



# **eCoordinator - Admin 201**

Sunday, October 23, 2016

9:00 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)**

# Export Data to Excel or PDFs

- From any grid:

The image shows a web form titled "Log Book Data Grid Report" with the instruction "Please select parameters for report". The form includes the following fields and options:

- Print:** Radio buttons for "All rows from grid" and "Only the selected rows" (selected). A checkbox for "Print summary table only" is also present.
- 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 checkbox, which is highlighted with a red box in the image.

To the right of the form is a vertical list 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, or a TXT file.
- To open a txt file in excel –  
File/Open/change the type to 'All Files (\*.\*)' and select your txt file.

# Automations:

- 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.



# **Dismissed/Dead/Deleted volunteers**

- In general – we don't delete volunteers, we just mark them TMN-Inactive.
- 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'.

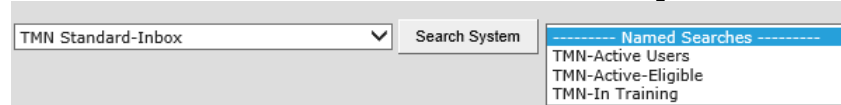
# **Transferring Volunteers**

- Remember – Hours stay with the Opportunity and Opportunities stay with the chapter.
- Volunteers can see everything, but you -as Admin- can only see hours that are attached to your chapter opportunities.
- We use a special type of survey that is not tied to an opportunity to transfer the volunteer hours so the next chapter can see them as lump-sum entries for milestones and recertification.
- You'll need to get to know the Hours keeper at the other chapter. You can find them on the helpdesk
- Go to the Admin Help Guide for detailed, step-by-step instructions.



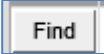
# The Inbox – Cleanup & New Recruits

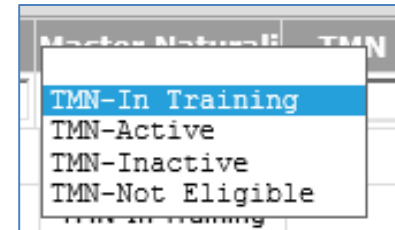
- Grid: TMN Standard-Inbox, be sure the Names Searches is 'Named Searches' to pick up all entries.



- 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!
- *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.
- When you start your class – before you setup your attendees in the system – check to see if they are in the TPWD 'Volunteer Cross Reference' list already (found on the Help Desk). If they are, contact Michelle to have TPWD share that volunteer with the Master Naturalists. This helps prevent duplicates in the system, and makes sure that the volunteer can see all their hours from all divisions in one place.
- Volunteer Grid: TMN Standard
- Select Named Search: TMN-In Training volunteers
- (Don't forget the  Button)
- Select Logbooks – for all volunteers in the grid
- Logbook Grid: TMN Standard-Training Class. Opens in summary mode but you can change to detail mode.



# Incoming...!

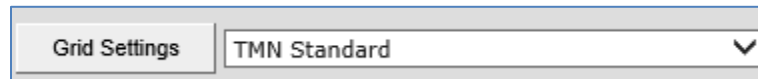
- We are still struggling to find a consistent process to [onboard new volunteers](#)
- The goal is to eliminate duplicates.
  - Online applications in VMS (Apply To Opportunity)
  - Paper applications
  - Other online application
  - Waiting lists? Payments? Prescreening?

# 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.

# 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 clean up the system.

# Creating Grids Window

## Grid Settings For Opportunities

Select Columns to display in the Grid

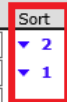
### Available Columns:

|   |
|---|
| <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 Save

### Saved Grids List:

TMN Standard

Delete Open

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

Move Up

Move Down

Number of records per page:

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

Column searches

Current column sort

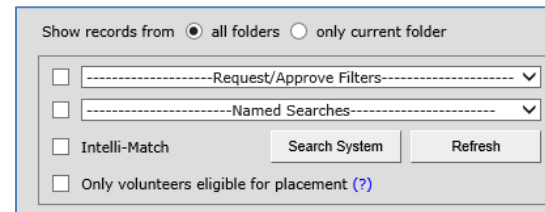
Currently selected folder ----- Folders ----- ▼

Currently selected named search ---- Named Searches ---- ▼

Search System

# Approving subsets of Volunteers

- Use the named searches field to show only a subset of your volunteers



Show records from  all folders  only current folder

-----Request/Approve Filters----- ▾

-----Named Searches----- ▾

Intelli-Match

Only volunteers eligible for placement (?)

- Examples:
- From the Opportunity side: use the TMN-In Training search
- From the volunteer side: use the TMN-Active Opportunities search

# Background Checks

- Annual background checks are now being done by TPWD through the VMS.
- 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.
- 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.

 [Edit My Profile](#)



# The Full Development List

|   |
|---|
| <b>eRecruiter</b>                                     |
| * Default Opportunity Type = Ordinary Logbook Entries |
| * Chronological listing                               |
| * TMN Hours on Dashboard                              |
| Clean up white space, eliminate unused columns        |
| Make the columns align                                |
| Horizontal scroll bar at the bottom of logical screen |
| Clean up data in the summary area                     |
| Replace 'Park' with 'Chapter'                         |
| Printing capabilities                                 |

\* At the top of the overall priority list

# The Full Development List

## eCoordinator

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

\* Automations: see affected number before the OK

Select entries across grid pages

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

Make columns stretchable

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

Increase Named Search Name limit

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

# 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



# **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**



**Questions?**