

Volunteer Management System Approver Training Outline for Texas Master Naturalists

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Texas Parks and Wildlife Department • 4200 Smith School Road • Austin, Texas 78744

Opportunity Approver Training Outline

Reference Guide: VMS Approver Guide

- I. Project Overview (Implementation Team, All Chapters converting, types of users)
- II. Terminology: Opportunities, VMS Portal, Surveys, eCoordinator/eRecruiter, Log Book
- III. User ID's and Logging In
 - a. TMN VMS Web Portal (txmn.org/tmn-vms-users)
 - i. Brief discussion of the Help Desk and requesting help
 - b. Login as a Registered Volunteer: Your Volunteer User ID and password
 - c. The view as a volunteer (handout)
 - i. Issues (45 day lock-out, log book alignment)
 - ii. Selecting the correct opportunity; survey questions; incorrect postings
 - iii. Fractional hours as decimal number
 - d. VMS – eCoordinator Login: Your Admin User ID, Password, and Admin Dashboard
 - e. Changing your administrative password, phone number or email address
 - f. Changing the view to Opportunities
 - g. **Selecting your chapter folder** (Admin Guide page 5), Clear Filters
 - h. **Saved grids** set to “TMN Standard”
- IV. Consolidating Opportunity Titles (Reducing the number of opportunities) – Handout
- V. Common Opportunities (handout - discussion)
- VI. Create a new opportunity in the VMS for members to report hours
 - a. How to designate advanced training when creating an opportunity (AT: xxxx)
 - b. Include the date in the title and/or the description; spell out the month
 - c. Primary contact designation (your chapter or another organization – TPWD, AgriLife)
 - d. Select the Region and “Approved” or “Requested”
 - e. UDF: Category (from list) and opportunity type (AT, Service, or Initial Training)
 - f. TMN Federal Reporting Category (Activity List Handout)
- VII. Select and declare a survey (dialog to report hours) for use with this opportunity
 - a. 1X – one time surveys; field research surveys, report my hours survey
- VIII. To publish or not to publish (to the Web)
- IX. Approve your volunteers to the opportunity (necessary unless published)
- X. Modifying opportunities (Edit button)
- XI. Deleting Opportunities –please don't - where to recover them if you do
- XII. Statewide opportunities (those created by the TMN State Program Office)
- XIII. Contact Michelle Haggerty for TMN policy questions
- XIV. For VMS assistance, contact: Chapter Admin, Help Desk, tmnvms@gmail.com
- XV. Summary and Questions