

TMN/VMS Newsletter

T E X A S



FOR TEXAS MASTER NATURALISTS VMS ADMINISTRATORS

Volume 3

October, 2015

Deleting People & Opportunities

People come and people go. But in Samaritan, we don't want them to go away completely.

Deleting a person—sort of

We don't recommend actually 'deleting' a volunteer—the best practice is to mark them TMN-Inactive

The first thing to do when you want to remove a person from your roster is to be sure they aren't approved for any opportunities.

Be sure that you have the all folders filter set so that you can capture all opportunities that they might be approved for.

Show records from ☒ all folders ☐ only current folder

Once you've removed them from all the opportunity approvals, they won't be able to record any new hours.

Check the volunteer's logbook entries to make sure they have all of their hours approved and that they are appropriate. You may want to wait until the end of the year before marking them TMN-Inactive so that their hours will show up in the standard grids for reporting purposes.

Schedule

Next Uploads

People Uploads: We will be sending in a new batch of people to be uploaded the weekend of 10/17. Have your data to your coordinator by 10/15.

Hours Uploads: The next Hours Upload will be sent around the 20th of October or 5 days after the people upload has been completed.

Deleting Opportunities

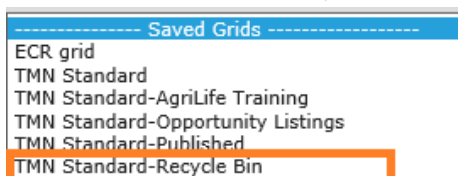
It is ok to delete opportunities—but be careful to clean them up first, otherwise there could be orphaned logbook entries and your numbers could be off.

First: Be sure that no one is approved for the opportunity—again, select 'all folders' as your approval filter.

Second: Be sure there are no logbook entries associated with the opportunity that you want to delete.

The Recycle Bin: after you delete the opportunity, you can find it in the Recycle bin. Use the TMN Standard-Recycle Bin grid to see more information about what's in the bin.

In order to remove approvals or check for logbook entries for deleted opps, you'll need to restore them to your 'My Data' folder, fix them and then delete them again.



Annual Meeting Opportunities

Do you have members that are attending the state meeting?

If so, you'll need to create an opportunity for AT. If you have volunteers that are working at the meeting, you'll also need to setup a service opportunity for them.

Special points of interest:

- ◆ SCHEDULE
- ◆ HOW TO: DELETING PEOPLE AND OPPS
- ◆ FIELD IN FOCUS: OPPORTUNITY DATES
- ◆ ANNUAL MEETING OPPS
- ◆ BACKGROUND CHECKS
- ◆ SUCCESS STORIES

Join us at the Annual Meeting

End User Training
Friday 3:30pm

VMS Roundtable
Friday 8:15pm

Admin 201
Saturday 3pm

Demo Table
All Weekend

Completed Chapters

- ◆ BLUESTEM
- ◆ GUADALUPE
- ◆ COASTAL PRAIRIE

TMN/Volunteer Management System Rollout

TEXAS MASTER NATURALISTS



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Success Stories Online

They finished! Clyde Camp from Blackland Prairie and representatives from the Galveston Bay Area chapter gave a great presentation on how they rolled out VMS at their chapters.

If you missed the conference call, you can find it online at the helpdesk.

[Chapter Implementation Success Stories \(1\)](#)

 [Success Story Presentations](#)

Background Checks—now through TPWD Human Resources

Background checks on TMN volunteers are a necessity for both of our program's sponsoring agencies. With the implementation of the VMS, *annual* background checks can now be done by TPWD through the VMS. Be sure your volunteers have put in their driver's license number and have agreed and signed the Background Check Waiver in their profile. Texas A&M AgriLife Extension accepts the TPWD background check as listed on their 'prior approved screenings list'. Members can access their profile at the bottom of their eRecruiter Dashboard.

 [Edit My Profile](#)

Fields in Focus - Opportunity Dates

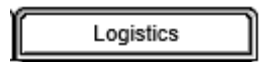
What are these dates used for in the Logistics Tab of the Opportunity profile?

Most of these dates are used by the system to determine when to show an opportunity on the txmn.org search opportunity screen. But since we don't publish our opportunities to the TXMN site—what can we use them for?

The Project Creation Date is a system generated date—it is generated when the opportunity is created and can be useful to see as history for the admins.

The Project Expiration Date can be blank—it doesn't do anything.

The Display dates were designed to be used by the Website Search engine. But since we don't generally publish our opportunities, they really have no impact on our system. We show the Display End Date on several of the opportunity grids because it can be useful for admins. For instance—for opportunities that repeat annually or for an event that doesn't repeat—you can use the date to tell at a glance that the event has passed, or has a specific day. That can come in handy when you are approving logbook entries. It can also be used to identify old events. If an event has passed (more than 45 days ago), you can un-approve your volunteers for the event to remove it from their drop-down box.



Project Creation Date: 5 Jul 2014

Project Expiration Date: 4 Aug 2014

Display Begin Date: 22 Jun 2014

Display End Date: 6 Jul 2014

Help on the Web:

The Admin Guides are updated on regular basis...

Find them here: <http://texasmasternaturalist.freshdesk.com/support/home>