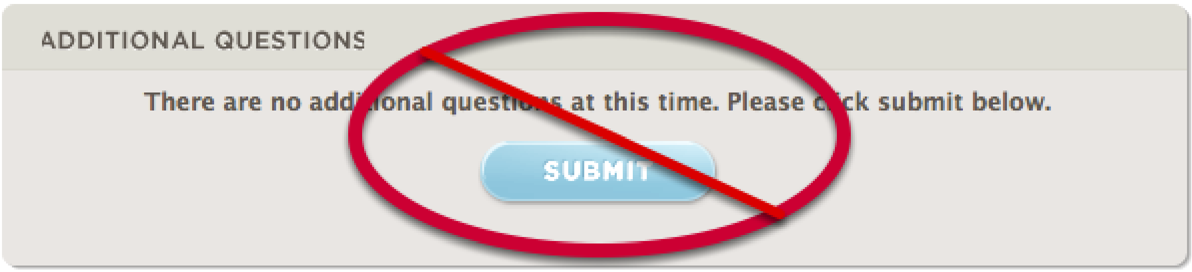


If a volunteer clicks on the Sign Up or Express Interest button and isn't logged in a new pop-up window appears giving them the option to Login or Register.

If they select Login, then they will be able to log in using the pop-up window and remain on the Opportunity Detail Page.

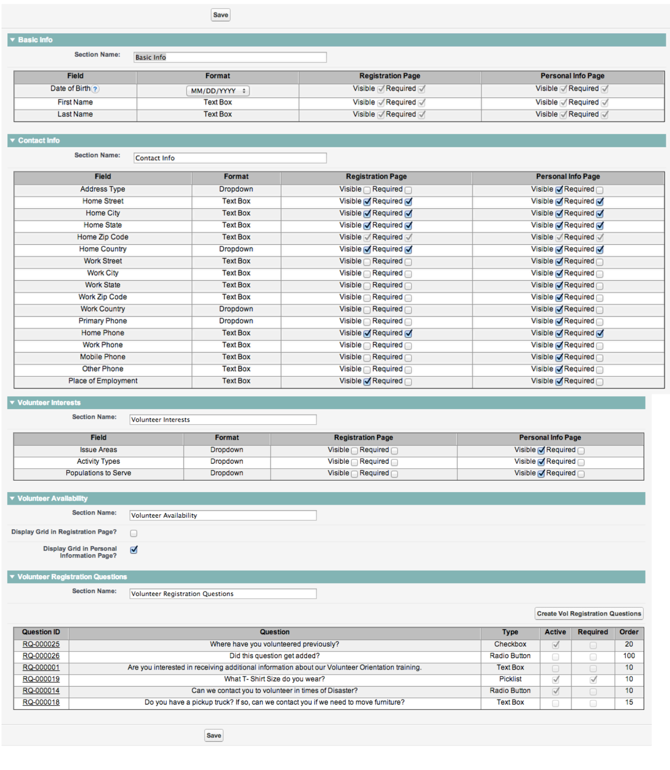
If they select Register, then they will be taken to the Volunteer Registration Form and have the option to return to the Opportunity Detail page once completed.

Volunteer Sign Up/ Express Interest Bypasses Question Page if there are no Questions



If there are no Volunteer Opportunity Questions then when the volunteer clicks on the Sign Up or Express Interest button they will be taken directly to the Success page.

New Volunteer Registration Form Control Panel



With this release System Admins are given the ability to customize the Volunteer Registration Form and Personal Information Page.

System Admins can define which fields are visibile and required on for each page independently. System Admins can also edit the names of the various section headers on the Registration form. The new control panel also houses the Disaster and Disability Questions previously found on the Site Configuration page and integrates the ability to create new

Registration Questions directly from the Vol Registration Configuration Control Panel. With regard to the Disability and Disaster Questions, when this release is deployed your existing setting from the Site Configuration page will be brought over to the new Vol Registration Configuration page.

The new Vol Registration Config page can be found under the Control Panel tab.

The following fields are always visible and required and cannot be edited:

- First Name
- Last Name
- Date of Birth
- Email
- Password (Only on Registration Page)
- Reset Password (Only on Personal Information Page)
- Opt Out of Communications from HandsOn Network/ Points of Light

In addition to the fields listed above, HandsOn Network Affiliates also have these additional fields as always visible and cannot be edited:

- Home Zip Code (Also Required)
- Gender (Not Required)
- Ethnicity (Not Required)

Date of Birth - The date of birth field now has different options for the information gathered.

- MM/DD/YYYY - This asks for the full date of birth of the volunteers and has been updated to use a Month dropdown, day dropdown and Year text field to make it easier to enter.
- YYYY - This allows for the volunteer to just enter the year in a text field. Date of Birth default to Jan 1 of the year entered.
- Over 18? - This provides a checkbox for volunteers to indicate if they are over 18 or not. If they are over 18, the date of birth defaults to the Jan 1 of the year that would make them 18 (currently 1995). If they are under 18, the date of birth defaults to Jan 1 with the previous year to make them 1 year old (currently 2012). This option is not available to HandsOn Network Affiliates.

NOTE:

YYYY - Selecting this option means that the system will not be able to reliably determine whether or not a volunteer is legally a minor or under age 13. Age restrictions will be limited by year, not actual age.

Over 18 - Selecting this option means that the system will not be able to determine if a volunteer is under age 13 and thereby in violation of COPA internet laws for children. Age signup restrictions for opportunities will be limited.

Consult your legal counsel before choosing either of these options.

For example a volunteer opportunity with a minimum age of 18 could allow a 17 year old with a birthdate of Nov 10, 1995 to register when using the YYYY option since it would calculate their date of birth as 1/1/1995 making them already 18.

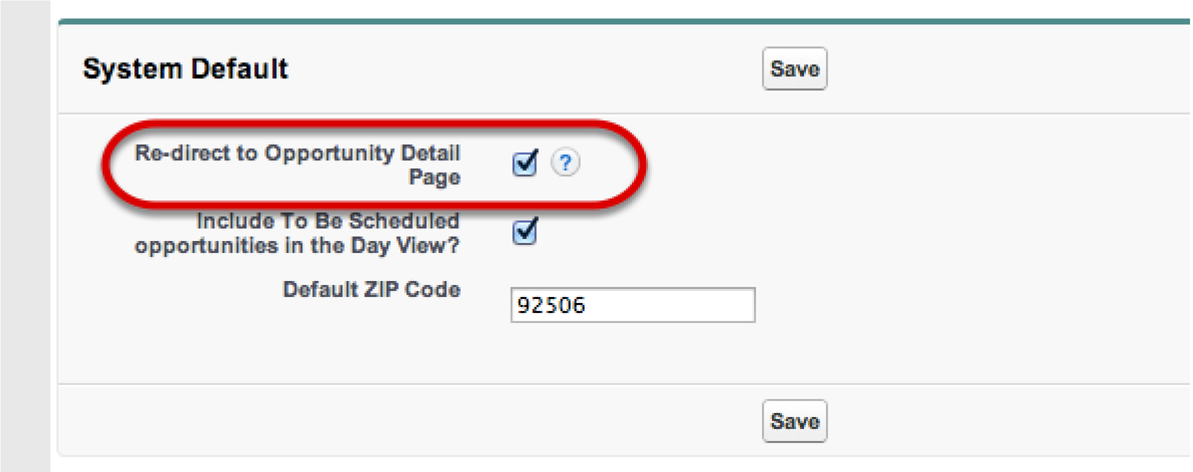
Note: The following fields are on the Vol Registration Configuration Control Panel, but have not yet been added to the pages on the public site. These will be added in a future release.

- Alternative Email - Registration Page
- Address Type - Personal Information Page
- Time Zone - Registration Page and Personal Information Page. This will be added as we make improvements to HandsOn Connect for customers in multiple time zones.

[Full information on how to use the Vol Registration Configuration can be found here.]

[Updated process for creating Custom Registration Questions.]

Re-direct to Opportunity Detail Page



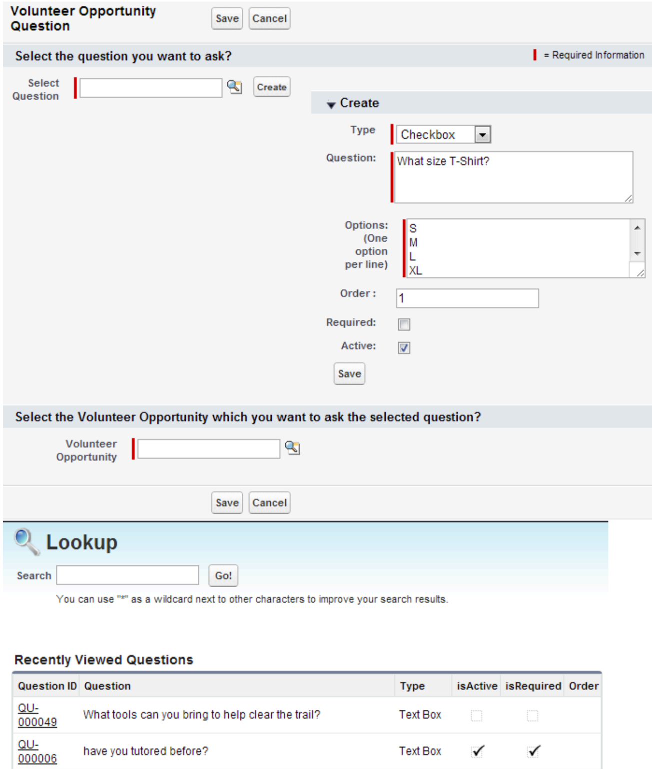
System Admins now have the option to redirect volunteers to the Opportunity Detail Page after completing their registration form and bypassing the Registration Confirmation page. When checked, if a volunteer uses the above mentioned Login/Register Window to arrive at the Registration Page, when the volunteer completes the Registration form they will immediately be taken back to the Opportunity Detail Page to complete the Sign Up or Express Interest.

This feature is deployed as inactive.

ADMIN ACTION (OPTIONAL)

To enable, System Admins should go to Control Panel - Site Configuration and scroll down to the System Defaults section and check the box for "Re-direct to Opportunity Detail Page."

Volunteer Opportunity Questions (System Admin, Staff, and Premium Portal Customers ONLY)



In this release we've added the ability to recycle Questions.

Using the new interface shown above System Admins, Staff, Partner Staff, and Employee Coordinators can create 1 question and associate it with multiple volunteer opportunities. The page allows users to search through existing questions or create new questions and then select the Volunteer Opportunity to associate the question with.

Each time the volunteer answers the question, a new Answer record will be created for each response and associated to the Question, Connection AND to the Contact.

In addition to, the ability to recycle your questions, when a volunteer is presented a question that they have been asked before their previous answer will already be displayed/ selected so the volunteer can just hit submit or edit/ update their answer before submitting. I think you're volunteers will be happy to see that they don't have to select their t-shirt size again and again, and can easily update it when they've hit there weight loss goals!

Finally, if a user were to view an existing Question through the Questions tab or related list in the Volunteer Opportunity record, the page has a new button labeled "Add to Volunteer Opportunity" which will open the interface shown above with the Select Question field already populated so that they can easily add existing questions to new opportunities.

DEPLOYMENT NOTE:

1. During deployment a batch update will be run to associate all existing questions with their Volunteer Opportunity using the new structure.
2. Existing Answers will not be updated to populate the Contact field, but System Admins can do a batch update to add that relationship if desired.

Full documentation on how to create Volunteer Opportunity Questions using the new structure can be found here:

System Admins and Staff

Partner Staff

Employee Coordinators

ADMIN ACTIONS (STRONGLY ENCOURAGED) If you do not take these actions, questions will no longer be listed under the Questions related list since the relationship is now with the new Volunteer Opportunity Questions object.

The new Volunteer Opportunity Question enhancements have been deployed to you so that they work with the existing format and related lists. Anytime a user clicks on New Question in a related list or in the Questions tab they will be provided the new interface so no further action is needed on your part to utilize this functionality. However, there are two additional related items that can be added to increase access to these features.

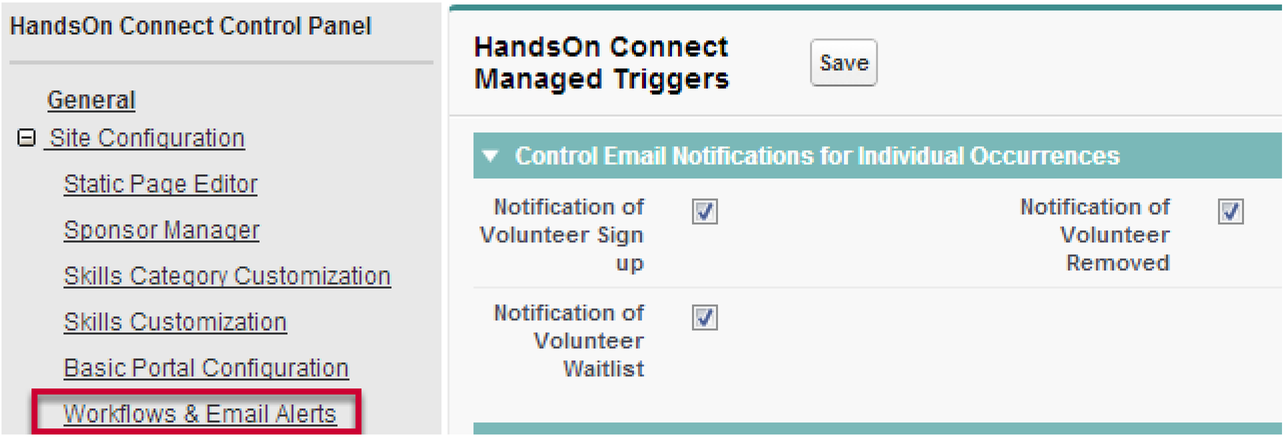
1. Add Question button - System Admins can add a custom button to the Volunteer Opportunity page layout called Add Question. When a user clicks on this button it will open the new interface shown above with the Volunteer Opportunity pre-populated in the Select Volunteer Opportunity field so all the use needs to do is select or create the Question.

2. Volunteer Opportunity Related List - Currently the Volunteer Opportunity page layouts have a related list called Questions. We recommend that System Admin remove the Questions related list and add the Volunteer Opportunity Questions related list. When adding the Volunteer Opportunity Related list the recommended columns to display are Volunteer Opportunity Questions, Question, Question Text, Active, Required, and Order so that you can quickly access both the Volunteer Opportunity Question relationship if you want to select a different question and also access the Question record if you need to edit the text, options, or other fields. You can select to leave the New Button in the Volunteer Opportunity Questions related list and it too will open the new interface.

Both of these optional modifications are included by default in the Staff and Partner Staff Page Layouts v3 that are described below.

Here's a video on how to make these changes and where to check which page layouts are assigned to your users.

Workflow Rules and Email Alerts - New Control Panel for Triggers



There are three email alerts that we managed as Triggers as opposed to the standard workflow rules because of their complexity. Previously, there was no way for system admins to disable these notifications.

In this release we added to the Control Panel a new page called "Workflows & Email Alerts"

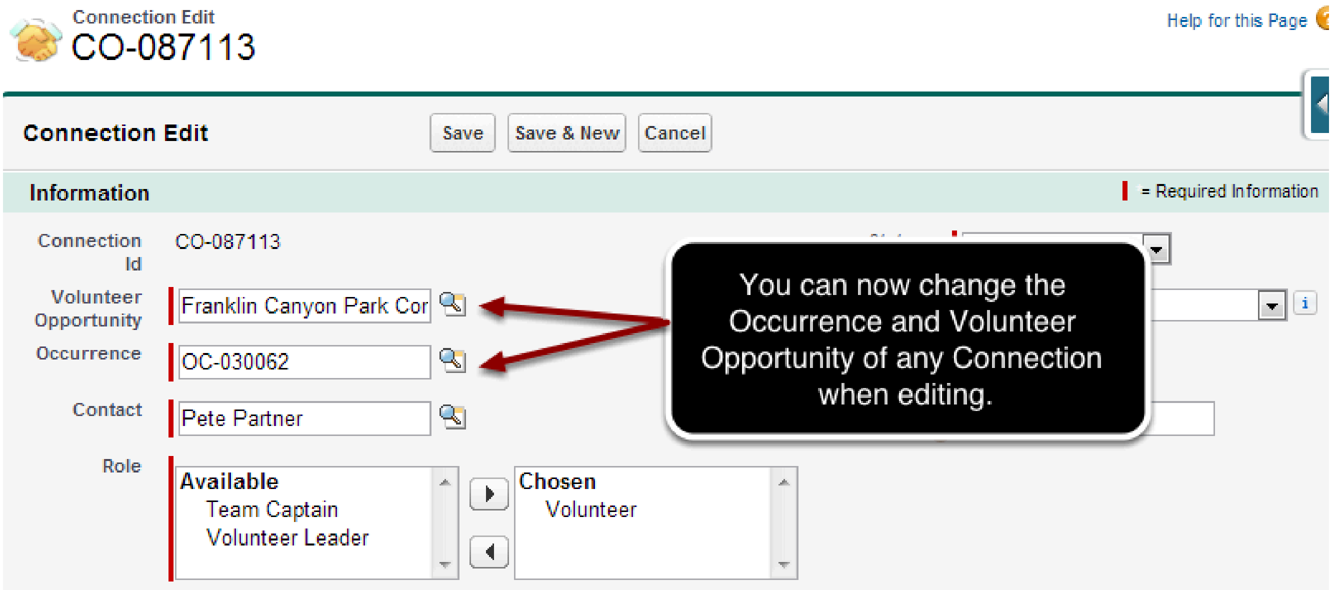
To start there are 3 existing notifications that can now be turned off using this control panel:

- Notification of Volunteer Sign Up
- Notification of Volunteer Removed
- Notification of Volunteer Waitlist

In addition to these existing notifications, the Workflow & Email Alerts page also controls new notifications associated with Grouped Occurrences (detailed below). In the future other trigger based email notifications will be managed on this page as well.

If you wish to disable a notification, simply uncheck the box and click Save.

Reassign Connections

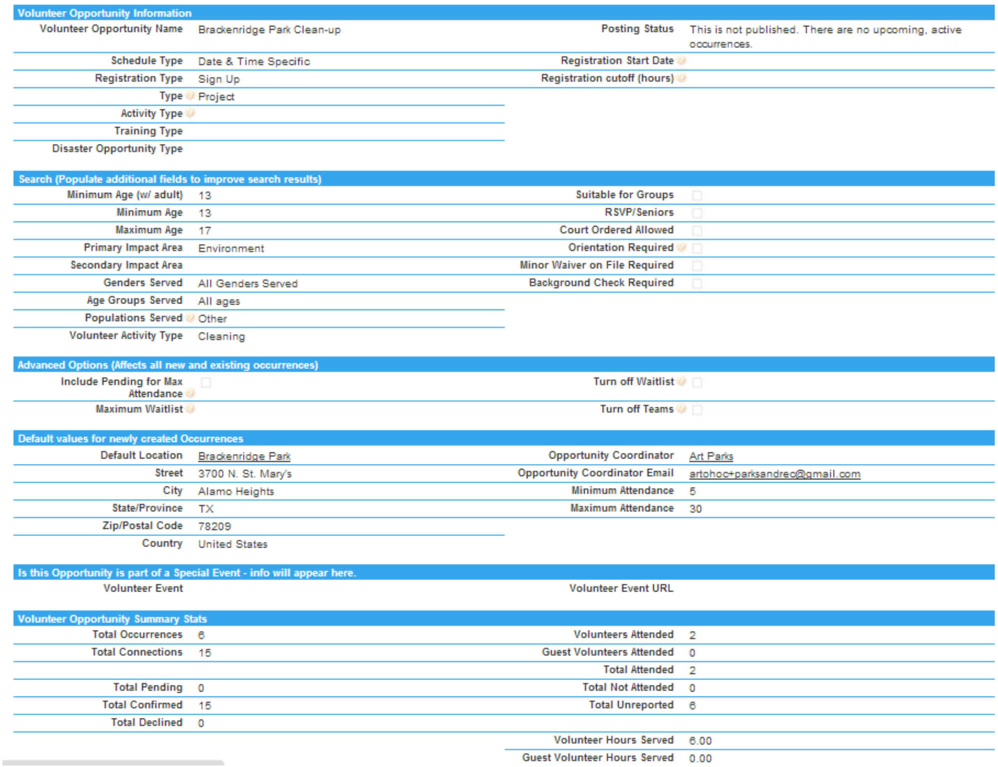


While this is enabled primarily for the Move/Copy Connections functionality described below, the ability to move individual connections is present for any user that can **Edit** connections.

When a volunteer contacts you or an partner to reschedule their connection you no longer have to decline the existing connection and create a new one, you can simply edit the connection and select the new Occurrence, even the new Volunteer Opportunity if needed.

This functionality could also be helpful in reassigning Self-Reported Volunteer Hours associated with the Individual organization to the correct existing organization. Just make sure that when updating self-reported connections that you use the lookup for Existing Organization and select the correct Volunteer Opportunity and Occurrence associated with the selected organization.

Partner Staff and Staff Page Layouts v3 (System Admin, Staff, and Premium Portal Customers ONLY)



Volunteer Opportunity Information			
Volunteer Opportunity Name	Brackenridge Park Clean-up	Posting Status	This is not published. There are no upcoming, active occurrences.
Schedule Type	Date & Time Specific	Registration Start Date	
Registration Type	Sign Up	Registration cutoff (hours)	
Type	Project		
Activity Type			
Training Type			
Disaster Opportunity Type			
Search (Populate additional fields to improve search results)			
Minimum Age (w/ adult)	13	Suitable for Groups	
Minimum Age	13	RSVP/Seniors	
Maximum Age	17	Court Ordered Allowed	
Primary Impact Area	Environment	Orientation Required	
Secondary Impact Area		Minor Waiver on File Required	
Genders Served	All Genders Served	Background Check Required	
Age Groups Served	All ages		
Populations Served	Other		
Volunteer Activity Type	Cleaning		
Advanced Options (Affects all new and existing occurrences)			
Include Pending for Max Attendance		Turn off Waitlist	
Maximum Waitlist		Turn off Teams	
Default values for newly created Occurrences			
Default Location	Brackenridge Park	Opportunity Coordinator	Art Parks
Street	3700 N. St. Mary's	Opportunity Coordinator Email	artohoc+parksandrec@gmail.com
City	Alamo Heights	Minimum Attendance	5
State/Province	TX	Maximum Attendance	30
Zip/Postal Code	78209		
Country	United States		
Is this Opportunity is part of a Special Event - info will appear here.			
Volunteer Event		Volunteer Event URL	
Volunteer Opportunity Summary Stats			
Total Occurrences	6	Volunteers Attended	2
Total Connections	15	Guest Volunteers Attended	0
		Total Attended	2
Total Pending	0	Total Not Attended	0
Total Confirmed	15	Total Unreported	6
Total Declined	0		
		Volunteer Hours Served	6.00
		Guest Volunteer Hours Served	0.00

In this release, we provided some new Page Layouts for Volunteer Opportunities, Occurrences, and Connection that can be used by your Partner Staff, Volunteer Leaders, Employee Coordinators, Staff, and System Admin.

These page layouts **are not** enabled by default and require System Admins to activate them for users. [Click here to see how to enable these new Page Layouts for your Staff and Partner Staff.]

The new page layouts organize all the required information at the top of the page followed by fields that can be optionally populated or edited.

HandsOn Connect uses standard Salesforce.com page layouts for the Volunteer Opportunity, Occurrences, and Connections objects. If you do not wish to enable the page layouts we provided you can utilize standard Salesforce.com methods to modify your existing page layouts to suit your business needs. [For more information on how to modify standard Salesforce.com page layouts, click here].

Other Generally Available Improvements

- New "Locations Detail Page" URL field added to the Occurrence object. When added to the page layout can display the link to the Location Detail page on the public site that is emailed to volunteers and accessed via the Upcoming Opportunities.
- New Visualforce page has been deployed called "New VO Button" that can be used to redirect the New button for Volunteer Opportunities for Staff, System Admins, and Premium Partner users to open the VO Wizard.
- Registration Cutoff (hours) has been updated to have a default value of 1 hour.
- Premium Partner Portal - Partner Help tab has been updated to point to new link for premium portal documentation.

Advanced Features - These Features Require Activation by System Admins and are only available for System Admin, Staff, and Premium Portal Customers

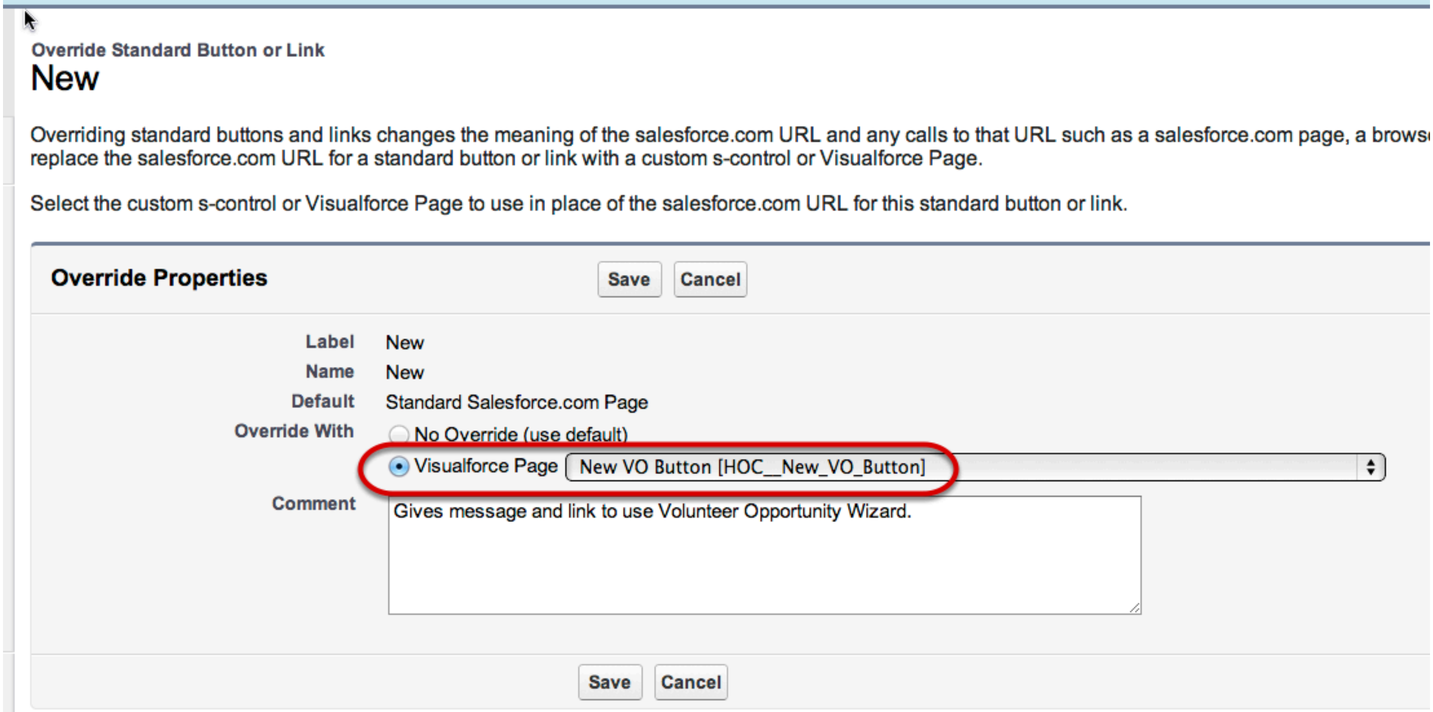
The following features and functionality that has been added to the HandsOn Connect package are optional and therefore not enabled when deployed to customers.

These release notes feature general information about the feature with links to detailed steps on how to enable the functionality for your various users.

We will be offering special webinars on these advanced features, please check the 2.5 Release Training schedule to locate the desired training or recording.

It is strongly recommended that you consider your Staff Training process before enabling the features outlined below.

New VO Button



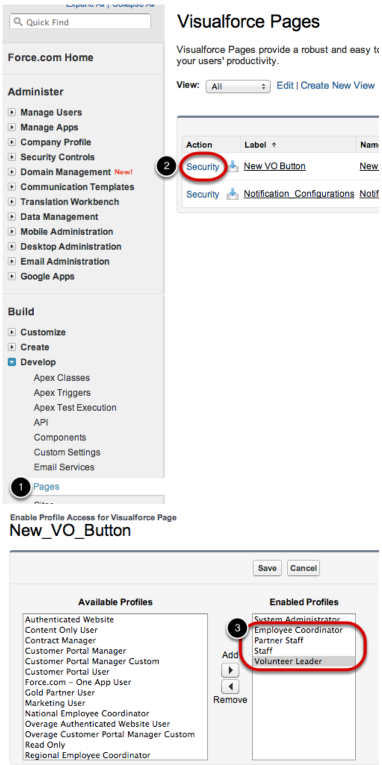
System Admins can now override the "New Volunteer Opportunity Button" that appears in the Volunteer Opportunity tab as well as the Volunteer Opportunity related lists using the "New VO Button" visualforce page. When the "New Volunteer Opportunity" button is clicked it will direct the user to use the VO Wizard instead of the standard Salesforce volunteer opportunity page.

This is a recommended enhancement for users of the Premium Partner Portal to ensure that partner staff (as well as your staff) always use the VO Wizard when creating new Volunteer Opportunities.

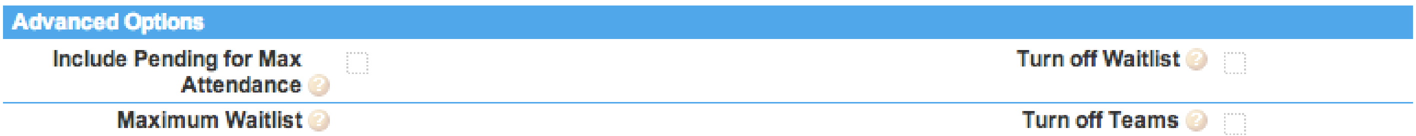
ADMIN ACTION

1. To enable this System Admins would go to Setup -> Create -> Objects -> Volunteer Opportunities. Then scroll to the Button, Links, and Action section and click Edit next to the "New" option. On the Override options page (shown above) select Override With "Visualforce Page" and use the dropdown to select the "New VO Button" page. Click Save.

2. System Admins also will need to grant access to the Visualforce Pages for the respective profiles as well. Go to Setup -> Develop -> Pages. Locate the New_VO_Button page and click on Security. Then select the additional profiles to enable. (See image below).



Advanced Options for Occurrences



In this release we have added 4 new advanced option fields to the Occurrence object.

- **Include Pending for Max Attendance** - When checked, this will include the number of connections in "Pending Approval" status when determining the maximum attendance. Once the maximum attendance, total of confirmed and pending connections, is reached any new volunteers will be prompted to join the waitlist. This is recommended for Date & Time Specific - Express Interest occurrences, but can be used for any occurrence.
- **Maximum Waitlist** - Populate this field with a number to indicate the maximum number of connections allowed to be waitlisted for this occurrence. Once the Maximum Waitlist has been reached, new volunteers will be told that this occurrence is full and not accepting any additional volunteers at this time.
- **Turn off Waitlist** - When checked, this will prevent any volunteers being added to the waitlist for this occurrence. Once the Maximum Attendance has been reached, new volunteers will be told that this occurrence is full and not accepting any additional volunteers at this time.
- **Turn off Teams** - When checked, this will prevent any teams being able to register for this occurrence and the "or sign up/ express interest with a team" link wil be removed from the Sign Up/ Express Interest box on the Opportunity Detail Page on the public site.

ADMIN ACTION

If System Admins want to enable any or all of these fields, they will need to:

1. Grant access to the field to the desired profiles. It is already granted for the recommended use by System Admins and Staff, so this is only needed if you want to grant access to Partner Staff, Employee Coordinators, or Volunteer Leaders (if they have access to modify occurrences).
2. Add the field to the page layout(s) associated with the desired profile(s).

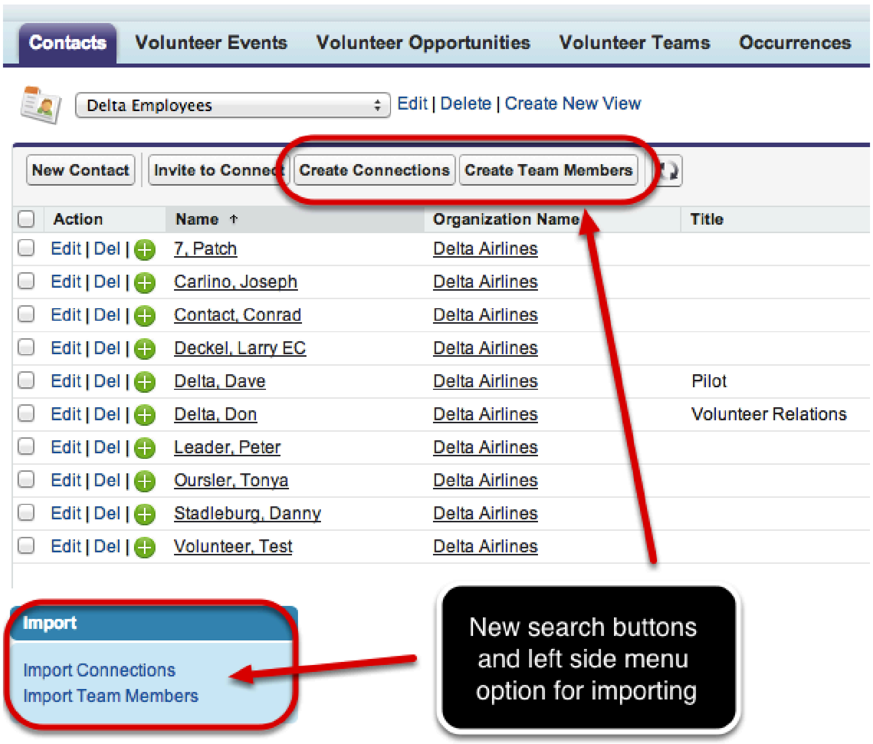
If desired, System Admins can also create a custom workflow rule and field update to set a default value for any of these four fields.

Full documentation on how to enable these four fields can be found here.

Advanced Data Management Options

The features in this section are pretty powerful tools. So remember "With great powers come great responsibility" and train users how to properly use these features.

Batch Create Volunteer Teams and Connections



To make it easier for you to manage **existing** contacts we have added two wizards, one for Team Members and one for Connections.

Batch Create Volunteer Teams

There are two ways to create a Volunteer Team introduced in this release.

1. Import Team Members - Left Side Menu

2. Create Team Members button - Contact List View

Both of these work by using Contact records that already exist in your instance and adding them to a Volunteer Team.

REMINDER: If you are batch adding Team Members to an existing volunteer team, make sure your the contacts included in your report or selected in your list view don't contact any duplicates.

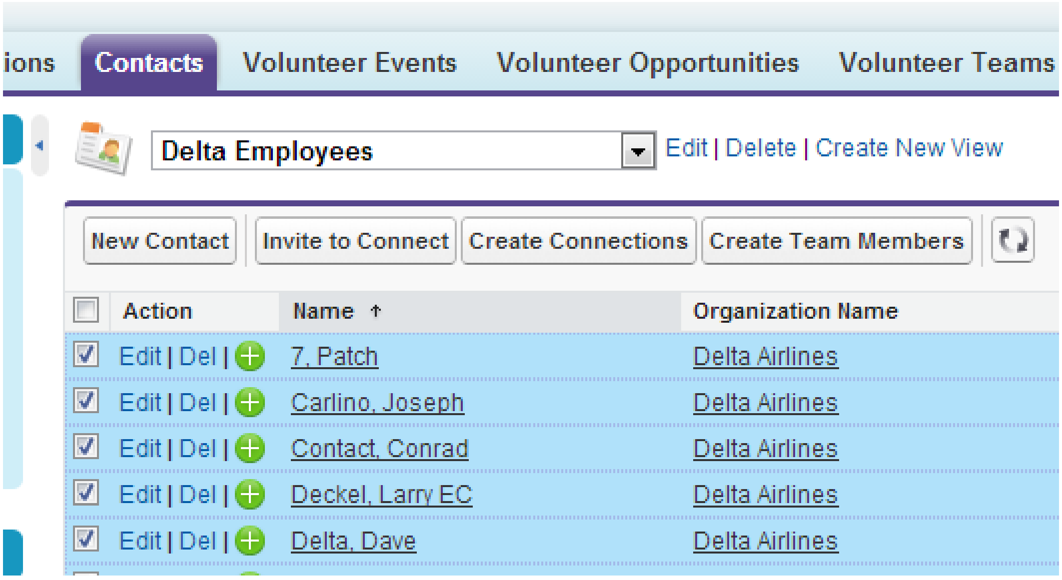
Getting your Contacts - Reports

There are a number of reports that you can use to create your table for importing. If you are working on creating employee teams, the "Employers and Contacts" can be filtered for the related organization. Reports are helpful if you are seeking contacts based on their related records, such as is a member of a Volunteer Team or has a connection to a specific volunteer opportunity.

The three most important aspects when creating a report for use in importing are:

1. Include the Contact ID column in the report. The Contact ID is the Salesforce ID for that record and is a 15-18 digit alphanumeric number
2. Export as a **.CSV** file
3. After exporting the report, open it and remove the footer from the report. The footer is the last 5 lines that appear after the last row of data and begins with the report name.

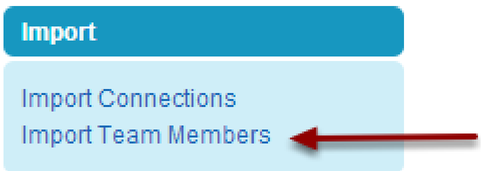
Getting your Contacts - View

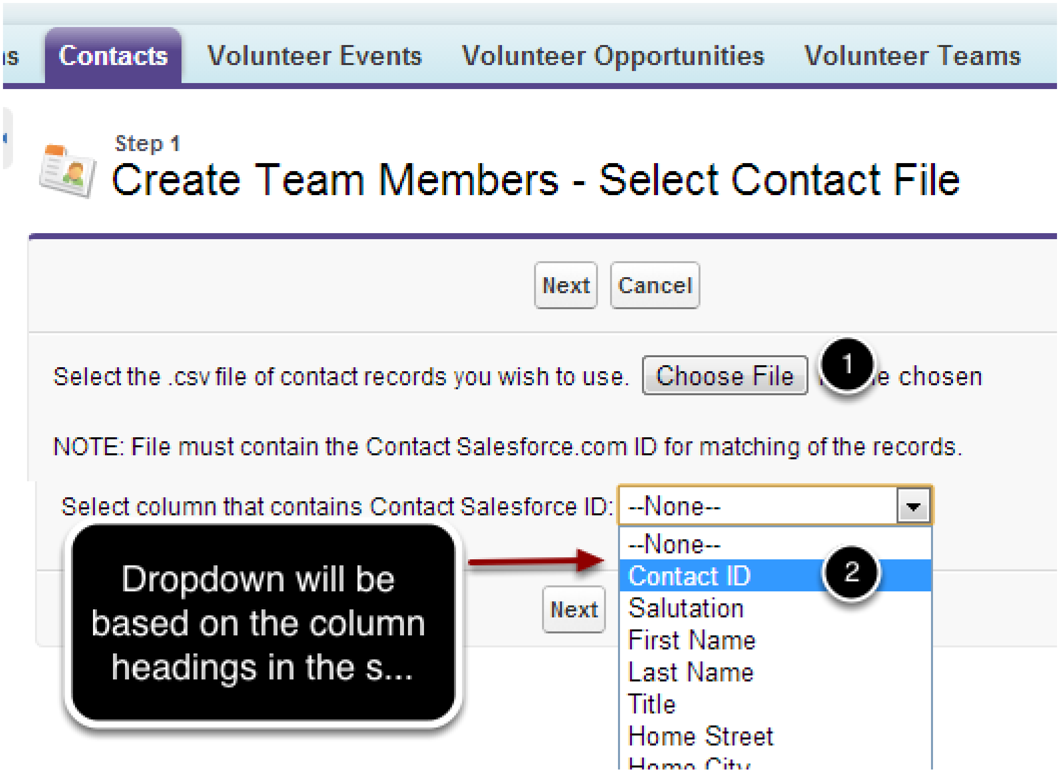


You can use an existing or create a new view of contact records. Remember when creating views you are limited to filter based only on the Contact fields. This approach is helpful for locating contacts associated with a specific organization or have complete orientation, etc.

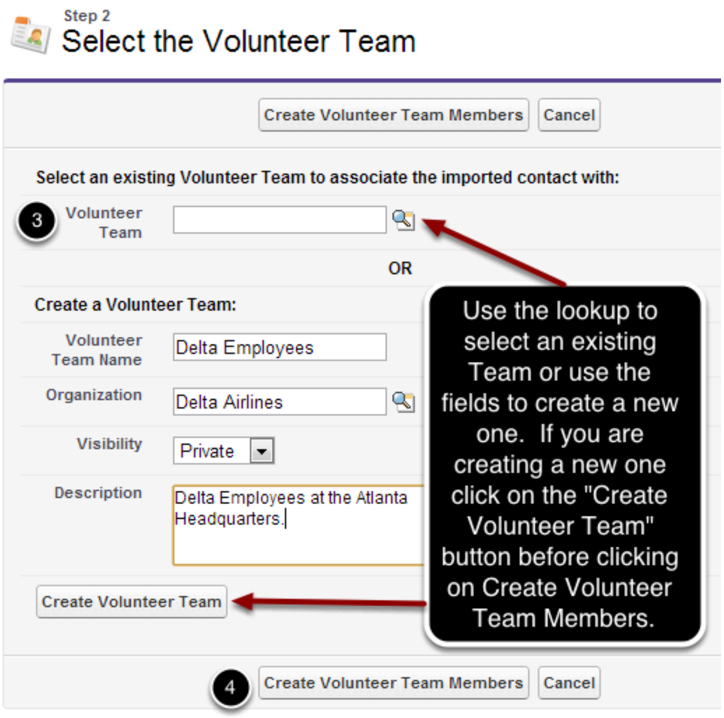
If you are using views and selecting the "Create Team Members" button, you'll be able to skip the first step of the Wizard.

Importing Team Members - Step 1





Importing Team Members - Step 2



Once you click on "Create Volunteer Team Members" then go to the Volunteer Team and confirm that all members were added.

Batch Create Connections

There are two ways to create a Connection introduced in this release.

1. Import Connections - Left Side Menu

2. Create Connections button - Contact List View

Both of these work by using Contact records that already exist in your instance and adding them to existing Volunteer Opportunities and Occurrences.

REMINDER: If you are batch adding Connections, make sure your the contacts included in your report or selected in your list view don't contact any duplicates.

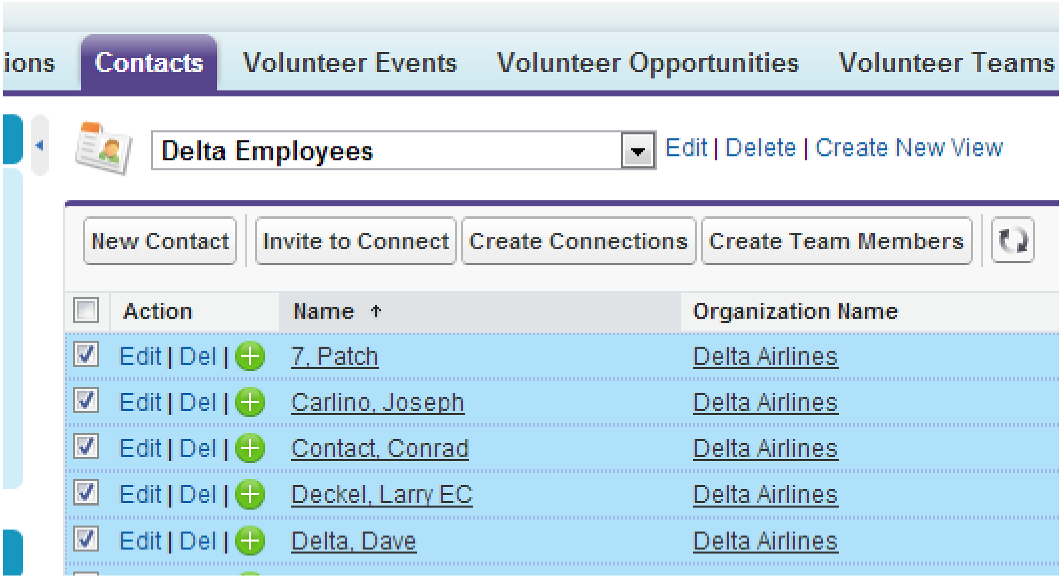
Getting your Contacts - Reports

There are a number of reports that you can use to create your table for importing. If you are working on creating connections with team members, then use the "Volunteer Teams with Volunteer Team Members and Contact" report type to get both the Contact ID and Team Member ID. Reports are helpful if you are seeking contacts based on their related records, such as is a member of a Volunteer Team or has a connection to a specific volunteer opportunity.

The three most important aspects when creating a report for use in importing are:

1. Include the Contact ID column in the report. The Contact ID is the Salesforce ID for that record and is a 15-18 digit alphanumeric number. If you are also wanting to associate the Connections with a Team Member, you also need the 15-18 digit Volunteer Team Member Salesforce ID. Note: The Salesforce ID for Team Members is **not** the VTM-0000000 id.
2. Export as a **.CSV** file
3. After exporting the report, open it and remove the footer from the report. The footer is the last 5 lines that appear after the last row of data and begins with the report name.

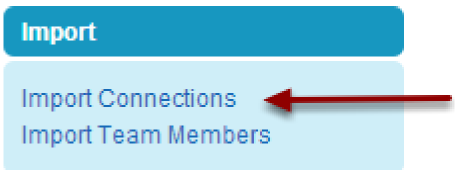
Getting your Contacts - View

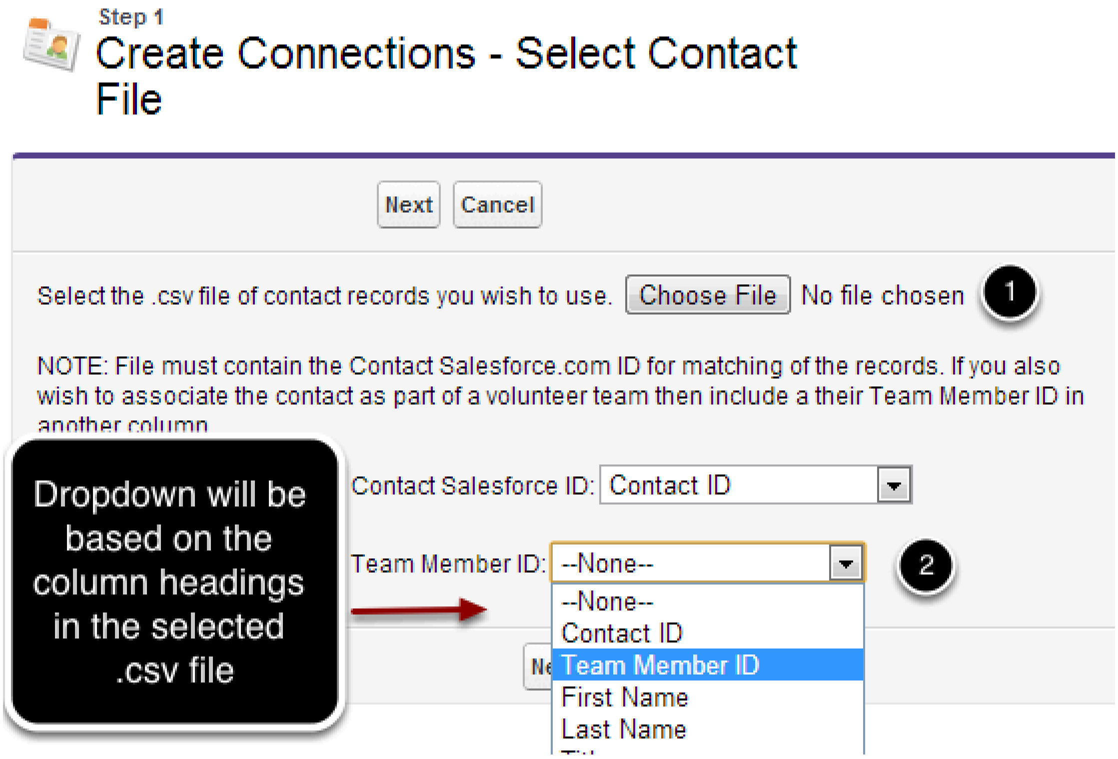


You can use an existing or create a new view of contact records. Remember when creating views you are limited to filter based only on the Contact fields. This approach is helpful for locating contacts associated with a specific organization or have complete orientation, etc.

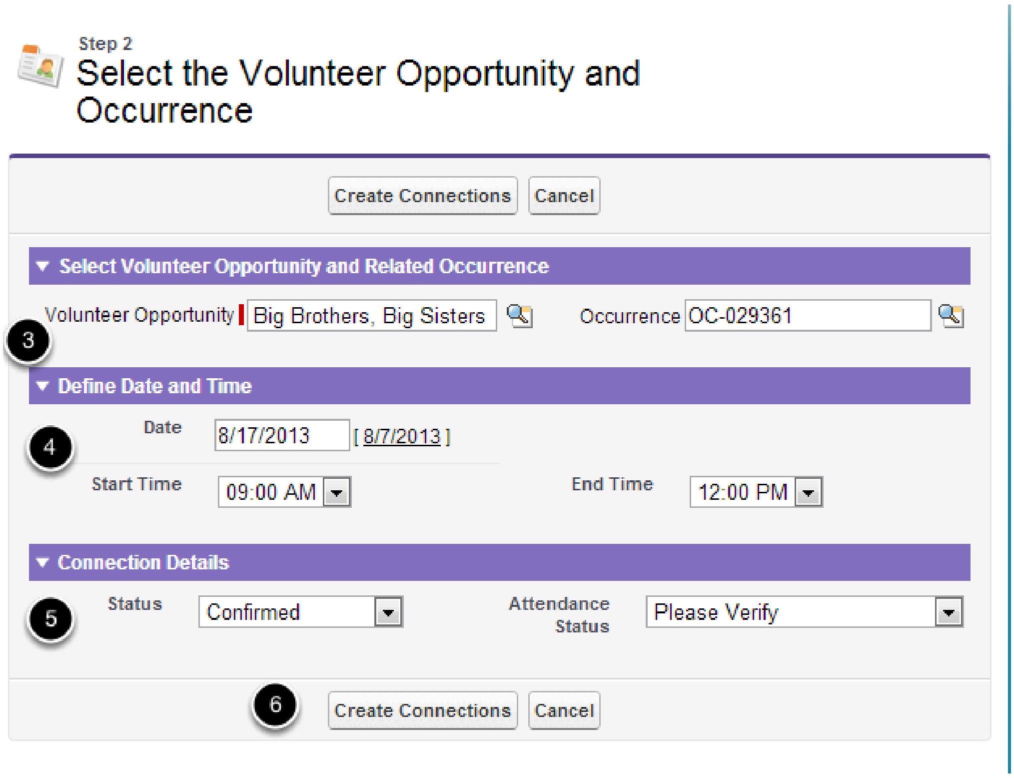
If you are using views and selecting the "Create Connections" button, you'll be able to skip the first step of the Wizard.

Importing Connections - Step 1





Importing Connections - Step 2



3. Use the lookup to select the Volunteer Opportunity. Once the Volunteer Opportunity has been selected, then use the Occurrence lookup. The Occurrence lookup will be filtered to all the Occurrences associated with the selected Volunteer Opportunity.

4. If the Volunteer Opportunity and Occurrence are a To Be Scheduled opportunity, then the Date, Start Time and End Time fields will be presented.

5. Designate the Status and Attendance Status for the Connections you are creating. Remember if the Date & Time are in the future then use the Attendance Status = Please Verify

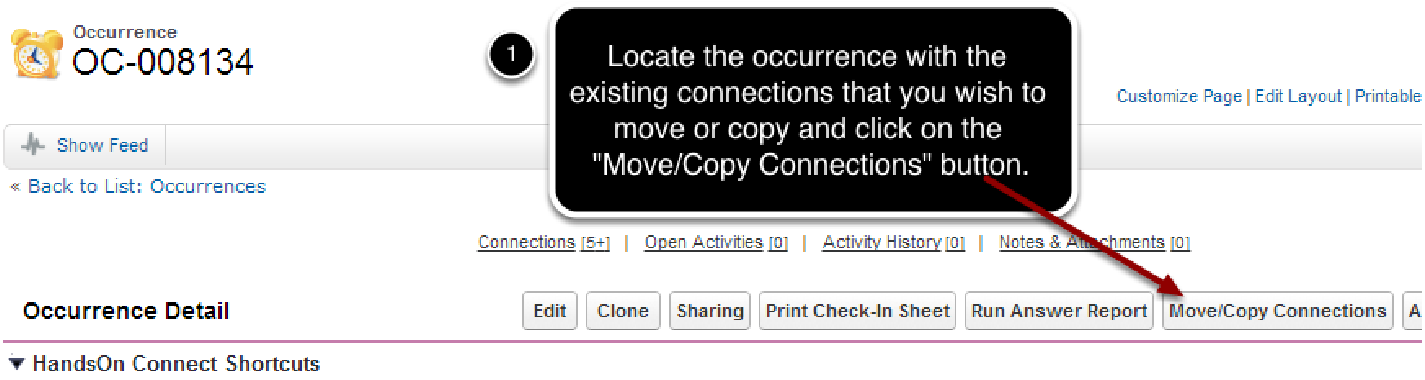
Once you click on "Create Connection" then go to the Occurrence and confirm that all connections were added.

Enabling Batch Create Team Members and Connections

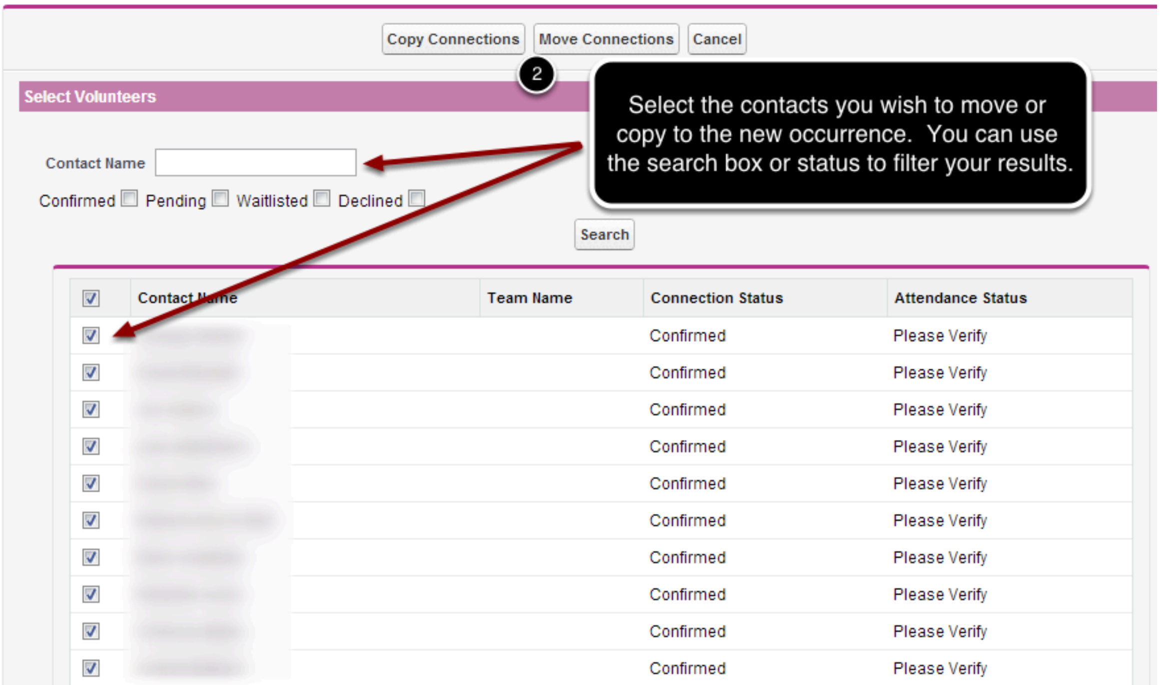
System Admins that wish to enable this functionality can follow the steps at this link.

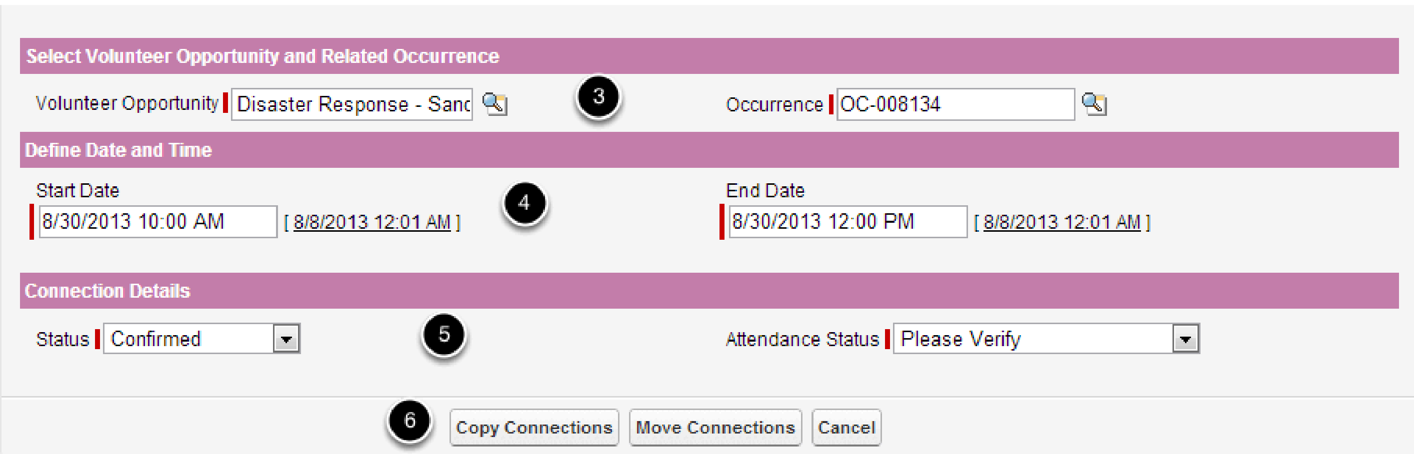
Move/Copy Connections

This functionality allows users to move or copy a set of connections from one occurrence to another occurrence or volunteer opportunity. Make sure you train any user that you grant this feature to so that they don't duplicate or corrupt your data.



Move or Copy Connections





3. Use the lookup to select the Volunteer Opportunity. Once the Volunteer Opportunity has been selected, then use the Occurrence lookup. The Occurrence lookup will be filtered to all the Occurrences associated with the selected Volunteer Opportunity.

4. If the Volunteer Opportunity and Occurrence are a To Be Scheduled opportunity, then the Date, Start Time and End Time fields will be presented.

5. Designate the Status and Attendance Status for the Connections you are creating. Even if you are moving existing Connections you still need to select the Status and Attendance Status that they will have with the new occurrence. Remember if the Date & Time are in the future then use the Attendance Status = Please Verify

6. Click on the desired action to take:

- Move Connections - The existing connection will be updated to the new Occurrence and Volunteer Opportunity, if any. **The Notice of Occurrence Rescheduled will be sent to these contacts.**
- Copy Connections - New connections will be created for these contacts for the new Occurrence and Volunteer Opportunity, if any. **The respective Opportunity Sign-up Confirmation email alert will be sent to these contacts.**

Once you click on "Copy Connections" or "Move Connections" then go to the Occurrence and confirm that all connections were added.

Enabling Move/Copy Connections

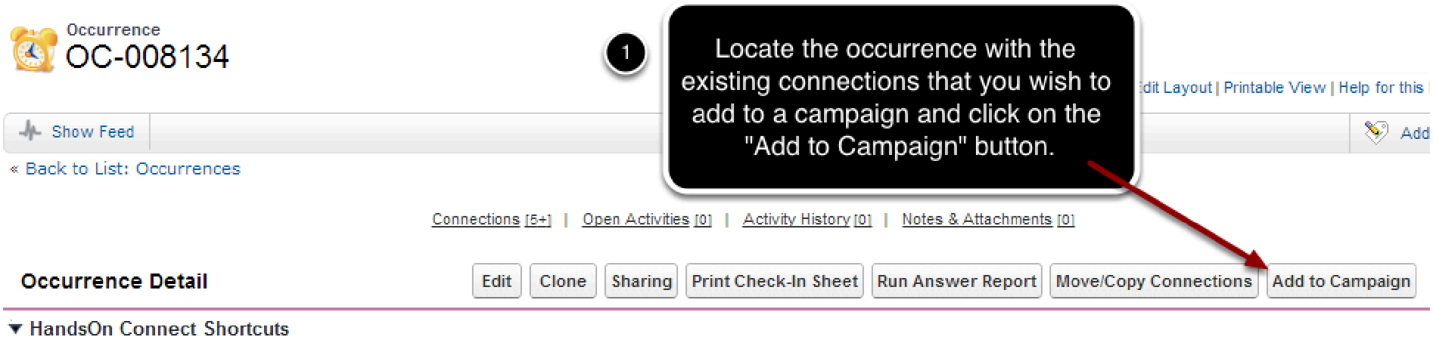
System Admins that wish to enable this functionality can follow the steps at this link.

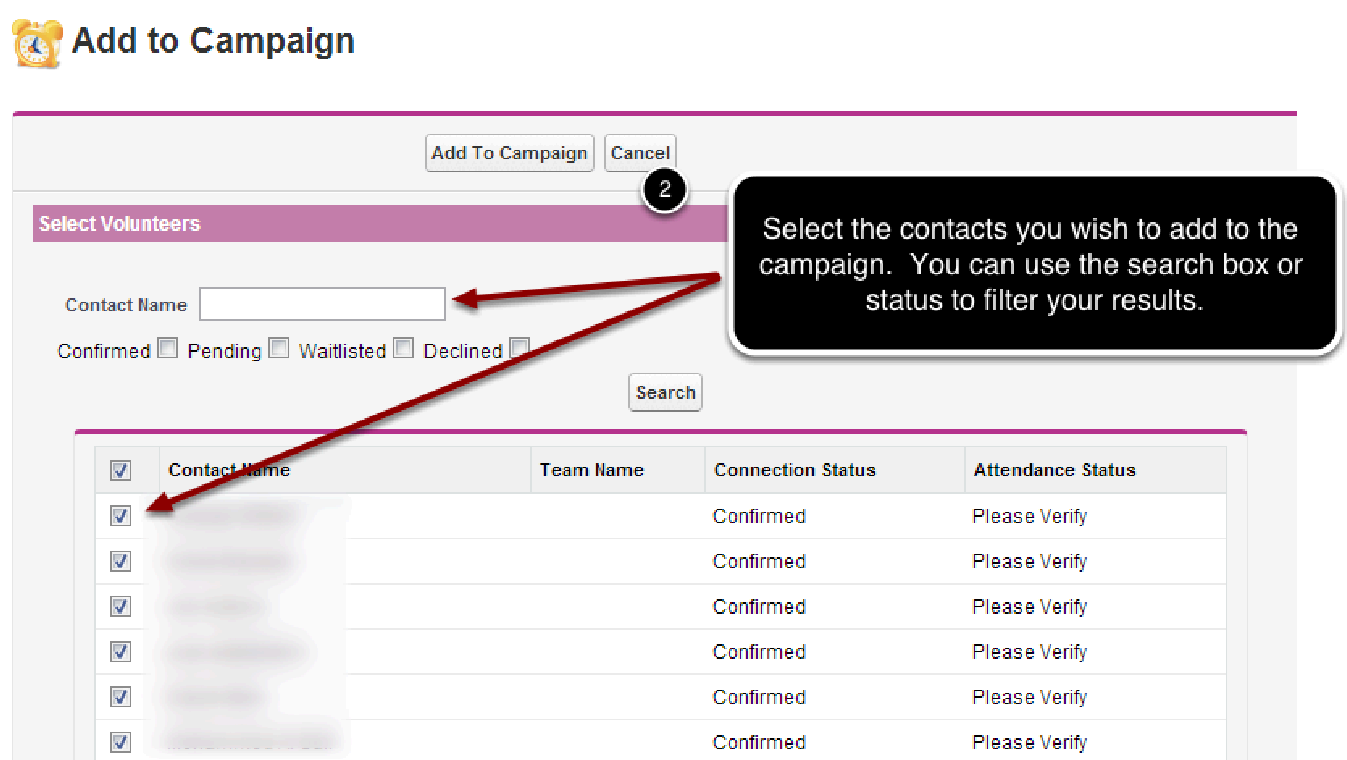
Add to Campaign

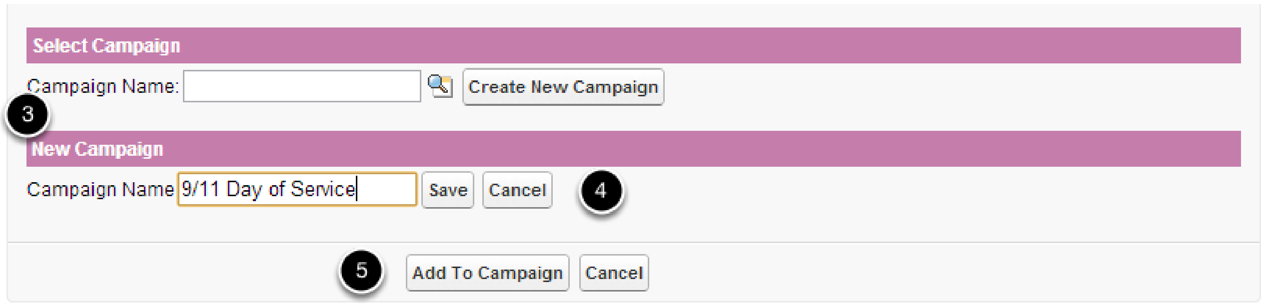
This feature is enabled to support the use of Campaigns, which is a native functionality of Salesforce.com. Campaigns can be used in a variety of ways and are often utilized with 3rd party Mass Email applications found on the Salesforce AppExchange.

While Campaigns is not part of the HandsOn Connect applications, we hope that customers that are leveraging this tool will be able to utilize the "Add to Campaign" functionality to make it easier to add contacts to your campaigns based on their involvement. We think this will be helpful in managing communications and donation efforts around volunteer events and disaster response.

To learn more about campaigns and how they could be beneficial to your organization, click here to see documentation from Salesforce.com.







3. Use the lookup to select an existing Campaign.

4. If necessary, you can click the "Create New Campaign" button. When clicked you are given a text field to name the campaign. After you click save, the newly create campaign will be populated in the Select Campaign section. All campaigns created using this feature will have the following default values, but can be edited from the campaign record:

- Campaign Owner - user that created the campaign
- Status - In Progress
- Active - TRUE
- Type - Email

Once you click on "Add to Campaign" then go to the Campaign and confirm that all contacts were added as campaign members

Enabling Add to Campaigns

System Admins that wish to enable this functionality can follow the steps at this link.

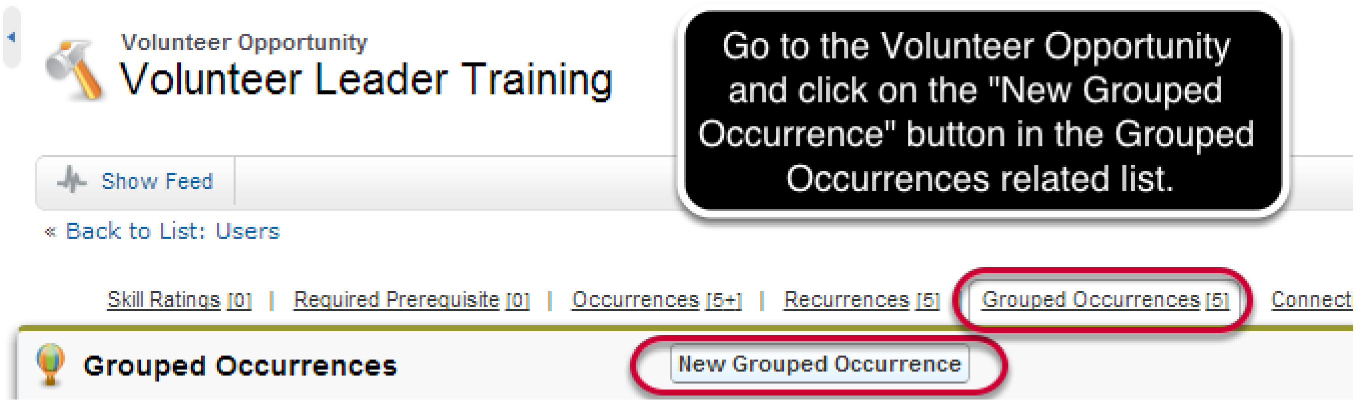
Advanced Volunteer Opportunity Management

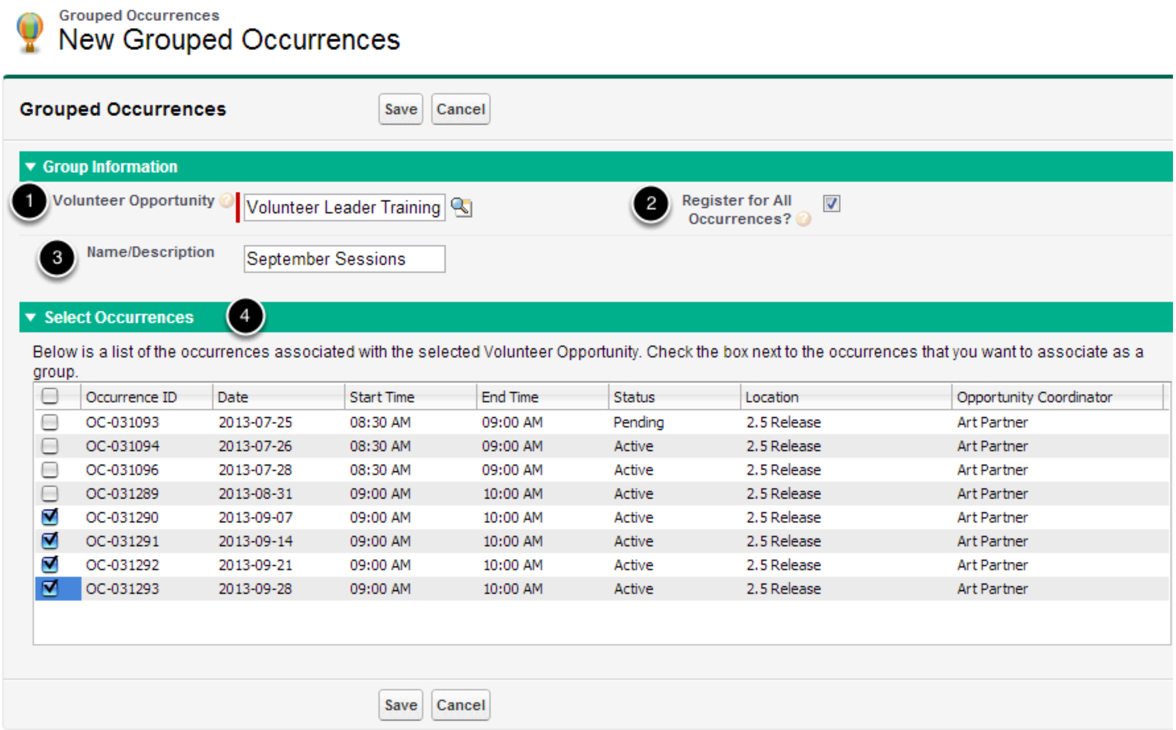
The features in this section are pretty powerful tools and create multiple connections at once. So remember "With great powers come great responsibility" and train users how to properly use these features.

Grouped Occurrences

Grouped Occurrences allow users to have volunteers sign up or express interest in a series of occurrences as in one step. They can only be associated with Date & Time Specific volunteer opportunities and all the occurrences in the group must be associated with a single volunteer opportunity.

Creating a Grouped Occurrence





On the Grouped Occurrence page, you have the following options:

1) Volunteer Opportunity - Will be pre-populated with the name of the opportunity you came from.

2) Register for All Occurrences? - When checked, volunteers MUST sign up for all the occurrences in the group. Once the first occurrence has past, then all the other occurrences will be removed from the Opportunity Detail page and no longer allow volunteers to register for the series. (Note: the occurrences will still appear on the Opportunity Calendar, they are only removed from the opportunity detail page.)

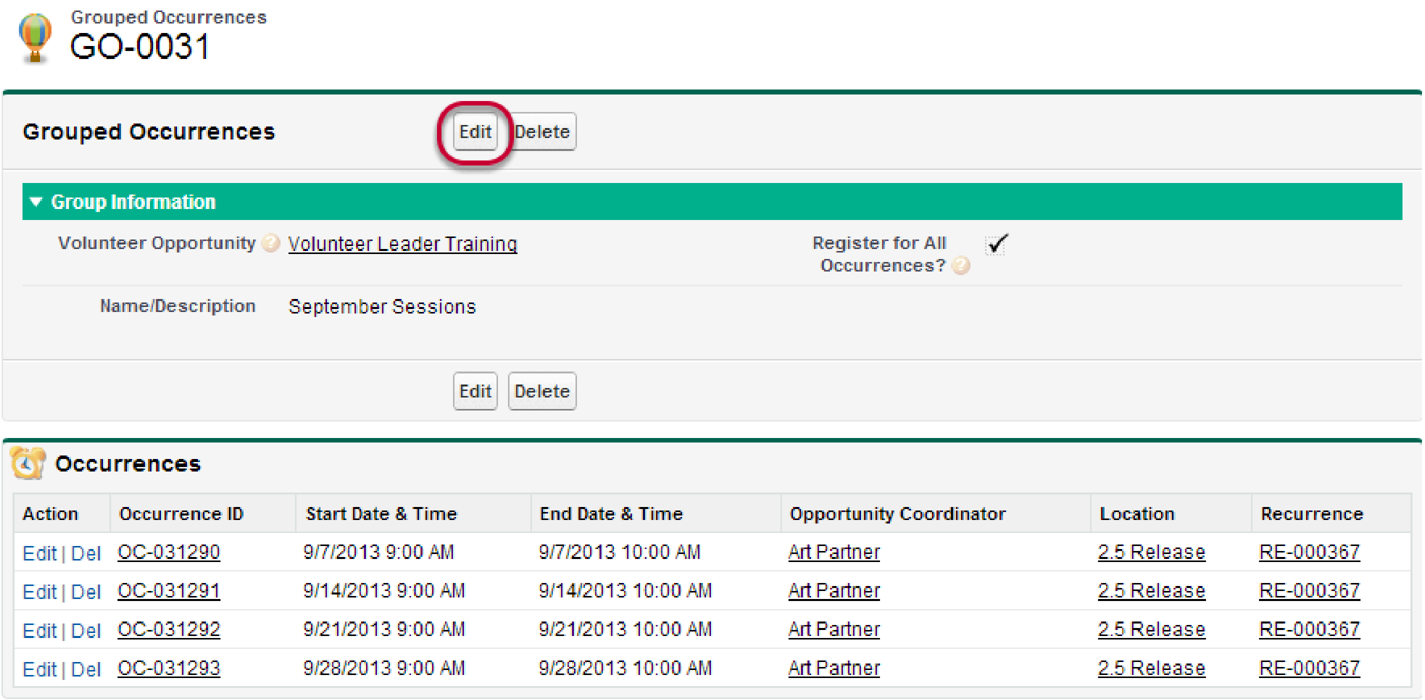
3) Name/Description - This is an optional text field to allow you to define the grouping in case you have multiple grouped occurrences with a single volunteer opportunity.

4) Select Occurrences - Occurrences can only be part of 1 grouped occurrence series. The chart that is displayed shows all the occurrences associated with the selected Volunteer Opportunity. Column headers can be clicked to resort the occurrences based on any of the columns in case you want to group them based on location or opportunity coordinator.

You must select at least 2 occurrences to create a grouped occurrence record.

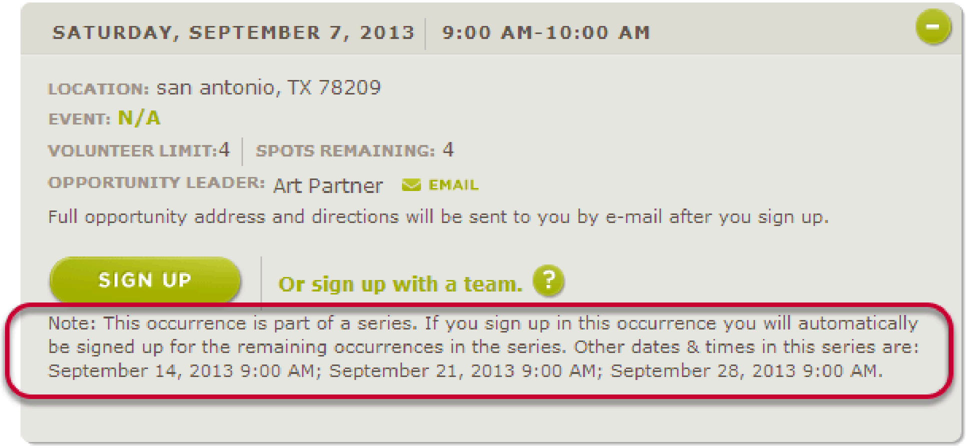
Once you have selected the Occurrences and other fields, click Save.

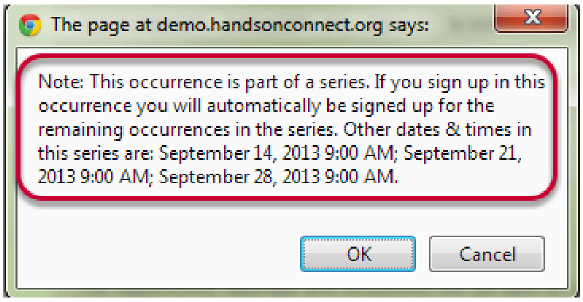
Grouped Occurrence Record



Once created the Grouped Occurrence record has a related list of the occurrences in the group. You can also Edit the grouped occurrence to remove or add occurrences, change the description, or "Register for All Occurrences?" checkbox.

Grouped Occurrences on the Public Site (Register for All Occurrences? = Unchecked)



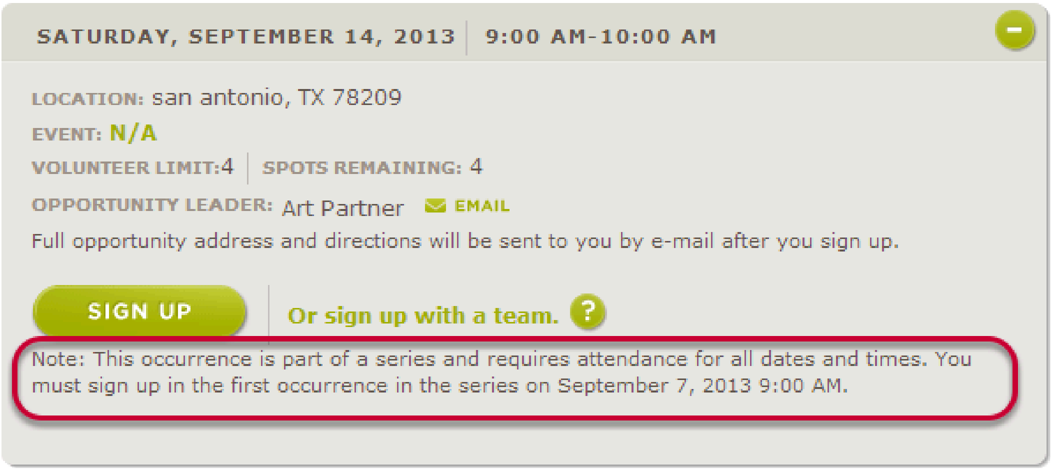


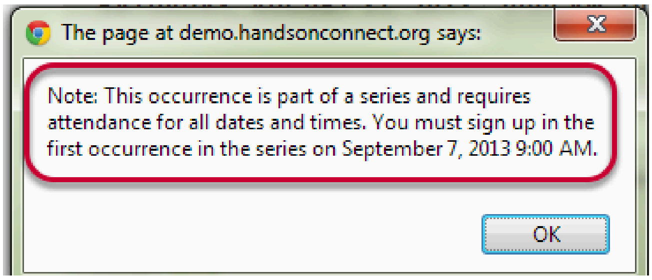
Occurrences that are part of a Grouped Occurrence have a **NOTE** add to the Sign up/ Express Interest box as well as a pop-up message letting the volunteer know that they are registering for a series and all the dates of the series.

When Register for All Occurrences? is unchecked then the same note appears for all the occurrences in the series with the dates that are remaining.

For example in the image above, the series is September 7, 14, 21, and 28. If a volunteer were to click on the September 21 occurrence to sign up they would be signing up for the 21 & 28, but not the 7 & 14 since those take place prior to the first occurrence of which they were registering and registering for all is not required.

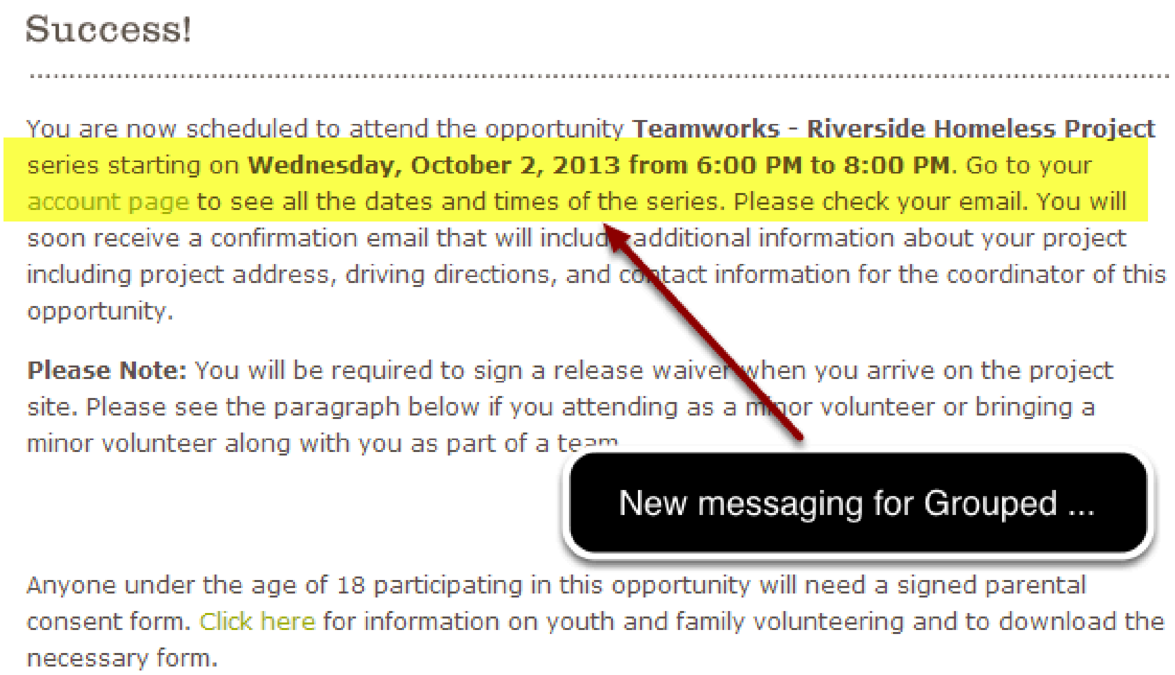
Grouped Occurrences on the Public Site (Register for All Occurrences? = Checked)





When Register for All Occurrences? is checked, then volunteers are only able to sign-up for the entire series. Occurrences that are part of the series, but not the first have a **NOTE** letting the volunteer that they must sign up for the first occurrence in the series and provides them the date. A pop-up message also appears in case they don't see the Note.

Grouped Occurrence Confirmation Page Message (Public Site)



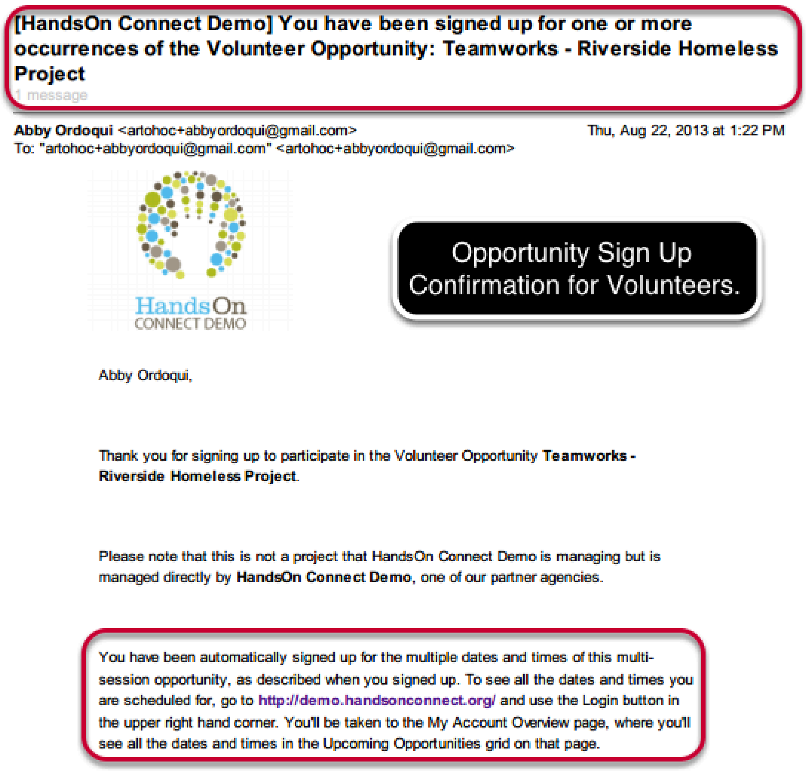
Success!

You are now scheduled to attend the opportunity **Teamworks - Riverside Homeless Project** series starting on **Wednesday, October 2, 2013 from 6:00 PM to 8:00 PM**. Go to your account page to see all the dates and times of the series. Please check your email. You will soon receive a confirmation email that will include additional information about your project including project address, driving directions, and contact information for the coordinator of this opportunity.

Please Note: You will be required to sign a release waiver when you arrive on the project site. Please see the paragraph below if you attending as a minor volunteer or bringing a minor volunteer along with you as part of a team.

Anyone under the age of 18 participating in this opportunity will need a signed parental consent form. Click here for information on youth and family volunteering and to download the necessary form.

Grouped Occurrences Email Alerts



[HandsOn Connect Demo] You have been signed up for one or more occurrences of the Volunteer Opportunity: Teamworks - Riverside Homeless Project

1 message

Abby Ordoqui <artohoc+abbyordoqui@gmail.com> Thu, Aug 22, 2013 at 1:22 PM

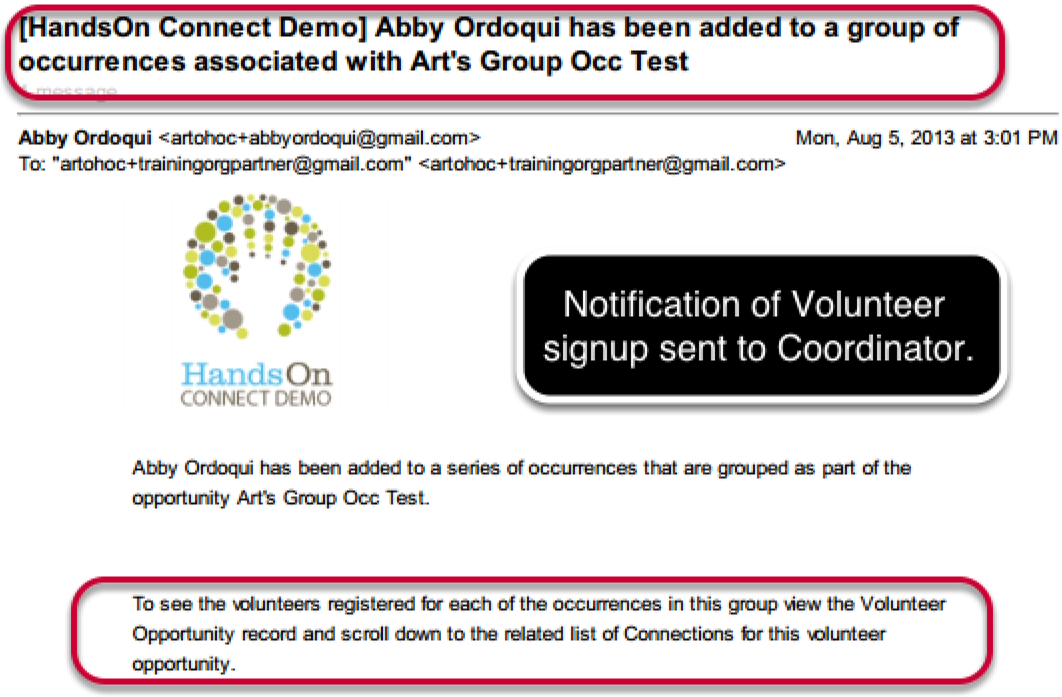
To: "artohoc+abbyordoqui@gmail.com" <artohoc+abbyordoqui@gmail.com>

Abby Ordoqui,

Thank you for signing up to participate in the Volunteer Opportunity **Teamworks - Riverside Homeless Project**.

Please note that this is not a project that HandsOn Connect Demo is managing but is managed directly by **HandsOn Connect Demo**, one of our partner agencies.

You have been automatically signed up for the multiple dates and times of this multi-session opportunity, as described when you signed up. To see all the dates and times you are scheduled for, go to http://demo.handsonconnect.org/ and use the Login button in the upper right hand corner. You'll be taken to the My Account Overview page, where you'll see all the dates and times in the Upcoming Opportunities grid on that page.

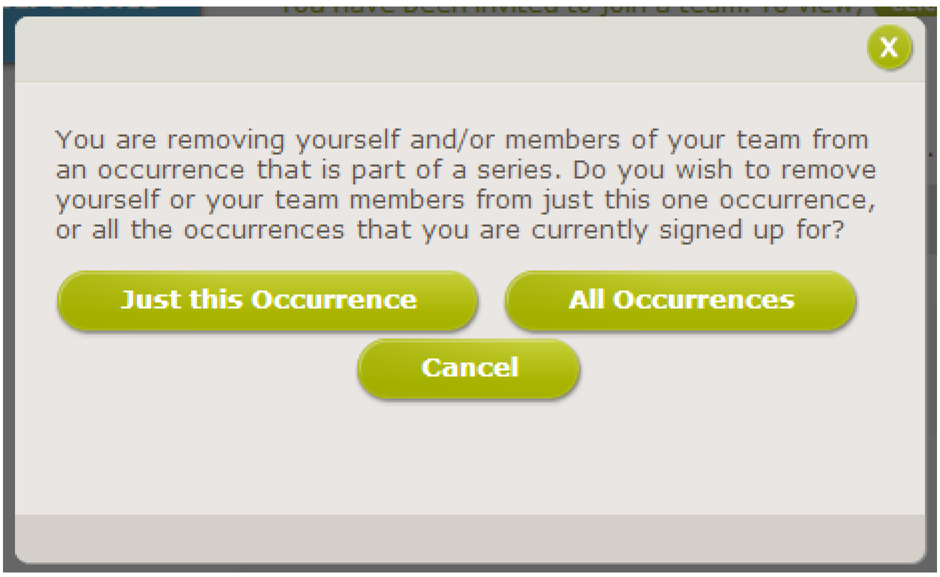


The Grouped Occurrence notifications are now managed through the Control Panel (see how to enable Grouped Occurrences below).

The Grouped Occurrence notification triggers were created to send 1 notice to each volunteer that signs up or express interest in a grouped occurrence series, rather than the usual email for each occurrence.

The Notification of Volunteer Signup, Removal, Waitlisted, and Interest Notification were created to send 1 notice for each volunteer to the Opportunity Coordinator and Volunteer Leader.

Removing Volunteers and Teams (Public site)



When a Volunteer on the public site tries to remove themselves from a grouped occurrence series they are presented with the option to remove themselves from just the selected occurrence or ALL Upcoming occurrences (essentially all the occurrences in the series that still appear in the Upcoming Opportunities grid).

Enabling Grouped Occurrences

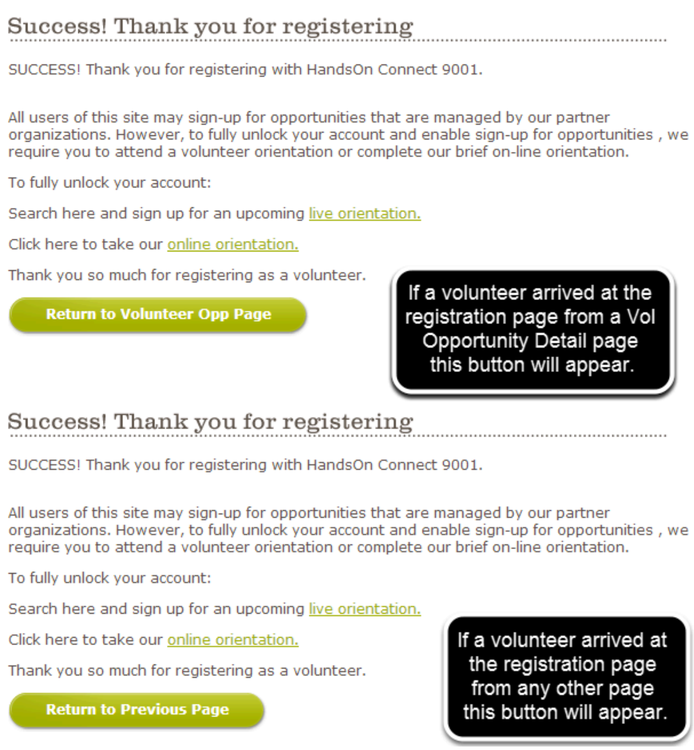
System Admins that wish to enable this functionality can follow the steps at this link.

Prerequisites

2.13 Release Patch 8

2.13 Release Patch 8 was deployed overnight on May 22nd and addresses issues with volunteer registration, team creation, AFG Search improvements and Basic Portal enhancements as well as other bugs.

Volunteer Registration Redirect



So as phase 1 of the One-Step Sign up process, we have implemented a new pair of buttons that will appear on the Volunteer Registration Confirmation Page to direct the user back to where they were before they registered.

For example:

1) A volunteer searches for an opportunity and clicks to sign up and receive the pop-up message that tells them they must log in or register.

2) The volunteer clicks on the Login button and see that there is a "Not a member? Register." link and clicks that to be taken to the Volunteer Registration Page.

3) When the volunteer completes the registration page and clicks Submit, they are taken to the Volunteer Registration Success Page and will now see a button that says "Return to Volunteer Opp Page" which will guide them back to the Volunteer Opportunity that they were last viewing.

If the volunteer was not a Volunteer Opportunity Detail Page, but instead was on the search page, Organization Detail, etc. prior to arriving at the Volunteer Registration page then they will see a generic "Return to Previous Page" button on the Volunteer Registration Confirmation page.

NOTE: Our plan is to update the pop-up message to allow the user to login or be directed to the registration page directly from the pop-up without needing to go to the Login button in the top right corner. This should be able to be included in the next full release in late summer.

Team Creation for teams larger than 7 members

- The team creation issue when creating a team larger than 8 members (Team captain + 7 additional team members/captains) has been resolved and larger teams can be created.
- Row 8 has been added back into the Team Member form
- When the volunteer clicks on the "Create Team" button the "Please Wait" screen will flash up quickly and disappear, but duplicate teams can't be created even with the "Create Team" button still accessible.

AFG Search Improvements

These changes only impact customers that have activated the AFG Search Integration. Haven't made the move yet? Now is the time. Open a support ticket and we can bring the power of AFG search to your volunteers.

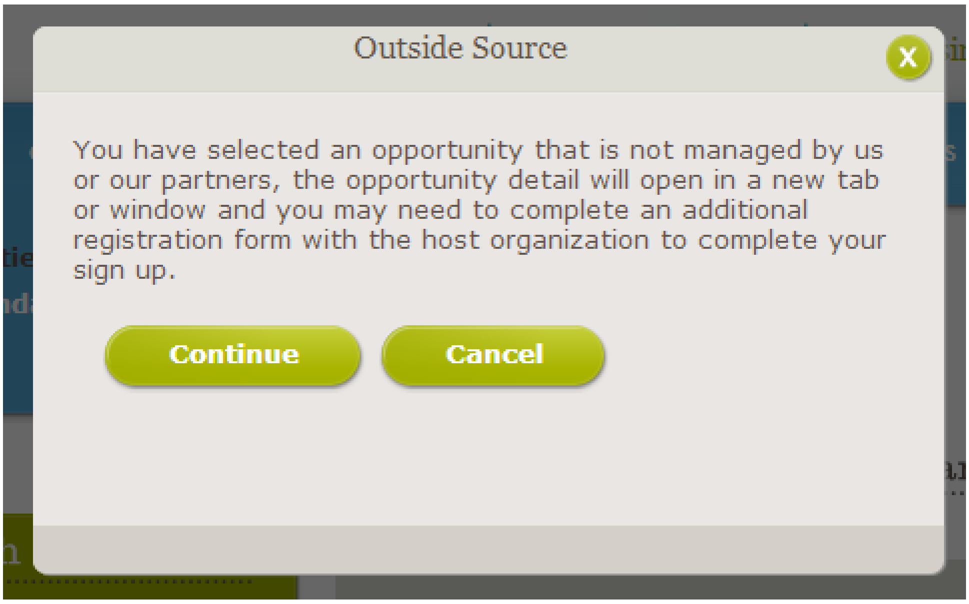
Search Result Pagination

The biggest improvement to the AFG Search integration is the improvement to the vertical scroll and pagination. Moving the vertical scroll our of the search results allows volunteers to easily scroll through the available opportunities and see them all on the screen at once. Plus moving the vertical scroll to the main scroll bar makes the page easier to view and navigate on tablets!

The new "Load More Opportunities" will always appear when they are more opportunities available to search and when click will quickly expand the page down to show the next 25 opportunities.

Search results still default based on distance from the location provided and when sorting the columns, it sorts against **all** the available opportunities not just the ones on the screen. When doing a search the system reloads the search results in the new ascending order based on the criteria selected. When sorting by the When column, date & time projects will appear first starting with the ones that are coming up first then the To Be Scheduled occurrences after.

Outside Sources



With AFG search activated, customers now how the option to pull in opportunities from other HandsOn Connect and AFG sources into their main search results. If you have **elected** to do this when a volunteer selects a project that is not managed by your HandsOn Connect instance they will receive the pop-up message shown above letting them know that it is a project not managed by you or your partners and the volunteer opportunity will open in a new tab or window so that the volunteer doesn't lose their place on your site.

Other AFG Search Improvements

1) Keyword field has been updated to search using AND when multiple terms are entered. So when a volunteer searches for "park clean-up" will narrow the search results to those that have both terms instead of either.

2) Occurrences that took place earlier in the day will drop off the search results since volunteer can no long sign up for them to help highlight the next occurrence for that opportunity. In other words, if you have a project that takes place from 8:00 am- 10:00 am, with the new AFG Search at 10:01 AM this project will no longer appear in the search instead the next occurrence will appear, if any.

3) Using an Invitation Code for your Day of Caring and want to allow volunteers to further filter the results. Now you can! With the AFG Search, volunteers can now use keyword, schedule type or any of the advanced filters in addition to the Invitation Code to refine their searches to find the perfect project.

4) When clicking on the "See All Volunteer Opportunities with this Partner Organization" link on the Organization Detail page, some organizations that included "Education" and other general search terms were having problems getting accurate results since it would attempt to locate

organizations with similar keywords. This issue has been corrected and the "See all..." link on the Organization Detail page now functions as expected.

5) Occurrences that took place later in the day were getting dropped off the day view because when converted to Universal Time they were "scheduled" for the next day. This has been corrected and all Calendar, Day View, and general searches have been adjusted to search based on the local time zone of your instance.

National Search Page

If you have elected to include the AFG National Search page on your site, the Pagination, Outside Source, and other search related changes will be applied to the AFG National Search page next week.

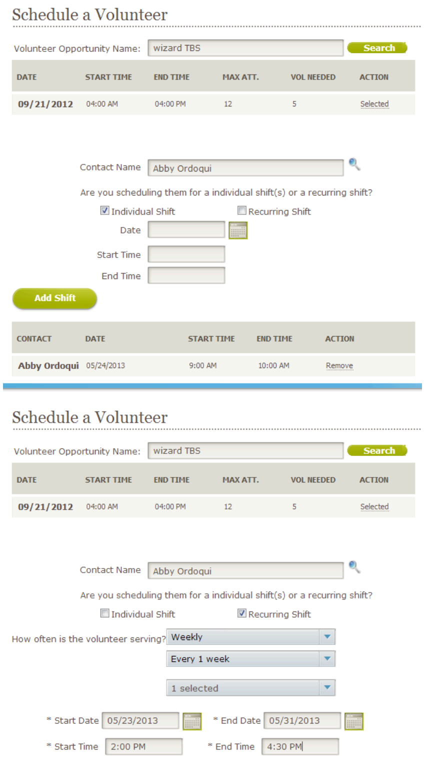
Posting Status improvements

The new trigger introduced in patch 7 was having some order of operation issues when recurrences were involved since both the recurrence and the volunteer opportunity records, when activated, were trying to update the related occurrences causing the posting status to be incorrect. Improvements were made to the logic of the trigger and posting statuses should reflect accurately whether approving the occurrences from the volunteer opportunity or recurrence record.

Premium Portal - My Organization Page

An issue with the Organization Name on the My Organization page in the premium portal was addressed in this patch.

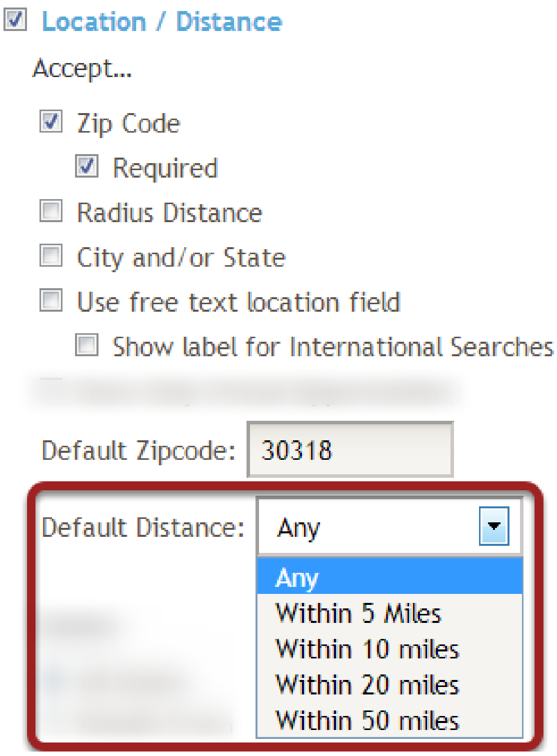
Basic Portal - Schedule a Volunteer



As part of this patch we are expanding the ability to schedule volunteer for To Be Scheduled occurrences through the Basic Portal. When scheduling a volunteer for a To Be Scheduled occurrence, the Partner Staff or Volunteer Leader will have the ability to schedule the contact for individual shifts that are non-recurring or have the option to create a recurring shift and schedule the volunteer to come in every Monday for a set period of time and duration.

Connections for To Be Schedule occurrence are still created in Pending Approval status, but this allows you to easily create multiple connections at once. Auto-confirmation of To Be Schedule connection created by the partner staff or volunteer leader will be added in a future release.

HandsOn Connect Remote enhancement



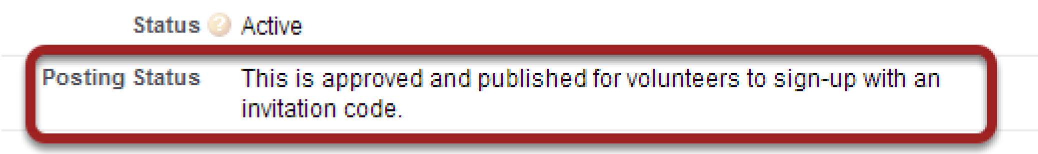
HandsOn Connect Remote users can now set a default distance radius for their search widgets. Widget customers can select "Any," "Within 5 Miles," "Within 10 miles," "Within 20 Miles," or "Within 50 Miles" as the default distance radius for their widgets.

HOConnect Remote - Time Zones

The time zones in the widget builder have been update to reflect the safe process used in Salesforce of America/ New York, America/ Chicago, etc. \ This will allow the widgets to automatically adjust for daylight savings time, just as in Salesforce.com.

2.13 Patch 6 & 7

Posting Status Enhancements



In this patch we are taking the first steps to improving the messaging in the Posting Status field. This patch will apply to any records created or **manually edited** after May 1, 2013. Existing records will not be impacted.

The posting status will be updated to reflect the following statements based on the related criteria. (criteria -- message)

Occurrence records:

- Status= Pending -- Posting Status = "This is not published. Please submit for approval."
- Status= Inactive -- Posting Status = "This has been archived. Please contact your system administrator"
- Status= Awaiting Approval -- Posting Status = "This is not published and has been submitted for approval."
- Status= Admin -- Posting Status = "This is not published (admin only)."
- Status= Canceled -- Posting Status= "This is not published. It has been canceled."
- Status= Active & Volunteer Opportunity in Status= Active & Volunteer Opportunity - **Invitation code = Blank** -- Posting Status = **"This is approved and published for volunteers to sign-up."**
- Status= Active & Volunteer Opportunity in Status= Active & Volunteer Opportunity - Invitation code NOT = Blank -- Posting Status = **"This is approved and published for volunteers to sign-up with an invitation code."**
- Status= Active & Volunteer Opportunity NOT in Status= Active -- Posting Status = **"This is not published. The Volunteer Opportunity is not active."**
- Status= Active & End Date & Time < TODAY -- Posting Status = "This is not published. The Date & Time is in the past."

Volunteer Opportunity records:

- Status= Pending -- Posting Status = "This is not published. Please submit for approval."
- Status= Inactive -- Posting Status = "This has been archived. Please contact your system administrator"
- Status= Awaiting Approval -- Posting Status = "This is not published and has been submitted for approval."
- Status= Admin -- Posting Status = "This is not published (admin only)."

- Status= Active & has at least 1 occurrence in Status= Active and End Date & Time Greater than TODAY & Volunteer Opportunity - Invitation code = Blank. -- Posting Status = **"This is approved and published for volunteers to sign-up."**
- Status= Active & has at least 1 occurrence in Status= Active and End Date & Time Greater than TODAY & Volunteer Opportunity - Invitation code NOT = Blank. -- Posting Status = **"This is approved and published for volunteers to sign-up with an invitation code."**
- Status= Active & 0 occurrence in Status= Active and End Date & Time Greater than TODAY. -- Posting Status = "This is not published. There are no upcoming, active occurrences."

Further improvements will be made in the next full release expected in later July.

- Automation of the Posting Status Trigger to run nightly so that as Occurrence End Date & Times pass the posting status for the Occurrence and if necessary the Volunteer Opportunity will be updated.
- Batch update to correct existing records, prior to May 1, that have not already been updated to the new posting status message.

We decided that in light of the delay of volunteer opportunities appearing in search results due to the enhanced AFG search integration that moving forward with the updated posting status was the better course of action so that staff, system admins, and premium portal users would be able to use the posting status message to determine the visibility of their projects on the public site.

Admin Action - Deactivate Workflow Rules

In this patch we began the improvement for clearer Posting Status messages, by moving the action that updates the message to a trigger to allow for more control of the message displayed.

To support this enhancements, System Admins should deactivate the following workflow rules:

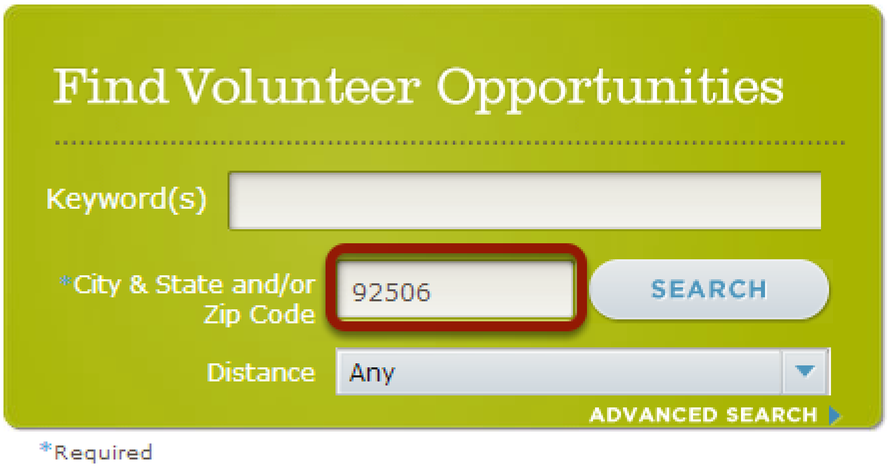
- Auto populate PostingStatus from Status (related to Occurrences)
- Auto populate PostingStatus from Status (related to Vol Opps)

The description for these rules has been updated to "Do Not Activate. This action has been moved to a trigger to improve the expected behavior." to reflect that they are no longer in use.

Steps for how to deactivate workflow rules.

We also suggest to Premium Portal Customers that you move your Partner Staff and Volunteer Leaders to the Partner Staff Volunteer Opportunity Layout 2 and Partner Staff Occurrence Layout 2 which has the posting status field as Read Only. (Documentation for improved Partner Staff - Premium Portal can be found here.)

Home Page Search Box



If you have the Default Zip Code populated in the control panel, it will now be populated in the Home Page Search box so while a location is still required, the default zip code will allow for volunteers to just enter a keyword and go without getting the "Location is required" error pop-up.

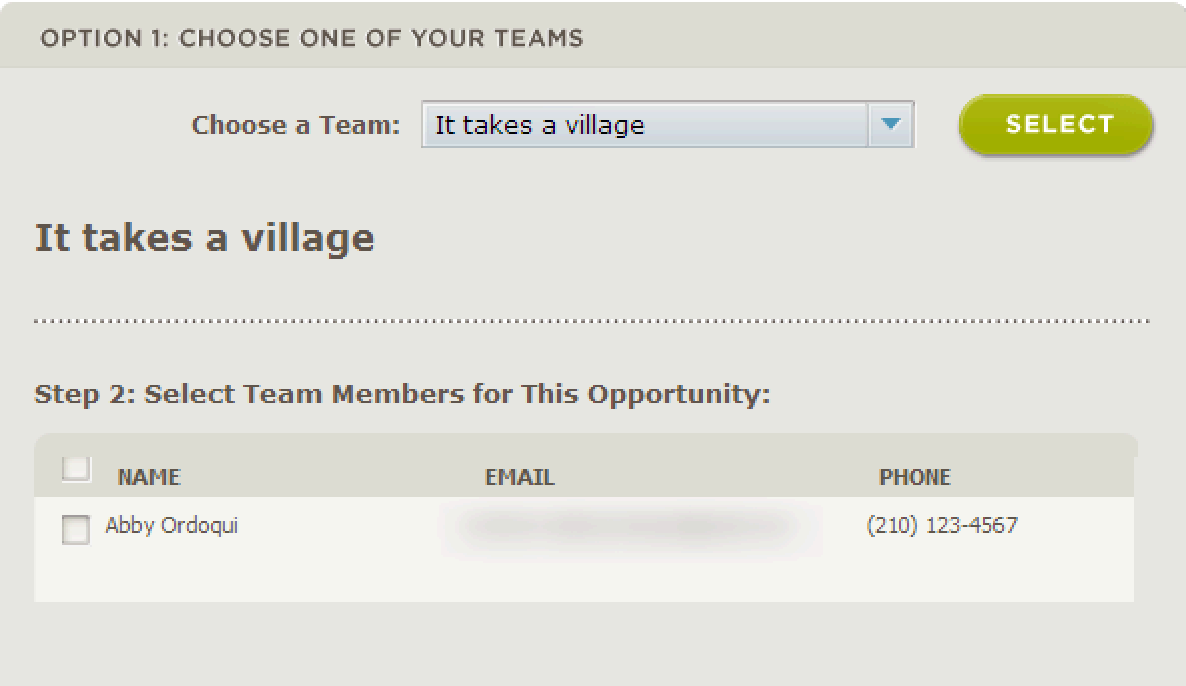
If you opt to not provide a default zip code, volunteers will still be required to provide a value for the location field when using the Home Page Search Box.

Other Search Related Improvements

- Typo in the distance column where a distance of 2-9 miles was missing the s has been corrected.
- Using a Saved Search link will override any existing search criteria. In the past, it was just add the saved search to the existing criteria.

Enhancements to Volunteer Teams

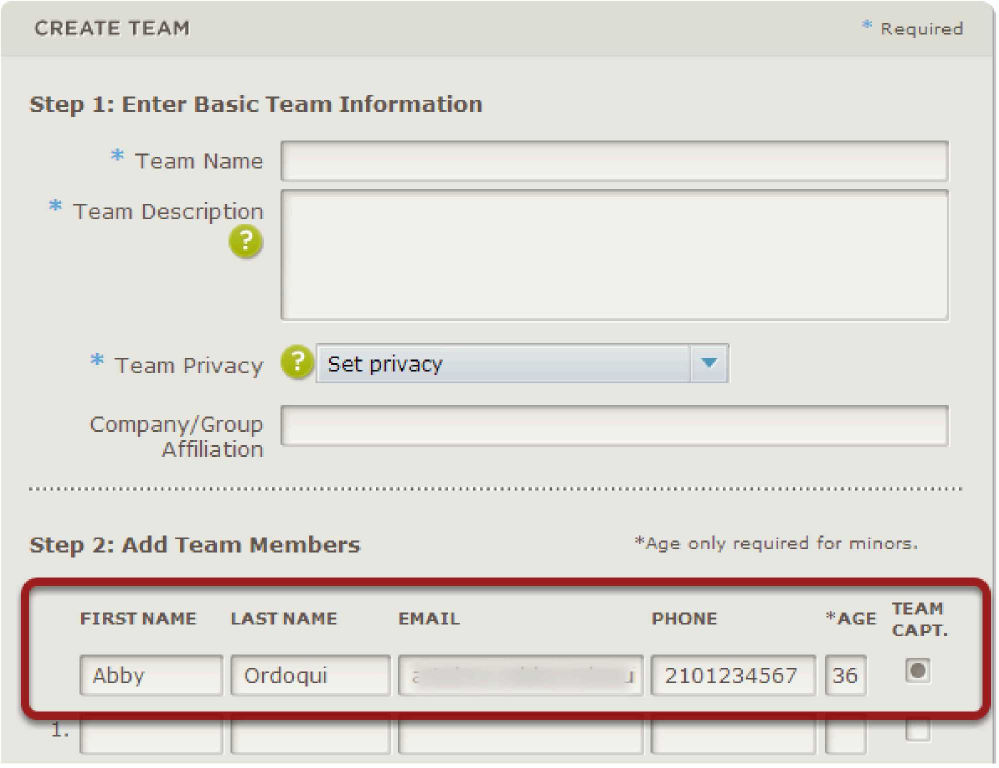
Team Members can now sign up/express interest as part of a team



In the past only Team Captains could Sign Up/ Express Interest for volunteer team members. With this enhancement if an individual volunteer that is not a team captain selects the "Sign Up/ Express Interest with a team." option they can select from a team which they are a member of to associated their connection with. When the volunteer does this they will only be able to see their own association with the team and not other team members.

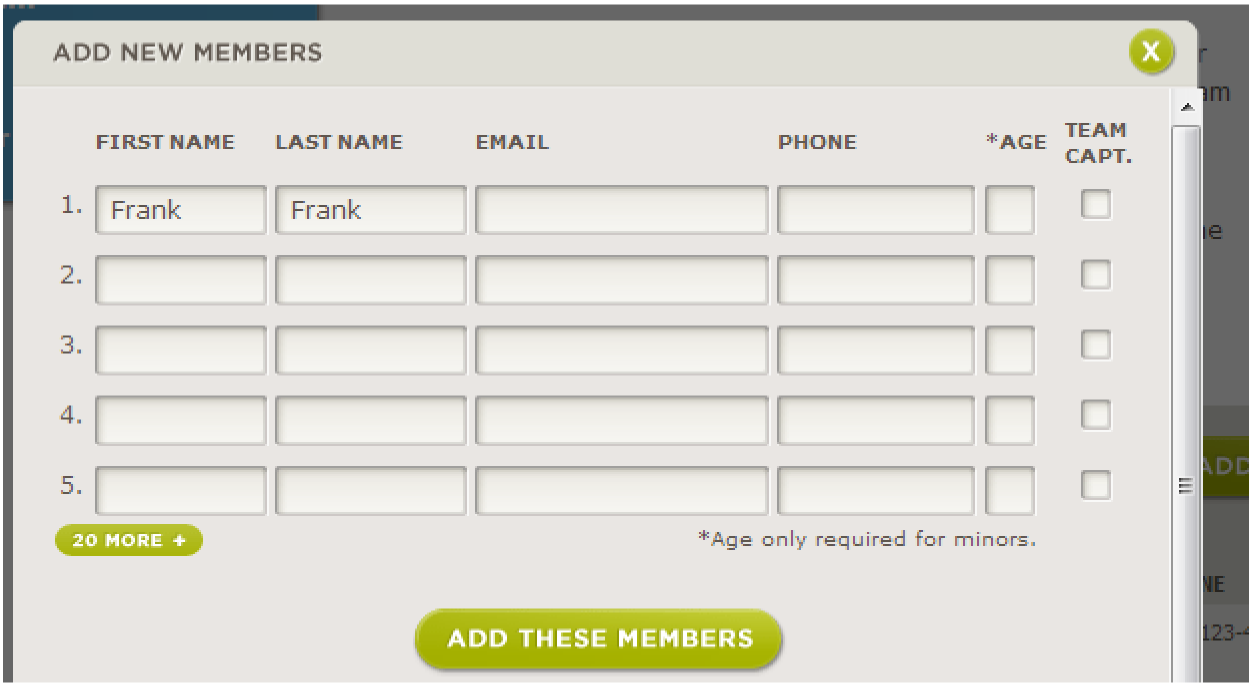
For example, if Company XYZ creates a volunteer team of all their employees, their employees can use the sign up with a team option and select Company XYZ Team so that even if other employees aren't participating they can still track and associated their service hours to that volunteer team.

Team Captain pre-populated for New Volunteer Teams



When a volunteer elects to create a new volunteer team, that volunteer's information will appear in the list of team members as row 0 so that they don't try to add themselves again as members. This row is not editable.

Adding Team Members



When initially creating a Volunteer Team, if the Company/ Group Affiliation is populated you don't have to provide an email or phone number for the team members. However, in the past, when you later added additional team members an email or phone number were required.

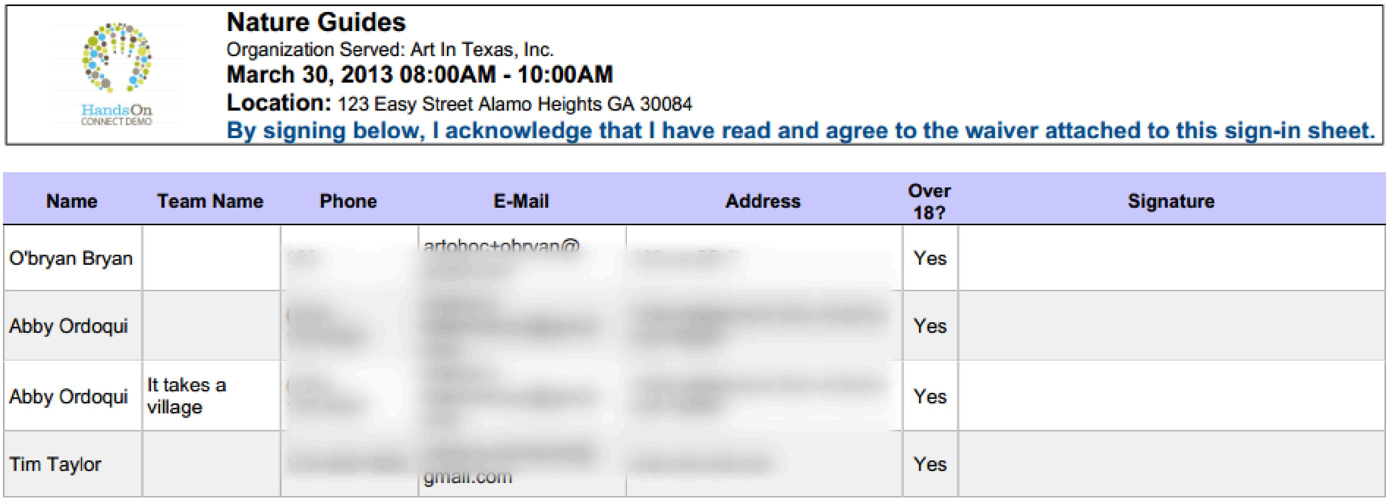
With this patch, adding team members for teams with a Company/ Group Affiliation no longer require an email or phone number. Teams without a Company/ Group Affiliation will still require a phone number or email address to add new members.

Other Volunteer Team Improvements

These other improvements were made around volunteer teams:

- Upcoming Opportunities are now showing on the Team detail page
- Please Wait bar has been added when a volunteer submits a new team for creation to prevent double clicking and duplicate teams.
- Volunteer Teams that Express Interest for a project can no longer be confirmed when the Team Captain uses the "Manage My Team" option.
- New contacts created via a volunteer team now have the Primary Address? field set to Home, Calculated Birthdate checked when an age is provided, and Volunteer Type= Volunteer.
- Team sign ups for date & time specific occurrences now have the Attendance Status field populated with "Please Verify"

Check-in Sheet Improvements



Nature Guides
Organization Served: Art In Texas, Inc.
March 30, 2013 08:00AM - 10:00AM
Location: 123 Easy Street Alamo Heights GA 30084
By signing below, I acknowledge that I have read and agree to the waiver attached to this sign-in sheet.

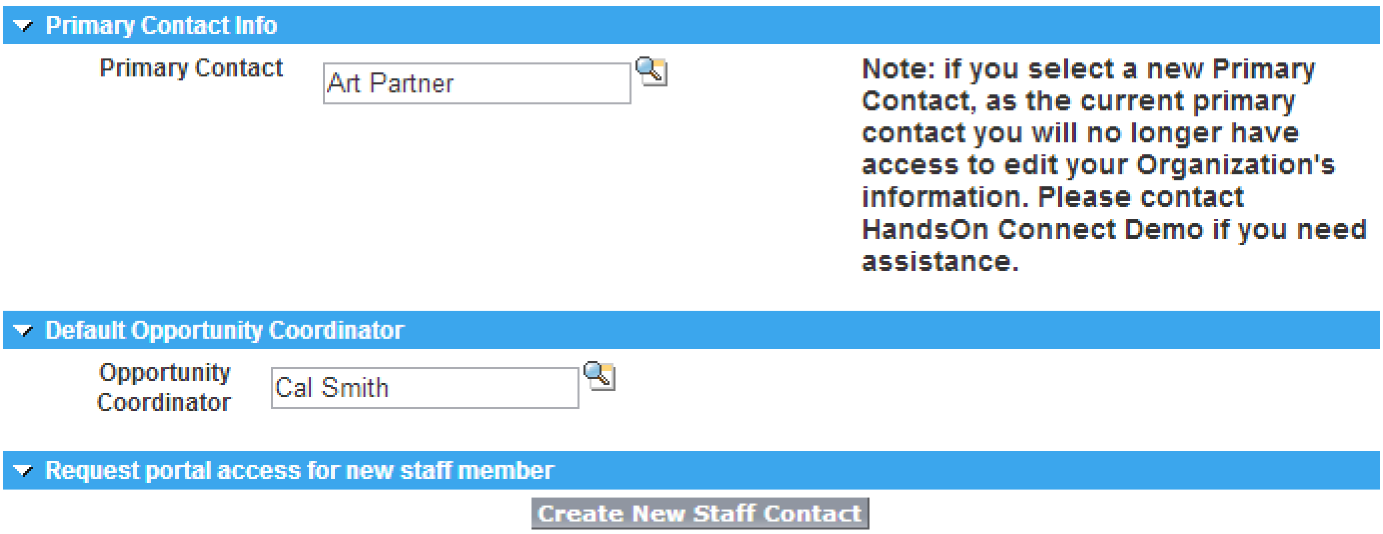
Name	Team Name	Phone	E-Mail	Address	Over 18?	Signature
O'bryan Bryan		[illegible]	artohoc+obryan@ [illegible]	[illegible]	Yes	
Abby Ordoqui		[illegible]	[illegible]	[illegible]	Yes	
Abby Ordoqui	It takes a village	[illegible]	[illegible]	[illegible]	Yes	
Tim Taylor		[illegible]	[illegible] gmail.com	[illegible]	Yes	

The check-in sheet was improved by increasing the font size to 10pt to make it easier to read and lightening the grey shading.

Volunteers with Age = 0 will have "Ukn" in the Over 18?. This will usually be the case for Volunteer Team Members.

Premium Portal Changes

My Organization Edit Page



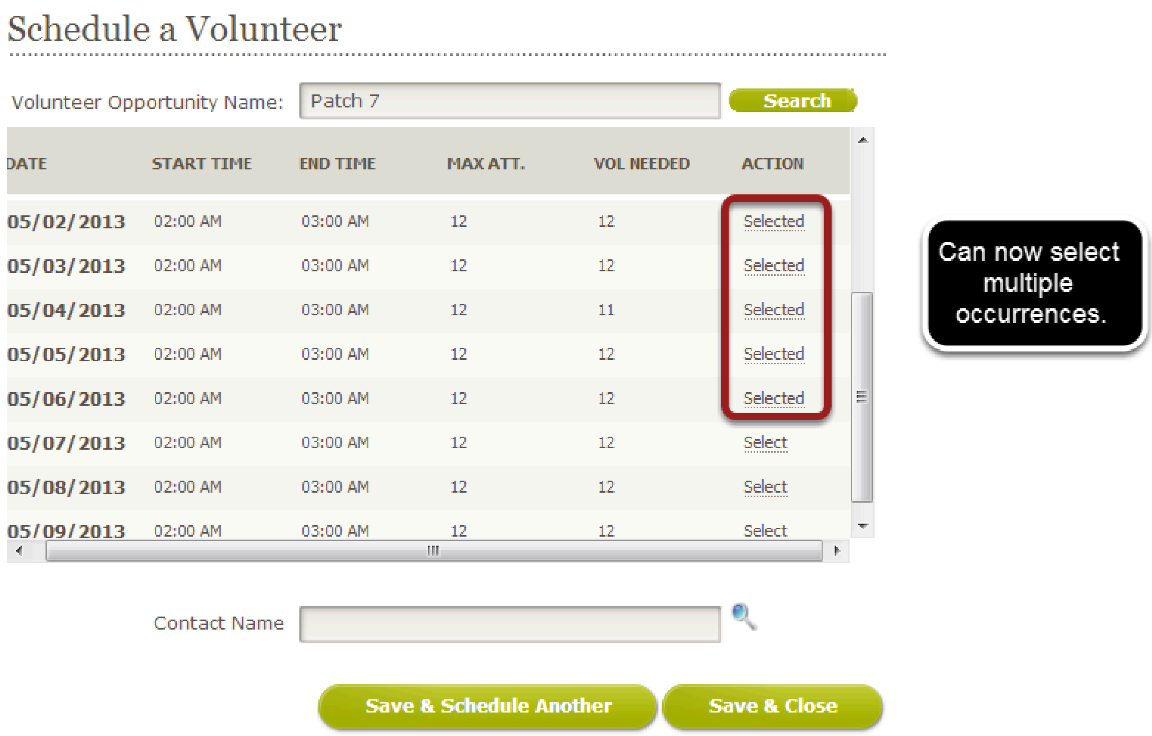
Improvements were made to the My Organization page when being edited by the Primary Contact.

- Primary Contact was changed to a look-up field to prevent the contact record from being overwritten.
- Note was added that if the primary contact changes the primary contact to someone else that they are locking themselves out of the My Organization page.
- The "New" button was renamed to "Create New Staff Contact" and removed from next to the Opportunity Coordinator look-up and moved to it's own section labeled "Request portal access for new staff member."
- Bug fix: when using the look-up some customers were having trouble being able to select new contacts. This has been corrected and the look-up works as expected.

Basic Portal Changes

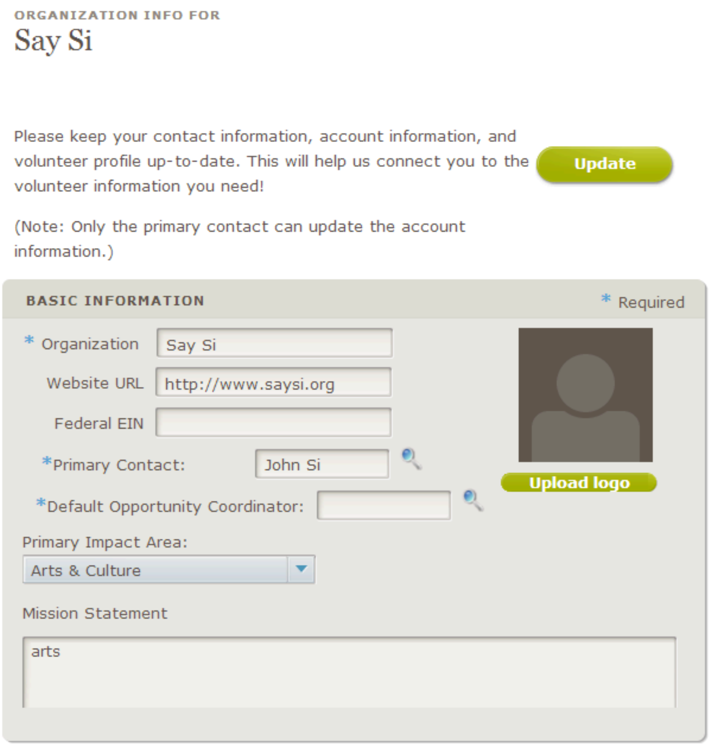
The following changes only apply to Basic Portal customers

Schedule a Volunteer Page



When scheduling a volunteer for a Date & Time Specific opportunity, you can now select <u>up to 5 occurrences</u> at once to schedule the volunteer.

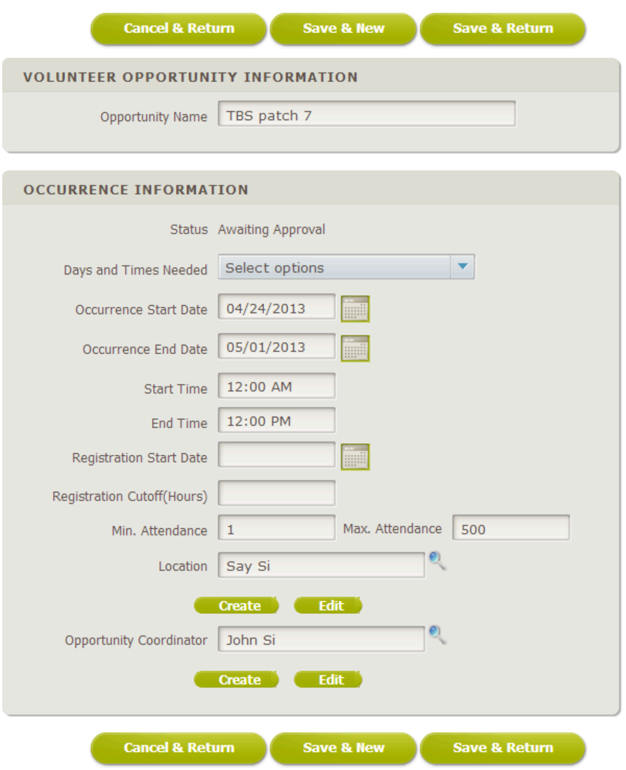
Organization Information Page



The Organization Information page has been updated in the following ways:

- Removed the Edit buttons next to the Primary Contact and Opportunity Coordinator fields.
- Removed the Create button next to the Opportunity Coordinator field. (All contacts should be created using the "Create New Staff Contact" button
- Changes the label from Opportunity Coordinator to Default Opportunity Coordinator.
- The primary contact for the organization is able to use the look-up to change both the Primary Contact field and the Default Opportunity Coordinator field.
- Primary Impact Area now displays the value selected when a single value is selected. If multiple values are selected it will display "# Selected"
- Expanded the Mission Statement text field to be a text area so that at least 4 lines of text are visible.
- Changed the section label from Contact Information to Organization Contact Information
- Changed the section label from Contacts Information to Organization Staff Contacts and changed the Create New Contact button to "Create New Staff Contact."
- Changed the section label from Locations Information to Opportunity Locations and the State is now displayed in the grid
- The column headers in the Opportunity Locations and Organization Staff Contact tables are now clickable for sorting.

Occurrence Detail Page



The Occurrence Detail page has been updated in the following ways:

- For Date & Time Specific occurrences: Date, Start time, and End Time fields are displayed.
- For To Be Scheduled Occurrences: Occurrence Start Date and Occurrence End Date are displayed.
- You can now edit the Occurrence End Date of a To Be Scheduled occurrence
- When editing the date of a Date & Time specific occurrence the Start Time and End Time remain unchanged (used to update to the current time)
- New Occurrences are automatically placed in "Awaiting Approval" status
- If a user enters the Date or Time in an unacceptable format an error message pops up letting them know the correct format before they attempt to save the record.
- The Save button has been updated to Save & New, and the buttons have been added to the bottom of the page for easier access.
- Corrected an issue with the mapping of the Min and Max attendance fields.

Other Fixes and Enhancements

These other improvements were made to HandsOn Connect in this patch:

- Self-Reported Volunteer Hours can now be made the same day as the service project took place.
- Volunteer Event Detail page has been updated to display the "See all opportunities associated with this special event" link based on the End Date & Time of the related

occurrences being in the future. Previously it was based on Start Date & Time which prevented the link from appearing when To Be Scheduled opportunities were associated with the event.
- Names with apostrophes were causing issues on the volunteer registration form, custom Registration Questions and Volunteer Opportunity Questions, in the Employee Coordinator portal tabs, and in the Control Panel for the various Approval Managers. All of these have been corrected and can now accept apostrophes.
- Limit was increased that was impacting the creating of the sharing groups used for the Partner Staff premium portal.
- Employer field has been added to the Personal Information page at the top of the "Work Address" section.
- Sharing rules are now triggered when an existing connection is edited to add the role of "Volunteer Leader
- "Grant Portal login in the Contact Overview was improved so that only the profiles associated with your type of portal will be displayed.

Premium Portal:

- Volunteer
- Volunteer Leader
- Partner Staff (when related to an Organization with Record Type = Nonprofit and Status = Active Partner)
- Employee Coordinator (when related to an Organization with Record Type = Business and Status = Active Sponsor)

Basic Portal

- Volunteer
- Volunteer Leader v2
- Partner Staff v2 (when related to an Organization with Record Type = Nonprofit and Status = Active Partner)

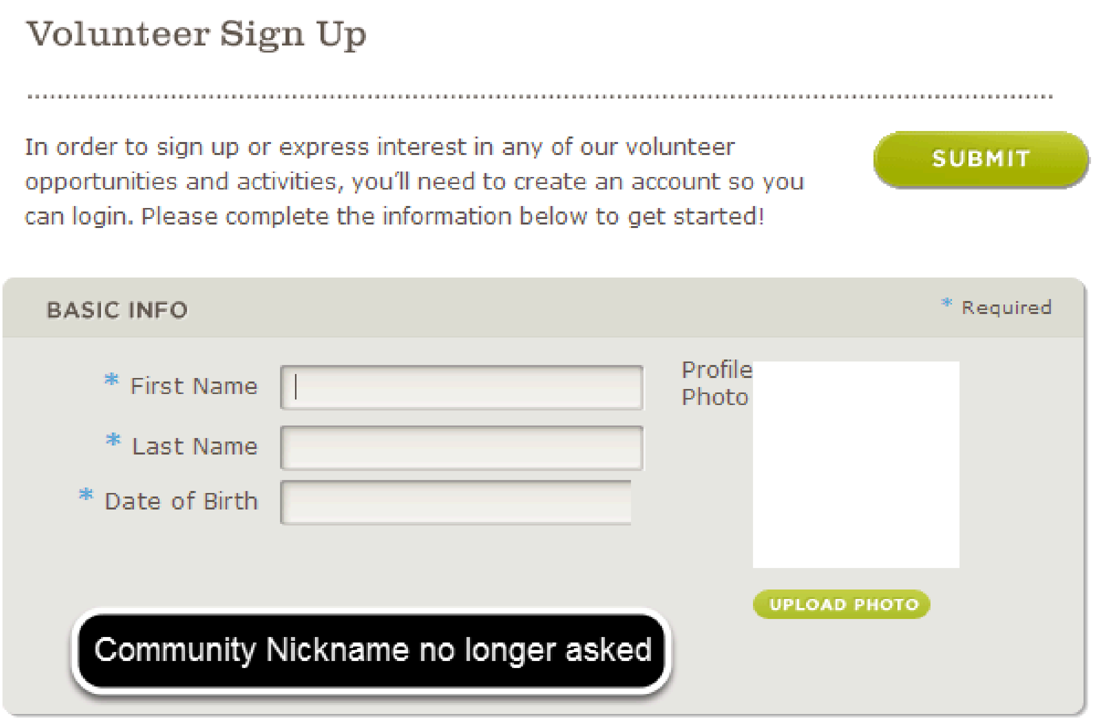
2.13 Release - Patch 5 & Other Typos Corrections being made

This post covers the changes deployed in Patch #5 on March 18 as well as some changes that are being made by the support team over the next few weeks that cannot be deployed.

Optional Admin Action listed at the end.

2.13 Release Patch #5 changes

Community Nickname Removed from Volunteer Registration

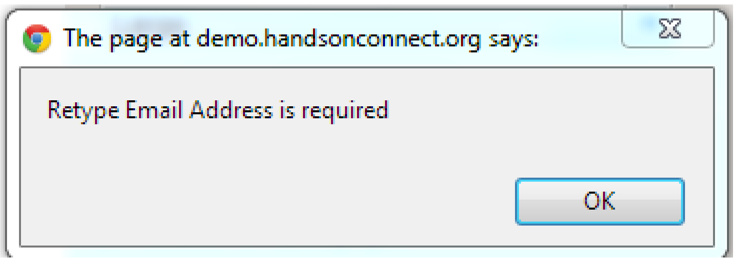


We have been able to auto-generate a community nickname for the user record and so it is no longer required as part of the Volunteer Registration for HandsOn Connect. The nickname is formed by taking the first and last name and adding a number to the end, up to 40 characters total. If two contacts have the same first and last name then the number at the end is changed to make them unique, such as JohnSmith1, JohnSmith2, JohnSmith3, etc.

Volunteer Registration Email

When a Team Captain adds Team Members to their team, if it is a new Contact, the contact record is created with the Status = Pending (Team Registration) and the volunteer is encouraged to complete the volunteer registration form. This patch addressed an issue that when the volunteer registered, if the email did not match exactly, including case sensitivity, then duplicate contact records were created. With this patch the case sensitivity was removed as a condition to prevent duplicate contact records from being created. So now aordoqui@pointsoflight.org is recognized as the same as AOrdoqui@pointsoflight.org.

Volunteer Registration Error



When registering, if a Volunteer failed to retype their email address or password, the error message that popped up had a typo that has now been corrected. The new messages are "Retype Email Address is required." and "Retype Password is required."

Changes being made by Support Team

Over the next few weeks the support team will be making the following corrections to your instance to correct typos and address items that align with the HandsOn Network Annual Affiliate Report. We do not have a deployment release schedule for these changes since they are being managed by the support team instead of our developers.

Skill Category Typo Corrections

The following Skill Categories are being updated to correct formatting and typos.

- Art, Culture, Recreations & Sports is being updated to "Arts, Culture, Recreation & Sports"
- Business: Administration and Clerical is being updated to "Business: Administration & Clerical
- Education & Children Support is being updated to Education & Child Support
- Shelter/FoodBank/Special Event Support is being updated to Shelter/ Food Bank/ Special Event Support
- Volunteering Management is being updated to Volunteer Management

Skill Typo Corrections

The following default skills are being updated to correct formatting and typos.

- Advertisement and Promotions Plan is being updated to Advertisement & Promotion Plans
- AmeriCorps – Vista Experience is being updated to AmeriCorps - VISTA Experience
- Child Care And Therapy is being updated to Child Care & Therapy
- Comp. And Benefits is being updated to Compensation & Benefits
- Controlling is being updated to Controller
- Customer Rel. / Front Desk / Reception is being updated to Customer Relations / Front Desk / Reception
- Disaster Damage Assesst is being updated to Disaster Damage Assessment
- Disaster Services (Cleaning, Food, etc…) is being updated to Disaster Services (Clearning, Food, etc.) (only one period)
- E learning – Webinars is being updated to E-learning - Webinars
- E mailing Exp. is being updated to Email Administration
- Environmental Protection/Advocacy is being updated to Environmental Protection / Advocacy (add a space before and after the /)
- Executive Assistance Exp. is being updated to Executive Assistance Experience
- Foundations Relations is being updated to Foundation Relations
- General Account- Accounts Payables is being updated to General Account - Accounts Payable
- HR Policies And Processes is being updated to HR Policies & Processed
- Identity / Positioning & Org. Msgs is being updated to Identity / Positioning
- Language – Translation/Interpretations is being updated to Language - Translation / Interpretations (add space before and after the /)
- Mailing Experience is being updated to Mailing Administration
- Mechanicals is being updated to Mechanics
- Painting - Sculpting is being updated to Painting / Sculpting
- Patient Support And Therapy is being updated to Patient Support & Therapy
- Program Costs Analyses is being updated to Program Cost Analyses
- Skills-Based Volunteering Assessments is being updated to Skills-Based Volunteer Assessments
- Social Networking (FB, Twitters, etc…) is being updated to Social Networking
- Special Event is being updated to Special Events
- Speech And Hearing Rehabilitation is being updated to Speech & Hearing Rehabilitation
- Strategy Plan is being updated to Strategy Plans
- Techno Systems Analyses & Reco. is being updated to Technology Systems Analyses
- Training Plan is being updated to Training Plans
- Volunteering Project Management is being updated to Volunteer Project Management
- Volunteers Management is being updated to Volunteer Management
- Web Techno Architecture is being updated to Web Technology Architecture

National Impact Goal Added

"Veterans & Military Families" was added to the list of National Impact Goals

National Service Event Added

"Veterans Day (November)" was added as a National Service Event

Impact Area Added

"Veterans & Military Families" is being added as an Impact Area to the following objects and fields:

- Organization - Impact Area
- Contact - Interests
- Volunteer Opportunity - Primary Impact Area, Secondary Impact Area

Connection Cancellation Email Template

The {!HOC__Connection__c.HOC__Start_Date_Time__c} merge field that was deployed as part of the 2.12 Release for the Connection Cancellation email template is correct, but for some customers Salesforce is not recognizing it as a merge field. We are re-inserting the {!HOC__Connection__c.HOC__Start_Date_Time__c} merge field into the email template so that Salesforce can properly insert the Connection Start Date & Time for the volunteer to know which occurrence was canceled.

CMS Update

In December an Admin Alert was issued to make a change to the Item URL for the Search Opportunities page. We are confirming that this change was made and if not making the change to remove the "?p=vct" from the Item URL.

ADMIN ACTION: Recommended Changes to National Metrics

The following fields are no longer needed for the HandsOn Network for Annual Affiliate Reporting and can be removed from the page layout by System Admin if they no longer wish to capture this information for their own data and reporting.

- Target Volunteer Groups

- HON Signature Initiatives