Texas Parks and Wildlife / Texas A&M AgriLife Extension



Volunteer Management System

Reporting Guide for Texas Master Naturalist Chapter Administrators

11 October 2019





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eCoordinator Reporting

eCoordinator has very little reporting capability. Because of this, grid views and filters have to be used within eCoordinator to organize data into useful information. Often data has to be moved out of the system and into other applications for processing. The examples in this document show how to use eCoordinator and Microsoft Excel to answer questions from your chapter partners, volunteers and board.

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Using this Guide

Start by going through the Chapter Roster Report example first. This report goes through all the steps necessary to move data out of eCoordinator and into Microsoft Excel using the eCoordinator Data Grid Report. This process is call exporting. The exporting process is not repeated in the other examples because the steps are the same.

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Member Reporting

Chapter Roster Report

Begin by logging into eCoordinator and selecting your chapter folder. In this example we're working in the Mid-Coast folder.

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The report parameters window is shown. Exclude the columns not needed in the roster report by checking the boxes to the right of the field names. In this example the Last Name, First Name, Home Phone, Cell Phone, Email Address, Street Address, City, Zip, and Master Naturalist Class are the only fields needed on the report. The rest of the fields will be excluded. After excluding fields, select the Excel (*.xlsx) item on the Report Format dropdown list. Note: the resulting export file will be named using the Report Title on this window.

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| | Master Naturalist Class: | Master Naturalist Class | |
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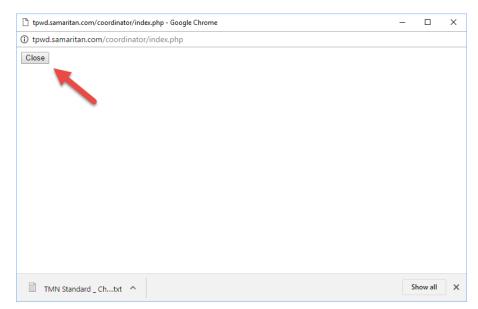
Depending on which internet browser software you are using the window shown below may be different. The purpose of this step is to save the data file from eCoordinator to your computer. In this example Internet Explorer is being used. Save the file and note where it is located on your computer. Often, the default folder is your Downloads folder. Google Chrome has a feature that shows the folder in which the file has been saved. If you are using Google Chrome you can select Show in Folder to get this information.

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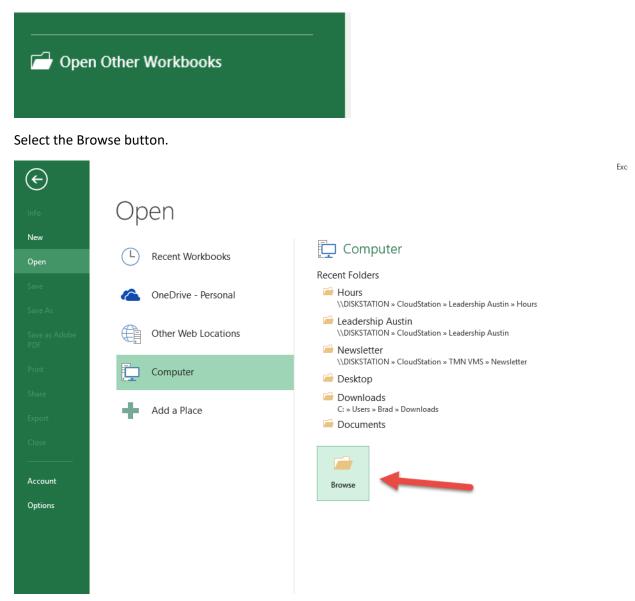
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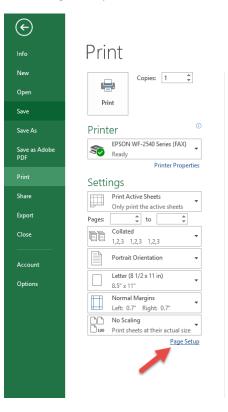
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| | Barnhart | Claire | | | | | 90 |
| | Barron | Trey | (3 | | | | |
| | Barton | Karen | | | | | 14 |
| | Benson | Karen | | | | | 11 |
| | Berger | Allan | | | | | 37 |
| | Berger | Brigid | | | | | 07 |
| | Boatman | Helen | | | | | 04 |
| | Bootzin | Rebecca | _ | | | | 14 |
| | Brunsting | Anita Mike | _ | | | | 15 |
| | Burnett | Arlene | _ | | | | 05 05 |
| | Burnett | | | | | | 35 34 |
| | Carney Clark | Caroll Laura | | | | | 54 14 |
| | Coleman | Donna | (3 | | | | 14 |
| | Conger | Richard | (5 | | | | 38 |
| | Dorn | Claudia | (3 | | | | 11 |
| | Eggert | Marie | (3 | | | | 13 |
| | Farnsworth | Bill | (2 | | | | 25 |
| | Flood | Sharron | (3 | | | | 10 |
| | Frank | Linda | (3 | | | | 12 |
| | Friedrichs | Bob | 10 | | | | 15 |
| | Friedrichs | Irma | (9 | | | | 15 |
| | Garland | Joe | | | | | 15 |
| | Garland | Patricia | (3 | | | | 15 |
| | Gomez | Glenn | | | | | 15 |
| | Goodner | Judy | (3 | | | | 10 |
| | Goodner | Ken | (3 | | | | 10 |
| | Harlan | Greg | | | | | 02 |
| | Hartigan | Patrick | | | | | 13 |
| | Hejtmancik | Gay | | | | | 26 |
| | Henneke | Lawrence | (3 | | | | 38 |
| | Hirsch | Norman | (3 | | | | 02 |
| | Huber | Mollie | (9 | | | | 12 |
| | James | Brad | (5 | | | | 13 |
| | Jones | Barbara | (3 | | | | 12 |
| | Kanak | Frances | | | | | 13 |
| | Kirkwood | Raymond | (3, | | | | |

You can use this same process to create a volunteer phone list and meeting sign in sheet.

Return to the Table of Contents

Dues

Begin by logging into eCoordinator and choosing your chapter folder. In this example we're working with the Mid-Coast chapter. Select the Volunteer tab and the TMN Standard grid view from the dropdown list.

| Account | Tools | ; | Report All | | | | | |
|---------------------------------------------|---------|----------------------|--------------|---------|-----------|---------------|--------------|-------------|
| TEXAS PARKS & WILDLIFE PWD - Maste | er Na | aturalist | 🗅 Mid Co | ast | | | | |
| /olunteers Opportuni | ties C | Chapters | | | | | | |
| New | Clear F | ilters Grid Setti | TMN Standard | | Vilters | TMN-Active | e/InTrain/No | tEligible// |
| Edit | 1 to 88 | of 88 Volunteer | 5 | | | | | |
| Delete | | Last Name ↓ 1 | First Name | User ID | Master Na | turalist Cert | Age | Home Phone |
| | Find | | | | | ~ | ~ | |
| Reports | | Alison | Lane | | | | | |
| Calendar | | Amsler, III | Neill | | | | | |
| Request/Approve | | Baiamonte | Terry | | | | | |
| Log Book | | Bailey | Donna | | | | | |
| | | Barnhart | Claire | | | | | |
| Email | | Barron | Trey | | | | | |
| Share | | Barton | Karen | | | | | |
| Automation | | Benson | Karen | | | | | |
| Add Hours | | Berger | Allan | | | | | |
| | | Berger | Brigid | | | | | |
| | | Boatman | Helen | | | | | |
| Newly shared records | | Bootzin | Rebecca | | | | | |
| Folder Manager | | Burge | William | | | | | |

Click on the Filters button.

TPWD - Master Naturalist : 🖿 Mid Coast

| New | Clear F | ilters Grid Settin | ngs TMN Standar | d 🗸 | Filters TMN-Active | /InTrain/N | lotEligible// | |
|-----------------|---------|----------------------|-----------------|---------------------|------------------------|------------|----------------|-----|
| Edit | 1 to 88 | of 88 Volunteers | 5 | | | | | |
| Delete | | Last Name ↓ 1 | First Name | User ID | Master Naturalist Cert | Age | Home Phone | |
| _ | Find | | | | ~ | ~ | | |
| Reports | | Alison | Lane | midcoast-LAlison | TMN-Active | 70 | | (36 |
| Calendar | | Amsler, III | Neill | midcoast-namsler | TMN-Active | 70 | (361) 319-5252 | (36 |
| Request/Approve | | Baiamonte | Terry | midcoast-TBaiamonte | TMN-Active | 116 | | (36 |
| Log Book | | Bailey | Donna | midcoast-DBailey | TMN-Active | 63 | (361) 872-2264 | (28 |
| - | | Barnhart | Claire | midcoast-CBarnhart | TMN-Active | 64 | | (36 |
| Email | | Barron | Trey | midcoast-tbarron | TMN-Advisor | 116 | (361) 576-0022 | |
| Share | | Barton | Karen | midcoast-KBarton | TMN-Active | 67 | | (36 |

The Filters window is displayed. Click on the New button.

| Ø Filters - Internet Explorer, enhanced for Bing and MSN | | - 0 | × |
|---------------------------------------------------------------------------------------------------------------------------------------------------------|-------|--------|---|
| Shttps://tpwd.samaritan.com/coordinator/index.php | | | |
| Filters Create Filters to display in the Grid | | | |
| Filters Filters | | New | |
| TIMN Standard - Kris Notify TIMN-Active Only | | Edit | |
| TMN-Active/InTrain/NotEligible/Advisors TMN-Class and Staff | | Сору | |
| TMN-Has EMail TMN-Hours Entry Eligible | | Delete | |
| TMN-In Training TMN-Inactive or Interested TMN-Officers & Committees Select a previously created filter OR click 'New' to create a new filter. | Apply | Close | |
| | | 🔍 105% | · |

The New Filter window is displayed.

| 🥔 New Filter - Inte | net Explorer, enhanced for Bing and MSN | | | | | | - | | × |
|---------------------|------------------------------------------------------------------------|-----|----|---|---|----|--------|--------|----------|
| anttps://tpwd.san | aritan.com/coordinator/index.php | | | | | | | | a |
| New Fil | er | | | | | | | | ^ |
| Filter Name: | New Filter | | | | | | | × | |
| Description: | | | | | | | | | |
| | Make this filter available to all users of this acc Close Requirements | | | | | | | | |
| 01 | | AND | OR | (|) | | | | |
| | equirement to add below. | | | | | | | | |
| ▶ Vo | unteer Fields | | | | | | | | |
| ▶ Vo | unteer User Defined Fields | | | | | | | | |
| ▶ Vo | unteer Contacts | | | | | | | | |
| ▶ Vo | unteer Attachment | | | | | | | | |
| ▶ Vo | unteer Email Template Last Sent Date | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | OK | Cancel | | ~ |
| | | | | | | | (| ۹ 105% | • |

In this case we are creating a filter for <u>TMN-Active</u> volunteers who have <u>not</u> paid 2018 dues. As a reward for service, the Mid-Coast chapter does not require volunteers with over 5,000 service hours to pay dues. Enter a name and description for your search.

| <i> New</i> Filter - Inte | rnet Explorer, enhanced for Bing and MSN — | | × |
|---------------------------|-------------------------------------------------------------------------------------------------|------|----------|
| John Steps://tpwd.san | naritan.com/coordinator/index.php | | a |
| New Fil | ter | | ^ |
| Filter Name: | Dues Check | | |
| Description: | Active Volunteers, does not include 2017 or 2025 | | |
| | Make this filter available to all users of this account Close Requirements AND OR () | | |
| | equirement to add below. Iunteer Fields | | |
| | lunteer User Defined Fields | | |
| | lunteer Attachment | | |
| | ОК Са | ncel | ~ |

Now we need to find our requirements fields. Expand the User Defined Fields list on the left.

| <i>e</i> New Fi | ilter - Inter | rnet Explorer, enhanced for Bing and MSN — | | \times |
|-------------------|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|--|----------|
| <i>ể</i> https:// | /tpwd. sam | naritan.com/coordinator/index.php | | |
| Νον | v Filt | tor | | ^ |
| nev | • • • • | | | |
| Filter | Name: | Dues Check | | |
| Descr | ription: | Active Volunteers, does not include 2017 or 2025 | | |
| Ch | | Make this filter available to all users of this account Close Requirements AND OR () equirement to add below. Iunteer Fields | | |
| 1 | Activity | / Status | | |
| | Activity | / Status Date | | |
| - | Addres | ss is not work address | | |
| | Age | | | |
| | Any ad | Iditional information | | |
| | Availat | bility | | |
| | Availat | ble hours | | |
| | Birthda | ay . | | |

Expand the Certifications group list.

| | ernet Explorer, enhanced for Bing and MSN | | | | | | - | | × |
|------------------|-----------------------------------------------------|---------|----|---|---|----|-------|---|---|
| https://tpwd.sar | naritan.com/coordinator/index.php | | | | | | | | |
| Filter Name: | Dues Check | | | | | | | | |
| Description: | Active Volunteers, does not include 2017 or 2025 | | | | | | | | |
| | | | | | | | | | |
| | ☐ Make this filter available to all users of this a | iccount | | | | | | | |
| | Close Requirements | AND | OR | 1 | 2 | | | | |
| Choose a r | requirement to add below. | AND | OR | (|) | | | | |
| ▶ Vo | lunteer Fields | | | | | | | | |
| | | | | | | | | | |
| Vo | lunteer User Defined Fields | | | | | | | | |
| Ζ, | General | | | | | | | | |
| + | Background and Driver Check | | | | | | | | |
| • | Alternative Workforce | | | | | | | | |
| • | Group Affiliation | | | | | | | | |
| - | Certifications | | | | | | | | |
| Ce | rtifications/Master Naturalist Certification Level | | | | | OK | Cance | I | |
| Ce | rtifications/Initial Certification | | | | | | | | |
| Ce | rtifications/Master Naturalist Cert Date | | | | | | | | |
| Ce | rtifications/Master Naturalist Dues | | | | | | | | |

Scroll down the list until you find Certifications under the User Defined Fields list. Scroll down the Certifications list until you find the Certifications/ Master Naturalist Certifications Level. Hint: when looking for fields, think about where they appear in the Volunteer Profile. The dues field is located on the User Defined tab, in the Certifications group on the Volunteer Profile. Click on the Certifications/Master Naturalist Dues listing to show the qualifications options. Select equals and the option TMN-Active. Click the Save button.

| Media Waiver | |
|------------------------------------------------------------|----------------|
| Group Affiliation | OK Cancel |
| Certifications | |
| Certifications/Master Naturalist Cere equals | ▼ TMN-Active ▼ |
| Certifications/Classroom Training c | Cancel Save |
| Certifications/Initial Certification | |
| Certifications/Master Naturalist Cert Date | |
| Certifications/Master Naturalist Dues | |
| Certifications/Master Naturalist Class | |
| Certifications/Master Naturalist Certification Comments | |

Click the AND and (buttons.

| ter Name: | Dues Check | | |
|-------------|----------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|------------|
| escription: | Active Volunteers, does not in include 2018 or 20 | 125 | |
| Choose a re | Make this filter available to all users of this Close Requirements quirement to add below. | AND OR () | |
| ▶ Volu | nteer Fields | Certifications/Master Naturalist Certification Level equa TMN-Active | lls - X |
| 🔻 Volu | nteer User Defined Fields | AND | • X |
| • | General | (| • × |
| ▶ E | Background and Driver Check | | |
| • | Alternative Workforce | | |

Scroll down the list until you find Certifications under the User Defined Fields list. Scroll down the Certifications list until you find the Certifications/ Master Naturalist Dues listing (near the bottom of the list). Click on the Certifications/Master Naturalist Dues listing to show the qualifications options. Select does not include and enter 2017. Click on the Save button. Remember that we're looking for TMN-Active volunteers who do not have 2017 in their dues field.

| Group Affiliation | | | | | | |
|------------------------------------------------------------|-----------|-----|----|--------|--|--|
| Certifications | | | | | | |
| Certifications/Master Naturalist Certification Level | | | OK | Cancel | | |
| Certifications/Initial Certification | | | | | | |
| Certifications/Master Naturalist Cert Date | | | | | | |
| Certifications/Master Naturalist Dues does not include 🔽 | 2017 | × | | | | |
| Certifications/Master Naturalist Class | Cancel Sa | ave | | | | |
| Certifications/Master Naturalist Certification Comments | | | | | | |
| Certifications/Chapter Trained In | | | | | | |
| Certifications/Chapter Certified | | | | | | |
| Certifications/Current Chapter | | | | | | |
| Certifications/Angler Ed Instructor | | | | | | |
| Certifications/Angler Ed Instructor Modified Date | | | | | | |
| Certifications/Angler Ed Instructor Date | | | | | | |

Click the OR button.

| | Dues Check | |
|------------------------------------|------------------------------------------------|----------------------------------------------------------------------------------|
| iption: | Active Volunteers, does not in include 2018 of | or 2025 |
| | ☐ Make this filter available to all users of | this account |
| | Close Requirements | AND OR () |
| choose a requirement to add below. | | |
| Volu | Inteer Fields | Certifications/Master Naturalist Certification Level equals TMN-Active |
| 🗸 Volu | inteer User Defined Fields | ▲ ▼ × |
| | | AND 🔺 🗸 🗙 |
| • 0 | General | (• × |
| ▶ E | Background and Driver Check | Certifications/Master Naturalist Dues does not include 2017 |
| | Alternative Workforce | ▲ ▼ × |
| ► A | | |
| ► A | | or 🔺 🗸 🗙 |

In the Mid-Coast chapter volunteers with >= 5,000 service hours are not required to pay dues. To eliminate them we populate the dues field with the year 2025. If your chapter does not do this then skip to the Filter saving step.

| Click the OR button. | Add the qualif | ers for the 20 | 025 vear iust | like 2017. | Click the) butto | n. |
|----------------------|-----------------|----------------|---------------|------------|-------------------|----|
| | riaa tire qaani | | or year jase | | ener the poulte | |

| Search Name: | Dues Check | | |
|-----------------------|------------------------------------------------------------|----------------------------------------------------------|-------------------|
| Description: | Active Volunteers, does not include 201 | 7 or 2025 | |
| | Make this named search available to Close Requirements | AND OR () | • |
| se a requirement to a | add below. | Certifications/Master Naturalist Certification Active | Level equals TMN- |
| User Defined Fie | ds | AND | |
| | | t Certifications/Master Naturalist Dues does r | not include 2017 |
| Certifications/Pro | ject WILD Facilitator Modified Date | | |
| Certifications/Ang | ler Ed Instructor Modified Date | OR | |
| Certifications/Fly | Fishing Instructor Modified Date | Certifications/Master Naturalist Dues does n | not include 202 |
| Certifications/Are | a Chief Instructor Modified Date | | |
| | ster Naturalist Certification Level | | |
| Certifications/Ma | Net Nataranat Certification Level |) | |

This is the result we're looking for:

| New Filt | er | | | | | | | | | | |
|------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|----------|-----------|------------|-------------|-------|----|----------|---|--|
| Filter Name: | Dues Check | | | | | | | | | | |
| Description: Active Volunteers, does not in include 2018 or 2025 | | | | | | | | | | | |
| | Make this filter available to all users of the second | his account | | | | | | | | | |
| | Close Requirements | AND | OR | (|) | | | | | | |
| Choose a ree | quirement to add below. | | | | | | | | | | |
| Volu | Volunteer Fields | | | | | | | • | × | ~ | |
| | | | AND | | | | | - | \times | | |
| 🚽 Volu | inteer User Defined Fields | (| | | | | | • | × | | |
| • 0 | General | Certifica 2017 | tions/Ma | ster Natu | ralist Due | es does not | inclu | de | | | |
| ► E | Background and Driver Check | | | | | | • | • | × | | |
| | | OR | | | | | - | ▼ | × | | |
| ▶ 4 | Alternative Workforce | Certifica 2025 | tions/Ma | ster Natu | ralist Due | es does not | inclu | de | | | |
| ► C | Group Affiliation | | | | | | - | ▼ | × | | |
| • (| Certifications |) | | | | | • | ▼ | × | ~ | |
| Certi | fications/Master Naturalist Certification Level | | | | | ОК | | Са | ncel | | |
| Certi | ifications/Initial Certification | | | | | | | | | | |

Save your work. Scroll down to the bottom of the page and click the OK button.

| | Dues Check | | | | | | | |
|------------|---------------------------------------------------|-------------------|-----------|-----------|------------|------------|------------|-------|
| cription: | Active Volunteers, does not in include 2018 or 20 | 25 | | | | | | |
| | ☐ Make this filter available to all users of this | account | | | | | | |
| | Close Requirements | AND | OR | (|) | | | |
| oose a rec | quirement to add below. | 1010 | on | (| / | | | |
| | nteer Fields | | | | | | | |
| , voiu | | AND | | | | | • • | × î |
| 🔻 Volu | ✓ Volunteer User Defined Fields | | | | | | * v | × |
| • 6 | Seneral | Certifica 2017 | itions/Ma | ster Natu | ralist Due | s does not | include | |
| ► B | ackground and Driver Check | | | | | | * • | × |
| , C | 5 | OR | | | | | • | × |
| ▶ A | Iternative Workforce | | itions/Ma | ster Natu | ralist Due | s does not | include | |
| • 6 | Group Affiliation | 2025 | | | | | • • | × |
| — C | Certifications |) | | | | | 2 4 | × |
| | | | | | | ок | Ca | ancel |
| Certit | fications/Master Naturalist Certification Level | | | | | | | |

Now we have a new Filter. Click on the Close button to close the window.

| Silters - Internet Explorer, enhanced for Bing and MSN | | - 0 | × |
|--------------------------------------------------------------------------------------------------------------------------|-------|--------|---|
| https://tpwd.samaritan.com/coordinator/index.php | | | |
| Filters Create Filters to display in the Grid | | | |
| Dues Check | | New | |
| TMN Standard - CBC Waiver TMN Standard - Kris Notify | | Edit | |
| TMN-Active Only TMN-Active/InTrain/NotEligible/Advisors | | Сору | |
| TMN-Class and Staff TMN-Has EMail | | Delete | |
| TMN-Hours Entry Eligible TMN-In Training TMN-Inactive or Interested TMN-Interested TMN-Officers & Committees | | | |
| Select a previously created filter OR click 'New' to create a new filter. | | | |
| | Apply | Close | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | 🔍 105% | • |

When the Filters window closes we return to the Volunteer grid. Click the Grid Settings Button.

TPWD - Master Naturalist : 🗅 Mid Coast

| Volunteers Opportuni | ties C | hapters | | | | | | | | | |
|-------------------------------|---------|----------------------|-----------------|---------|------------------------|-------------|---------------|--|--|--|--|
| New | Clear F | ilters Grid Settin | ngs TMN Standar | rd 💌 | Filters TMN-Active | e/InTrain/N | lotEligible// | | | | |
| Edit 1 to 88 of 88 Volunteers | | | | | | | | | | | |
| Delete | | Last Name → 1 | First Name | User ID | Master Naturalist Cert | Age | Home Phone | | | | |
| Durante | Find | | | | ~ | ~ | | | | | |
| Reports | | Alison | Lane | | | | | | | | |
| Calendar | | Amsler, III | Neill | | | | | | | | |
| Request/Approve | | Baiamonte | Terry | | | | | | | | |
| Log Book | | Bailey | Donna | | | | | | | | |

The Grid Settings for Volunteers window is shown.

| vailable Columns: | | Selected Columns: | Column Searches | So | ort Wie | dth |
|---------------------------------------------|----|----------------------------------------------------------------------|---------------------------------|----|-----------|-----|
| Volunteer | | Last Name | | - | 99 |], |
| Vol: Email Template Last Sent Date | | First Name | | - | 108 | |
| Vol: General* | | User ID | | _ | 162 | |
| Vol: Background and Driver Check* | | Certifications/Master Naturalist Certificati | | _ | 135 | |
| Vol: Alternative Workforce* | | Age | = | _ | 50 | |
| Vol: Group Affiliation* | >> | - | - • | | | |
| Vol: Certifications* | << | Home Phone | | - | 153 | |
| Vol: Contact* | | Cell Phone | | - | 153 | |
| Vol: TMN Recognition* | | Email Address | | - | 270 | |
| Vol: TMN Officers/Committees* | | TMN Officers/Committees/TMN Officer L | ~ | | 135 | |
| | | TMN Officers/Committees/TMN Committ | | - | 135 |] |
| | | Certifications/Current Chapter* | | - | 135 | Ī |
| Indicates user defined fields. | | | | | | |
| ave As: | | The top to bottom order of the fields above the columns on the grid. | matches the left to right order | of | Move Up | p |
| TMN Standard | | Number of records per page: 100 | | | Move Dov | |
| Make this saved grid available to all users | | | | | viove Dov | vn |
| of this account Save | | Additional items to include as part of the ✓ Column searches | is saved grid: | | | |
| aved Grids List: | | Current column sort | | | | |
| | ~ | Currently selected folder Click | To Select | | | |
| | | Currently selected filter | MN-Active/InTrain/Not | | Filters | |

Our focus is on dues for our new grid view. Begin by holding the Ctrl key on the keyboard and clicking the User ID, Age, TMN Officers/Committees/TMN Officer List, TMN Officers/Committees/ TMN Committee, Certifications/ Current Chapter, and Gender selected columns fields as shown below. Click on the << button to return these fields to the Available Columns list.

| | Selected Columns: | Column Searches | So | | dth |
|----|----------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | First Name | | _ | 108 | ^ |
| | User ID | | _ | 162 | 1 |
| | Certifications/Master Naturalist Certificati | | _ | | |
| | | | | | 1 |
| | Age | = | _ | 50 | |
| >> | Home Phone | | - | 153 | |
| << | Cell Phone | | - | 153 | |
| | Email Address | | _ | 270 | |
| | TMN Officers/Committees/TMN Officer L | ~ | | 135 | 1 |
| | TMN Officers/Committees/TMN Committ | | - | 135 | 1 |
| | Certifications/Current Chapter* | | - | 135 | |
| | Gender | ~ | - | 63 | ~ |
| | | | | | |
| | The top to bottom order of the fields above the columns on the grid. | matches the left to right order | of | Move Up |) |
| | Number of records per page: 100 | | | Move Dov | vn |
| | _ | User ID Certifications/Master Naturalist Certificati Age Home Phone Email Address TMN Officers/Committees/TMN Officer L TMN Officers/Committees/TMN Committ Certifications/Current Chapter* Gender The top to bottom order of the fields above the columns on the grid. | User ID Certifications/Master Naturalist Certificati Age = Age = Home Phone Email Address TMN Officers/Committees/TMN Officer L TMN Officers/Committees/TMN Officer L TMN Officers/Committees/TMN Committ Certifications/Current Chapter* Gender | User ID Certifications/Master Naturalist Certificati Age = Age = Home Phone - Cell Phone - Email Address TMN Officers/Committees/TMN Officer L TMN Officers/Committees/TMN Committ Certifications/Current Chapter* Gender V | User ID – 162 Certifications/Master Naturalist Certificati ✓ – 135 Age = ✓ – 50 Home Phone – 153 Cell Phone – 153 Email Address – 270 TMN Officers/Committees/TMN Officer L ✓ 135 Certifications/Current Chapter* – 135 Gender ✓ – 63 |

24

Now we have selected the columns that we want for our resulting grid with one exception, the Dues field. Expand the VOL: Certifications group in the Available Columns list.

Grid Settings For Volunteers

| | ect Columns to display in the Grid ilable Columns: | | | Selected Columns: | Column Searches | Sort | Width |
|-------|-------------------------------------------------------|---|----|-------------------|-----------------|------|-------|
| ٠ | Volunteer | ~ | | Last Name | | _ | 99 |
| ٠ | Vol: Email Template Last Sent Date | | | First Name | | _ | 108 |
| ٠ | Vol: General* | | | Home Phone | | | 153 |
| ٠ | Vol: Background and Driver Check* | | | Cell Phone | | | 153 |
| ٠ | Vol: Alternative Workforce* | | | | | | |
| ٠ | Vol: Group Affiliation* | | >> | Email Address | | _ | 270 |
| | Vol: Certifications* | | << | | | | |
| | Certifications/Master Naturalist Certification Level* | | | | | | |
| | Certifications/Initial Certification* | | | | | | |
| | Certifications/Master Naturalist Cert Date* | | | | | | |
| | Certifications/Master Naturalist Dues* | | | | | | |
| | Certifications/Master Naturalist Class* | ~ | | | | | |
| * Inc | licates user defined fields. | | | | | | |

Scroll down until you find the Certifications/Master Naturalist Dues field in the list. Click on it to highlight and then click the >> button to add it to the Selected Columns list.

| Select Columns to display in the Grid Available Columns: vor. Anternative vvorkiorce | | | Selected Columns: | Column Searches | Sort | Width |
|--------------------------------------------------------------------------------------------|---|----|-------------------|-----------------|------|-------|
| Vol: Group Affiliation* | ^ | | Last Name | | - | 99 |
| Vol: Certifications* | | | First Name | | _ | 108 |
| Certifications/Master Naturalist Certification Level* | | | Home Phone | | _ | 153 |
| Certifications/Initial Certification* | | | Cell Phone | | _ | 153 |
| Centrations/Master Naturalist Cert Date* | | >> | Email Address | | _ | 270 |
| Certifications/Master Naturalist Dues* | | ~ | | | | |
| Certifications/Master Naturalist Class* | | | | | | |
| Certifications/Master Naturalist Certification Comments* | | | | | | |
| Certifications/Chapter Trained In* | | | - | | | |
| Certifications/Chapter Certified* | | | | | | |
| Certifications/Current Chapter* | ~ | | | | | |
| * Indicates user defined fields. | | | | | | |

The Dues field is now in the Selected Columns List.

| G | rid Settings For Volunteer | S | | | | | |
|-------|-------------------------------------------------------------------------------------|---|----|----------------------------------------|-----------------|------|-------|
| | ect Columns to display in the Grid ilable Columns: vor. Alternative workforce | | | Selected Columns: | Column Searches | Sort | Width |
| ÷ | Vol: Group Affiliation* | ^ | | Last Name | | - | 99 |
| | Vol: Certifications* | | | First Name | | - | 108 |
| | Certifications/Master Naturalist Certification Level* | | | Home Phone | | - | 153 |
| | Certifications/Initial Certification* | | | Cell Phone | | - | 153 |
| | Certifications/Master Naturalist Cert Date* | | >> | Email Address | | - | 270 |
| | Certifications/Master Naturalist Dues* | | << | Certifications/Master Naturalist Dues* | | - | 135 |
| | Certifications/Master Naturalist Class* | | | | | | |
| | Certifications/Master Naturalist Certification Comments* | | | | | | |
| | Certifications/Chapter Trained In* | | | | | | |
| | Certifications/Chapter Certified* | | | | | | |
| | Certifications/Current Chapter* | ~ | | | | | |
| * Inc | icates user defined fields. | | | | | | |

Click on the Currently Selected Folder checkbox and select your chapter from the Chapter dropdown list. Click on the Currently Selected Filter dropdown list and select the Filter that you saved previously. In this case we are using the Dues Check Filter.

| G | rid Settings For Volunteer | s | | | | | | |
|-------|-------------------------------------------------------------|--------------|----|-------------------------------------------------------------|---------------|------------------------------------|------|---------|
| | ect Columns to display in the Grid ilable Columns: | | | Selected Columns: | | Column Searches | Sort | Width |
| + | Vor. Alternative vvorkiorce | ~ | | Last Name | | | _ | 99 |
| + | Vol: Group Affiliation* | | | First Name | | | _ | 108 |
| | Vol: Certifications* | | | Lines Direct | | | | 450 |
| | Certifications/Master Naturalist Certification Level* | | | Home Phone | | | - | 153 |
| | Certifications/Initial Certification* | | | Cell Phone | | | - | 153 |
| | Certifications/Master Naturalist Cert Date* | | >> | Email Address | | | _ | 270 |
| | Certifications/Master Naturalist Dues* | | << | Certifications/Master Naturalist | t Dues* | | - | 135 |
| | Certifications/Master Naturalist Class* | | | | | | | |
| | Certifications/Master Naturalist Certification Comments* | | | | | | | |
| | Certifications/Chapter Trained In* | | | | | | | |
| | Certifications/Chapter Certified* | | | | | | | |
| | Certifications/Current Chapter* | ~ | | | | | | |
| * Inc | licates user defined fields. | | | | | | | |
| Sav | e As: | | | The top to bottom order of the fit the columns on the grid. | elds above | matches the left to right order of | M | ove Up |
| ТМ | N Standard | | | Number of records per page: 1 | 100 | | | |
| | Make this saved grid available to all users | | | Number of records per page. | 100 | | Mo | ve Down |
| | of this account Save | | | Additional items to include as ✓ Column searches | s part of thi | s saved grid: | | |
| _ | | | | Current column sort | | | | |
| | ed Grids List: | ~ | | Currently selected folder | Mid Coas | st 🗸 | | |
| 110 | | | - | Currently selected filter | D | ues Check | F | ilters |
| | Delete Open | | | | | K | | |
| Defa | ault Saved Grid At Login | | | | | | | |
| Re | member the last grid upon logout | \mathbf{v} | | Apply | | OK | C | Cancel |

Now we need to save the grid under a new name. Click in the Save As name text box and type a new name. Then click the save button.

| Grid Settings For Volunteers | s | | | | | |
|-------------------------------------------------------------|--------------|----|----------------------------------------------------------------------|--------------------------------------|------|--------|
| Select Columns to display in the Grid Available Columns: | | | Selected Columns: | Column Searches | Sort | Width |
| Vol: Group Affiliation* | ^ | | Last Name | | - | 99 |
| □ Vol: Certifications* | | | First Name | | - | 108 |
| Certifications/Master Naturalist Certification Level* | | | Home Phone | | - | 153 |
| Certifications/Initial Certification* | | | Cell Phone | | _ | 153 |
| Certifications/Master Naturalist Cert Date* | | | Email Address | | _ | 270 |
| Certifications/Master Naturalist Dues* | | >> | Certifications/Master Naturalist Dues* | | | 135 |
| Certifications/Master Naturalist Class* | | << | Centrications/Master Naturalist Dues" | | _ | 135 |
| Certifications/Master Naturalist Certification Comments* | | | | | | |
| Certifications/Chapter Trained In* | | | | | | |
| Certifications/Chapter Certified* | | | | | | |
| Certifications/Current Chapter* | \checkmark | | | | | |
| * Indicates user defined fields. | | | | | | |
| | | | The top to bottom order of the fields above the columns on the grid. | e matches the left to right order of | M | ove Up |
| Save As: Dues Check | × | | | | | |
| Make this saved grid available to all users | _ | | Number of records per page: 100 | | Mov | e Down |
| of this account | | | Additional items to include as part of th | nis saved grid: | | |
| | K | | Column searches | | | |
| Saved Grids List: | | | Current column sort | | | |
| TMN Standard | ~ | | Currently selected folder Mid Coa | | | |
| | | | Currently selected filter | Dues Check | Fi | Iters |
| Delete Open | | | | | | |
| Default Saved Grid At Login | | | | | | |
| Remember the last grid upon logout | ~ | | Apply | OK | C | ancel |

This example is saved as Dues Check. Click the OK button to return to the Volunteer tab.

| Grid Settings For Voluntee | rs | | | | | | |
|------------------------------------------------------------------|----|----|---------------------------------------------------|-----------|---------------------------------------|-------|---------|
| Select Columns to display in the Grid Available Columns: | | | Selected Columns: | | Column Searches | Sort | Width |
| Vol: Group Affiliation* | ^ | | Last Name | | | _ | 99 |
| ─ · · · · · · · · · · · · · · · · · · · | -1 | | First Name | | |] – | 108 |
| Certifications/Master Naturalist Certification Level* | | | Home Phone | | |] _ | 153 |
| Certifications/Initial Certification* | | | Cell Phone | | | _ | 153 |
| Certifications/Master Naturalist Cert Date* | | ~~ | Email Address | | | _ | 270 |
| Certifications/Master Naturalist Dues* | | << | Certifications/Master Naturalis | t Dues* | | _ | 135 |
| Certifications/Master Naturalist Class* | | ~~ | | | | | |
| Certifications/Master Naturalist Certification Comments* | | | | | | | |
| Certifications/Chapter Trained In* | | | | | | | |
| Certifications/Chapter Certified* | | | | | | | |
| Certifications/Current Chapter* | ~ | | | | | | |
| * Indicates user defined fields. | | | | | | | |
| | | | | ields ab | ove matches the left to right order o | of Mc | ove Up |
| Save As: | | | the columns on the grid. | | | | /10 Op |
| Dues Check | × | | Number of records per page: | 100 | | Mov | /e Down |
| Make this saved grid available to all users of this account Save |) | | Additional items to include as Column searches | s part of | f this saved grid: | | |
| | | | Current column sort | | | | |
| Saved Grids List: | | | Currently selected folder | Mid C | Coast | | |
| TMN Standard | ~ | | Currently selected filter | Wild C | | E: | ilters |
| Delete Oper | ı | | Y currently selected filler | | Dues Check | FI | nelS |
| Default Saved Grid At Login | | | | | | | |
| Remember the last grid upon logout | ~ | | Apply | | ОК | C | ancel |

The resulting grid view is a list of our TMN-Active volunteers who have not paid their 2018 dues. Note that the Dues Check grid view and Dues Check Filter are being used.

| New | Clear F | ilters Grid Settir | Dues Check | | ✓ Filters | Dues Check | ~ | |
|-------------------|---------|--------------------|------------|------------|-----------|------------|---------------|-----------------------|
| Edit | 1 to 80 | of 80 Volunteers | 5 | | | | | |
| Delete | | Last Name 🚽 1 | First Name | Home Phone | Cell | Phone | Email Address | Master Naturalist Due |
| | Find | | | | | | | |
| Reports | | Alison | Lane | | | | | 2018 |
| Calendar | | Amsler, III | Neill | | | | | 2018 |
| equest/Approve | | Baiamonte | Terry | | | | | 2018 |
| Log Book | | Bailey | Donna | | | | | 2018 |
| | | Barnhart | Claire | | | | | 2018 |
| Email | | Barton | Karen | | | | | 2018 |
| Share | | Benson | Karen | | | | | 2018 |
| Automation | | Berger | Allan | | | | | 2018 |
| Add Hours | | Boatman | Helen | | | | | 2018 |
| Add Hours | | Bootzin | Rebecca | | | | | 2018 |
| | | Burge | William | | | | | 2018 |
| ly shared records | | Burnett | Mike | | | | | 2018 |
| Folder Manager | | Burnett | Sam | | | | | 2018 |

TPWD - Master Naturalist : 🗖 Mid Coast

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Certifications, Volunteer Counts and Hours Reporting Percentages

Begin by logging into eCoordinator and choosing your chapter folder. In this example we're working with the Mid-Coast chapter. Select the Volunteer tab and select the TMN Standard grid view from the dropdown list.

| Account | Tools | | Report All | | | | |
|----------------------|---------|----------------------|-----------------|---------|-------------------------------|--------------------|-----------------|
| PWD - Mast | | | D Mid Co | bast | | | |
| | | | | | | | |
| New | Clear F | ilters Grid Setti | n s TMN Standar | d | ✓ Filters | TMN-Active/InTrain | n/NotEligible// |
| Edit | 1 to 88 | of 88 Volunteer | 5 | | | | |
| Delete | | Last Name ⊸ 1 | First Name | User ID | Master Na | turalist Cert Age | Home Phone |
| Denet | Find | | | | | ~ | |
| Reports | | Alison | Lane | | | | |
| Calendar | | Amsler, III | Neill | | | | |
| Request/Approve | | Baiamonte | Terry | | | | |
| Log Book | | Bailey | Donna | | | | |
| | | Barnhart | Claire | | | | |
| Email | | Barron | Trey | | | | |
| Share | | Barton | Karen | | | | |
| Automation | | Benson | Karen | | | | |
| Add Hours | | Berger | Allan | | | | |
| | | Berger | Brigid | | | | |
| | | Boatman | Helen | | | | |
| Newly shared records | | Bootzin | Rebecca | | | | |
| Folder Manager | | Burge | William | | | | |

Select the TMN Standard grid view from the Grid View selection dropdown list. Select the TMN-Hours Entry Eligible Filter from the Filters dropdown list. The resulting grid shows the TMN-Active and TMN-InTraining volunteers excluding TMN-Inactive, TMN-Interested, and TMN-Not Eligible.



| TPWD - Mast Volunteers Opportur | | aturalist : ^{Chapters} | 🖿 Mid Co | oast | | Filters Dues Check TMN Standard - CBC Waiver TMN Standard - Kris Notify | |
|------------------------------------|---------|------------------------------------|------------------|---------|-------------|-----------------------------------------------------------------------------------|------------|
| New | Clear F | ilters Grid Setti | ngs TMN Standard | d 📕 | ▼ Filters | TMN-Active Only TMN-Active/InTrain/NotEligible/Advisors TMN-Class and Staff | |
| Edit | 1 to 88 | of 88 Volunteers | 5 | | | TMN-Has EMail TMN-Hours Entry Eligible | |
| Delete | | Last Name ↓ 1 | First Name | User ID | Master Nati | I WIN-INACTIVE OF INTERESTED | Cell Phone |
| | Find | | | | | TMN-Interested TMN-Officers & Committees | |
| Reports | | Alison | Lane | | | | |
| Calendar | | Amsler, III | Neill | | | | |
| Request/Approve | | Baiamonte | Terry | | | | |
| Log Book | | Bailey | Donna | | | | |
| | | Barnhart | Claire | | | | |

The Mid-Coast chapter has 85 volunteers who meet the Hours Entry Eligible criteria.

TPWD - Master Naturalist : 🗀 Mid Coast

| New | Clear F | Grid Setti | ngs Save | d Grids List | ▼ Filters TMN-Hour | s Entry Eliç | jible 🔽 | |
|-----------------|---------|----------------------|------------|---------------------|------------------------|--------------|----------------|----------------|
| Edit | 1 to 85 | of 85 Volunteer | 5 | | | | | |
| Delete | | Last Name ↓ 1 | First Name | User ID | Master Naturalist Cert | Age | Home Phone | Cell Phone |
| | Find | | | | | ~ | | |
| Reports | | Alison | Lane | midcoast-LAlison | TMN-Active | 70 | | (361) 790-3103 |
| Calendar | | Amsler, III | Neill | midcoast-namsler | TMN-Active | 70 | (361) 319-5252 | (361) 319-5252 |
| Request/Approve | | Baiamonte | Terry | midcoast-TBaiamonte | TMN-Active | 116 | | (361) 935-2322 |
| Log Book | | Bailey | Donna | midcoast-DBailey | TMN-Active | 63 | (361) 872-2264 | (281) 908-0000 |
| | | Barnhart | Claire | midcoast-CBarnhart | TMN-Active | 64 | | (361) 542-0348 |
| Email | | Barton | Karen | midcoast-KBarton | TMN-Active | 67 | | (361) 649-9305 |
| Share | | Benson | Karen | midcoast-KBenson | TMN-Active | 70 | | (361) 350-9999 |
| Automation | | Berger | Allan | midcoast-aberger | TMN-Active | 68 | | (713) 829-2852 |
| Add Hours | | Berger | Brigid | midcoast-bberger | TMN-Active | 57 | | (713) 825-1929 |
| Add Hours | | Boatman | Helen | midcoast-HBoatman | TMN-Active | 79 | | (361) 649-4908 |
| | | Bootzin | Rebecca | midcoast-RBootzin | TMN-Active | 64 | | (361) 676-2883 |

Select All volunteers in Grid option.

| Volunteers Opportu | inities (| Chapters | | | | |
|------------------------|-----------|----------------------|-------------|------------|-----------|--------------------|
| New | Clear F | Filters Grid Setti | ngs Saved G | Grids List | ✓ Filter: | s TMN-Hours Entry |
| Edit | 1 to 8 | of 85 Volunteer | 5 | | | |
| Delete | | Last Name ↓ 1 | First Name | User ID | Master | Naturalist Cert Ag |
| | Find | | | | | ` |
| Reports | | Alison | Lane | | | |
| Calendar | | Amsler, III | Neill | | | |
| Request/Approve | | Baiamonte | Terry | | | |
| | | Janey | Donna | | | |
| All Volunteers in Grid | Int | Barnhart | Claire | | | |
| | | Barton | Karen | | | |
| Share | | Benson | Karen | | | |
| Automation | | Berger | Allan | | | |
| Add Llouro | | Berger | Brigid | | | |
| Add Hours | | Boatman | Helen | | | |
| | | Bootzin | Rebecca | | | |
| Newly shared records | | Burge | William | | | |

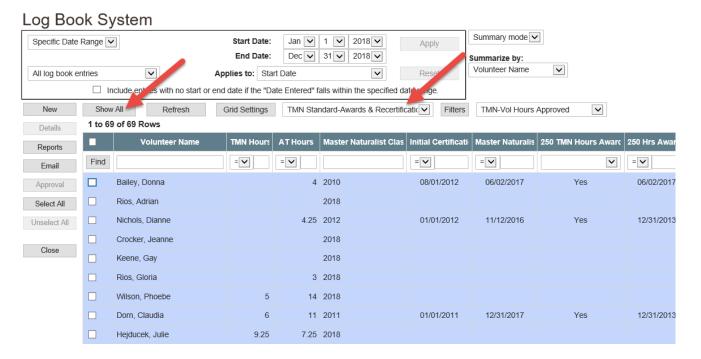
TPWD - Master Naturalist : 🗖 Mid Coast

Note: Approve all hours before checking certifications and milestones.

The eCoordinator Log Book System window is displayed. Check that you have All Log Book entries selected. Check the date range. In this example we are checking for certifications in 2018. The date range has been set to January 1, 2018 through December 31, 2018. Click the Apply button to apply the settings to the grid.

| Log Boo | k Sy | ystem | | | | • | | | | |
|-----------------|---------|-------------------------------------|---------------------------------------|-------------|--------------|----------|----------|-------------------------|----------------|-------------|
| Specific Date | Range 🔽 | | Start Date: Jan 🔽 1 🕚 | 2018 | | Apply | Su | Immary mode 🗸 | | |
| | | | End Date: Dec 🗸 31 | 2018 | ~ | | | nmarize by: | | |
| All log book er | | | oplies to: Start Date | | ~ | Reset | | lunteer Name | | |
| | | nclude entries with no start or end | I date if the "Date Entered" falls wi | thin the sp | ecified date | e range. | | | | |
| New | Show | | Grid Settings Sa | wed Grids- | | ▼ F | ilters | Filters | ~ | |
| Details | 1 to 6 | 9 of 69 Rows | 0 | 044 D- | | | | • | 8 -11 8 -4114 | |
| Reports | | Volunteer Name | Opportunity Title | Start Da | TMN Ho | A I Hour | TMN Init | Approval Status | Admin Activit | Approved By |
| Email | Find | | | | ~ | ~ | ~ | | ~ | |
| Approval | | Berger, Brigid | 15 Opportunities | N/A | 589.5 | 53 | | Not Yet Approved:6, Yes | Board/Committ | N/A |
| Select All | | Garland, Patricia | 13 Opportunities | N/A | 488.75 | 24 | | Not Yet Approved:4, Yes | Board/Committ | N/A |
| Unselect All | | Kirkwood, Raymond | 17 Opportunities | N/A | 479.25 | 33.25 | | Yes Approved:88 | Board/Committ | N/A |
| | | Kirkwood, Kris | 15 Opportunities | N/A | 468.5 | 16.75 | | Yes Approved:187 | Board/Committ | N/A |
| Close | | Shirey, Linda | 11 Opportunities | N/A | 310.5 | 15.5 | | Not Yet Approved:1, Yes | Board/Committ | N/A |
| | | Burge, William | 10 Opportunities | N/A | 294.25 | 23.75 | | Not Yet Approved:2, Yes | Board/Committ | N/A |
| | | Friedrichs, Bob | 10 Opportunities | N/A | 272 | 14.5 | | Yes Approved:47 | Chapter Meetir | N/A |
| | | Ortego, Dora | 9 Opportunities | N/A | 255 | 21 | | Not Yet Approved:7, Yes | Chapter Meetir | N/A |
| | | Price, Janet | 13 Opportunities | N/A | 236.75 | 17.75 | | Not Yet Approved:2, Yes | Board/Committ | N/A |
| | | | | | | | | | | |

Click the Show All button and then select TMN Standard-Awards & Recertification from the Grid View dropdown list. Note: Selecting this



Now we are looking at all volunteers who report hours in 2018 with TMN Hours summarized and sorted in descending order. Note: this will not include hours from volunteers who transferred to another chapter. The light blue background signifies that the grid is in summary mode. Sixty-nine volunteers have reported hours in 2018 (number of rows). So 81% of the Mid-Coast hours entry eligible reported some hours in 2018 (69 volunteers reporting hours divided by 85 hours entry eligible volunteers from the row count of the Volunteer tab equals 81% reporting hours for 2018).

Log Book System

| Specific Date | Range 🗸 | 1 | Start Date: End Date: | Jan 🗸 Dec 🗸 | 1 V 2018 V 31 V 2018 V | Apply | Summary mode | | |
|-----------------|---------|------------------------------------|--------------------------|----------------|------------------------------|---------------------|------------------|---------------------|--------------|
| All log book er | ntries | ✓ Ap | plies to: Sta | rt Date | ~ | Reset | Volunteer Name | V | |
| | 🗆 In | clude entries with no start or end | date if the "Da | ate Entered" f | alls within the specified da | ite range. | | | |
| New | Show | All Refresh | Grid Settings | TMN Star | ndard-Awards & Recertific | ratic 🗸 Filters | TMN-Vol Hours | Approved 🗸 | |
| Details | 1 to 69 | of 69 Rows | | | | | | | |
| Reports | | Volunteer Name | TMN Hours | AT Hours | Master Naturalist Clas | Initial Certificati | Master Naturalis | 250 TMN Hours Award | 250 Hrs Awar |
| Email | Find | | = 🗸 | = 🗸 | | = 🗸 | = 🗸 | ~ | = 🗸 |
| Approval | | Bailey, Donna | | 4 | 2010 | 08/01/2012 | 06/02/2017 | Yes | 06/02/2017 |
| Select All | | Rios, Adrian | | | 2018 | | | | |
| Unselect All | | Nichols, Dianne | | 4.25 | 2012 | 01/01/2012 | 11/12/2016 | Yes | 12/31/2013 |
| 01 | | Crocker, Jeanne | | | 2018 | | | | |
| Close | | Keene, Gay | | | 2018 | | | | |
| | | Rios, Gloria | | 3 | 2018 | | | | |
| | | Wilson, Phoebe | 5 | 14 | 2018 | | | | |
| | | Dorn, Claudia | 6 | 11 | 2011 | 01/01/2011 | 12/31/2017 | Yes | 12/31/2013 |
| | | Hejducek, Julie | 9.25 | 7.25 | 2018 | | | | |

Click on the = dropdown list on the left side of the TMN Hours Find grid row. Select >=.

Log Book System

| Specific Date | Range 🔽 | | | | 18 🗸 Apply | Summary m | |
|----------------|---------|-----------------|----------------------|----------|------------------------|---------------------|----------------------|
| All log book e | | Ap | plies to: Start Date | | Reset | Volunteer N | - |
| New | Show | All Refresh | Grid Settings | Saved Gr | ids V | Filters TMN-Vol | Hours Approved |
| Details | 1 to 69 | of 69 Rows | | | | | |
| Reports | | Volunteer Name | TMN Hours ▼ 1 | AT Hours | Master Naturalist Clas | Initial Certificati | Master Naturalis 250 |
| Email | Find | | = | = 🗸 | | = 🗸 | = |
| Approval | | Bailey, Donna | >= | 4 | 2010 | 08/01/2012 | 06/02/2017 |
| Select All | | Rios, Adrian | <= n-n | | 2018 | | |
| Unselect All | | Nichols, Dianne | | 4.25 | 2012 | 01/01/2012 | 11/12/2016 |
| 01 | | Crocker, Jeanne | | | 2018 | | |
| Close | | Keene, Gay | | | 2018 | | |
| | | Rios, Gloria | | 3 | 2018 | | |
| | | Wilson, Phoebe | 5 | 14 | 2018 | | |
| | | Dorn Claudia | 0 | 44 | 0011 | 04/04/0044 | 40/04/0047 |

Enter 40 in the right side. Select the >= from the dropdown list under AT Hours and enter 8 in the text box. Click the Find button. Our list now shows only those volunteers who had greater or equal to 40 hours of service and greater than or equal to 8 hours of advanced training hours in 2018. With the current hours eligible count of 85, the Mid-Coast chapter had 69% of volunteers who certified in 2018. (34 certified rows in the grid divided by 85 hours entry eligible from the row count of the volunteer tab= 40% certified for 2018). This is a low average for the Mid-Coast chapter. Hurricane Harvey had an effect on volunteering and reporting.

| Log Boo | OK S | ystem | | | | | | | |
|----------------|---------|-----------------------------------|--------------------------|-------------------------|-------------------------|----------------------------|------------------|---------------------|-------|
| Specific Date | Range | ~ | | | 18 Apply | Summary m | iode 🗸 | | |
| | | | | | 18 🗸 | Summarize I Volunteer N | - | | |
| All log book e | entries | ✓ | Applies to: Start Date | e | ✓ Reset | volunteer N | ame 🗸 | | |
| | | nclude entries with no start or e | nd date if the "Date Er | tered" falls within the | e specified date range. | | | | |
| New | Show | | Grid Settings | Saved Gr | rids V F | Filters TMN-Vol | Hours Approved | V | |
| Details | 1 to 3 | 4 of 34 Rows | | | | | | | |
| Reports | | Volunteer Name | TMN Hours v 1 | AT Hours | Master Naturalist Clas | Initial Certificati | Master Naturalis | 250 TMN Hours Awarc | 250 H |
| Email | Find | | >= 🔽 80 | >= 🗸 8 | | = 🗸 | = 🗸 | ~ | = 🗸 |
| Approval | | Snider, Sharon | 8 | 205 | 2018 | 05/31/2018 | 11/02/2018 | | |
| Select All | | S, urrell, Nelida | 8. | 1 | 2017 | 01/08/2018 | 09/30/2018 | | |
| Unselect All | | Snider, Robert | 85.75 | 20.25 | 2018 | 05/31/2018 | 11/02/2018 | | |
| Close | | Rystad, KarenLee | 87.5 | 8.5 | 2010 | 01/01/2010 | 08/16/2018 | Yes | 01/ |
| Close | | Henneke, Lawrence | 89.75 | 19.25 | 2008 | 01/01/2008 | 05/31/2018 | Yes | 01/ |
| | | Threatt, Barbara | 93 | 10.25 | 2008 | 01/01/2008 | 05/10/2018 | Yes | 01/ |
| | | Dahms-Nelson, Debra | 93 | 10 | 2018 | 05/31/2018 | | | |
| | | Clark, Laura | 98.5 | 20 | 2014 | 08/01/2014 | 11/02/2018 | Yes | 05/ |
| | | Koenig, Catherine | 104 | 36.25 | 2015 | 11/03/2015 | 05/31/2018 | Yes | 04/ |
| | | Crane, Denise | 105 | 26.25 | 2018 | 05/31/2018 | 08/20/2018 | | |
| | | Hudson, Beth | 107.75 | 27 | 2016 | 11/14/2016 | 04/07/2018 | | |
| | | Crane, Gary | 109.25 | 26.25 | 2018 | 05/31/2018 | 08/23/2018 | | |
| | | | | | | | | | |

Check the Master Naturalist Cert Date column to see which volunteer profiles you need to update. Tip: Use automation to update these as a group instead of having to update each volunteer profile.

| Specific Date | Range 🔽 | | | | 18 V Apply | Summary m | | | |
|----------------|---------|------------------------------------|-------------------------|------------------------|-------------------------|---------------------|-----------------------------|---------------------|-----|
| All log book e | ntries | ✓ Ap | oplies to: Start Date | | Reset | Volunteer N | | | |
| | 🗆 In | clude entries with no start or end | d date if the "Date Ent | ered" falls within the | e specified date range. | | | | |
| New | Show | All Refresh | Grid Settings | Saved Gr | rids V | ilters TMN-Vol I | Hours Approved | | |
| Details | 1 to 34 | l of 34 Rows | | | | | | | |
| Reports | | Volunteer Name | TMN Hours ▼ 1 | AT Hours | Master Naturalist Clas | Initial Certificati | Master Naturalist Cert Date | 250 TMN Hours Aware | 250 |
| Email | Find | | >= 🖌 80 | >= 🗸 8 | | = 🗸 | = 🗸 | ` | =[|
| Approval | | Snider, Sharon | 83.75 | 20.25 | 2018 | 05/31/2018 | 11/02/2018 | | |
| Select All | | Spurrell, Nelida | 84 | 10 | 2017 | 01/08/2018 | 09/30/2018 | | |
| Unselect All | | Snider, Robert | 85.75 | 20.25 | 2018 | 05/31/2018 | 11/02/2018 | | |
| | | Rystad, KarenLee | 87.5 | 8.5 | 2010 | 01/01/2010 | 08/16/2018 | Yes | |
| Close | | Henneke, Lawrence | 89.75 | 19.25 | 2008 | 01/01/2008 | 05/31/2018 | Yes | |
| | | Threatt, Barbara | 93 | 10.25 | 2008 | 01/01/2008 | 05/10/2018 | Yes | |
| | | Dahms-Nelson, Debra | 93 | 10 | 2018 | 05/31/2018 | | | |
| | | Clark, Laura | 98.5 | 20 | 2014 | 08/01/2014 | 11/02/2018 | Yes | |
| | | Koenig, Catherine | 104 | 36.25 | 2015 | 11/03/2015 | 05/31/2018 | Yes | (|
| | | Crane, Denise | 105 | 26.25 | 2018 | 05/31/2018 | 08/20/2018 | | |
| | | Hudson, Beth | 107.75 | 27 | 2016 | 11/14/2016 | 04/07/2018 | | |
| | | Crane, Gary | 109.25 | 26.25 | 2018 | 05/31/2018 | 08/23/2018 | | |
| | | Smudy, Ron | 111.75 | 8.5 | 2010 | 01/01/2010 | 11/02/2018 | Yes | |
| | | | | | | | | | |

In summary the Mid-Coast chapter had:

85 volunteers who met the hours entry eligible criteria (current year)
69 volunteers who reported hours in 2018
69 reporting hours divided by 85 hours entry eligible equals 81% reporting hours for 2018
34 Volunteers who certified
34 volunteers who certified divided by 85 hours entry eligible volunteers equals 40% certified for 2018
<u>Return to the Table of Contents</u>

Milestones

Begin by logging into eCoordinator and choosing your chapter folder. In this example we're working with the Mid-Coast chapter. Select the Volunteer tab and select the TMN Standard grid view from the dropdown list.

| Account | Tools | | Report All | | | | | |
|---------------------------------------------|---------|----------------------|-------------|---------|-----------|---------------|-------------|--------------|
| TEXAS PARKS & WILDLIFE PWD - Maste | er Na | aturalist | 🗅 Mid Co | past | | | | |
| /olunteers Opportuni | | hapters | | | | | | |
| New | Clear F | ilters Grid Setti | TMN Standar | d | Vilters | TMN-Active | e/InTrain/N | otEligible// |
| Edit | 1 to 88 | of 88 Volunteers | 5 | | | | | |
| Delete | | Last Name ↓ 1 | First Name | User ID | Master Na | turalist Cert | Age | Home Phone |
| Basarta | Find | | | | | ~ | v | |
| Reports | | Alison | Lane | | | | | |
| Calendar | | Amsler, III | Neill | | | | | |
| Request/Approve | | Baiamonte | Terry | | | | | |
| Log Book | | Bailey | Donna | | | | | |
| | | Barnhart | Claire | | | | | |
| Email | | Barron | Trey | | | | | |
| Share | | Barton | Karen | | | | | |
| Automation | | Benson | Karen | | | | | |
| Add Hours | | Berger | Allan | | | | | |
| Add Hours | | Berger | Brigid | | | | | |
| | | Boatman | Helen | | | | | |
| Newly shared records | | Bootzin | Rebecca | | | | | |
| Folder Manager | | Burge | William | | | | | |

Select the TMN Standard grid view from the Grid View selection dropdown list. Select the TMN-Hours Entry Eligible Filter from the Filters dropdown list. The resulting grid shows the TMN-Active and TMN-InTraining volunteers excluding TMN-Inactive, TMN-Interested, and TMN-Not Eligible.



| Volunteers Opporture | | aturalist : ^{Chapters} | 🖿 Mid Co | oast | | Filters Dues Check TMN Standard - CBC Waiver TMN Standard - Kris Notify | |
|--------------------------|---------|------------------------------------|------------------|---------|------------|-----------------------------------------------------------------------------------|------------|
| New | Clear F | ilters Grid Setti | ngs TMN Standard | d 🗡 | ▼ Filters | TMN-Active Only TMN-Active/InTrain/NotEligible/Advisors TMN-Class and Staff | |
| Edit | 1 to 88 | of 88 Volunteers | 5 | | | TMN-Has EMail TMN-Hours Entry Eligible | |
| Delete | | Last Name ↓ 1 | First Name | User ID | Master Nat | HVIN-INACTIVE OF INTERESTED | Cell Phone |
| | Find | | | | | TMN-Interested TMN-Officers & Committees | |
| Reports | | Alison | Lane | | | | |
| Calendar | | Amsler, III | Neill | | | | |
| Request/Approve | | Baiamonte | Terry | | | | |
| Log Book | | Bailey | Donna | | | | |
| 3 | | Barnhart | Claire | | | | |

The Mid-Coast chapter has 85 volunteers who meet the Hours Entry Eligible criteria. Make a note of this number for your volunteers reporting calculation later. Select the Log Book Button.

TPWD - Master Naturalist : 🖿 Mid Coast

| New | Clear F | ilters Grid Setti | ngs Save | d Grids List | ✓ Filters | TMN-Hours | Entry Elig | jible 🔽 | |
|---------------------|---------|----------------------|------------|---------------------|-------------|-------------|------------|----------------|----------------|
| Edit | 1 to 85 | of 85 Volunteers | | | | | | | |
| Delete | | Last Name ↓ 1 | First Name | User ID | Master Natu | ralist Cert | Age | Home Phone | Cell Phone |
| Denet | Find | | | | | ~ | ~ | | |
| Reports | | Alison | Lane | midcoast-LAlison | TMN-A | ctive | 70 | | (361) 790-3103 |
| Calendar | | Amsler, III | Neill | midcoast-namsler | TMN-A | ctive | 70 | (361) 319-5252 | (361) 319-5252 |
| Request/Approve | | Baiamonte | Terry | midcoast-TBaiamonte | TMN-A | ctive | 116 | | (361) 935-2322 |
| Log Book | | Bailey | Donna | midcoast-DBailey | TMN-A | ctive | 63 | (361) 872-2264 | (281) 908-0000 |
| | | Barnhart | Claire | midcoast-CBarnhart | TMN-A | ctive | 64 | | (361) 542-0348 |
| Email | | Barton | Karen | midcoast-KBarton | TMN-A | ctive | 67 | | (361) 649-9305 |
| Share | | Benson | Karen | midcoast-KBenson | TMN-A | ctive | 70 | | (361) 350-9999 |
| Automation | | Berger | Allan | midcoast-aberger | TMN-A | ctive | 68 | | (713) 829-2852 |
| Add Hours | | Berger | Brigid | midcoast-bberger | TMN-A | ctive | 57 | | (713) 825-1929 |
| Add Hours | | Boatman | Helen | midcoast-HBoatman | TMN-A | ctive | 79 | | (361) 649-4908 |
| | | Bootzin | Rebecca | midcoast-RBootzin | TMN-A | ctive | 64 | | (361) 676-2883 |
| ewly shared records | | Burge | William | midcoast-bburge | TMN-A | ctive | 61 | | (713) 828-3823 |

Select All volunteers in Grid option.

| olunteers Opportu | nities (| Chapters | | | | |
|---------------------------------------------------|----------|----------------------|---------------|---------|-----------|-------------------|
| New | Clear F | ilters Grid Setti | ngs Saved Gri | ds List | ✓ Filters | TMN-Hours Entr |
| Edit | 1 to 85 | of 85 Volunteers | 5 | | | |
| Delete | | Last Name ↓ 1 | First Name | User ID | Master N | laturalist Cert A |
| | Find | | | | | ~ |
| Reports | | Alison | Lane | | | |
| Calendar | | Amsler, III | Neill | | | |
| Request/Approve | | Baiamonte | Terry | | | |
| | | Laney | Donna | | | |
| All Volunteers in Grid All Volunteers in Accou | nt | Barnhart | Claire | | | |
| All Volunteers in Accou | | Barton | Karen | | | |
| Share | | Benson | Karen | | | |
| Automation | | Berger | Allan | | | |
| Additions | | Berger | Brigid | | | |
| Add Hours | | Boatman | Helen | | | |
| | | Bootzin | Rebecca | | | |
| Newly shared records | | Burge | William | | | |

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Note: Approve all hours before checking certifications and milestones.

The eCoordinator Log Book System window is displayed. Check that All Log Book entries are selected. Select Relative date range. In this example we are checking for milestones. Choose All Time from the Period dropdown list. Click the Apply button to apply these settings to the grid.

| Log Boo | ok Sy | /stem | | | | | | | | |
|-----------------|---------|-------------------|----------------------------|----------|---------|--------------------|----------|------------------------------|----------------|-------------|
| Relative Date | Range 🗸 | | Period: All Time | | ~ ← | Apply Summary mode | | | | |
| All log book er | ntries | | oplies to: Start Date | [| ~ | Rese | | mmarize by: Dlunteer Name | | |
| New | Show | | Grid Settings TMN Standard | | | ~ | 'ters | TMN-Vol Hours Approved | ~ | |
| Details | 1 to 69 | of 69 Rows | | | | | - | | | |
| Reports | | Volunteer Name | Opportunity Title | Start Da | TMN Ho | AT Hour | TMN Init | t Approval Status | Admin Activity | Approved By |
| Email | Find | | | | ♥ 8 | ♥ 8 | ~ | | ~ | |
| Approval | | Kirkwood, Raymond | 34 Opportunities | N/A | 11487.4 | 589.25 | | Yes Approved:384 | Board/Committ | N/A |
| Select All | | Kirkwood, Kris | 33 Opportunities | N/A | 10158.7 | 516.5 | | Yes Approved:766 | Board/Committ | N/A |
| Unselect All | | Berger, Brigid | 26 Opportunities | N/A | 5196 | 396.75 | | Yes Approved:520 | Board/Committ | N/A |
| - | | Smudy, Ron | 16 Opportunities | N/A | 4065.4 | 99.5 | | Yes Approved:156 | Board/Committ | N/A |
| Close | | Berger, Allan | 24 Opportunities | N/A | 3677 | 347.75 | | Yes Approved:149 | Chapter Meetir | N/A |
| | | Burnett, Mike | 4 Opportunities | N/A | 3524.5 | 189.75 | | Yes Approved:66 | | N/A |
| | | Threatt, Barbara | 12 Opportunities | N/A | 3380.75 | 204 | | Yes Approved:89 | Chapter Meetir | N/A |

Select the TMN Standard-Awards 00250 Hours grid view.

Log Book System

| Relative Date | Range | Image: A set of the set of the | | | Peri | od: All Time | ~ | Apply | Summ | nary mode 🗸 | |
|----------------|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|-------------|---------|-------------------------------------|--------------------|--------|------------|------------------------|-----------------------|
| All log book e | ntries | ~ | | Applies to: | Start D | ate | ~ | Reset | | arize by: teer Name | |
| New | Shov | v All | Refresh | Grid Setti | | | d Grids | | Filters TM | N-Vol Hours Approv | ed 🗸 |
| Details | 1 to 2 | of 20 Rows | | | | 250 Hours Test Standard-Aw | ards & Recertific | ation | | | |
| - | | Volunte | er Name ▼ 1 | TMN | Hours | TMN Admin-Snap TMN Standard | shot | | Hours Awar | Initial Certificati | Master Naturalist Cla |
| Reports | | | | | | TMN Standard Re | porting - Detail | | | | |
| Email | Find | | | n-n 🗸 | | TMN Standard Re | | | ~ | = 🗸 | |
| | | Alison, Lane | | | | TMN Standard Re TMN Standard Wi | | ers | Yes | 01/01/2007 | 2006 |
| Approval | | Alison, Lane | | | 000.0 | TMN Standard-All | Hours | | Tes | 01/01/2007 | 2000 |
| Select All | | Bailey, Donn | а | | | TMN Standard-Ap TMN Standard-Av | | cation | Yes | 08/01/2012 | 2010 |
| | _ | Destas Kons | _ | | | TMN Standard-Av | | | 24 | 40/00/0044 | 0044 |
| Jnselect All | | Barton, Kare | n | | 307 | TMN Standard-Av | vards 00500 Hou | Irs | Yes | 10/02/2014 | 2014 |
| | | Burge, Willia | m | | | TMN Standard-Av TMN Standard-Av | | | Yes | 12/31/2017 | 2017 |
| Close | | | | | | TMN Standard-Av | | | | | |
| | | Carney, Caro |)II | | 391.25 | TMN Standard-Av | vards 05000 Hou | Irs | Yes | 01/01/2006 | 2004 |
| | | Clark, Laura | | | | TMN Standard-Av TMN Standard-Av | | | Yes | 08/01/2014 | 2014 |
| | | Glark, Laura | | | | TMN Standard-Av | | | 103 | 00/01/2014 | 2014 |
| | | Cunningham | , Robert | | 320.75 | TMN Standard-Cu | Irrent Year Certif | | Yes | 06/03/2017 | 2017 |
| | | | | | | TMN Standard-Di TMN Standard-Ho | | | N | 10/01/0010 | 0040 |
| | | Eggert, Marie | 5 | | | TMN Standard-IR | | | Yes | 12/31/2013 | 2013 |
| | | Frank, Linda | | | 418 75 | TMN Standard-No | ot Yet Approved | | Yes | 01/01/2012 | 2012 |
| | | , , | | | | TMN Standard-Tr Volunteer Logboo | | | | | |
| | | Harlan, Greg | | | 440.25 | volunieer Logboo | n Gilu | | Yes | 01/01/2002 | 2002 |
| | | Hartigan, Pat | rick | | 421 | 134.75 | 02/01/2016 | | Yes | 12/31/2013 | 2013 |
| | | riarugun, r u | a rort | | 761 | 104.10 | 5210112010 | | | 120112010 | 20.0 |
| | | Hudson, Beth | ı | | 261.25 | 65.75 | | | | 11/14/2016 | 2016 |

We are now looking at volunteers with cumulative service hours >= 250 but less than 500. Look for anyone who has an empty date in the 250 Hrs Award Date column.

| | | n/coordinator/index.php | | | | | | | |
|----------------|--------|---------------------------|---------------------|----------------|------------------|-------------|------------------|----------------------|---------------------|
| .og Boo | ok S | ystem | | | | | | | |
| Relative Date | Range | \checkmark | Peri | od: All Time | ~ | Apply | Summa | ary mode 🗸 | |
| All log book e | ntries | • | Applies to: Start D | ate | V | Reset | Summa Volunte | rize by: eer Name | |
| New | Sho | w All Refresh | Grid Settings | TMN Standard-A | wards 00250 Hour | s 🗸 Filters | TMN | -Vol Hours Approve | ed 🗸 |
| Details | 1 to 2 | 20 of 20 Rows | | | | | | | |
| Reports | | Volunteer Name ▼ 1 | TMN Hours | AT Hours | 250 Hrs Award [| 250 TMN Hou | rs Awarc | Initial Certificati | Master Naturalist C |
| Email | Find | | n-n 💙 💈 - 4 | = | = | | ~ | = | |
| Approval | | Alison, Lane | 389.5 | 68.5 | 01/04/2011 | Yes | | 01/01/2007 | 2006 |
| Select All | | Bailey, Donna | 407 | 82.5 | 06/02/2017 | Yes | | 08/01/2012 | 2010 |
| Jnselect All | | Barton, Karen | 307 | 63 | 07/01/2017 | Yes | | 10/02/2014 | 2014 |
| 01 | | Burge, William | 352.25 | 46.5 | 08/04/2018 | Yes | | 12/31/2017 | 2017 |
| Close | | Carney, Caroll | 391.25 | 111.5 | 01/04/2008 | Yes | | 01/01/2006 | 2004 |
| | | Clark, Laura | 456 | 181.5 | 05/15/2016 | Yes | | 08/01/2014 | 2014 |
| | | Cunningham, Robert | 320.75 | 77.5 | 05/31/2018 | Yes | | 06/03/2017 | 2017 |
| | | Eggert, Marie | 264 | 28 | 11/12/2016 | Yes | | 12/31/2013 | 2013 |
| | | Frank, Linda | 418.75 | 120 | 08/01/2014 | Yes | | 01/01/2012 | 2012 |
| | | Harlan, Greg | 440.25 | 60 | 10/31/2014 | Yes | | 01/01/2002 | 2002 |
| | | Hartigan, Patrick | 421 | 134.75 | 02/01/2016 | Yes | | 12/31/2013 | 2013 |
| | | Hudson, Beth | 261.25 | 65.75 | | | - | 11/14/2016 | 2016 |
| | | Koenig, Catherine | 485.75 | 158 | 04/04/2017 | Yes | | 11/03/2015 | 2015 |
| | | Konarik, Melanie | 278.25 | 143.5 | 09/30/2018 | Yes | | 07/01/2015 | 2015 |
| | | Mathis, Barbara | 492.25 | 143.5 | 04/04/2017 | Yes | | 06/03/2015 | 2015 |
| | | Ortoga Dara | 400 | 05 | 04/04/0040 | No | | 00/00/2047 | 2047 |

Check each of the milestone levels in the grid view dropdown list 20000, 15000, 10000, 5000, 4000, 2500, 1000, 500, and 250 and then their corresponding Awarded Date and Hours Award (Yes/No) columns to see if the volunteer profiles have been updated.

Tip: Check the ones that require updating and run a Logbook Data Grid Report. Exporting the data will give you a list of volunteers to update.

Return to the Table of Contents

Interests

Often a chapter is looking for volunteers with a particular skillset. Checking volunteer Work History and Experience could be just the answer. Begin by logging into eCoordinator and choosing your chapter folder. In this example we're working with the Mid-Coast chapter.

| ccount | Tools | | Report All | | | | | |
|------------------------------|---------|----------------------|------------------|---------|------------|---------------|-------------|---------------|
| TEXAS PARKS & WILDLIFE | | | | | | | | |
| PWD - Maste | er Na | aturalist | D Mid Coa | ist | | | | |
| /olunteers Opportunit | | hapters | | | | | | |
| New | Clear F | ilters Grid Setti | n s TMN Standard | | ✓ Filters | TMN-Active | /InTrain/No | tEligible// 🗸 |
| Edit | 1 to 88 | of 88 Volunteers | s | | | | | |
| Delete | | Last Name ↓ 1 | First Name | User ID | Master Nat | turalist Cert | Age | Home Phone |
| | Find | | | | | ~ | ~ | |
| Reports | | Alison | Lane | | | | | |
| Calendar | | Amsler, III | Neill | | | | | |
| Request/Approve | | Baiamonte | Terry | | | | | |
| Log Book | | Bailey | Donna | | | | | |
| | | Barnhart | Claire | | | | | |
| Email | | Barron | Trey | | | | | |
| Share | | Barton | Karen | | | | | |
| Automation | | Benson | Karen | | | | | |
| Add Hours | | Berger | Allan | | | | | |
| Add Hours | | Berger | Brigid | | | | | |
| | | Boatman | Helen | | | | | |
| Newly shared records | | Bootzin | Rebecca | | | | | |
| Folder Manager | | Burge | William | | | | | |

Select the TMN Standard grid view from the dropdown list. Click on the Grid Settings button.

TPWD - Master Naturalist : 🗀 Mid Coast

| lunteers Opportu | nities C | Chapters | | | | | | | | | |
|-------------------------------|----------|----------------------|----------------|---------------------|------------------------|-------------|----------------|--|--|--|--|
| New | Clear F | ilters Grid Setti | ngs TMN Standa | rd 📃 | Filters TMN-Active | e/InTrain/N | lotEligible// | | | | |
| Edit 1 to 88 of 88 Volunteers | | | | | | | | | | | |
| Delete | | Last Name ↓ 1 | First Name | User ID | Master Naturalist Cert | Age | Home Phone | | | | |
| _ | Find | | | | | ~ | | | | | |
| Reports | | Alison | Lane | midcoast-LAlison | TMN-Active | 70 | | | | | |
| Calendar | | Amsler, III | Neill | midcoast-namsler | TMN-Active | 70 | (361) 319-5252 | | | | |
| Request/Approve | | Baiamonte | Terry | midcoast-TBaiamonte | TMN-Active | 116 | | | | | |
| Log Book | | Bailey | Donna | midcoast-DBailey | TMN-Active | 63 | (361) 872-2264 | | | | |
| | | Barnhart | Claire | midcoast-CBarnhart | TMN-Active | 64 | | | | | |
| Email | | Barron | Trey | midcoast-tbarron | TMN-Advisor | 116 | (361) 576-0022 | | | | |

The Grid Settings for Volunteers window is shown. Expand the Vol: General field list and click on General/ Work History/ Experience. Click the >> button to move it to the Selected Columns list.

| G | rid Settings For Voluntee | ers | | | | | |
|------|-------------------------------------------------------|-----|----|----------------------------------------------------------------------|-----------------------------------|----|-----------|
| | ect Columns to display in the Grid ilable Columns: | | | Selected Columns: | Column Searches | So | ort Width |
| ٠ | Volunteer | ~ | | Last Name | | - | 99 🔨 |
| ÷ | Vol: Email Template ast Sent Date | | | First Name | | _ | 108 |
| | Vol: General* | | | User ID | | _ | 162 |
| | General/Nickname* | | | Sotifications/Master Naturalist Certificati | | _ | 135 |
| | General/Co-resident* | | | Age | = | _ | 50 |
| | General/Are you a TPWD Employee?* | | >> | | - | | |
| | General/Work Status* | | << | Home Phone | | - | 153 |
| | General/Work History/Experience* | | | Cell Phone | | - | 153 |
| Г | General/Reference Information* | | | Email Address | | - | 270 |
| | General/Licensure/Certifications/Skills* | | | TMN Officers/Committees/TMN Officer L | \checkmark | | 135 |
| ٠ | Vol: Background and Driver Check* | | | TMN Officers/Committees/TMN Committ | | _ | 135 |
| ٠ | Vol: Alternative Workforce* | ~ | | Certifications/Current Chapter* | | _ | 135 🗸 |
| * In | dicates user defined fields. | | | | | | |
| | e As: N Standard | | | The top to bottom order of the fields above the columns on the grid. | matches the left to right order o | of | Move Up |
| | - Contract of | | | Number of records per page: 100 | | | Move Down |

Position it to the third column position by selecting it and then click the Move Up button.

| ٩va | ilable Columns: | | | Selected Columns: | Column Searches | So | rt Wi | idth |
|-----|--------------------------------------------------|---|----|------------------------------------------------------------------------|------------------------------------|----|----------|------|
| + | Volunteer | ~ | | Last Name | | _ | 99 | ~ |
| ÷ | Vol: Email Template Last Sent Date | | | First Name | | _ | 108 | 7 |
| - | Vol: General* | | | General/Work History/Experience* | | | 135 | |
| | General/Nickname* | Т | ~ | User ID | | _ | 162 | |
| | General/Co-resident* | | | | | _ | | 4 |
| | General/Are you a TPWD Employee?* | | >> | Certifications/Master Naturalist Certificati | ✓ | - | 135 | |
| | General/Work Status* | | << | Age | = 🖌 | - | 50 | _ |
| | General/Work History/Experience* | | | Home Phone | | - | 153 | |
| | General/Reference Information* | | | Cell Phone | | _ | 153 | |
| | General/Licensure/Certifications/Skills* | | | Email Address | | _ | 270 | |
| ÷ | Vol: Background and Driver Check* | | | TMN Officers/Committees/TMN Officer L | \checkmark | | 135 | ī |
| ÷ | Vol: Alternative Workforce* | ~ | | TMN Officers/Committees/TMN Committ | | _ | 135 | |
| In | dicates user defined fields. | | | | | | | |
| av | e As: | | | The top to bottom order of the fields above r the columns on the grid. | natches the left to right order of | | Move U | р |
| ΓN | IN Standard | | | | | _ | | |
| | Make this saved grid available to all users Save | | | Number of records per page: 100 | | P | Move Dov | wn |

Type a name for the new grid setting and click on the Save button. Click OK to return to the Volunteer tab using the new grid view.

| Grid Settings For Volunteers | | | | | | |
|---------------------------------------------|----|----------------------------------------------------------------------|------------------------------------|------|---------|-----|
| Select Columns to display in the Grid | | Selected Columns: | Column Searches | Sort | Wio | ith |
| Volunteer | | Last Name | | - | 99 | ~ |
| Vol: Email Template Last Sent Date | | First Name | | - | 108 | 1 |
| Vol: General* | | General/Work History/Experience* | | | 135 | |
| Vol: Background and Driver Check* | | User ID | | _ | 162 | |
| Vol: Alternative Workforce* | | | | | | |
| Vol: Group Affiliation* | >> | Certifications/Master Naturalist Certificati | ~ | | 135 | |
| Vol: Certifications* | << | Age | = | - | 50 | |
| Vol: Contact* | | Home Phone | | - [| 153 | |
| Vol: TMN Recognition* | | Cell Phone | | - [| 153 | |
| Vol: TMN Officers/Committees* | | Email Address | | - [| 270 |] |
| | | TMN Officers/Committees/TMN Officer L | ~ | | 135 | |
| | | TMN Officers/Committees/TMN Committ | | - [| 135 | ~ |
| Indicates user defined fields. | | | | | | |
| ave As: | | The top to bottom order of the fields above the columns on the grid. | matches the left to right order of | ſ | love Up | , |
| Volunteer Work History and Experience | | Number of records per page: 100 | | | | |
| Make this saved grid available to all users | | Number of fectorus per page. | | Mo | ive Dov | 'n |
| of this account | | Additional items to include as part of thi Column searches | s saved grid: | | | |
| aved Grids List: | | Current column sort | | | | |
| Volunteer Work History and Experience | | Currently selected folder Click | To Select | | | |
| | | Currently selected filter | MN-Active/InTrain/Not | F | liters | |
| Delete Open | | | | | | |
| efault Saved Grid At Login | | | | | | |
| Remember the last grid upon logout | | Apply | OK | | Cancel | |

Using our new grid view, Work History/ Experience has now been added in the third column position in the grid. Review the Work History/ Experience column to see if the skillset you need is listed.

| PWD - Maste | | aturalist : ^{Chapters} | 🗅 All Da | ta | | | | | | | |
|----------------------|---------|------------------------------------|-----------------|----------------------------|------------------------------------------------------------|----|------------------------|-----|---|--|--|
| New | Clear F | ilters Grid Setti | ngs Volunteer W | ork History and Experience | nd Experience V Filters TMN-Active/InTrain/NotEligible// V | | | | | | |
| Edit | 1 to 10 | 0 of 5226 Volunt | eers | | Page 1 of 53 ≤ < 1 ► ► | | | | | | |
| Delete | | Last Name +1 | First Name | Work History/Experier | User | ID | Master Naturalist Cert | Age | н | | |
| Reports | Find | | | | | | | ~ | | | |
| Calendar | | Abbott | Shelly | 2013 - present: Homes | 1 | | | | | | |
| Calcillai | | Abbott | Thomas | Project Management, C | - | | | | | | |
| Request/Approve | | Abel | Harriet | High School Physics an | 1 | | | | | | |
| Log Book | | Abernathy | Ann | Auditor | (| | | | | | |
| Email | | Abernathy | Sue | | ę | | | | | | |
| | | Abernethy | Susan | CPA | ŧ | | | | | | |
| Share | | Abrahams | Petrine | Landscape Designer | r | | | | | | |
| Automation | | Abreu | James | Owned a motorcycle de | C | | | | | | |
| Add Hours | | Abright | William | Most Recent = Psychot | t | | | | | | |
| | | Ackerman | Benjamin | | - | | | | | | |
| Newly shared records | | Ackerman | Judy | Army | - | | | | | | |

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Class Listing

Begin by logging into eCoordinator and selecting your chapter folder. In this example we're working in the Mid-Coast folder and we want a listing of the volunteers in the 2016 class.

Select the TMN Standard – Chapter Member Summary grid view from the Grid View selection dropdown box.

Opportunities Chapters Volunteers New Clear Filters Grid Settings TMN Standard-Chapter Member Summa V Filters TMN-Active/InTrain/NotEligible// V 1 to 88 of 88 Volunteers Edit First Name Last Name 🖵 1 User ID Home Phone Cell Phone Email Address Delete Find Reports Alison Lane 1 Calendar Amsler, III Neill Baiamonte Terry Request/Approve Bailey Donna Log Book Barnhart Claire Email Barron Trey Share Barton Karen Benson Karen Automation Berger Allan Add Hours Berger Brigid Boatman Helen

TPWD - Master Naturalist : 🗅 Mid Coast

Since some of the 2016 class may no longer be active we need to include them in the grid. Do this by selecting the Clear Filters button. Now the grid has all of the chapter's historical volunteers who have not transferred out of the chapter. Click the Grid Settings button.

| TPWD - | Master | Naturalist | : 🗖 | Mid | Coast |
|--------|--------|------------|-----|-----|-------|
| | | | | | |

| New | Clear F | Grid Setti | ngs Saved | Grids List | ▼ FiltersFi | Iters | V | | |
|-----------------|---------|----------------------|------------|------------|-----------------------|----------|------------|------------|--|
| Edit | 1 to 10 | 0 of 249 Volunte | ers | | Page | e1of3 ∣⊲ | ⊲ 1 ► ⊳ | | |
| Delete | | Last Name → 1 | First Name | User ID | Master Naturalist Cer | t Age | Home Phone | Cell Phone | |
| Reports | Find | | | | × | ~ | | | |
| Oslandar | | Aldridge | Gill | | | | | | |
| Calendar | | Aldridge | Kitty | | | | | | |
| Request/Approve | | Alison | Lane | | | | | | |
| Log Book | | Amsler, III | Neill | | | | | | |
| Email | | Andrews | Steven | | | | | | |
| _ | | Angerstein | Robert | | | | | | |
| Share | | Arnold | Beverly | | | | | | |
| Automation | | Baiamonte | Rob | | | | | | |
| Add Hours | | Baiamonte | Terry | | | | | | |
| | | Bailey | Donna | | | | | | |
| | | Banh | Thu | | | | | | |

The Grid Settings for Volunteers is shown. Scroll down the Selected Columns list and find the Certifications/ Master Naturalist Class column. Type 2016 in the text box to the right of the class field. Click on the Apply button. This applies the view to the Volunteer tab. Since this will be a temporary view, click the Cancel button to return to the Volunteer tab.

| elect Columns to display in the Grid ailable Columns: | | Selected Columns: | Column Searches | Sort | Width | n |
|----------------------------------------------------------|----|-------------------------------------------------------------------------|--------------------------------------|------|----------|---|
| Volunteer | | Cell Phone | | _ | 108 | ^ |
| Vol: Email Template Last Sent Date | | Email Address | | _ | 270 | |
| Vol: General* | | | | | | |
| Vol: Background and Driver Check* | | Street Address 1 | | - | 180 | |
| Vol: Alternative Workforce* | | City | | - | 99 | |
| Vol: Group Affiliation* | >> | Zip | | - | 54 | |
| Vol: Certifications* | << | Age | = | _ | 50 | |
| Vol: Contact* | | Certifications/Master Naturalist Certificati | | | 135 | |
| Vol: TMN Recognition* | | Certifications/Master Naturalist Dues* | | _ | 135 | |
| Vol: TMN Officers/Committees* | | Certifications/Master Naturalist Class* | 2016 | | 135 | |
| | ~ | Certifications/master Naturalist Class" | | - | | |
| | | Certifications/Initial Certification* | = | - | 99 | ~ |
| ndicates user defined fields. | | Certifications/Chanter Certified* | | - | 135 | |
| ve As: MN Standard-Chapter Member Summary | | The top to bottom order of the fields above the columns on the grid. | e matches the left to right order of | I | Nove Up | |
| | | Number of records per page: 100 | | M | ove Down | |
| Make this saved grid available to all users Save | | Additional items to include as part of the Column searches | nis saved grid: | | | |
| ved Grids List: | | Current column sort | | | | |
| MN Standard-Chapter Member Summary | | Currently selected folder Clic | ck To Select | | | |
| | | Currently selected filter | TMN-Active/InTrain/Not | | Filters | |
| Delete Open | 1 | | | | | |

When the Volunteer tab is shown again the 2016 class are the only volunteers in the list.

TPWD - Master Naturalist : 🗀 Mid Coast

| Marri | 0100 5 | ihara Orid C. III | | Orida Link | Titlere The Last | de Tesis Blad lisis | | |
|---------------------|---------|-------------------|------------|------------|--------------------|------------------------|---------------|----------------|
| New | Clear F | Grid Settin | igs Saved | Grids List | Filters TMN-Active | /InTrain/NotEligible// | 1 | |
| Edit | 1 to 12 | of 12 Volunteers | 5 | | | | | |
| Delete | | Last Name 🖵 1 | First Name | User ID | Home Phone | Cell Phone | Email Address | Street Address |
| | Find | | | | | | | |
| Reports | | Amsler, III | Neill | 1 | | | | |
| Calendar | | Burge | William | 1 | | | | |
| Request/Approve | | Cunningham | Robert | 1 | | | | |
| Les Deck | | DeVries | Lisa | (| | | | |
| Log Book | | Guilbeaux | Scott | Ę | | | | |
| Email | | Kleypas | Jynatha | j | | | | |
| Share | | Ortego | Dora | I | | | | |
| Automation | | Savage | Robyn | 1 | | | | |
| | | Spurrell | Nelida | 1 | | | | |
| Add Hours | | Stapleton | Phil | 1 | | | | |
| | | Stapleton | Rebecca | 1 | | | | |
| ewly shared records | | Sterne | Martha | 1 | | | | |
| Folder Manager | | | | | | | | |
| a All Data | | | | | | | | |
| My Data (3) | | | | | | | | |
| Inbox (18) Archive | | | | | | | | |

Return to the Table of Contents

Emailing Volunteer Milestones and Certification Progress

Begin by logging into eCoordinator and choosing your chapter folder. In this example we're working with the Mid-Coast chapter. Select the Volunteer tab and select the TMN Standard grid view from the dropdown list.

| ccount | Tools | \$ | Report All | | | | | |
|--------------------------------------------|---------|----------------------|--------------|---------|------------|---------------|-----------------|------------|
| TEXAS PARKS & WILDLIFE PWD - Mast | er Na | aturalist | 🗅 Mid Co | ast | | | | |
| olunteers Opportun | ities (| Chapters | | | | | | |
| New | Clear F | ilters Grid Setti | TMN Standard | | ▼ ilters | TMN-Active/Ir | 1Train/NotEligi | ble// 🗸 |
| Edit | 1 to 88 | of 88 Volunteers | 5 | | | | | |
| Delete | | Last Name ⊸ 1 | First Name | User ID | Master Nat | turalist Cert | Age | Home Phone |
| Reports | Find | | | | | ~ | ~ | |
| | | Alison | Lane | | | | | |
| Calendar | | Amsler, III | Neill | | | | | |
| Request/Approve | | Baiamonte | Terry | | | | | |
| Log Book | | Bailey | Donna | | | | | |
| - | | Barnhart | Claire | | | | | |
| Email | | Barron | Trey | | | | | |
| Share | | Barton | Karen | | | | | |
| Automation | | Benson | Karen | | | | | |
| Add Hours | | Berger | Allan | | | | | |
| Plue Hours | | Berger | Brigid | | | | | |
| | | Boatman | Helen | | | | | |
| Newly shared records | | Bootzin | Rebecca | | | | | |
| Folder Manager | | Burge | William | | | | | |

Select the TMN Standard grid view from the Grid View selection dropdown list. Select the TMN-Hours Entry Eligible Filter from the Filters dropdown list. The resulting grid shows the TMN-Active and TMN-InTraining volunteers excluding TMN-Inactive, TMN-Interested, and TMN-Not Eligible.



| TPWD - Mast | | aturalist : ^{Chapters} | 🗖 Mid Co | oast | | Filters Dues Check TMN Standard - CBC Walver TMN Standard - Kris Notify | |
|-----------------|---------|------------------------------------|------------------|---------|------------|-----------------------------------------------------------------------------------|------------|
| New | Clear F | ilters Grid Setti | ngs TMN Standard | d 🦊 | ▼ Filters | TMN-Active Only TMN-Active/InTrain/NotEligible/Advisors TMN-Class and Staff | |
| Edit | 1 to 88 | of 88 Volunteers | 5 | | | TMN-Has EMail TMN-Hours Entry Eligible | |
| Delete | | Last Name ↓ 1 | First Name | User ID | Master Nat | TMN-In Training TMN-Inactive or Interested TMN-Interested | Cell Phone |
| Dapata | Find | | | | | TMN-Interested TMN-Officers & Committees | |
| Reports | | Alison | Lane | | | | |
| Calendar | | Amsler, III | Neill | | | | |
| Request/Approve | | Baiamonte | Terry | | | | |
| Log Book | | Bailey | Donna | | | | |
| | | Barnhart | Claire | | | | |

Set the Relative Date Range to This Year to include hours reported in the current year. Select TMN Standard Awards & Recertification from the Grid Settings dropdown list. Finally, click the Email button.

| Log Boo | k Sy | ystem | | | | | | | | |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|------------------|--------------|---------------------------|--------------------|---------------------------------|---------------------|-----------------|----------|
| Relative Date | Range | | F | Period: This | Year 🔽 | Apply | Summary mode 🗸 | • | | |
| All log book er | Itries | V | Applies to: Star | rt Date | ~ | Reset | Summarize by: Volunteer Name | ~ | | |
| New | Shov | | Grid Settings | TMN Star | ndard-Awards & Recertific | catic V Filters | TMN-Vol Hours | Approved 🗸 | | |
| Details | | 9 of 69 Rows | | | | | | | | |
| Reports | | Volunteer Name | TMN Hours | AT Hours | Master Naturalist Clas | Initial Cel. Scati | Master Naturalis | 250 TMN Hours Awarc | 250 Hrs Award E | 500 TM |
| Email | Find | | = 🗸 | = | | = 🗸 | = 🗸 | ~ | = 🗸 | |
| Approval | | Bailey, Donna | | 4 | 2010 | 08/01/2012 | 06/02/2017 | Yes | 06/02/2017 | ^ |
| Select All | | Adrian | | | 2018 | | | | | |
| Unselect All | | Nichols, Dianne | | 4.25 | 2012 | 01/01/2012 | 11/12/2016 | Yes | 12/31/2013 | - |
| | | Crocker, Jeanne | | | 2018 | | | | | |
| Close | | Keene, Gay | | | 2018 | | | | | |
| | | Rios, Gloria | | 3 | 2018 | | | | | |
| | | Wilson, Phoebe | 5 | 14 | 2018 | | | | | |
| | | Dorn, Claudia | 6 | 11 | 2011 | 01/01/2011 | 12/31/2017 | Yes | 12/31/2013 | |
| | | Hejducek, Julie | 9.25 | 7.25 | 2018 | | | | | |
| | | Moore, Jane | 9.25 | 9 | 2018 | | | | | |
| | | Burnett, Sam | 12 | | 2005 | 01/01/2005 | 01/02/2011 | Yes | 01/04/2006 | |
| | < | Wilson, Vickie | 15.5 | 5.5 | 2018 | | | | | ` |
| | \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ | | | | | | | | | / |

The eCoordinator Volunteer Log Book Email window is shown.

| ou cur moore | a mail merge field into any of the fields below. | | Email Que |
|-------------------------|-----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|-------------|
| То: 🖲 А | II 69 record(s) in the grid (Donna BaileyBrigid Berger) | Volunteer Mail Merge Fields: | |
| Insert | alternate email addresses, including mail merge fields, here. | Account Title | ~ |
| | | The cursor is in the Message field. | Insert |
| Reply To: | youremail@here.com | Attachments: (Maximum 2MB) | |
| Sender Name: | Your Name | | Browse |
| Sender Organization: | Your Chapter | Attach Data Grid Report to Email: | Attach File |
| Do: | | | ~ |
| Bcc: | | Attach Volunteer Report to Email: | |
| Subject: | 'Your Chapter' Annual Recertification Status | Click To Select | 🗸 |
| <u>A</u> ~ <u>A</u> · | erdana - 14px - B I U - E Ξ Ξ Ξ Ξ Ξ & & \ E I L H | TMN-Recertification Status ✓ Make this template available to other users of this account. | Save |
| | DL FIRST NAME]: | Saved Email Template List: | |
| - | ; | TMN-Recertification Status | ~ |
| | ecorded [LBE:TMN_HOURS:1] Volunteer Hours and OURS:1] Advanced Training Hours. | Delete | Open |
| You need 4 | 0 Volunteer Hours and 8 Advanced Training hours to | Send Using: | |
| recertify for | r this year. | eCoordinator | |
| Keep Busy! | | O Default email client on this comp | uter |
| | | Send Email Results Report email | |

~

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47

Use the Saved Email Template List to select the TMN-Recertification Status template. Click the Open button below the dropdown list.

| ou can insert | a mail merge field into any of the fields below. | | Email Queue |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|
| o: 🖲 A | II 69 record(s) in the grid (Donna BaileyBrigid Berger) | Volunteer Mail Merge Fields: | |
| Insert | alternate email addresses, including mail merge fields, here. | Account Title | |
| anhy Tay | vauramail@hara.com | The cursor is in the Message field. | Insert |
| eply To: | youremail@here.com | Attachments: (Maximum 2MB) | |
| ender ame: | Your Name | | Browse |
| | | | Attach File |
| ender rganization: | Your Chapter | | |
| - | | Attach Data Grid Report to Email: | ~ |
| c: | | | • |
| cc: | | | |
| ubject: | 'Your Chapter' Annual Recertification Status | Attach Volunteer Report to Email: | |
| lessage: | Tour Chapter Annual Recentification Status | Click To Select | V |
| ★ ★ ★ ★ ★ ★ ★ ↓ ↓ | erdana - 14px - B I U - E E E E E E E E E E | Save Email Template: TMN-Recertification Status ✓ Make this template available to other users of this account. Saved Email Template List: TMN-Recertification Status Delete | Sava V Open |
| You need 4 recertify foi Keep Busy! | | Send Using: e Coordinator Default email client on this comp Send Email Results Report email | |

Change the information in the template to your contact information and signature. Use the Save Email Template text box to create a template with your information. Prefix the name of the template with your first initial and last name. You will use this new template for recertification email communication in the future. Click the Save button.

| D: • A | II 69 record(s) in the grid (Donna BaileyBrigid Berger) | Volunteer Mail Merge Fields: | |
|--------------|-----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|--------------|
| _ | alternate email addresses, including mail merge fields, here. | Account Title | ~ |
| Insen | alientale entail addresses, including mail merge lields, here. | The cursor is in the Message field. | Insert |
| eply To: | youremail@here.com | Attachments: (Maximum 2MB) | |
| ender | Vour Namo | , | Browse |
| ame: | Your Name | | Attach File |
| ender | Your Chapter | | |
| rganization: | | Attach Data Grid Report to Email: | |
| c: | | | \checkmark |
| cc: | | | |
| | | Attach Volunteer Report to Email: | |
| ubject: | 'Your Chapter' Annual Recertification Status | Click To Select | |
| | | Make this template available to other users of this account. Saved Email Template List: | Save |
| | DL_FIRST_NAME]: | TMN-Recertification Status | ~ |
| | ecorded [LBE:TMN_HOURS:1] Volunteer Hours and OURS:1] Advanced Training Hours. | Delete | Open |
| | O Volunteer Hours and 8 Advanced Training hours to | Send Using: | |
| recertify fo | r this year. | eCoordinator | |
| Keep Busy! | 1 | O Default email client on this com | outer |
| | | Send Email Results Report emai | Ι. |
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Click the Preview button.

| Message: | Report should include only recipient's data |
|--------------------------------------------------------------------------------------------------|--------------------------------------------------------------|
| Edit - Insert - View - Format - Table - | |
| ◆ 🖈 Verdana - 14px - B <i>I</i> U | Save Email Template: |
| · · · · · · · · · · · · · · · · · · · | BJames Recertiication Template |
| | Make this template available to other users of this account. |
| | |
| | Saved Email Template List: |
| Hi [VOL:VOL_FIRST_NAME]: | TMN-Recertification Status |
| You have recorded [LBE:TMN_HOURS:1] Volunteer Hours an [LBE:AT_HOURS:1] Advanced Training Hours. | Delete Open |
| You need 40 Volunteer Hours and 8 Advanced Training hour | s to Send Using: |
| recertify for this year. | eCoordinator |
| Keep Busy! | O Default email client on this computer |
| | Send Email Results Report email. |
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| | |
| | |
| Reset Previ | iew Send Cancel Message |
| | |
| Signature: [Show] formatting |) toolbar |
| | |
| Your Name Here | ^ |
| | |

The eCoordinator Email Preview window is shown. This is what your email will look like when sent to the volunteers in your list. Click the Close button.

| 👙 eCoordinator Email Preview - Internet Explorer, enhanced for Bing and MSN | - 🗆 | \times |
|---------------------------------------------------------------------------------------|--------|----------|
| https://tpwd.samaritan.com/coordinator/index.php | | ſ |
| eCoordinator Email Preview | | |
| To: I@gmail.com | | |
| Reply To: youremail@here.com | | |
| Cc: | | 7 |
| Bcc: | | |
| Subject: 'Your Chapter' Annual Recertification Status | | |
| | | |
| Message: | | |
| Hi Donna: | | |
| You have recorded Volunteer Hours and 4 Advanced Training Hours. | | |
| You need 40 Volunteer Hours and 8 Advanced Training hours to recertify for this year. | | |
| Keep Busy! | | |
| | | |
| Your Name Here | | |
| Your Phone Number | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| Note: If you use HTML in your email then you must use HTML tags for | Close | |
| proper formatting of white space including spaces and blank lines. | 01030 | |
| | | |
| | | |
| | ۹ 105% | 6 🗸 |

When you are satisfied with your email, click the Send button. This will send an individualized email to each of the volunteers in your log book grid.

| Message: | |
|---------------------------------------------------------------------------------------|---------------------------------------------------------|
| | Report should include only recipient's data |
| Edit Insert View Format Table | Save Empil Templater |
| ★ | Save Email Template: BJames Recertilication Template |
| | |
| | Make this template available Save |
| ○ 53 | |
| | Saved Email Template List: |
| Hi [VOL:VOL_FIRST_NAME]: | TMN-Recertification Status |
| You have recorded [LBE:TMN_HOURS:1] Volunteer Hours and | Delete Open |
| [LBE:AT_HOURS:1] Advanced Training Hours. | Delete |
| You need 40 Volunteer Hours and 9 Advanced Training hours to | Cand Using |
| You need 40 Volunteer Hours and 8 Advanced Training hours to recertify for this year. | Send Using: |
| | eCoordinator |
| Keep Busy! | O Default email client on this computer |
| | Send Email Results Report email. |
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| | |
| | |
| | |
| | |
| Reset Preview | Send Cancel Message |
| | |
| Signature: [Show] formatting toolbar | |
| | |
| Your Name Here | |
| Your Phone Number | |
| | |

There is also template named TMN-Milestone Status for use in communicating volunteer cumulative and milestone dates. Use the same steps above to customize and use this template.

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Chapter Reports

Use the Opportunity tab for reporting cumulative hour totals for the chapter. If you use the Volunteer tab you may be missing hours reported by volunteers who have transferred to other chapters. Hours always stay with the opportunities.

Hours by Category | Creating Pivot Tables and Charts in Excel

In this example we will be gathering information out of eCoordinator and using it to report 2017 hours and impact data for the Mid-Coast chapter. In addition, we will create a chart showing total hours spent in each opportunity category for the year.

Log in to eCoordinator. Choose your chapter folder. In this example we're using the Mid-Coast chapter. Select the Opportunity tab and the TMN Standard grid view. Click the Log Book button and choose all opportunities in grid.

| | PWD - Master Naturalist : D Mid Coast | | | | | | | | | | | | | | |
|-----------------|---------------------------------------|--------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------|-----------------------|--|--|--|--|--|--|--|--|--|--|
| New | Clear Fi | ilters Grid Settings TMN Standard | Filters | Filters | | | | | | | | | | | |
| Edit | 1 to 75 | 1 to 75 of 75 Opportunities | | | | | | | | | | | | | |
| Сору | | Opportunity Title 🖵 1 | Description | Opportunity/Organization | Alternate Contact Nam | | | | | | | | | | |
| | Find | | | | | | | | | | | | | | |
| Calendar | | Apply to the Mid-Coast Chapter | Apply to take certification training with Coast Texas Master Naturalist Chapte Coast Website Contact the Membersh | Mid Coast | | | | | | | | | | | |
| Reports | | AT: Lecture Series presentation | Sessions that are part of a series offe | Mid Coast | | | | | | | | | | | |
| | | AT: Online Training | Approved online training listed on the | MC Hours-keeper | Brad James | | | | | | | | | | |
| Request/Approve | | AT: Single presentation | Approved training that is not part of a | MC Hours-keeper | Brad James | | | | | | | | | | |
| Log Book | | AT: Specific-Project | Approved training for a specific Chapt Heavy Equipment training, Matagorda MAPS bird- banding. Specify the partner & amp; p | Mid Coast | | | | | | | | | | | |
| Share | | AT: TX Waters Certification Training | This curriculum will allow Texas Maste focused educational activities at festiv | TPWD-TX Waters | Johnnie E. Smith | | | | | | | | | | |
| Unshare | | AT: with Chapter Meeting | Advanced Training provided in conjun | Mid Coast | Brad James | | | | | | | | | | |
| Automation | | AT: with State Meet | Advanced Training provided in conjun | TMN Statewide | Brad James | | | | | | | | | | |
| Automation | | CB: Chapter Business | Includes attending chapter meetings, keeping, website, newsletter, hospital | Mid Coast | Brad James | | | | | | | | | | |

Set the date range (January 1, 2016 to December 31, 2016). Click the Apply button. Choose the TMN Standard Reporting grid view from the Grid View dropdown list. Select Summary Mode.

| Log Boo | ok Sy | /stem | | | | | | |
|---------------|---------|-------------------------------------|----------------------------------|----------------------------------|-------------|-----------|-----------------|-------|
| Specific Date | Range 🗸 | • | Start Date: Jan 🔽 1 🔽 | 2017 V Apply | Summary m | ode 🗸 | | |
| | | | End Date: Dec 🗸 31 🗸 | 2017 🗸 | Summarize b | | | |
| | | | es to: Start Date | ✓ Reset | Opportunity | i itie 🗸 | | |
| | | iclude entries with no start or end | date if the "Date Entered" falls | within the specified date range. | <u> </u> | | | |
| New | Show | | Grid Settings TMN Standar | d Reporting 🔽 Fi | Iters Fil | ters | \checkmark | |
| Details | |) of 60 Rows | | | | | | |
| Reports | | Opportunity Title +1 | Volunteer User ID | Voluntet Name | AT Hours | TMN Hours | TMN Initial Tra | Start |
| Email | Find | | | | = 🗸 | = 🗸 | = 🗸 | : 🗸 |
| Approval | | AT: Lecture Series presentatior | N/A | 29 Volunteers | 171.25 | | | N/ |
| Select All | | AT: Online Training | N/A | 18 Volunteers | 71.5 | | | N/ |
| Unselect All | | AT: Single presentation | N/A | 51 Volunteers | 388.5 | | | N/ |
| 01 | | AT: Specific-Project | N/A | 38 Volunteers | 329 | | | N/ |
| Close | | AT: TX Waters Certification Tra | N/A | 12 Volunteers | 107.5 | | | N/ |
| | | AT: with Chapter Meeting | N/A | 38 Volunteers | 90.5 | | | N/ |
| | | AT: with State Meet | N/A | 14 Volunteers | 122.25 | | | N/ |
| | | CB: Chapter Business | N/A | 42 Volunteers | | 1141 | | N/ |
| | | FR: ANWR research | N/A | 8 Volunteers | | 142.5 | | N/ |
| | | FR: Aquatic Life | N/A | 3 Volunteers | | 3.75 | | N/ |
| | | FR: Bird Populations | N/A | 33 Volunteers | | 2322.2 | | N/ |
| | | | | | | | | |

Click on the Reports button and choose Opportunity Data Grid.

Log Book System

| Specific Date Range | - | Start Da | | 2017 Apply | Summary m | node | |
|--------------------------|------------------------------------------------------------------------|-------------------------|----------------------------|---------------------------------|----------------------------|-----------|-----------------|
| | | End Da Applies to: | | 2017 🗸 Reset | Summarize I Opportunity | | |
| | nclude entries with r | no start or end date if | the "Date Entered" falls w | ithin the specified date range. | | | |
| New Show | v All Refr | resh Grid Se | ttings TMN Standard | Reporting | Iters Fi | Iters | \checkmark |
| Details 1 to 6 | 0 of 60 Rows | | | | | | |
| | Opportunity | Title ▼ 1 | Volunteer User ID | Volunteer Name | AT Hours | TMN Hours | TMN Initial Tra |
| Opportunity Roster | 4 | | | | = 🗸 | = 🗸 | = 🗸 |
| Placement Report | Deportunities Registered Placement Report cture Series presentation | | | 29 Volunteers | 171.25 | | , |
| Referral Report | line Trainir | ng N/A | | 18 Volunteers | 71.5 | | |
| Opportunity Schedule | ngle presen | ntation N/A | | 51 Volunteers | 388.5 | | |
| Opportunity Shift Placer | nents ecific-Proje | ect N/A | | 38 Volunteers | 329 | | |
| Opportunity Report | | | | | 107.5 | | |
| Log Book Data Grid Rep | port | IVA | | 12 Volunteers | | | |
| | AT: with Chapter | Meeting N/A | | 38 Volunteers | 90.5 | | |
| | AT: with State Me | eet N/A | | 14 Volunteers | 122.25 | | |
| | CB: Chapter Business | | | 42 Volunteers | | 1141 | |
| | FR: ANWR research | | | 8 Volunteers | | 142.5 | |
| | FR: Aquatic Life | | | 3 Volunteers | | 3.75 | |
| | FR: Bird Population | ons N/A | | 33 Volunteers | | 2322.2 | |

The Report Parameters window is shown. Type a name for your report in the Report Title text box. Exclude the Start Date, Chapter Name, and Service Performed columns. Since this is summary data those column values are N/A. Choose Excel (*.xlsx) from the Report Format dropdown list. Click the OK button to continue.

~

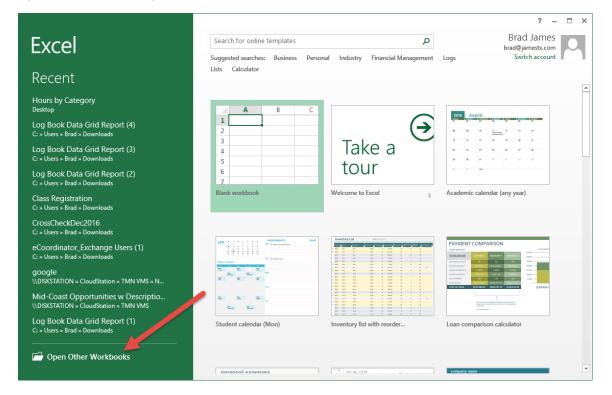
| Print: | Please s All rows from grid Only the selected row Print summary table | | |
|----------------|-------------------------------------------------------------------------------------------------------------|-------------------------------------------|--------------|
| Report Title: | Mid-Coast 2017 Hours S | ummary | Exclude |
| | Opportunity Title: | Opportunity Title | |
| | Volunteer User ID: | Volunteer User ID | |
| | Volunteer Name: | Volunteer Name | |
| | AT Hours: | AT Hours | |
| | TMN Hours: | TMN Hours | |
| | TMN Initial Training: | TMN Initial Training | |
| | Start Date: | Start Date | |
| | What category does the project fall under: | What category does the project fall under | |
| | Chapter Name: | Chapter Name | \checkmark |
| | Service Performed: | Service Performed | \checkmark |
| | Grand Total: | Grand Total | |
| | Adult Male Total: | Adult Male Total | |
| | Adult Female Total: | Adult Female Total | |
| | Adult Sub Total: | Adult Sub Total | |
| | Youth Sub total: | Youth Sub total | |
| | Adult White: | Adult White | |
| | Adult Hispanic: | Adult Hispanic | |
| | Adult Black: | Adult Black | |
| | Adult Asian: | Adult Asian | |
| | Adult Amer Ind / Alaskan: | Adult Amer Ind / Alaskan | |
| Report Format: | Excel (*.xlsx) | | ~ |
| Orientation: | Portrait Landscape | | |

Depending on which internet browser software you are using the window shown below may be different. The purpose of this step is to save the data file from eCoordinator to your computer. In this example Internet Explorer is being used. Save the file and note where it is located on your computer. Often, the default folder is your Downloads folder. Google Chrome has a feature that shows the folder in which the file has been saved. If you are using Google Chrome you can select Show in Folder to get this information. Click the Close button when eCoordinator Log Book System window is shown again.





Open Excel. Choose Open Other Workbooks.



Click the Browse button or choose the folder where your report file was stored. Select your file and click the Open button.

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The report data is now in Excel.

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| A1 \cdot : $\times \checkmark f_x$ Oppor | rtunity Title | | | | | | | | | |
| A | в | с | D | E | F | | | | G | |
| 1 Opportunity Title | Volunteer User ID | Volunteer Name | AT Hours | _ | TMN Initial Train | ning | What cate | egory does the pr | - | - |
| 2 AT: Lecture Series presentation | N/A | 29 Volunteers | 171.25 | | The second se | 1116 | Advance | | oject lan unuer | |
| 3 AT: Online Training | N/A | 18 Volunteers | 71.50 | | | | Advance | | | |
| 4 AT: Single presentation | N/A | 51 Volunteers | 388.50 | | | | Advance | | | |
| 5 AT: Specific-Project | N/A | 38 Volunteers | 329 | | | | Advance | | | |
| 6 AT: TX Waters Certification Training | N/A | 12 Volunteers | 107.50 | | | | Advance [•] | 0 | | |
| 7 AT: with Chapter Meeting | N/A | 38 Volunteers | 90.50 | | | | Advance [®] | | | |
| 8 AT: with State Meet | N/A | 14 Volunteers | 122.25 | | | | Advance | Training | | |
| 9 CB: Chapter Business | N/A | 42 Volunteers | | 1141 | | | Chapter 8 | k Program Busine | ss/Administrati | ion |
| 10 FR: ANWR research | N/A | 8 Volunteers | | 142.50 | | | Field Res | earch (including | surveys) | |
| 11 FR: Aquatic Life | N/A | 3 Volunteers | | 3.75 | | | Field Res | earch (including | surveys) | |
| 12 FR: Bird Populations | N/A | 33 Volunteers | | 2,322.20 | | | Field Res | earch (including | surveys) | |
| 13 FR: Insect Life | N/A | 3 Volunteers | | 48 | | | Field Res | earch (including | surveys) | |
| 14 FR: Mad Island | N/A | 1 Volunteer | | 16 | | | Field Res | earch (including | surveys) | |
| 15 FR: Other Partners | N/A | 7 Volunteers | | 256.50 | | | Field Res | earch (including | surveys) | |
| 16 FR: TPWD | N/A | 3 Volunteers | | 18 | | | Field Res | earch (including | surveys) | |
| 17 FR: Water Quality | N/A | 2 Volunteers | | 28 | | | Field Res | earch (including | surveys) | |
| 18 FR: WWF research | N/A | 2 Volunteers | | 13 | | | Field Res | earch (including | surveys) | |
| 19 Initial Training | N/A | 16 Volunteers | | | | 735.25 | | | | |
| 20 NPA: ANWR | N/A | 3 Volunteers | | 92.50 | | | | ublic Access | | |
| 21 NPA: Aransas Pathways | N/A | 7 Volunteers | | 78.25 | | | | ublic Access | | |
| 22 NPA: Coleto Creek | N/A | 3 Volunteers | | 23 | | | | ublic Access | | |
| 23 NPA: Other Locations | N/A | 1 Volunteer | | 11 | | | | ublic Access | | |
| 24 NPA: WWF | N/A | 9 Volunteers | | 66.75 | | | Nature/P | ublic Access | | |
| 25 OT: Partner Organization | N/A | 9 Volunteers | | 203.50 | | | Other | | | |

Click the corner arrow to select all cells and drag the column divider to the right to widen the columns. This will make it easier to see the information.

| Image: Solution of the second sec | FORMULAS DATA REV | IEW VIEW DEVE | LOPER TEA | ٩M | Mid_Coast_2017_ | Hours_Summar | y.xlsx - Excel | | |
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| А | В | С | D | E | F | | | G | |
| 1 Opportunity Title | Volunteer User ID | Volunteer Name | AT Hours | TMN Hours | TMN Initial Training | What cate | gory does the pr | oject fall unde | r |
| 2 AT: Lecture Series presentation | N/A | 29 Volunteers | 171.25 | | Ŭ | Advance T | raining | | |
| 3 AT: Online Training | N/A | 18 Volunteers | 71.50 | | | Advance T | raining | | |
| 4 AT: Single presentation | N/A | 51 Volunteers | 388.50 | | | Advance T | raining | | |
| 5 AT: Specific-Project | N/A | 38 Volunteers | 329 | | | Advance T | raining | | |
| 6 AT: TX Waters Certification Training | N/A | 12 Volunteers | 107.50 | | | Advance T | raining | | |
| 7 AT: with Chapter Meeting | N/A | 38 Volunteers | 90.50 | | | Advance T | raining | | |
| 8 AT: with State Meet | N/A | 14 Volunteers | 122.25 | | | Advance T | raining | | |
| 9 CB: Chapter Business | N/A | 42 Volunteers | | 1141 | | Chapter & | Program Busine | ss/Administrat | ion |
| 10 FR: ANWR research | N/A | 8 Volunteers | | 142.50 | | Field Rese | arch (including | surveys) | |
| 11 FR: Aquatic Life | N/A | 3 Volunteers | | 3.75 | | Field Rese | arch (including | urveys) | |
| 12 FR: Bird Populations | N/A | 33 Volunteers | | 2,322.20 | | Field Rese | arch (including | urveys) | |
| 13 FR: Insect Life | N/A | 3 Volunteers | | 48 | | Field Rese | arch (including | urveys) | |
| I4 FR: Mad Island | N/A | 1 Volunteer | | 16 | | Field Rese | arch (including | urveys) | |
| 15 FR: Other Partners | N/A | 7 Volunteers | | 256.50 | | Field Rese | arch (including | urveys) | |
| 16 FR: TPWD | N/A | 3 Volunteers | | 18 | | Field Rese | arch (including | urveys) | |
| 17 FR: Water Quality | N/A | 2 Volunteers | | 28 | | Field Rese | arch (including | urveys) | |
| 18 FR: WWF research | N/A | 2 Volunteers | | 13 | | Field Rese | arch (including | urveys) | |
| 19 Initial Training | N/A | 16 Volunteers | | | 735. | 25 | | | |
| 20 NPA: ANWR | N/A | 3 Volunteers | | 92.50 | | Nature/Pu | blic Access | | |
| 21 NPA: Aransas Pathways | N/A | 7 Volunteers | | 78.25 | | Nature/Pu | blic Access | | |
| 22 NPA: Coleto Creek | N/A | 3 Volunteers | | 23 | | Nature/Pu | blic Access | | |
| 23 NPA: Other Locations | N/A | 1 Volunteer | | 11 | | Nature/Pu | blic Access | | |
| 24 NPA: WWF | N/A | 9 Volunteers | | 66.75 | | Nature/Pu | blic Access | | |
| 25 OT: Partner Organization | N/A | 9 Volunteers | | 203.50 | | Other | | | |

Locate the total line at the bottom of the imported data. You may want to print this line, it contains the total number of hours for each opportunity, number of volunteers reporting hours to each opportunity, hours' totals for advanced training, initial training and service hours. It also contains impact data for the date range including people touched by outreach activities, acreage, and new trail miles impacted. For this example we are going to delete the row. Delete the summary row.

| FILE HOME INSERT PAGE LAYOUT | | | | ELOPER TEA | M | | |
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| A | В | С | D | E | F | G | Н |
| 10 RM: Aransas Pathways | N/A | 19 Volunteers | | 194.25 | | Natural Resource Management | |
| 11 RM: Coleto Creek | N/A | 1 Volunteer | | 6 | | Natural Resource Management | |
| 12 RM: Goose Island | N/A | 2 Volunteers | | 38.50 | | Natural Resource Management | |
| 13 RM: Mad Island | N/A | 5 Volunteers | | 141.05 | | Natural Resource Management | |
| 4 RM: MBNP | N/A | 1 Volunteer | | 3 | | Natural Resource Management | |
| 15 RM: Other Locations | N/A | 24 Volunteers | | 869.70 | | Natural Resource Management | 15 |
| 16 RM: PAIS Sea Turtles | N/A | 7 Volunteers | | 596.25 | | Natural Resource Management | 1 |
| 17 RM: WWF | N/A | 1 Volunteer | | 4 | | Natural Resource Management | |
| 18 TG: ANWR | N/A | 5 Volunteers | | 139.50 | | Technical Guidance | 15 |
| 9 TG: Aransas Pathways | N/A | 6 Volunteers | | 40.50 | | Technical Guidance | 2 |
| 50 TG: Balcones Canyonlands NWR | N/A | 1 Volunteer | | 8.25 | | Technical Guidance | |
| TG: City or County | N/A | 3 Volunteers | | 4.75 | | Technical Guidance | 1 |
| 52 TG: Mad Island | N/A | 1 Volunteer | | 53.95 | | Technical Guidance | |
| 3 TG: Other Organizations | N/A | 12 Volunteers | | 342.75 | | Technical Guidance | 69 |
| 4 TG: TMN VMS Implementation and Support | N/A | 1 Volunteer | | 130.25 | | Technical Guidance | 2 |
| 55 TG: WWF | N/A | 6 Volunteers | | 280.50 | | Technical Guidance | |
| 66 TR: ANWR direct education | N/A | 3 Volunteers | | 17 | | Traising & Educating Others (Direct) | 89 |
| 7 TR: Coleto Creek | N/A | 5 Volunteers | | 28 | | aining & Educating Others (Direct) | 28 |
| 58 TR: Mad Island | N/A | 1 Volunteer | | 6 | | Training & Educating Others (Direct) | 12 |
| 59 TR: Other Organizations | N/A | 18 Volunteers | | 831 | | Training & Educating Others (Direct) | 1110 |
| 50 TR: TMN VMS Implementation and Support | N/A | 1 Volunteer | | 67 | | Training & Educating Others (Direct) | 51 |
| 1 TR: WWF direct education | N/A | 4 Volunteers | | 30.50 | | Training & Educating Others (Direct) | 183 |
| 60 Opportunities | N/A | 75 Volunteers | 1,280.50 | 10,956.15 | 735. | 25 N/A | 5742 |
| 53 | | | | | | | |
| 54 | | | | | | | |
| 55 | | | | | | | |

Highlight the cells containing data. In this example, columns A-Q and rows 1-60. Choose the Insert tab on the menu and then click the Pivot Table icon on the Ribbon Bar.

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| f_x : $\times \checkmark f_x$ o | Opportunity Title | | | | | | | |
| А | В | с | D | E | F | G | Н | 1 |
| Opportunity Title | Volunteer Use | J Volunteer Name | AT Hours | TMN Hours | TMN Initial Training | What category does the project fall under | Grand Total Ad | ult Male Total Adult |
| AT: Lecture Series presentation | N/A | 29 Volunteers | 171.25 | | | Advance Training | | |
| AT: Online Training | N | 18 Volunteers | 71.50 | | | Advance Training | | |
| AT: Single presentation | N/A | 51 Volunteers | 388.50 | | | Advance Training | | |
| AT: Specific-Project | N/A | 38 Volunteers | 329 | | | Advance Training | | |
| AT: TX Waters Certification Training | N/A | 12 Volunteers | 107.50 | | | Advance Training | | |
| AT: with Chapter Meeting | N/A | 38 Volunteers | 90.50 | | | Advance Training | | |
| AT: with State Meet | N/A | 14 Volunteers | 122.25 | | | Advance Training | | |
| CB: Chapter Business | N/A | 42 Volunteers | | 1141 | | Chapter & Program Business/Administration | | |
| FR: ANWR research | N/A | 8 Volunteers | | 142.50 | | Field Research (including surveys) | | |
| FR: Aquatic Life | N/A | 3 Volunteers | | 3.75 | | Field Research (including surveys) | | |
| FR: Bird Populations | N/A | 33 Volunteers | | 2,322.20 | | Field Research (including surveys) | | |
| FR: Insect Life | N/A | 3 Volunteers | | 48 | | Field Research (including surveys) | | |
| FR: Mad Island | N/A | 1 Volunteer | | 16 | | Field Research (including surveys) | | |
| FR: Other Partners | N/A | 7 Volunteers | | 256.50 | | Field Research (including surveys) | | |
| FR: TPWD | N/A | 3 Volunteers | | 18 | | Field Research (including surveys) | | |
| FR: Water Quality | N/A | 2 Volunteers | | 28 | | Field Research (including surveys) | | |
| FR: WWF research | N/A | 2 Volunteers | | 13 | | Field Research (including surveys) | | |
| Initial Training | N/A | 16 Volunteers | | | 735.25 | | | |
| NPA: ANWR | N/A | 3 Volunteers | | 92.50 | | Nature/Public Access | | |
| NPA: Aransas Pathways | N/A | 7 Volunteers | | 78.25 | | Nature/Public Access | | |
| NPA: Coleto Creek | N/A | 3 Volunteers | | 23 | | Nature/Public Access | | |
| NPA: Other Locations | N/A | 1 Volunteer | | 11 | | Nature/Public Access | | |
| NPA: WWF | N/A | 9 Volunteers | | 66.75 | | Nature/Public Access | | |
| OT: Partner Organization | N/A | 9 Volunteers | | 203.50 | | Other | 7 | 2 |
| PO: ANWR | N/A | 18 Volunteers | | 1,192.25 | | Public Outreach (Indirect) | 1799 | 66 |
| PO: Aransas Pathways | N/A | 9 Volunteers | | 78.75 | | Public Outreach (Indirect) | 258 | 23 |
| B PO: ARH docent | N/A | 3 Volunteers | | 48 | | Public Outreach (Indirect) | 761 | |
| PO: Balcones Canyonlands NWR | N/A | 1 Volunteer | | 58.25 | | Public Outreach (Indirect) | | |
| 0 PO: Coleto Creek | Ν/Δ | 11 Volunteers | | 96.75 | | Public Outreach (Indirect) | 218 | 70 |

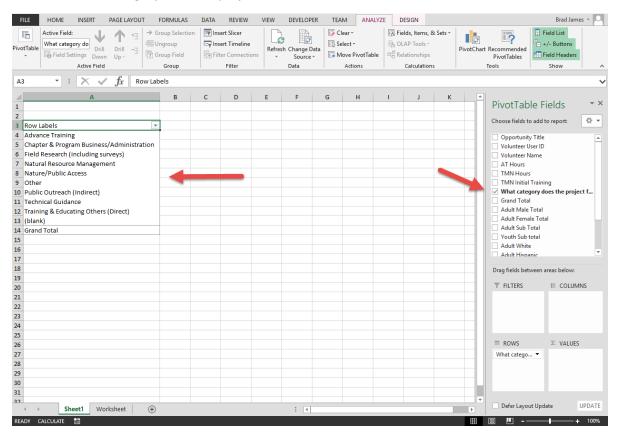
The Create Pivot Table window is shown. Check that New Worksheet is selected and click OK.

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| A1 \cdot : $\times \checkmark f_x$ | Opportunity Title | | | | | | | | | |
| A | В | С | D | E | | F | G | Н | | |
| 1 Opportunity Title | Volunteer User ID | Volunteer Name | AT Hours | TMN H | ours | TMN Initial Training | What category does the project fall unde | er Grand Total Adu | | |
| 2 AT: Lecture Series presentation | N/A | 29 Volunteers | 171.25 | | | | Advance Training | | | |
| 3 AT: Online Training | N/A | 18 Volunteers | 71.50 | | | | Advance Training | | | |
| 4 AT: Single presentation | N/A | 51 Volunteers | 388.50 | | | | Advance Training | | | |
| 5 AT: Specific-Project | Create PivotTable | | ? | × | | | Advance Training | | | |
| 6 AT: TX Waters Certification Training | | | | | | | Advance Training | | | |
| 7 AT: with Chapter Meeting | Choose the data that you want | to analyze | | | | | Advance Training | | | |
| 8 AT: with State Meet | Select a table or range | | | | | | Advance Training | | | |
| 9 CB: Chapter Business | Table/Range: Works | heet!SAS1:SQS61 | | 1 | 1141 | | Chapter & Program Business/Administra | tion | | |
| 10 FR: ANWR research | O Use an external data source | ce | | 4 | 42.50 | | Field Research (including surveys) | | | |
| 11 FR: Aquatic Life | Choose Connection. | | | | 3.75 | | Field Research (including surveys) | | | |
| 12 FR: Bird Populations | Connection name: | | | 2 | 22.20 | | Field Research (including surveys) | | | |
| 13 FR: Insect Life | Choose where you want the Pig | otTable report to be p | laced | | 48 | | Field Research (including surveys) | | | |
| 14 FR: Mad Island | New Worksheet | | | | 16 | | Field Research (including surveys) | | | |
| 15 FR: Other Partners | O Existing Worksheet | | | 5 | 56.50 | | Field Research (including surveys) | | | |
| 16 FR: TPWD | Location: | | | | 18 | | Field Research (including surveys) | | | |
| 17 FR: Water Quality | Choose whether you want to a | | | C.L.M. | 28 | | Field Research (including surveys) | | | |
| 18 FR: WWF research | | | | | 13 | | Field Research (including surveys) | | | |
| 19 Initial Training | Add this data to the Data | Model | | | | 735.25 | 5 | | | |
| 20 NPA: ANWR | | ОК | Canc | el g | 92.50 | | Nature/Public Access | | | |
| 21 NPA: Aransas Pathways | IN/A | 7 volunteers | | | 78.25 | | Nature/Public Access | | | |
| 22 NPA: Coleto Creek | N/A | 3 Volunteers | | | 23 | | Nature/Public Access | | | |
| 23 NPA: Other Locations | N/A | 1 Volunteer | | | 11 | | Nature/Public Access | | | |
| 24 NPA: WWF | N/A | 9 Volunteers | | e | 66.75 | | Nature/Public Access | | | |
| 25 OT: Partner Organization | N/A | 9 Volunteers | | 20 | 03.50 | | Other | 7 | | |
| 26 PO: ANWR | N/A | N/A 18 Volunteers | | 1,19 | 92.25 | | Public Outreach (Indirect) | 1799 | | |
| 27 PO: Aransas Pathways | N/A | 9 Volunteers | | 7 | 78.75 | | Public Outreach (Indirect) | | | |
| 28 PO: ARH docent | N/A | 3 Volunteers | | | 48 | | Public Outreach (Indirect) | | | |
| 29 PO: Balcones Canyonlands NWR | N/A | 1 Volunteer 5 | | 58.25 | | Public Outreach (Indirect) | | | | |
| 20 PO: Coloto Crook | NI/A | 11 Voluntoors | | | 96 75 | | Public Outroach (Indiract) | 210 | | |

The new work sheet is shown with the pivot table.

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Click the "What category does the project fall under" checkbox to include this data in the table.



Position the mouse pointer over TMN Hours and right mouse click to show the Options dropdown list. Choose the Add to Values option.

| G | H | PivotTable Fields • × Choose fields to add to report: |
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| | | Opportunity Title Volunteer Name AT Hours TMN Hours ✓ Mhat category does th Grand Total Adult Male Total Adult Female Total Adult Sub Total Adult Sub Total Adult White Adult Hispanic Adult Asian Adult Amer Ind / Alaskan |
| | | Drag fields between areas below: ▼ FILTERS III COLUMNS |

Count of TMN Hours has been added to the table.

| FILE HOME INSERT PAGE LAY | OUT FORMULAS DATA | REVIEW VIEW | DEVELOPER T | EAM ANALYZE | DESIGN | | Brad James 👻 📿 |
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| A | B | C D | E F | G H | | _ | PivotTable Fields * * |
| 1 2 | | | | | | | |
| 3 Row Labels | Count of TMN Hour | | | | | | Choose fields to add to report: |
| 4 Advance Training | | 5 | | | | | |
| 5 Chapter & Program Business/Adminis | stration | 1 | | | | | Opportunity Title |
| 6 Field Research (including surveys) | stration | 9 | | | | | Volunteer User ID |
| 7 Natural Resource Management | | 9 | | | | | Volunteer Name |
| 8 Nature/Public Access | | 5 | | | | | TMN Hours |
| 9 Other | | 1 | | | | | TMN Initial Training |
| 10 Public Outreach (Indirect) | | 3 | | | | | ✓ What category does the project f |
| 11 Technical Guidance | | 8 | | | | | Grand Total |
| 12 Training & Educating Others (Direct) | | 6 | | | | | Adult Male Total |
| 13 (blank) | | 0 | | | | | Adult Female Total |
| 14 Grand Total | | 52 | | | | | Adult Sub Total |
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| 16 | | | | | | | Adult White |
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| 18 | | | | | | | Drag fields between areas below: |
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| 27 | | | | | | | Defect weet the data to 1000 ATC |
| ♦ ▶ Sheet1 Worksheet | + | | | | | Þ | Defer Layout Update UPDATE |
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Position the mouse pointer over AT Hours and right mouse click to show the Options dropdown list. Choose the Add to Values option.

| 🕅 🗖 5 · C · - | | Log Book Data | Grid Report (5) - Excel | | | PIVOTTA | BLE TOOLS ? 📧 - 🗆 🗙 |
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| PivotTable What category do | | t Slicer t Timeline r Connections Filter | Refresh Change Data * Source * Data | Actions | Fields, Item COLAP Tools Relationshi Calculat | PivotChart Recommended Ps PivotTables | ☐ Field List 1 +/- Buttons ☐ Field Headers Show |
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| 1 | | | | | | PivotTable Fields | * X |
| 2 3 Row Labels | Count of TMN Hours | | | | | Choose fields to add to report: | 43- |
| 3 Row Labels 4 Advance Training | Count of TMN Hours | | | | | | |
| 5 Chapter & Program Business/Administration | n 1 | | | | | Opportunity Title Volunteer Name | <u> </u> |
| 6 Field Research (including surveys) | 9 | | | - | | AT Hours | |
| 7 Natural Resource Management | 11 | | | | | TMN Hours T Add to Report Fil | ter |
| 8 Nature/Public Access | 4 | | | | | 🗌 TMN Initial 📒 🛛 Add to Row Labe | ls |
| 9 Other | 1 | | | | | V What categ III Add to Column L | abels |
| 10 Public Outreach (Indirect) | 12 | | | | | Grand Total E Add to Values | |
| 11 Technical Guidance | 7 | | | | | Adult Male Adult Femal | |
| 12 Training & Educating Others (Direct) | 7 | | | | | Adult Sub T | |
| 13 Grand Total | 52 | | | | | Youth Sub total | |
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Count of AT hours has been added to the table.

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| 3 Row Labels | Count of TMN Hours Coun | t of AT Hours | | | | Choose fields to add to re | eport: 🕀 🔻 |
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| 6 Field Research (including surveys) | 9 | | | | | Volunteer Name | |
| 7 Natural Resource Management | 9 | | | | | AT Hours | |
| 8 Nature/Public Access | 5 | | | | | TMN Hours | |
| 9 Other | 1 | | | | | TMN Initial Training | |
| 10 Public Outreach (Indirect) | 13 | | | | | ✓ What category does | the project f |
| 11 Technical Guidance | 8 | | | | | Grand Total | |
| 12 Training & Educating Others (Direct) | 6 | | | | | Adult Male Total | |
| 13 (blank) | | | | | | Adult Female Total | |
| 14 Grand Total | 52 | 7 | | | | Adult Sub Total | |
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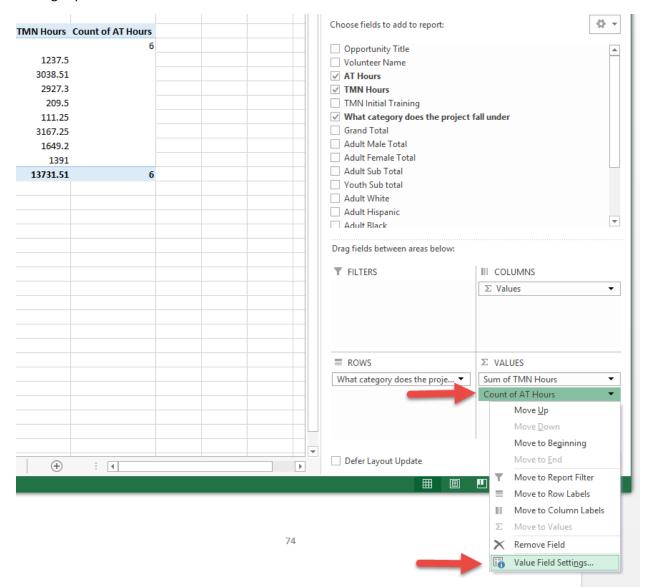
Click Count of TMN Hours in the Sum Values box to show the Options dropdown list. Choose the Value Fields Settings option.

| of TMN Hours Count of AT Hou | | Choose fields to add to report: | | | | | | | |
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| OF TIVIN HOURS COUNT OF AT HOU | | | | | | | | | |
| | 6 | Opportunity Title | | A | | | | | |
| 1 | | Volunteer Name | | | | | | | |
| 9 | | ✓ AT Hours | | | | | | | |
| 11 | | ✓ TMN Hours | | | | | | | |
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| 7 | | Adult Male Total | | | | | | | |
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| 52 | 6 | Adult Sub Total | | | | | | | |
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| | | | 6 | Value Field Setti <u>n</u> gs | | | | | |

We want the sum of TMN hours in our chart, but not the number of opportunities in each category. When the Value Field Settings window is shown click Sum and then click on OK.

| Value Field Settings | ? | \times |
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| Source Name: TMN Hours | | |
| Custom Name: Sum of TMN Hours | | |
| Summarize Values By Show Values As | | |
| Summarize value field by | | |
| Choose the type of calculation that you want to use data from the selected field | to summarize | |
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| Count | | |
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| Number Format | OK Ca | ncel |

Click Count of AT Hours in the Sum Values box to show the Options dropdown list. Choose the Value Fields Settings option.



We want the sum of AT hours in our chart, but not the number of opportunities in the AT category. When the Value Field Settings window is shown click Sum and then click on OK.

| Value Field Settings | ? | \times |
|--------------------------------------------------------------------------------------------------|-------|----------|
| Source Name: AT Hours | | |
| Custom Name: Sum of AT Hours | | |
| Summarize Values By Show Values As | | |
| Summarize value field by | | |
| Choose the type of calculation that you want to use to summarize data from the selected field | | |
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Now we are showing total hours for each of the nine categories.

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| 3 Row Labels | Sum of TMN Hours | Sum of AT Hours | | | | | | | | Choose fields to add to | report: 🔅 🔻 |
| 4 Advance Training | | 1280.5 | | | | | | | | Opportunity Title | A |
| 5 Chapter & Program Business/Administration | 1141 | | | | | | | | | Volunteer User ID | |
| 6 Field Research (including surveys) | 2847.95 | | | | | | | | | Volunteer Name | |
| 7 Natural Resource Management | 2188.75 | | | | | | | | | AT Hours | |
| 8 Nature/Public Access | 271.5 | | | | | | | | | TMN Hours | |
| 9 Other | 203.5 | | | | | | | | | TMN Initial Trainin | |
| 10 Public Outreach (Indirect) | 2323.5 | | | | | | | | | ✓ What category do | es the project f |
| 11 Technical Guidance | 1000.45 | | | | | | | | | Grand Total | |
| 12 Training & Educating Others (Direct) | 979.5 | | | | | | | | | Adult Male Total | |
| 13 (blank) | | | | | | | | | | Adult Female Total | |
| 14 Grand Total | 10956.15 | 1280.5 | | | | | | | | Youth Sub total | |
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Select title row through the last category and the three columns. Exclude the total line. Right click and select Copy.

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| 2 | | | |
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| 5 | Chapter & Progr. Business/Administration | 1237.5 | $\mathbf{B} I \equiv \mathbf{A} \star \mathbf{A} \star \mathbf{H} \star \mathbf{A} \star A$ |
| 6 | Field Research (including surveys) | 3038.51 | |
| 7 | Natural Resource Management | 2927.3 | 🗈 Сору 🧹 🚥 🚥 🚥 |
| 8 | Nature/Public Access | 209.5 | Eormat Cells |
| 9 | Other | 111.25 | |
| 0 | Public Outreach (Indirect) | 3167.25 | l Refresh |
| 1 | Technical Guidance | 1649.2 | PivotTable Options |
| 2 | Training & Educating Others (Direct) | 1391 | Hide Fiel <u>d</u> List |
| 3 | Grand Total | 13731.51 | 1120.25 |
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Select the New Sheet option and add a new sheet to the workbook.

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Select the newly created work sheet and right click on the new sheet and past the values into the sheet.

Adjust the column widths to see the data. Rename the column headings as shown below.

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| 2 Advance Training | | 1280.5 | | | | | |
| 3 Chapter & Program Business/Administration | 1141 | | | | | | |
| 4 Field Research (including surveys) | 2847.95 | | | | | | |
| 5 Natural Resource Management | 2188.75 | | | | | | |
| 6 Nature/Public Access | 271.5 | | | | | | |
| 7 Other | 203.5 | | | | | | |
| 8 Public Outreach (Indirect) | 2323.5 | | | | | | |
| 9 Technical Guidance | 1000.45 | | | | | | |
| 10 Training & Educating Others (Direct) | 979.5 | | | | | | |
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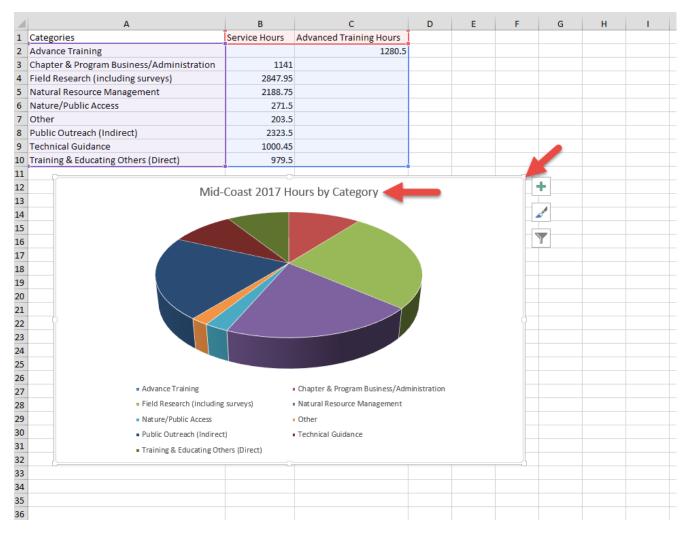
Select the data cells in the worksheet.

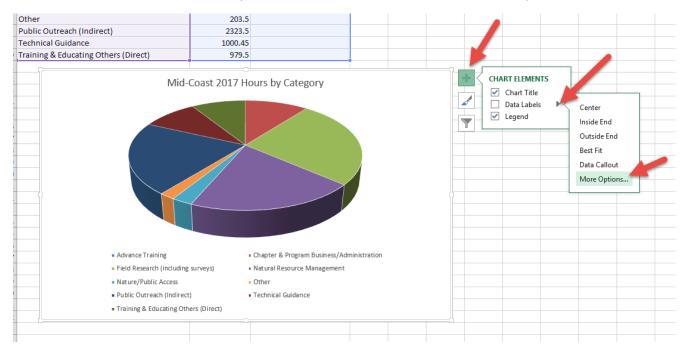
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| 4 | Field Research (i | 284 | 7.95 | | | | | | | | | | |
| 5 | Natural Resource Management | | | | 218 | 8.75 | | | | | | | |
| 6 | Nature/Public Access | | | | 2 | 71.5 | | | | | | | |
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| 1 Ca | | | | Hours | - 6 | | | 9 | | • | , | ĸ | - | 141 | - ' | | |
| | dvance Training | | - | 120.25 | | | | | | | | | | | | | |
| | napter & Program Busin | 1237.5 | 6 | | D |)oughnut | | | | | | | | | | | |
| 4 Fie | eld Research (including | 3038.51 | | | | | | | | | | | | | | | |
| 5 Na | atural Resource Manage | 2927.3 | | | (| 9 | | | | | | | | | | | |
| 6 Na | ature/Public Access | 209.5 | | | _ | | | | | | | | | | | | |
| | ther | 111.25 | | | O M | | e Charts | | | | | | | | | | |
| | blic Outreach (Indirect | | | | | | | | | | | | | | | | |
| | chnical Guidance | 1649.2 | | | | | | | | | | | | | | | |
| | aining & Educating Oth | 1391 | | | | | | | | | | | | | | | |
| 11 | | | | | | | | | | | | | | | | | |
| 12 13 | | | | | | | | | | | | | | | | | |
| 13 | | | | | | | | | | | | | | | | | |
| 15 | | | | | | | | | | | | | | | | | |
| 16 | | | | | | | | | | | | | | | | | |
| 17 | | | | | | | | | | | | | | | | | |
| 18 | | | | | | | | | | | | | | | | | |
| 19 | | | - Advance Training | | | | | | | | | | | | | | |
| 20 | | Advance Training Chapter & Program Business/Administration | | | | | | | | | | | | | | | |
| 21 | | | | | | | | | | | | | | | | | |
| 22 | | | | = Field F | | | | | | | | | | | | | |
| 23 | | | | | Natural Resource Management | | | | | | | | | | | | |
| 24 | | | | | | | e/Public Access | | | | | | | | | | |
| 25 | | | | | Other | | | | | | | | | | | | |
| 26 | | | | | | | | | | | | | | | | | |
| 27 | | | L | | | | - | | | | | | | | | | |
| 28 | | | | | | | | | | | | | | | | | |
| 29 | | | | | | | | | | | | | | | | | |

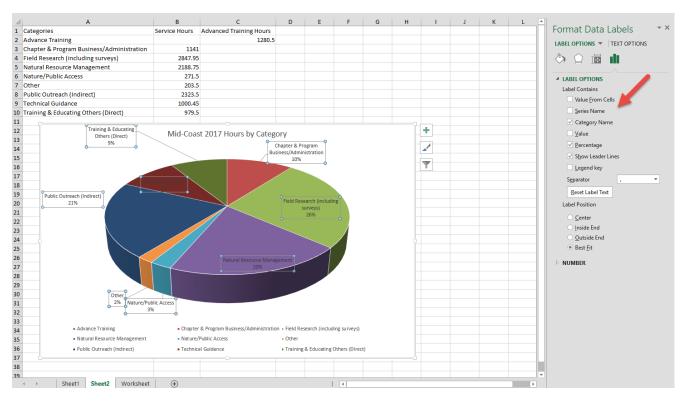
Adjust the size of the chart by grabbing the corners with the mouse pointer and holding down the left mouse button. Select the title box and type the title of your chart. In this example we're looking at the Mid-Coast 2017 Hours by Category.

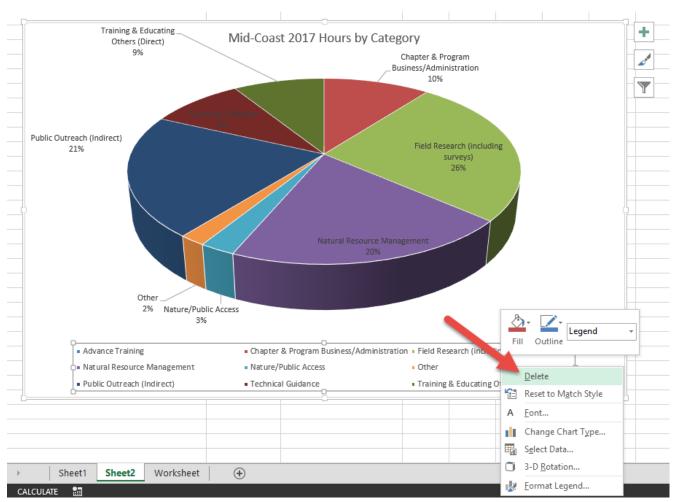




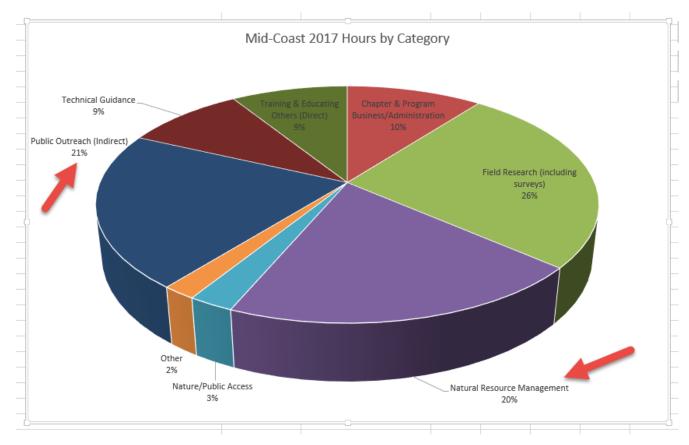
Click the Chart Elements + icon and expand the Data Labels selection. Choose More Options.

Format Data Labels is shown. Choose the Category Name and Percentage check boxes. Uncheck the value label. Click the X at the top of the Format Data Labels box to close it.

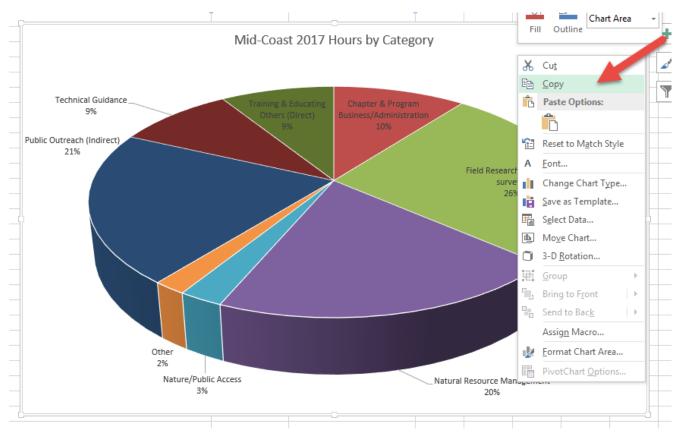




We now have the category names and percentage of the total hours in our pie chart. The legend at the bottom of the chart is redundant. Right mouse click on it and choose the delete option.



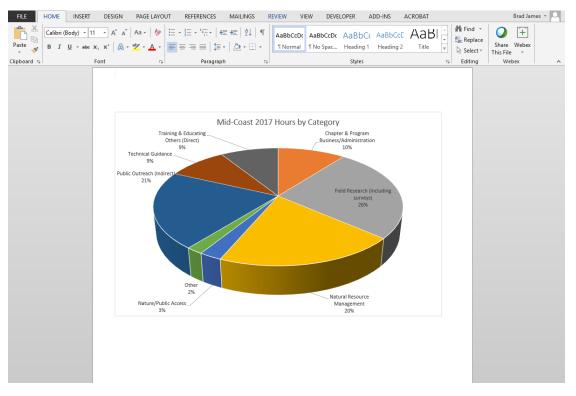
The chart is complete. If the text is hard to read within a slice. Drag it to an area where it is easier to read. Let's move it to something easier to send out to volunteers.



Right click on the chart and select Copy from the options list.

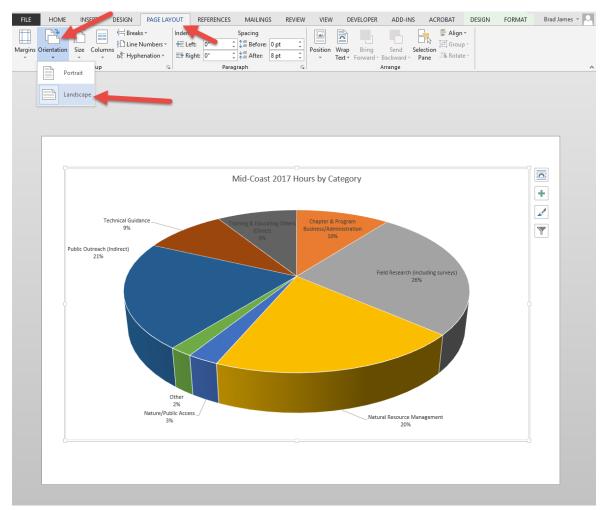
Open Microsoft Word and create a new blank document. Note: you could at this point paste this chart in applications other than Word. PowerPoint would be an example of one of these applications.

| E | | eCoordinator Reporting - Word |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Info | New | |
| New | | |
| Open | Search for online templates | |
| Save | Suggested searches: Business Industry Personal Design Sets Event Education Labels | |
| Save As | Aa | |
| Save as Adobe PDF | | Here a subsection of the subse |
| Print | | No 12 meret and the second sec |
| Share | Take a | Back Annual and an |
| Export | tour | |
| Close | Blank document Welcome to Word ₊ Single spaced (blank) | Creative resume, design |
| Account Options | YN MOO NOO NOO NOO NOO< | TTLE Data Data To an and the second second second second second the second seco |
| | | |

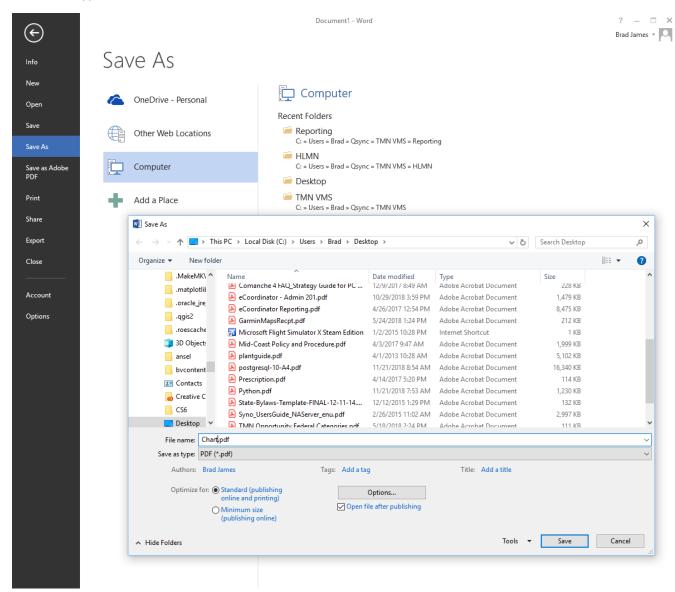


When the new Word document opens, click in the document space, right click and paste.

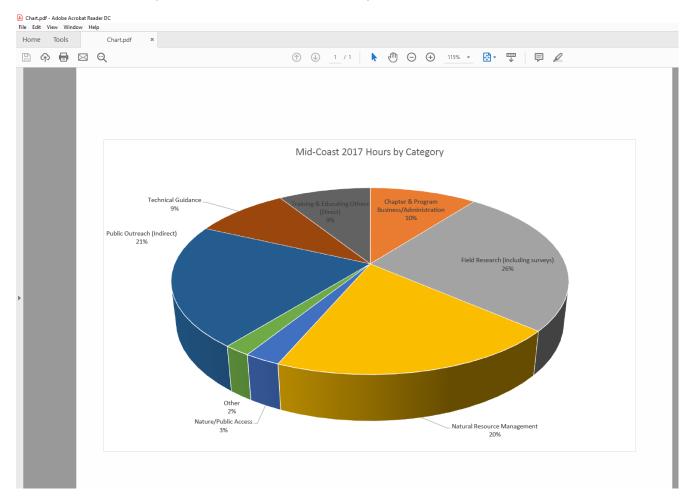
Choose Page Layout and change the page orientation to Landscape.



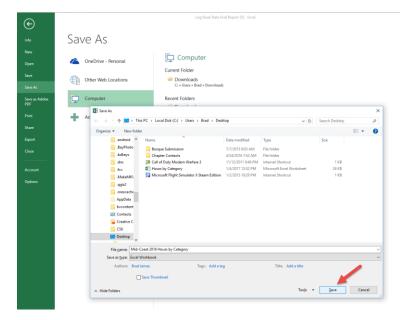
Choose the File menu, Save As, then choose a location to store the new document. Name your document and save the document as file type PDF. This will create a PDF document of your chart. This is a more secure document type to send via email.



The chart can now be opened in Adobe Acrobat Reader or your PDF reader of choice.



Returning to Excel, select File, name the file and then save as an Excel workbook.



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AgriLife Report

In many chapters the AgriLife extension agents request monthly reporting. These reports are generally focused on Outreach and Training and Educating Others opportunity categories. The information that they typically need, are the number of opportunities, how many volunteers contributed service to these opportunities, how many hours of service, and how many people were touched or impacted by the activities at these opportunities.

Log in to eCoordinator. Choose your chapter folder. In this example we're using the Mid-Coast chapter. Select the Opportunity tab. Select the TMN Standard AgriLife Training grid view from the Grid View dropdown list.

| TPWD - Mas | ter N | laturalist : 🖿 Mid C | Coast | P | | |
|--------------------|----------|---------------------------------|------------------------------|--------------------------|-------------------------------|----------|
| Volunteers Opportu | unities | Chapters | | | | |
| New | Clear Fi | ilters Grid Settings TMN Standa | ard-AgriLife Training | Filters TMN-AgriLife Tra | aining 🔽 | |
| Edit | 1 to 23 | of 23 Opportunities | | | | |
| Сору | | Opportunity Title 🖵 1 | Opportunity/Organization | Opportunity Ty 🛓 | What category does the projec | Filled V |
| | Find | | | | v | ~ |
| Delete | | PO: AgriLife Partner | Mid Coast | Service F oject | Public Outreach (Indirect) | 8, |
| Calendar | | PO: ANWR | Aransas National Wildlife Re | Service Project | Public Outreach (Indirect) | 8, |
| Reports | | PO: Aransas Pathways | Aransas Co-John Strothmar | Service Project | Public Outreach (Indirect) | 84 |
| Request/Approve | | PO: ARH docent | Aquarium at Rockport Harbo | Service Project | Public Outreach (Indirect) | 8, |
| | | PO: Balcones Canyonlands NWR | Balcones Canyonlands NWF | Service Project | Public Outreach (Indirect) | (|
| Log Book | | PO: Coleto Creek | Coleto Creek Park | Service Project | Public Outreach (Indirect) | 8, |
| Fmail | | | Stava Daisinnar | Sanvica Drojact | Dublic Outreach (Indirect) | ۹. |

The TMN Standard AgriLife Training filter sets the chapter opportunities list to only include Public Outreach (Indirect) and Training and Educating Others (Direct). Mid-Coast has 23 opportunities that meet these criteria. Click on the Log Book button and choose all opportunities in grid.

| TPWD - Mas | ter N | aturalist : 🖿 Mi | d Coast | | |
|--------------------|---------|-----------------------------|-----------------------------|-------------------------|-----------------|
| Volunteers Opportu | nities | Chapters | | | |
| New | Clear F | ilters Grid Settings TMN S | Standard-AgriLife Training | Filters TMN-AgriLife Tr | aining 🔽 |
| Edit | 1 to 23 | of 23 Opportunities | | | |
| Сору | | Opportunity Title 🖵 1 | Opportunity/Organization | Opportunity Type | What category o |
| Delete | Find | | | | |
| | | PO: Balcones Canyonlands NV | VR Balcones Canyonlands NWF | Service Project | Public Outrea |
| Calendar | | PO: Coleto Creek | Coleto Creek Park | Service Project | Public Outrea |
| Reports | | PO: H/BC | Steve Reisinger | Service Project | Public Outrea |
| Request/Approve | | PO: Incidental | Mid Coast | Service Project | Public Outrea |
| Log Book | | PO: MBNP | Matagorda Bay Nature Park | Service Project | Public Outrea |
| | | PO: MCBNC | Matagorda County Bird & Na | Service Project | Public Outrea |
| Email | | PO: MCTMN Plant Sale | Mid Coast | Service Project | Public Outrea |
| Share | | PO: Mission-Aransas NERR | Mission-Aransas NERR | Service Project | Public Outrea |
| Unshare | | PO: Other Events/Partners | Mid Coast | Service Project | Public Outrea |

We are preparing a quarterly report so the last 3 months of 2018 are selected for the date range (Oct, 1 2018 to Dec, 31 2018). Set the date range and click apply. Check that summary mode is selected. Choose TMN Standard – AgriLife Training from the Grid View dropdown list.

| Log Boo | ok Sy | ystem | | | | | | |
|---------------|---------|-------------------------------------------------------|----------------------------------------------|--------------------|-----------|-----------------|--------------|------------------|
| Specific Date | Range 💊 | | Oct 1 2018 Dec 31 2018 | | Sum | mmary mode | | |
| | | Applies to: Start Da | ite 💽 | R | eset | portunity Title | | |
| | 🗆 Ir | nclude entries with no start or end date if the "Date | e Entered" falls within the | specified date rar | nge. | | | |
| New | Show | v All Refresh Grid Settings | TMN Standard-AgriLife | Training | Filters | Filters | \checkmark | |
| Details | 1 to 10 | 0 of 10 Rows | | | | 1 | | |
| Reports | | Opportunity Title 🕶 1 | What category does th | Start Date | TMN Hours | Volunteer Name | Chapter Name | Service Performe |
| Email | Find | | v | : 🗸 | = | | | |
| Approval | | PO: ANWR | Public Outreach (Indired | N/A | 128 | 7 Volunteers | 1 Park | N/A |
| Select All | | PO: Aransas Pathways | Public Outreach (Indired | N/A | 18.25 | 4 Volunteers | 1 Park | N/A |
| Unselect All | | PO: Coleto Creek | Public Outreach (Indired | N/A | 26.75 | 2 Volunteers | 1 Park | N/A |
| 0 | | PO: Incidental | Public Outreach (Indired | N/A | 29 | 2 Volunteers | 1 Park | N/A |
| Close | | PO: MCTMN Plant Sale | Public Outreach (Indired | N/A | 5 | 1 Volunteer | 1 Park | N/A |
| | | PO: Other Events/Partners | Public Outreach (Indired | N/A | 24.75 | 5 Volunteers | 1 Park | N/A |
| | | PO: Texas State Aquarium | Public Outreach (Indire | N/A | 15 | 1 Volunteer | 1 Park | N/A |
| | | TR: Coleto Creek | Training & Educating O | N/A | 16 | 1 Volunteer | 1 Park | N/A |
| | | TR: Other Organizations | Training & Educating O | N/A | 98 | 5 Volunteers | 1 Park | N/A |
| | | TR: WWF direct education | Training & Educating O | N/A | 4.5 | 1 Volunteer | 1 Park | N/A |
| | Summa | ry info (for all 10 rows) | | | | | | |
| | | 10 Opportunities | N/A | N/A | 365.25 | 20 Volunteers | 1 Park | N/A |
| | Average | info (for all 10 rows) | | | | | | |
| | | 10 Opportunities: | N/A | N/A | 36.525 | 2 Volunteers | 0.1 Park | N/A |

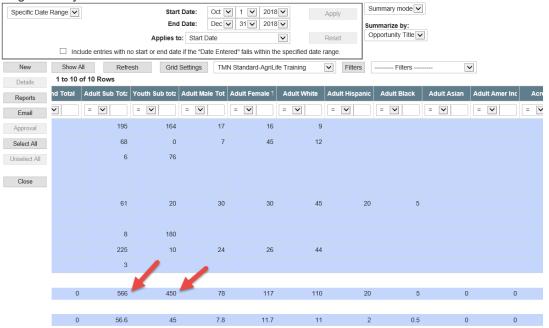
The resulting grid will typically satisfy the needs of the AgriLife Extension Agent. Looking at the total line in this grid there were 10 opportunities tracking outreach and training. 365.25 service hours were contributed. 20 volunteers contributing those hours.

Log Book System

| Specific Date F | Ir Show | End Date: Applies to: Start Date: holude entries with no start or end date if the "Date | | Respecified date rar | sumi eset Opp ige. | nmary mode V marize by: poortunity Title V Filters | 2 | |
|-----------------|---------|-----------------------------------------------------------------------------------------------|--------------------------|----------------------|--------------------------|-------------------------------------------------------------|--------------|------------------|
| Reports | | Opportunity Title v 1 | What category does th | Start Date | TMN Hours | Volunteer Name | Chapter Name | Service Performe |
| Email | Find | | | : | = 🗸 | | | |
| Approval | | PO: ANWR | Public Outreach (Indire | N/A | 128 | 7 Volunteers | 1 Park | N/A |
| Select All | | PO: Aransas Pathways | Public Outreach (Indired | N/A | 18.25 | 4 Volunteers | 1 Park | N/A |
| Unselect All | | PO: Coleto Creek | Public Outreach (Indired | N/A | 26.75 | 2 Volunteers | 1 Park | N/A |
| Close | | PO: Incidental | Public Outreach (Indired | N/A | 29 | 2 Volunteers | 1 Park | N/A |
| Close | | PO: MCTMN Plant Sale | Public Outreach (Indired | N/A | 5 | 1 Volunteer | 1 Park | N/A |
| | | PO: Other Events/Partners | Public Outreach (Indired | N/A | 24.75 | 5 Volunteers | 1 Park | N/A |
| | | PO: Texas State Aquarium | Public Outreach (Indired | N/A | 15 | 1 Volunteer | 1 Park | N/A |
| | | TR: Coleto Creek | Training & Educating O | N/A | 16 | 1 Volunteer | 1 Park | N/A |
| | | TR: Other Organizations | Training & Educating O | N/A | 98 | 5 Volunteers | 1 Park | N/A |
| | | TR: WWF direct education | Training & Educating O | N/A | 4.5 | 1 Volunteer | 1 Park | N/A |
| | Summa | ry info (for all 10 rows) 10 Opportunities | N/A | N/A | 365.25 | 20 Volunteers | 1 Park | N/A |
| | Average | e info (for all 10 rows) 10 Opportunities: | N/A | N/A | 36.525 | 2 Volunteers | 0.1 Park | N/A |

Scrolling to the right, we can see 1,016 people were impacted, 566 adults, and 450 youth.

Log Book System



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Chapter Impact

It is important to report to your chapter volunteers the impact that they have made as a chapter. Log into eCoordinator and select your chapter folder. Choose the Opportunities tab. In this example we are using the Mid-Coast chapter folder. Click on the Clear Filters button. Click on the Log Book button and choose all opportunities in grid.



| New | Clear F | ilters Grid Settings Saved | Grids List | Filters Filters | v | | |
|-----------------|---------|--------------------------------------|------------------------------|-------------------|----------------------------------|-----------|--------------------|
| Edit | 1 to 75 | of 5 Opportunities | | | | | |
| Сору | | Opportunity Title →1 | Opportunity/Organization | Opportunity Type | What category does the projec | Filled V(| Surveys Use |
| | Find | | | ~ | ~ | ~ | |
| Delete | | Apply to the Mid-Coast Chapter | Mid Coast | | | 1 | |
| Calendar | | AT: Lecture Series presentation | Mid Coast | Advanced Training | Advance Training | 84 | TMN AT Report Hour |
| Reports | | AT: Online Training | MC Hours-keeper | Advanced Training | Advance Training | 84 | TMN AT Report Hour |
| Request/Approve | | AT: Single presentation | MC Hours-keeper | Advanced Training | Advance Training | 84 | TMN AT Report Hour |
| | | AT: Specific-Project | Mid Coast | Advanced Training | Advance Training | 84 | TMN AT Report Hour |
| Log Book | | AT: TX Waters Certification Training | TPWD-TX Waters | Advanced Training | Advance Training | 84 | TMN AT Report Hour |
| Email | | AT: with Chapter Meeting | Mid Coast | Advanced Training | Advance Training | 84 | TMN AT Report Hour |
| Share | | AT: with State Meet | TMN Statewide | Advanced Training | Advance Training | 84 | TMN AT Report Hour |
| Unshare | | CB: Chapter Business | Mid Coast | Service Project | Chapter & Program Business/Ad | 84 | TMN Admin Report H |
| Unshare | | FR: ANWR research | Aransas National Wildlife Re | Service Project | Field Research (including survey | 84 | TMN Field Research |
| Automation | | FR: Aquatic Life | Mid Coast | Service Project | Field Research (including survey | 84 | TMN Field Research |
| _ | | FR: Bird Populations | Mid Coast | Service Project | Field Research (including survey | 84 | TMN Field Research |
| Folder Manager | | FR: Insect Life | Mid Coast | Service Project | Field Research (including survey | 84 | TMN Field Research |

Choose the date range for the period you want to report on. We're looking at January, 1 2016 to December 31, 2016 in this example. Click the Apply button to apply your date range to the grid. Choose Summary mode. Select TMN Standard Reporting from the Grid View select dropdown list.

| Log Boo | ok Sy | /stem | | | | | | |
|---------------|-----------------|-------------------------------------|----------------------------|----------------|----------------------------|-----------|-----------------|-------|
| Specific Date | Range 💊 | | start Date: Jan 💙 1 💙 | 2018 Apply | Summary m | node 🗸 🥌 | | |
| | | | End Date: Dec 🗸 31 🗸 | 2018 🗸 | Summarize I Opportunity | | | |
| | | | es to: Start Date | Reset | Opportunity | | | |
| New | | nclude entries with no start or end | | | | | | |
| New | Show 1 to 52 | All Refresh C | Grid Settings TMN Standard | Reporting Filt | ters Fi | Iters | \checkmark | |
| Reports | | Opportunity Title +1 | Volunteer User ID | Volunteer Name | AT Hours | TMN Hours | TMN Initial Tra | Start |
| Email | Find | | | | = 🗸 | = 🗸 | = 🗸 | : 🗸 |
| Approval | | AT: Lecture Series presentatior | N/A | 31 Volunteers | 165.5 | | | ^ |
| Select All | | AT: Online Training | N/A | 21 Volunteers | 90.6 | | | |
| Unselect All | | AT: Single presentation | N/A | 48 Volunteers | 472.75 | | | |
| | | AT: Specific-Project | N/A | 30 Volunteers | 255.5 | | | |
| Close | | AT: TX Waters Certification Tra | N/A | 8 Volunteers | 26.25 | | | |
| | | AT: with Chapter Meeting | N/A | 31 Volunteers | 61 | | | |
| | | AT: with State Meet | N/A | 4 Volunteers | 51 | | | |
| | | CB: Chapter Business | N/A | 44 Volunteers | | 1783.5 | | |
| | | FR: ANWR research | N/A | 4 Volunteers | | 55.5 | | |
| | | FR: Aquatic Life | N/A | 4 Volunteers | | 11 | | |
| | | FR: Bird Populations | N/A | 33 Volunteers | | 1900.75 | | |
| | | FR: Insect Life | N/A | 2 Volunteers | | 4.5 | | |

Scroll to the bottom of the grid to view the summary info row. Looking at this row we see:

Number of opportunities with hours reported Number of volunteers reporting Total number of Advanced Training hours Total number of Service hours Total number of Initial Training hours Total people impacted through outreach Acreage impacted New Trail Miles

Log Book System

| Specific Date | Range 🔽 | | Start Date: End Date: | Jan 🗸 1 🗸 Dec 🗸 31 🗸 | | pply | Summary m | | | | |
|---------------|---------|--------------------------------------------|--------------------------|-------------------------|-----------------------------|-------|-------------|-----------|-----------------|------------|------------|
| | | Appli | es to: Start [| Date | ▼ R | eset | Opportunity | | | | |
| | 🗆 Ir | clude entries with no start or end | date if the "Da | ate Entered" falls w | ithin the specified date ra | nge. | | | | | |
| New | Show | All Refresh | Grid Settings | TMN Standard | Reporting | Filte | ers Fil | ters | ~ | | |
| Details | 1 to 52 | 2 of 52 Rows | | | | | | | | | |
| Reports | | Opportunity Title -1 | Volun | teer User ID | Volunteer Name | | AT Hours | TMN Hours | TMN Initial Tra | Start Date | What categ |
| Email | Find | | | | | | = 🗸 | = | = 🗸 | : 🗸 | |
| Approval | | RM: Texas Zoo | N/A | | 1 Volunteer | | | 6 | | N/A | Natur |
| Select All | | RM: TMMSN | N/A | | 1 Volunteer | | | 6 | | N/A | Natur |
| Unselect All | | TG: ANWR | N/A | | 5 Volunteers | | | 37.5 | | N/A | |
| Close | | TG: Aransas Pathways | N/A | | 1 Volunteer | | | 1.5 | | N/A | |
| 0.000 | | TG: City or County | N/A | | 2 Volunteers | | | 12.75 | | N/A | |
| | | TG: Other Organizations | N/A | | 12 Volunteers | | | 184 | | N/A | |
| | | TG: TMN VMS Implementation | N/A | | 1 Volunteer | | | 2.5 | | N/A | |
| | | TG: WWF | N/A | | 1 Volunteer | | | 18.5 | | N/A | |
| | | TR: ANWR direct education | N/A | | 2 Volunteers | | | 22 | | N/A | Training |
| | | TR: Coleto Creek | N/A | | 1 Volunteer | | | 16 | | N/A | Training |
| | | TR: Mad Island | N/A | | 2 Volunteers | | | 13.75 | | N/A | Training |
| | | TR: Other Organizations | N/A | | 22 Volunteers | | | 646.25 | | N/A | Training |
| | | TR: WWF direct education | N/A | | 2 Volunteers | | | 36 | | N/A | Training |
| | s mma | ry info (for all 52 rows) | | | | | | | | | |
| | | 52 Opportunities | N/A | | 76 Volunteers | | 1122.6 | 9207.5 | 841 | N/A | |
| | Average | mfo (for all 52 rows) 52 Opportunities: | N/A | | 1.462 Volunteers | | 21.588 | 177.067 | 16.173 | N/A | |
| | < | oz opportunities. | N/A | | 1.402 VOIUNIEEIS | | 21.000 | 177.067 | 10.173 | IN/A | |

By changing Relative Date Range and choosing All Time then clicking the Apply button we get cumulative chapter totals.

| Relative Date | Range | | Period: All Time | Apply | Summary m | ode 🗸 | | | |
|---------------|---------|-----------------------------|----------------------------|------------------|-----------------------|-----------|-----------------|------------|--------------|
| | | Appli | es to: Start Date | Reset | Summarize Opportunity | | | | |
| New | Show | All Refresh | Grid Settings TMN Standard | l Reporting 🔽 Fi | lters Fi | ters | × | | |
| Details | 1 to 69 | of 69 Rows | | | | | | | |
| Reports | | Opportunity Title -1 | Volunteer User ID | Volunteer Name | AT Hours | TMN Hours | TMN Initial Tra | Start Date | What categor |
| Email | Find | | | | = 🗸 | = 🗸 | = 🗸 | : • | |
| Approval | | TG: ARH operations | N/A | 1 Volunteer | | 1.5 | | N/A | Те |
| Select All | | TG: Balcones Canyonlands NV | N/A | 1 Volunteer | | 8.25 | | N/A | Те |
| Unselect All | | TG: City or County | N/A | 8 Volunteers | | 58 | | N/A | Те |
| | | TG: Mad Island | N/A | 1 Volunteer | | 175.95 | | N/A | Те |
| Close | | TG: Other Organizations | N/A | 20 Volunteers | | 1093.65 | | N/A | Те |
| | | TG: TMN VMS Implementation | N/A | 1 Volunteer | | 700.5 | | N/A | Те |
| | | TG: WWF | N/A | 7 Volunteers | | 469.75 | | N/A | Те |
| | | TR: ANWR direct education | N/A | 11 Volunteers | | 113.75 | | N/A | Training & |
| | | TR: ARH direct education | N/A | 2 Volunteers | | 23.75 | | N/A | Training & |
| | | TR: Coleto Creek | N/A | 6 Volunteers | | 65.25 | | N/A | Training & |
| | | TR: Mad Island | N/A | 4 Volunteers | | 55 | | N/A | Training & |
| | | TR: Other Organizations | N/A | 35 Volunteers | | 2679 | | N/A | Training & |
| | | TR: TMN VMS Implementation | N/A | 2 Volunteers | | 193.25 | | N/A | Training & |
| | | TR: WWF direct education | N/A | 7 Volunteers | | 161.25 | | N/A | Training & |
| | Summa | ry infor all 69 rows) | | | | | | | |
| | | 69 Opportunities | N/A | 236 Volunteers | 18789.4 | 183077.26 | 1576.25 | N/A | |
| | Average | info (for all 69 rows) | | | | | | | |
| | < | 69 Opportunities: | N/A | 3.42 Volunteers | 272.31 | 2653.294 | 22.844 | N/A | |

Looking at the summary row, we see that the Mid-Coast has contributed 18,789.4 advanced training and 183,077.26 service hours. Use the Log book Data Grid Report to export the information.

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Partner Reports

Chapters often have partnership agreements with other organizations with whom they share volunteer service data. The easiest way to capture service information for these partners is to set up special opportunities. Aransas National Wildlife Refuge (ANWR) is one of the Mid-Coast chapter's partners. The chapter has created an opportunity for each of the activity categories that volunteers contribute hours at the ANWR. These are:

FR: ANWR research RM: ANWR NPA: ANWR PO: ANWR TG: ANWR TR ANWR direct education

These six opportunities capture the field research, resource management, nature/ public access, public outreach, technical guidance, and training activity that occurs at Welder. Using common naming for partners makes it easy to select all of the opportunities that belong to that partner. Let's look at the contributions the Mid-Coast chapter made to ANWR in 2018.

Begin by logging into eCoordinator and selecting your chapter folder. In this example we're working in the Mid-Coast folder. Click the Clear Filters button to clear all filters.

By Typing ANWR in the Find cell below the Opportunity Title column heading and clicking the Find button we can locate only the ANWR opportunities in the Mid-Coast opportunity list. Manual selection of partner opportunities may be needed depending on how you name opportunities in your chapter.

The result is the six ANWR opportunities. Click the Log Book button. In this case we choose all opportunities in grid. If you are manually selecting opportunities you would choose only selected.

| Edit | 1 to 6 (| of 6 Opportunities | | | | | |
|----------------|----------|---------------------------|------------------------------|------------------|----------------------------------|-----------|--------------------------|
| Сору | | Opportunity Title -1 | Opportunity/Organization | Opportunity Type | What category does the projec | Filled V(| Surveys Used |
| | Find | anwr | | ~ | ~ | ~ | |
| Delete | | FR: ANWR research | Aransas National Wildlife Re | Service Project | Field Research (including survey | 84 | TMN Field Research Hours |
| Calendar | | NPA: ANWR | Aransas National Wildlife Re | Service Project | Nature/Public Access | 84 | TMN Report Hours |
| Reports | | PO: ANWR | Aransas National Wildlife Re | Service Project | Public Outreach (Indirect) | 84 | TMN Report Hours |
| equest/Approve | | RM: ANWR | Aransas National Wildlife Re | Service Project | Natural Resource Management | 84 | TMN Report Hours |
| | | TG: ANWR | Aransas National Wildlife Re | Service Project | Technical Guidance | 84 | TMN Report Hours |
| Log Book | | TR: ANWR direct education | Aransas National Wildlife Re | Service Project | Training & Educating Others (Dir | 84 | TMN Report Hours |

TPWD - Master Naturalist : 🗖 Mid Coast

Choose the date range and click the Apply button. Select Summary mode. Choose the TMN Standard Reporting view to show the columns we need.

The result is all of the volunteer and impact data that the chapter contributed to ANWR in 2018. Change the date range to see chapter lifetime contributions to your partners. Use the Log Book Data Grid Report to export the information and share it with your partners.

| Specific Date | Range 🗸 | Арр | Start Date: Jan V 1 V End Date: Dec V 31 V lies to: Start Date d date if the "Date Entered" fails v | 2018 V Reset | Summary r Summarize Opportunity | by: | - | | |
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| Details | 1 to 5 | of 5 Rows | | | | | | 1 | |
| Reports | | Opportunity Title •1 | Volunteer User ID | Volunteer Name | AT Hours | TMN Hours | TMN Initial Tra | Start Date | What category do |
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| Approval | | FR: ANWR research | N/A | 4 Volunteers | | 55.5 | | N/A | Field Research |
| Select All | | PO: ANWR | N/A | 10 Volunteers | | 296.25 | | N/A | Public Ou |
| Unselect All | | RM: ANWR | N/A | 4 Volunteers | | 210.25 | | N/A | Natural Reso |
| | | TG: ANWR | N/A | 5 Volunteers | | 37.5 | | N/A | Techni |
| Close | | TR: ANWR direct education | N/A | 2 Volunteers | | 22 | | N/A | Training & Edu |
| | Summai | ry info (for all 5 rows) | | | | | | | |
| | | 5 Opportunities | N/A | 17 Volunteers | 0 | 621.5 | 0 | N/A | |
| | Average | info (for all 5 rows) | | | | | | | |
| | _ | 5 Opportunities: | N/A | 3.4 Volunteers | 0 | 124.3 | 0 | N/A | |

Return to the Table of Contents

Using the eCoordinator Combine Multiple Export Files Tool

Often when exporting detail information from eCoordinator the export results in more than one file. Use the eCoordinator File Combine Excel application to easily combine these files.

Create a directory to store the export files. Login to eCoordinator and create your export files (Text). Save them to the directory created in the step above. Copy the eCoordinatorFileCombine Excel file to the same directory.

| → ~ ↑ 📙 > Network > DISKSTATION > 0 | CloudStation > TMN VMS > ChapterReport | | | | |
|-------------------------------------|----------------------------------------|------------------|-------------------|--------|--|
| Pictures ^ | Name | Date modified | Туре | Size | |
| Saved Pictures | Log Book Data Grid Report | 10/30/2016 12:23 | Text Document | 367 KB | |
| Videos | Log Book Data Grid Report_part2 | 10/30/2016 12:23 | Text Document | 230 KB | |
| USB Drive (F:) | CoordinatorFileCombine | 10/30/2016 11:32 | Microsoft Excel M | 51 KB | |
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| Leadership Austin | | | | | |
| Leatherworking | | | | | |
| Photo Card Files | | | | | |
| Purchase Docs | | | | | |
| Recipes | | | | | |
| TMN Initial Training | | | | | |
| TMN VMS | | | | | |
| 2016 Uploads | | | | | |
| Account Check | | | | | |
| Alamo | | | | | |
| All Data | | | | | |
| Capital Area Chapter | | | | | |
| ChapterReports | | | | | |
| Check Data | | | | | |

Make a copy of the eCoordinatorFileCombine Excel file and rename it. This will be your working copy of the file.

| → ✓ ↑ Network → DISKSTATION → Clope | oudStation > TMN VMS > ChapterReports | | | |
|-------------------------------------------------------------------------------------------------------------------------|---------------------------------------|------------------|-------------------|--------|
| Pictures ^ | Name | Date modified | Туре | Size |
| Saved Pictures | 📄 Log Book Data Grid Report | 10/30/2016 12:23 | Text Document | 367 KB |
| Videos | 📄 Log Book Data Grid Report_part2 | 10/30/2016 12:23 | Text Document | 230 KB |
| USB Drive (F:) | 📳 eCoordinatorFileCombine | 10/30/2016 11:32 | Microsoft Excel M | 51 KB |
| Network | ChapterReportExample | 10/30/2016 11:32 | Microsoft Excel M | 51 KB |
| Aquarium Leadership Austin Leatherworking Photo Card Files Purchase Docs Recipes TMN Initial Training | | | | |

Open your working copy. This file contains code to process your export files. Because of this the Security warning will be shown the first time you open it. Check the Enable Content button.

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The Combine Multiple eCoordinator Export Files window will open. Click on the Browse button.

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Locate the first export file and click on it. Click on the OK button. The first file is important because it contains the column headings used for all of the export files.

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Verify your selection in the first export file and Path of eCoordinator export files text boxes. Note: The application expects that all of the export files to be processed are in the same directory as the first export file. Click on the Begin Processing Files button.

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The Message section shows the progress of file processing. When all files have been imported into Excel the "File processing complete" message is shown. Click the OK button to continue.

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The data from all of the files is now in the eCoordinator worksheet. Click the "X" in the top right of the window to close it and begin working with the data.

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To reopen the window and process additional export file sets, select the eCoordinator Tab on the Ribbon Bar. Then click on the FIleCombine icon. Note: Starting another file import will clear the contents of the eCoordinator worksheet.

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4200 Smith School Road Austin, TX 78744