

VMS-Admin-01 – How to Enter a New Opportunity – Rev5

To a large extent, these instructions define the *set of conventions* that BPTMN uses to set up a new opportunity. These conventions may differ from those of other chapters.

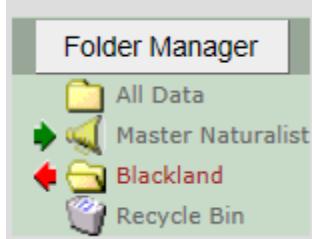
For entering a new opportunity, some of the screens do not apply to us and others do. Even those that do may not need to be fully filled out.

Where the BPTMN currently has Partner/Activity selections for chapter members, the VMS system only has Opportunities, so the members' dropdown selection list for hours entry may become quite long. In an effort to make things simpler, in many cases we will have one VMS opportunity that subsumes several of the partner/activities on the old BPTMN activities PDFs. For our members' benefit, the old activity PDF will have an added column for each line showing what the new VMS Opportunity is.

Several different Opportunities were used as the examples for this manual and the screenshots shown may be different for other Opportunities.

1. Before doing anything else, make sure the Folder manager is set to look at **Blackland** (it may come up in All Data). You will have to refresh the screen if you make this change.

NEVER EVER click the red or green arrows unless you have been instructed as to their use.



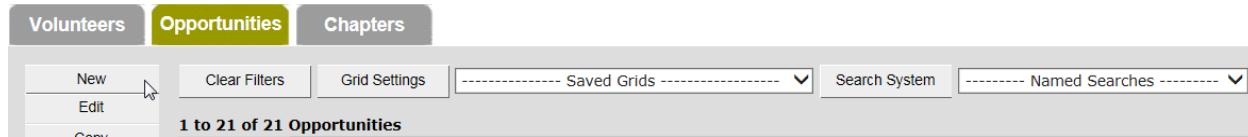
Note: Opportunities can be renamed at will to clarify what they are, but if they are ever deleted, then the hours assigned to them will be lost.

A great deal of discussion and tradeoff was taken in naming the initial set of Opportunities, both AT and VH. Please contact Melanie Schuhart or Kathi Camp before deleting or adding without understanding

2. Select the Opportunities Tab, click Clear Filters to clear all filters and make sure

Grid Settings is set to ---TMN Standard---

Search System is set to --Named Searches--



3. Click the New button and fill out the resulting tabbed screen as indicated in the following pages. Except for Tab 4, the TABS can be entered in almost any order and gone back to if need be. See the Tab 4 page for further info.
4. Click FINISH to complete the new Opportunity and return to the Opportunities TAB screen
5. If you need to edit what you've entered after you have clicked FINISH, then select the entry on the Opportunities TAB screen and click EDIT.
6. In the following descriptions,
 - a. Tabs colored GREEN must be filled out (**Tabs 1, 2, 3, 4, 6 (parts of 7), 11, 12**)
 - b. Tabs colored RED must be left alone (**Tabs (parts of 7), 8, 9**)
 - c. Tabs colored BLUE are optional (**Tabs 5, 10**)

Tab 1 - Main Info

Project Profile: YMCA: Collin County Adventure Camp

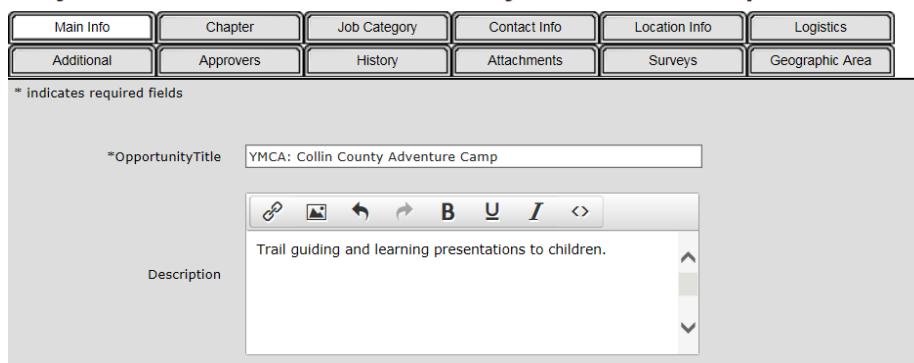
| | | | | | |
|------------|-----------|--------------|--------------|---------------|-----------------|
| Main Info | Chapter | Job Category | Contact Info | Location Info | Logistics |
| Additional | Approvers | History | Attachments | Surveys | Geographic Area |

* indicates required fields

*OpportunityTitle YMCA: Collin County Adventure Camp

Description Trail guiding and learning presentations to children.

Text area with rich text editor toolbar:



Notes:

1. Opportunity Title - a meaningful title with the following BPTMN conventions.

This title will show up in the member's personalized dropdown list of opportunities.

- a. If this opportunity is for Advanced Training, then the title should ALWAYS start with **AT:**
- b. Next should come the organization shortcode (e.g. BPTMN, BPRC, NWS, etc) and a colon (:)
- c. Next should come the project name or activity and possible special instructions (e.g. *(limit 1hr/month)*)
- d. The total character count for the title (a, b and c above) should not exceed about 45-60 characters or it may not display properly on the Volunteers' personal Opportunity dropdown list.
- e. Some activities may need to be duplicated - one for AT: and one for VH - if either VH or AT may be used depending on the circumstances. For example, lectures at the Monthly Meeting given by a chapter member will need two Opportunities: one for the listening audience (AT) and one for the speaker (VH)

2. Description – This should contain whatever notes the Opportunity creator wishes to add and should include any special cases that were decided on as Board Action after the initial definitions.

This will show up under the member's MyPlacements link

3. By convention, PLEASE use the following definitions for Trail Guides, Public Outreach and Presentations. Annex B has further descriptions as viewed from the member entering hours.

- Trail Guides

- **partnerName: Trail Guide** - Used where specific/formal training is required by the partner before someone can lead a walk on their property (e.g. the Heard, LLELA, BPRC, and others)
- **BPTMN: Trail Guide** - Used where the trail guiding requires no specialized training other than general TMN training

- Public Outreach

- **partnerName: Public Outreach** - Used when we are helping with another organization's Booth using our TMN training
- **BPTMN: Public Outreach** - When we are using our own booth to promote the BPTMN

- Presentations/talks vs. Community Presentation

- **partnerName: Educational Talk** (not program or presentation) - Presentation using TMN training to the public as a trained partner representative or member of a specific partner
- **BPTMN: Community Presentation** - General presentation as a Master Naturalist to an organization as a Guest Expert

Tab 2 - Chapter

Project Profile: YMCA: Collin County Adventure Camp

| | | | | | |
|------------|-----------|--------------|--------------|---------------|-----------------|
| Main Info | Chapter | Job Category | Contact Info | Location Info | Logistics |
| Additional | Approvers | History | Attachments | Surveys | Geographic Area |

* indicates required fields

Under which chapter does this project fall?*

Blackland Prairie Texas Master Naturalists

Chapter List

| |
|---|
| <input checked="" type="radio"/> Blackland Prairie Texas Master Naturalists |
|---|

Notes:

1. This may be initially blank but should always be checked. In an ideal world with a real application, this would come up pre-checked or never even appear. However, the state staff use the same process for all chapters and can edit everything - this lets them pick which TMN chapter this opportunity should go with.

It has no relevance to our chapter but still needs to be checked

Tab 3 - Job Category

Project Profile: YMCA: Collin County Adventure Camp

| | | | | | |
|------------|-----------|--------------|--------------|---------------|-----------------|
| Main Info | Chapter | Job Category | Contact Info | Location Info | Logistics |
| Additional | Approvers | History | Attachments | Surveys | Geographic Area |

Which type of activity will the volunteer perform? (Internal Use)

Texas Master Naturalist

Notes

1. This may be initially blank but should always be checked. In an ideal world with a real application, this would come up pre-checked or never even appear. However, the state staff use the same process for all chapters and can edit everything - this lets them pick which TMN chapter this opportunity should go with.

It has no relevance to our chapter but still needs to be checked

Tab 4 - Contact Info

Project Profile: YMCA: Collin County Adventure Camp

| Main Info | Chapter | Job Category | Contact Info | Location Info | Logistics |
|------------|-----------|--------------|--------------|---------------|-----------------|
| Additional | Approvers | History | Attachments | Surveys | Geographic Area |

* indicates required fields

Same as chapter

*Address 1: 1180 W. Houston St
Address 2:
*City: Anna
State: Texas
County: Choose a county
Zip: 75409
Country: United States

Opportunity/Organization Contact: YMCA
Primary Phone: (214) 667-5600
Secondary Phone:
Email Address:
Alternate Contact Name:
Alternate Contact Phone:
Web Site (if applicable):

Notes

1. **The program insists on an address before you can move on from this page.** It may be convenient to fill it out last.
2. BPTMN policy is that this is the address and contact info for the Opportunity Organization and should not have a chapter member listed on it
3. The *Same as chapter* box should only be checked for
 - a. Opportunities specific to the BPTMN itself (such as admin or chapter meeting)
 - b. Opportunities which might have multiple addresses for some reason (for example an organization that has both national offices and also local chapter offices)
 - c. Opportunities for which the address is unknown.
 - d. Opportunities for which we want people to go to the chapter for information rather than the organization itself.

Tab 5 - Location Info

Project Profile: YMCA: Collin County Adventure Camp

| | | | | | |
|------------|-----------|--------------|--------------|---------------|-----------------|
| Main Info | Chapter | Job Category | Contact Info | Location Info | Logistics |
| Additional | Approvers | History | Attachments | Surveys | Geographic Area |

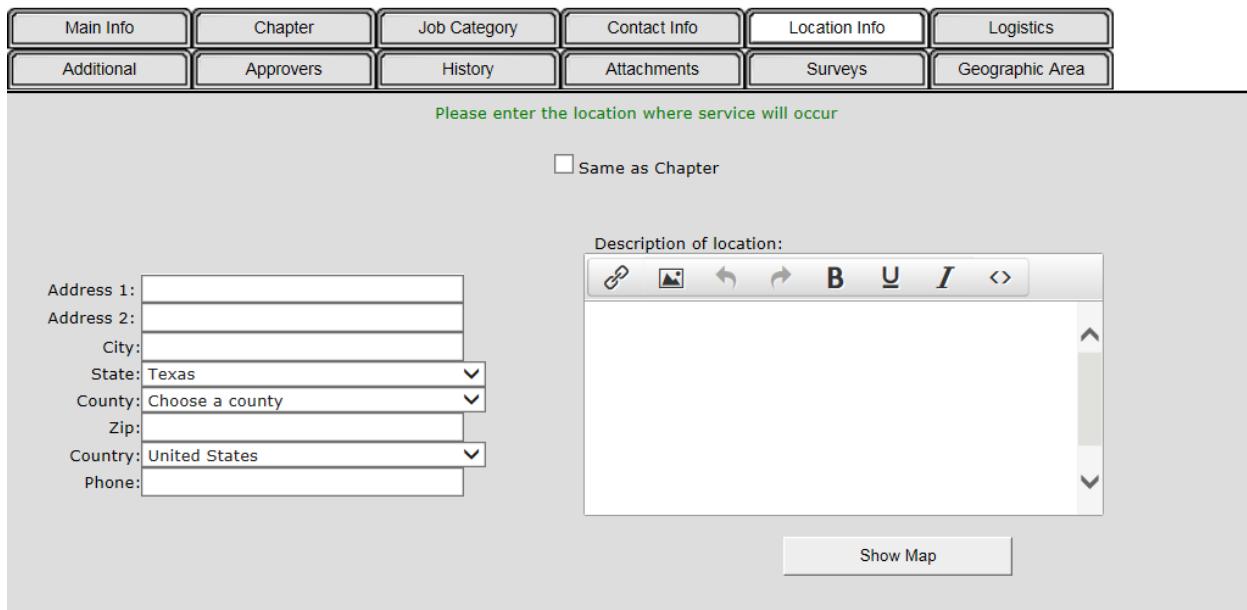
Please enter the location where service will occur

Same as Chapter

Description of location:

Address 1:
Address 2:
City:
State: Texas
County: Choose a county
Zip:
Country: United States
Phone:

Show Map



Notes

1. In the interests of time, for the BPTMN initial data entry, this Tab may be left blank, although it may be filled in if desired by whoever is entering the data.
2. The Location Info Address may be different from the Contact Info Address although they will frequently be the same. For example, the LLELA Office address would go into Tab 4 while this Tab would contain the LLELA location itself.
3. By BPTMN convention, the *Same as Chapter* should not be used. We have no real address other than the P.O. Box and the Agrilife offices for phone and fax.

Tab 6 - Logistics

Project Profile: YMCA: CCAC Trail guide

| Main Info | Chapter | Job Category | Contact Info | Location Info | Logistics |
|------------|-----------|--------------|--------------|---------------|-----------------|
| Additional | Approvers | History | Attachments | Surveys | Geographic Area |

Any additional information about this project

Project Creation Date:

Project Expiration Date:

Display Begin Date:

Display End Date:

Volunteers who sign-up for this activity on their own should be:

requested
 approved
 approved into schedule slots if already placed with project

Minimum age of volunteers

Number of volunteers needed

How many hours will volunteer serve per week?

Notes:

1. By BPTMN convention, the only fields that must be changed are the *Additional Information*, *Project Expiration Date* and *Approved*
 - a. *Additional Information* can have anything the person entering the data feels is useful
 - b. ***Project Expiration Date* should be blank** (above the first day/month/year in the dropdown list) unless this is a one-time VH or AT opportunity with an explicit end date.
 - c. ***Approved* MUST be checked.** If it is left blank, the member will not be able to self-delete the opportunity from their *my Placements* link.

Tab 7 - Additional

Project Profile: YMCA: Collin County Adventure Camp

| | | | | | |
|------------|-----------|--------------|--------------|---------------|-----------------|
| Main Info | Chapter | Job Category | Contact Info | Location Info | Logistics |
| Additional | Approvers | History | Attachments | Surveys | Geographic Area |

Group
Job Rate Job Rate for this service opportunity: \$23.00

Facility
 TMN Federal Reporting
 Agency Reports
 Availability
 Orientation/Training
 Opportunity Type
 Skills, Interest, or Equipment
 Service Project Activity
 Order Stats

Notes:

This is the most complex tab for the Opportunity but only the following four items under group need be filled out

1. **Job Rate** - fill out as blank for AT and \$23 for VH and leave blank for AT
2. **Facility** - Duplicate information from other tabs, but fill it out anyway

| | |
|---|---|
| Group Job Rate Facility TMN Federal Reporting | Facility Name: YMCA Collin County Adventure Camp Facility Type: Scout Facility/Youth Camp <input type="button" value="▼"/> |
|---|---|

3. **TMN Federal Reporting - This is important!**

It is what justifies the money the state gets from the federal government - IT MUST BE ACCURATE!

| | |
|--|--|
| Group Job Rate Facility TMN Federal Reporting Agency Reports Availability Orientation/Training Opportunity Type Skills, Interest, or Equipment Service Project Activity Order Stats | Required for TMN opportunities for federal reporting requirements Will the soil be disturbed: <input type="radio"/> Yes <input checked="" type="radio"/> No Will this project impact birds, mammals and/or their habitat?: No <input type="button" value="▼"/> What category does the project fall under: Enter the congressional district number the Enter the legislative district number the Please list the project partners: <input style="width: 150px; height: 100px; vertical-align: top;" type="text"/> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> Training & Educating Others (Direct) Advance Training Public Outreach (Indirect) Technical Guidance Natural Resource Management Nature/Public Access Field Research (Including surveys) Chapter & Program Business/Administration Other </div> |
|--|--|

- Answer the first two questions as appropriate. Note that the animal impact question is duplicated at the bottom. Answer only the first one.
- The *Project Category* items are defined in Annex 1.
- *Legislative District Number* and *Project Partner* can be left blank

(continued next page)

4. **Opportunity type** - select Advanced Training, Initial Training or Service Project as appropriate

| | | | |
|--|--|---------|------------|
| Additional | Approvers | History | Attachment |
| Group Job Rate Facility TMN Federal Reporting Agency Reports Availability Orientation/Training Opportunity Type Skills, Interest, or Equipment Service Project Activity Order Stats | Opportunity Type: <input type="radio"/> Advanced Training <input type="radio"/> Initial Training <input checked="" type="radio"/> Service Project | | |

5. All other items are not used and should not be changed.

- **Agency Reports,**
- **Availability,**
- **Orientation/Training,**
- **Skills/Interest/Equipment,**
- **Service Project Activity,**
- **Order Stats**

Tab 8 - Approvers

Project Profile: YMCA: Collin County Adventure Camp

| | | | | | |
|------------|-----------|--------------|--------------|---------------|-----------------|
| Main Info | Chapter | Job Category | Contact Info | Location Info | Logistics |
| Additional | Approvers | History | Attachments | Surveys | Geographic Area |

* indicates required fields

Enter or select the people that can approve items for this opportunity.

Available approvers

Approvers for this project

>>
<<

Copy Delete Same as program.

New Approver

This Tab is special use and BPTMN will not use it except in very special circumstances which are not likely to occur.
Consult with state VMS people before filling anything out.

Tab 9 - History

Project Profile: YMCA: Collin County Adventure Camp

| | | | | | |
|------------|-----------|--------------|--------------|---------------|-----------------|
| Main Info | Chapter | Job Category | Contact Info | Location Info | Logistics |
| Additional | Approvers | History | Attachments | Surveys | Geographic Area |

History:

22 Jun 2015 01:27 PM
Following actions performed by Clyde Camp:
Opportunity Type::Opportunity Type
changed from **N/A** to **Service Project**

22 Jun 2015 01:10 PM
Following actions performed by Clyde Camp:
Facility::Facility Name
changed from **YMCA Collin County Adventure Camp** to
YMCA Collin County Adventure Camp

22 Jun 2015 12:50 PM

Filter history to display:

Everything

Add Note Export History History Report

The History referred to here is the changes that have been made to this opportunity and who made them. This is for reference and troubleshooting only. And to identify who changed something that should not have been changed!

Tab 10 - Attachments

Project Profile: YMCA: Collin County Adventure Camp

| | | | | | |
|------------|-----------|--------------|--------------|---------------|-----------------|
| Main Info | Chapter | Job Category | Contact Info | Location Info | Logistics |
| Additional | Approvers | History | Attachments | Surveys | Geographic Area |

Attachment list:

| Uploaded | Attachment |
|----------|----------------------------------|
| - | Opportunity Document |
| - | Opportunity PDF |
| - | Opportunity Image |
| - | TPWD - Master Naturalist attachr |

Image Thumbnail:

This attachment visible in eRecruiter:

File:

3 MB maximum per attachment

Notes:

Download Upload Delete Save notes Restore notes

The BPTMN is not using this capability for its initial data entry.

It may be used in the future but has not been used to date.

Tab 11 - Surveys

Project Profile: YMCA: Collin County Adventure Camp

| | | | | | |
|------------|-----------|--------------|--------------|---------------|-----------------|
| Main Info | Chapter | Job Category | Contact Info | Location Info | Logistics |
| Additional | Approvers | History | Attachments | Surveys | Geographic Area |

Select the surveys that are used with this opportunity.

Available Surveys

- ARCHIVE-TMN Report Hours-02/19/2015
- Copy of TMN Report Hours
- New Opportunity Email Test
- TMN Field Research Hours
- TMN Initial Training Hours
- TMN New Opportunity
- TMN Report Hours-1X

>>
<<

[New](#) [Edit](#) [Delete](#)

Surveys used by this opportunity

- TMN Report Hours

[Move Up](#) [Move Down](#)

The top to bottom order of the surveys listed here determines the order in which the surveys are displayed in Recruiter.

Notes:

1. **The survey in the right hand box will automatically appear in the member's dropdown box following the Opportunity Title from Tab1.**
2. There should be only one selected for each Opportunity.
3. By default this comes up with *TMN Report Hours* in the *Surveys Used* box
(Survey does not mean what you think it means. Just ignore the word)
4. Unless otherwise told to do so, the only other general use categories that BPTMN will use are
 - a. TMN Initial Training Hours - for the annual training class Opportunity
 - b. TMN Field Research Hours - for on-going multi-day events in the Field Research Federal Category (see Tab #7) (ex. CoCoRaHS)
 - c. TMN Report Hours-1X – A one-time use survey for an event that only happens once (specific AT lectures, etc). Once the volunteer has reported hours for that event, it will no longer show up in their drop down box.
5. Select an item and then use the << or >> button to move it to the other box.

Tab 12 - Geographic Area

Project Profile: YMCA: Collin County Adventure Camp

| | | | | | |
|------------|-----------|--------------|--------------|---------------|-----------------|
| Main Info | Chapter | Job Category | Contact Info | Location Info | Logistics |
| Additional | Approvers | History | Attachments | Surveys | Geographic Area |

In which region does this opportunity occur?

- | | | |
|--|---|---|
| <input type="checkbox"/> Panhandle Plains | <input type="checkbox"/> Gulf Coast | <input type="checkbox"/> Hill Country |
| <input checked="" type="checkbox"/> Prairies & Lakes | <input type="checkbox"/> South Texas Plains | <input type="checkbox"/> Big Bend Country |
| <input type="checkbox"/> Pineywoods | | |

The geographic area should always be *Prairies & Lakes*
but the default is no selection.

Always check this Box

Annex 1 - Opportunity Category Definitions

Note: The Code column is for internal use and not used by the TMN program

Opportunity Category Definitions

| Activity | Code* | Description | Examples |
|--------------------------------------|--------------|---|---|
| Training & Educating Others (Direct) | TR | Leading, organizing, instructing or staffing an educational activity where participants have a planned learning objective and generally stay for the full event (e.g., planned start and end times with a single agenda). | <ul style="list-style-type: none">• Classroom instruction• Workshops• Presentations• Webinars• Chapter MN trainees/interns class |
| Advanced Training | AT | Advanced Training you attend as a participant | <ul style="list-style-type: none">• AT sessions at TMN Statewide Annual Meeting• Rainwater Harvesting Steward Program Training• Project WILD Instructor/Facilitator Training |
| Public Outreach (Indirect) | PO | Leading, organizing, or staffing an educational activity where participants come and go and are able to inquire on a broad set of topics. <or> Writing an educational article or brochure. | <ul style="list-style-type: none">• Manning booth or visitor center• Writing articles or brochures• Wildlife Hotline |
| Technical Guidance | TG | Any work that provides written management recommendations to land owners and/or land managers. | <ul style="list-style-type: none">• Writing ecosystem management plans• Land Management Assistance Program (LMAP)• City/Community/Regional Habitat Conservation Plan Committee |
| Natural Resource Management | RM | Activities that improve the health of a natural area or resource. Natural resource management, restoration, rescue and rehabilitation. | <ul style="list-style-type: none">• Invasive species or trash removal• Plant rescue• Restoring or improving natural habitat• Wildlife houses, towers, chimneys• Developing an eco-system plan |

Opportunity Category Definitions

| | | | |
|---|-----|--|---|
| Nature/Public Access | NPA | Field-based activities that improve and manage the public's access to natural areas or resources. Creating and/or maintaining nature trails, wildscapes and/or interpretive areas | Developing new or improving existing: <ul style="list-style-type: none">• Hiking trails• Interpretive gardens• Wildlife viewing blinds• Wildscapes• Interpretive hikes |
| Field Research (Including Surveys) | FR | Planning, leading or participating in data collection and/or analysis of natural resources where the results are intended to further scientific understanding. | <ul style="list-style-type: none">• Field surveys• Banding and tagging• Species watch |
| Chapter & Program Business/Administration | CB | Activities related to managing and running a master naturalist chapter and its committees. | <ul style="list-style-type: none">• Board of Director or committee duties• Newsletter or website management• Management of chapter records• Hours reporting• Chapter reporting• Representing chapter at multi-chapter events• Other chapter administration• Assistance to State Program and State Program Office |
| Other | OT | Any activity approved by a chapter that is not defined above. <i>In general a chapter should only have a small percentage of hours in this activity (< 5%). When this activity code is used a chapter should investigate the reason.</i> | <ul style="list-style-type: none">• Animal rescue |

* Codes may not be used by your chapter when entering opportunities

Annex 2 VMS - Opportunity Naming Conventions

Some Different Names for Your Activities

In order to make our list of Opportunities manageable in the new system, BPTMN went through our projects and activities to combine, consolidate and clean up a list that had grown like Topsy through the years.

As a result, the list went from 201 activities to 73. That does not mean that your particular activity has been eliminated. It just means that your activity may have a new name. We have provided you with a complete cross-reference table of Project/Activities to Opportunities. Most of the names are self-explanatory, but some may need clarification.

Here are a few:

- A **BPTMN: Community Presentation** is a presentation given by you as a Master Naturalist (guest expert) to a group or organization, including but not limited to ISD classrooms, Boy/Girl Scout workshops, AgriLife classes, TMN State Conference seminars.
- A **(partner name): Educational Talk** is a presentation by you as a Master Naturalist representing that organization about interests of that organization. This is especially true for organizations that require special training to prepare you to work with them. Example: the Heard, the Raptor Center, or Holifield.
- Booth staffing is now Public Outreach –
 - **BPTMN: Public Outreach** if manning a BPTMN booth at some event;
 - **(a partner name): Public Outreach** if manning that partner's booth and promoting nature and natural resources.
- For AT from other Master Naturalist chapter meetings; for members attending training class sessions that you have not heard before; and for bird, plant, tree and other nature walks that you use for Advanced Training, use **AT: BPTMN: Other Pre-approved Training**
- If you train for trail guiding for one of our Partners and are leading walks at the Partner site, record it under partner name. EX. **Heard: Trail Guide**
If you are leading a walk for a group somewhere other than at a partner site, record as **BPTMN: Trail Guide**
- For any training required by Partners before you can work at their site, including but not limited to the Heard, the Raptor Center, Holifield Outdoor Learning Center, and LLELA, use **AT: Volunteer Training for Support of Partners**.
- Bird, wildlife, plants, insect surveys, tree ID's, seed collections can all be recorded under **BPTMN: Bird/wildlife/ insect/plant and other surveys**.
- The term '**Facility Maintenance**' includes **construction**.
- Work on any prairie restoration other than with a major partner has been combined in **BPTMN: Other Prairie Restoration**. This includes Frankford, Bethany and other cemeteries.