



# eCoordinator - Admin 201

Saturday, October 19, 2018

10:00 AM - 12:00 PM

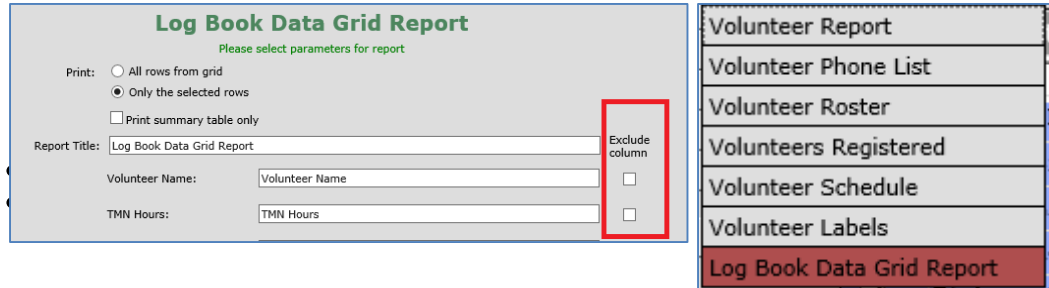


# **Recertifications and Milestones**

- **Grid:**
  - Logbook/TMN Standard-Awards and Recertification
- **Be sure that it is sorted by TMN Hours**
- **Make sure your date range is correct.  
(Current Year for recertification or all  
dates for Milestones)**
- **Grids for each milestone and current year  
recertification.**
- **Use the Relative Date ranges.**

# Export Data to Excel or PDFs

- From any grid:



The screenshot shows a web interface for generating reports. The main form is titled "Log Book Data Grid Report" and includes the following elements:

- Print:** Radio buttons for "All rows from grid" and "Only the selected rows" (selected), and a checkbox for "Print summary table only".
- Report Title:** A text input field containing "Log Book Data Grid Report".
- Volunteer Name:** A text input field containing "Volunteer Name".
- TMN Hours:** A text input field containing "TMN Hours".
- Exclude column:** A vertical column of checkboxes, with the top one checked. This column is highlighted with a red box.

To the right of the form is a vertical menu of report options:

- Volunteer Report
- Volunteer Phone List
- Volunteer Roster
- Volunteers Registered
- Volunteer Schedule
- Volunteer Labels
- Log Book Data Grid Report (highlighted in red)

- Note that the check marks are to *Exclude* columns from the report.
- It will export to a pdf, TXT or **Excel file**.
- To open a txt file in excel, Drag and Drop your text file into a blank Excel sheet (in the A1 cell)

# Automations:

- If you need a new automation, let us know via the Help Desk
- Volunteer profile changes
- Some Opportunity changes



# Sending Emails from eCoordinator

- Sending emails from within eCoordinator can be simple yet confusing.
- You have to be aware of where you are and who you are sending to.
- Be sure to use the preview button before you send it out.



# Attaching Grids & Reports to Emails

You can attach pre-existing grids and reports to your email

The Data Grids are all of the grids that have been created in VMS. *(and that's why it's important to put your chapter/name in the title of the grid)*

It matters where you start – If you are sitting in All Data, your grid data will include all the people in the transfer folder and the inbox.

Vol = Volunteer grid

LBVol = Volunteer Logbook grid

Opp = Opportunity grid

LBOpp = Opportunity Logbook grid

How would you use this functionality?

The screenshot shows a web browser window titled "Volunteer Email" with the URL "https://tpwd.samaritan.com/coordinator/index.php". The page has a "Volunteer Mail Merge Fields" section with a dropdown for "Activity Status" and an "Insert" button. Below that is an "Attachments" section with a "Choose File" button and "No file chosen" text. A "Send Using:" section is partially visible at the bottom.

A large dropdown menu is open, titled "Attach Data Grid Report to Email:". It lists various grid names, with "LB Vol: Hours approved by VMS Team for Ray" highlighted in blue. Other items include "LB Vol: EFMN-Admin10-Approved date", "LB Vol: GBAC - Recertification", "LB Vol: GCMN-Approval", "LB Vol: GLC approval", "LB Vol: GWMN Approval", "LB Vol: GWMN Hours", "LB Vol: HaysCertInfo", "LB Vol: History Snapshot", "LB Vol: Hours approved by VMS Team", "LB Vol: hours approved-date approved", "LB Vol: Hours Report", "LB Vol: Impact Test", "LB Vol: impat2", "LB Vol: In Training review", "LB Vol: Initial Training Log-interns", "LB Vol: J 1 TMN Standard-Awards-Recs-041617", "LB Vol: J 2 TMN Standard-Approval Audit-041617", "LB Vol: J 3 TMN Standard-Disapproved-041617", and "LB Vol: J 4 TMN Standard-Not Yet Approved-041617".

A red box highlights the "Attach Data Grid Report to Email:" dropdown in the main interface, and a blue arrow points from it to the expanded menu.

# **Dismissed/Dead/Deleted volunteers**

- In general – we don't delete volunteers, we just mark them TMN-Inactive and remove their opportunity approvals.
- We move around a lot! Add a note to their profile – User Defined/Certifications/Master Naturalist Certification Comments (These comments can be seen by all divisions at TPWD, so be tactful & polite—in 255 characters or less..) It will help us out in the future when we try to find volunteers.
- Mark the volunteer TMN-Inactive (don't change the password, ID or the TPWD status on the first page of the volunteer profile, they may need it for work with other divisions).
- Un-approve the volunteer from all opportunities
- Deceased? This is the only time we change the TPWD status on the first page of the volunteer profile. Change the TPWD status to 'Deceased' and the TMN Status 'TMN-Inactive' and remove their email.
- If they haven't paid dues and haven't recorded hours for the last two years, consider marking them as TMN-InActive.

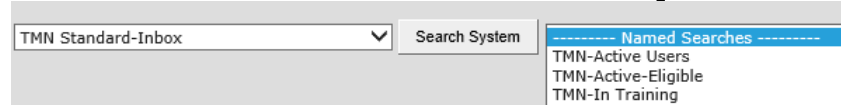
# **Transferring Volunteers**

- The State Admin team is now doing all the transfers – We can see all the data, so it just worked better for us to do it.
- Submit a help desk request at [txmn.org/help](https://txmn.org/help) to start the transfer





# The Inbox – Cleanup & New Recruits

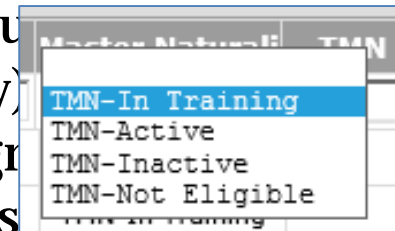
- Grid: TMN Standard-Inbox, be sure the Names Searches is 'Named Searches' to pick up all entries.



- You can use the column filters.
- There shouldn't be too many entries in the inbox. Our goal should be none (or at least very few).
- Your new recruits are here!
- Don't forget to take them out of the Inbox
- *When they sign up – they get an automatic email from TPWD, telling them you will contact them.*

# Training Classes

- All classroom work (and related field trips) should be applied to the 'Initial Training' opportunity for your chapter. The Initial Training opportunity does not have a federal category and does not count towards federal grants at the state level.
- Contact the Help Desk to make sure we don't have any duplicates with TPWD
- Find Your Training Class:
  - Select Named Search: TMN-In Training volunteers (Don't forget the  Button or Enter key)
  - Select Logbook  for all volunteers in the group
  - Logbook Grid: TMN Standard-Training Class summary mode but you can change to detail mode.
- TIP: Use the 'limit number of volunteers' field to restrict approvals for your whole class at once



How can we help you today?

Enter your search term here... SEARCH

- [+ New support ticket](#)
- [📄 Check ticket status](#)

## Knowledge base

### Using the Helpdesk

Helpdesk How To (1)

- [📄 Helpdesk: TMN Member Guide](#)

### Volunteers

Getting Started Videos (3)

- [📄 Getting answers to your questions- Helpdesk Tutorial](#)
- [📄 Logging in as a Registered User, Change your Password and Update Your ...](#)
- [📄 How to Report Your Service, View Your Logbook, Find & Use Online VMS ...](#)

Documentation (2)

- [📄 TMN VMS Volunteer Guide](#)
- [📄 Volunteer Cheat Sheet](#)

FAQ (2)

- [📄 FAQ-General](#)
- [📄 FAQ-eRecruiter](#)

Apply to

- [📄 Apply 1](#)

### Administrators

Newsletters (31)

- [📄 TMN VMS 2019 3rd Quarter Newsletter](#)
- [📄 TMN VMS 2019 2nd Quarter Newsletter](#)
- [📄 TMN VMS 2019 1st Quarter Newsletter](#)
- [📄 TMN VMS 2018 4th Quarter Newsletter](#)
- [📄 TMN VMS 2018 3rd Quarter Newsletter](#)
- [» See all 31 articles](#)

Documentation (13)

- [📄 TMN VMS Admin Guide](#)
- [📄 TMN VMS Reporting Guide](#)



Administ

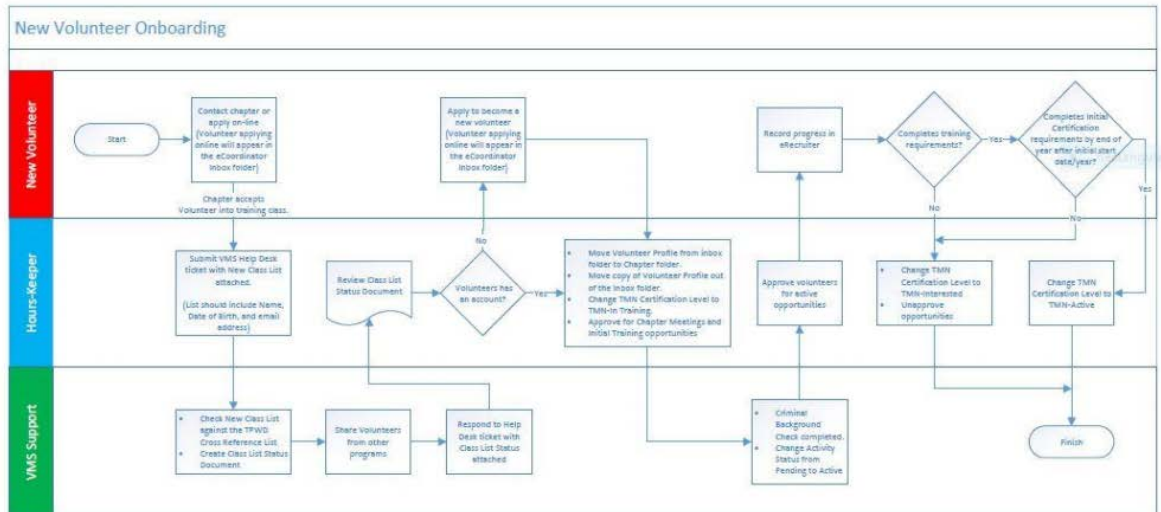
- [📄 Admin](#)

Training

- [📄 2018 5](#)
- [📄 Trainin](#)

# txmn.org/help The Admin Guide

## VOLUNTEER TAB PROCESS FOR ONBOARDING NEW TRAINEES



# Organization/Opportunity Field

- The key to working in a State wide system.
- The organization field should contain the organization that sponsors the event or activity (such as 'Keep Waco Beautiful' or 'Davis Mountain Preserve'). If it's a local organization it should be spelled out as much as possible so that the statewide management team can determine who the organization is directly, it will also eliminate possible duplications of acronyms. National, or statewide organizations (like TPWD, NOAA, NPSOT, etc) can use their common acronym. And there are always some opportunities that are sponsored by the chapter itself. The Opportunity TMN Standard grid sorts first on the organization field so that all opportunities for that organization can be seen together.
- There are two columns in the TMN Standard grid for Alternate Name & Phone information for the opportunity.

# Opportunity Description Field

- The description field is now on the surveys
- Some basic HTML is OK.

\* OpportunityTitle Lake Whitney: Training Others

Description Training and educating others at Lake Whitney. Leading walks, etc. (Include Impact Data)

```
<p>Training and educating others at Lake Whitney. Leading walks, etc. <br /><span style='color: red;'>(Include Impact Data)</span></p>
```

```
<p>Field-based activities that improve and manage the public's access to Lake Whitney State Park. Creating and/or maintaining nature trails, Wildscapes and/or interpretive areas. <br /><br /></p><ul><li>Hiking trails</li><li>Interpretive native species gardens (NOT vegetable gardens)</li><li>Wildlife viewing blinds</li><li>Building Interpretive hikes</li></ul>
```

## Report Service

Please select from the following survey(s):

Lake Whitney: Training Others: TMN Report Hours+ ▼

**Opportunity Description:**

Training and educating others at Lake Whitney. Leading walks, etc. (Include Impact Data)

## Report Service

Please select from the following survey(s):

Lake Whitney: Trail Work and Public Access Areas: TMN I ▼

**Opportunity Description:**

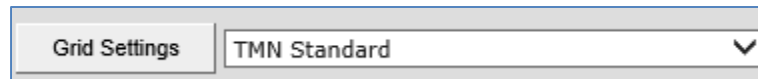
Field-based activities that improve and manage the public's access to Lake Whitney State Park. Creating and/or maintaining nature trails, Wildscapes and/or interpretive areas.

Developing new or improving existing:

- Hiking trails
- Interpretive native species gardens (NOT vegetable gardens)
- Wildlife viewing blinds
- Building Interpretive hikes

# Creating Grids

- We have a variety of grids setup for Volunteers, Opportunities and Logbooks. But you might have a need to create your own special grid.
- Start in a Grid that is close to what you want and select “Grid Settings”



- The Available Columns will be contingent on where you were when you started (an opportunity, a volunteer or a logbook entry). They are grouped based on the tabs and groups in the profile.
- You can sort by selecting (carefully) the number and down arrow in the Selected Columns box.
- When you save your grid – be sure to put your Chapter Name in front so we can tell who it belongs to when we use fields that pull grids.

# Creating Grids Window

## Grid Settings For Opportunities

Select Columns to display in the Grid

### Available Columns:

<input type="checkbox"/> Opportunity
<input type="checkbox"/> Opp: Job Rate*
<input type="checkbox"/> Opp: Facility*
<input type="checkbox"/> Opp: TMN Federal Reporting*
<input type="checkbox"/> Opp: Agency Reports*
<input type="checkbox"/> Opp: Availability*
<input type="checkbox"/> Opp: Orientation/Training*
<input type="checkbox"/> Opp: Opportunity Type*
<input type="checkbox"/> Opp: Skills, Interest, or Equipment*
<input type="checkbox"/> Opp: Service Project Activity*



>>  
<<

### Selected Columns:

Column Searches	Sort	Width / Max
OpportunityTitle	▼ 2	25 / 100
Opportunity/Organization Contact	▼ 1	18 / 50
Alternate Contact Name		16 / 50
Alternate Contact Phone	—	14 / 50
Opportunity Type/Opportunity Type*	▼	18 / 50
TMN Federal Reporting/What category does	▼	16 / 50
Filled Vol Positions	= ▼	5 / 25
Surveys Used		19 / 255
Display End Date	= ▼	5 / 50
Chapter Name	—	15 / 50
Region		15 / 255



\* Indicates user defined fields.

### Save As:

TMN Standard

Make this saved grid available to all users of this account

### Saved Grids List:

TMN Standard

The top to bottom order of the fields above matches the left to right order of the columns on the grid.

Number of records per page:

### Additional items to include as part of this saved grid:

Column searches

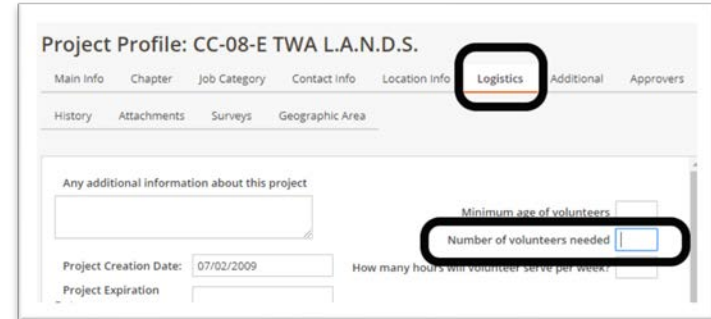
Current column sort

Currently selected folder  ▼

Currently selected named search  ▼

# Approving subsets of Volunteers or Opportunities

- Use the Limit number of volunteers to restrict unnecessary approvals



Project Profile: CC-08-E TWA L.A.N.D.S.

Main info Chapter Job Category Contact info Location info **Logistics** Additional Approvers

History Attachments Surveys Geographic Area

Any additional information about this project

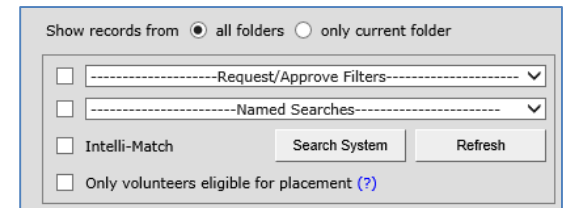
Minimum age of volunteers

Number of volunteers needed

Project Creation Date: 07/02/2009 How many hours will volunteer serve per week:

Project Expiration

- Use the named searches field to show only a subset of your volunteers
- Examples:
  - From the Opportunity side:  
use the TMN-In Training search
  - From the volunteer side: use the TMN-Active Opportunities search



Show records from  all folders  only current folder

-----Request/Approve Filters-----

-----Named Searches-----

Intelli-Match


Only volunteers eligible for placement (?)



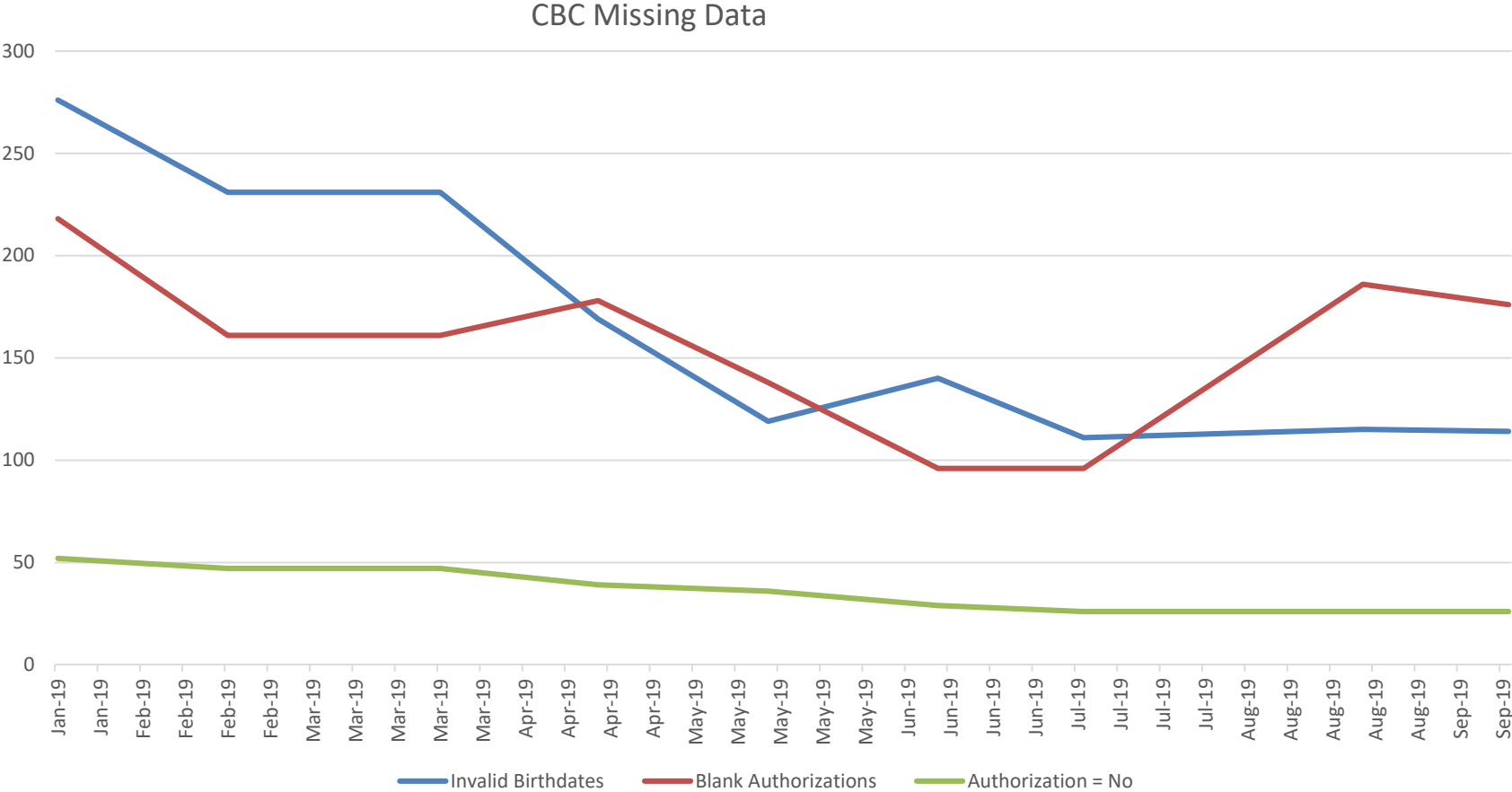
# Background Checks

- Annual background checks are now being done by TPWD through the VMS on all TMN-Active and TMN-InTraining volunteers
- Be sure your volunteers have put in their driver's license number\*, birthdate and have agreed and signed the Background Check Waiver in their profile.
- Other ways to complete the CBC – by Phone, full search
- Texas A&M AgriLife Extension accepts the TPWD background check as listed on their 'prior approved screenings list'.
- Members can access their profile at the bottom of their eRecruiter Dashboard.
- Don't worry about the TPWD Status = Pending.

\*Not required for standard CBC

 [Edit My Profile](#)

# CBC Missing Data



# **Federal Category Clarifications**

- **Technical Guidance vs. Other**
  - Other shouldn't be more than 5% of total chapter hours
- **Membership on partner boards. What is allowed, what isn't**
- **Cooking/Gift Shops/Wildlife Management/Citizen Science/On Call help desks**
- **Audit Review of NRM/NPA..it depends**

# Impact Data

- AgriLife needs impact data to qualify for grants and legislative reports
- Only one person should report the impact data for the event
- Generally only reported for Direct and Indirect training
- The Grand Total Field has been removed
- Is impact data allowed when training Master Naturalists?

# The Full Development List

eRecruiter
✓ * Chronological listing
✓ * TMN Hours on Dashboard
* Printing/Exporting capabilities
Make the columns align
Horizontal scroll bar at the bottom of logical screen
Clean up data in the summary area
Replace 'Park' with 'Chapter'
Clean up white space, eliminate unused columns
2019: Add distinguishing color for Unapproved LBEs

\* At the top of the overall priority list

# The Full Development List

## eCoordinator

\* The ability to move LBEs from one opportunity to another

✓ Make columns stretchable

Select entries across grid pages

Ability to select *multiple* volunteers and approve/disapprove them for *multiple* opportunities

Increase Named Search Name limit

Fix online Samaritan documentation

Show number of opportunities assigned to people in volunteer tab

Right justify grid column summary totals

Change 'Show All' to 'Clear Filters'

Report Writer App

In Opportunity/Contacts tab, remove 'same as chapter' check box

Add a history option for Grids, some way to see who can see what grid

2019: Copy Add Hours functionality to TMN Hours

# The Full Development List

## Surveys & Other Problems

✓ \* Pull selected opportunity description to the survey

If-Then-Else capability in survey designer

Add a 'Not' boolean option to the named search builder

Future Date 'feature'

Start Date > End Date error

Change 'Make another Entry' button to read "Use this opportunity Again"

✓ Time-Out issue blows out volunteer information

Thumbnail Refresh Bug

# What Changed this Year

- Working on our fourth 'Audit'
- eCoordinator/eRecruiter update by Samaritan
- Added descriptions to the surveys
- Streamlined the Transfer process
- Streamlined the duplicate check for new classes
- 45 day rule clarification and fix for Admins
- TX Waters Certification status field
  - Definitions for certification are not the same
  - Calendar used for TX Waters is Sept-August
  - AT Training 4+4 vs 8 Sponsored
  - Punt to Melissa Alderson, she is trying to figure out how to fix the issues





**Questions?**