



eCoordinator - Admin 201

Saturday, October 27, 2018
3:00 PM - 5:00 PM



Recertifications and Milestones

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

Export Data to Excel or PDFs

- From any grid:

The screenshot displays the 'Log Book Data Grid Report' interface. It includes a 'Print' section with three radio buttons: 'All rows from grid', 'Only the selected rows' (which is selected), and 'Print summary table only'. Below this is a 'Report Title' field containing 'Log Book Data Grid Report'. There are also input fields for 'Volunteer Name' and 'TMN Hours'. To the right of these fields is a red-bordered box labeled 'Exclude column' containing two unchecked checkboxes. On the right side of the interface is a vertical sidebar menu with the following items: 'Volunteer Report', 'Volunteer Phone List', 'Volunteer Roster', 'Volunteers Registered', 'Volunteer Schedule', 'Volunteer Labels', and 'Log Book Data Grid Report' (which is highlighted in red).

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

Automations:

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



Sending Emails from eCoordinator

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



Attaching Grids & Reports to Emails

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

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

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

Vol = Volunteer grid

LBVol = Volunteer Logbook grid

Opp = Opportunity grid

LOpp = Opportunity Logbook grid

How would you use this functionality?

The screenshot shows the 'Volunteer Email' interface in a Google Chrome browser window. The URL is <https://tpwd.samaritan.com/coordinator/index.php>. The page title is 'Volunteer Email'. Below the title, there is a note: 'You can insert a mail merge field into any of the fields below.' The 'To:' field has two radio buttons: 'All 54 record(s) in the grid (Don Alexander...Amanda Zumwalt)' and '1 selected record(s) (Cheryl Foster)'. The 'Volunteer' dropdown menu is set to 'Cheryl Foster' and the email address is 'cheryl.foster@yahoo.com'. On the right, there is a 'Volunteer Mail Merge Fields' section with a dropdown for 'Activity Status' and an 'Insert' button. Below that, there is an 'Attachments' section with a 'Choose File' button and a 'No file chosen' message. A red box highlights the 'Attach Data Grid Report to Email:' dropdown menu, which is open, showing a list of grid names. The list includes: 'LB Vol: EFMN-Admin10-Approved date', 'LB Vol: GBAC - Recertification', 'LB Vol: GCMN-Approval', 'LB Vol: GLC approval', 'LB Vol: GWMN Approval', 'LB Vol: GWMN Hours', 'LB Vol: HaysCertInfo', 'LB Vol: History Snapshot', 'LB Vol: Hours approved by VMS Team', 'LB Vol: Hours approved by VMS Team for Ray' (highlighted in blue), 'LB Vol: hours approved-date approved', 'LB Vol: Hours Report', 'LB Vol: Impact Test', 'LB Vol: impat2', 'LB Vol: In Training review', 'LB Vol: Initial Training Log-interns', 'LB Vol: J 1 TMN Standard-Awards-Recs-041617', 'LB Vol: J 2 TMN Standard-Approval Audit-041617', 'LB Vol: J 3 TMN Standard-Disapproved-041617', and 'LB Vol: J 4 TMN Standard-Not Yet Approved-041617'. On the right side of the interface, there is a 'Save Email Template' section with a 'Last email sent without a template' field and a 'Save' button. Below that, there is a 'Saved Email Template List' section with a 'Last email sent without a template' dropdown and 'Delete' and 'Open' buttons. At the bottom, there is a 'Send Using' section with a dropdown set to 'Coordinator' and a note: 'It email client on this computer'. A red box also highlights the 'Attach Volunteer Report to Email:' dropdown menu, which is set to 'Click To Select'.

Dismissed/Dead/Deleted volunteers

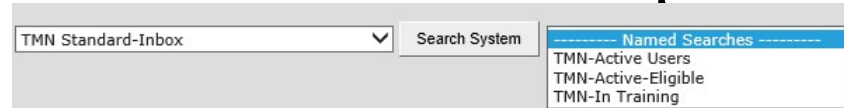
- In general – we don't delete volunteers, we just mark them TMN-Inactive.
- We move around a lot! Add a note to their profile – User Defined/Certifications/Master Naturalist Certification Comments (These comments can be seen by all divisions at TPWD, so be tactful & polite—in 255 characters or less..)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

Transferring Volunteers

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

The Inbox – Cleanup & New Recruits

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




TMN Standard-Inbox ▼ Search System

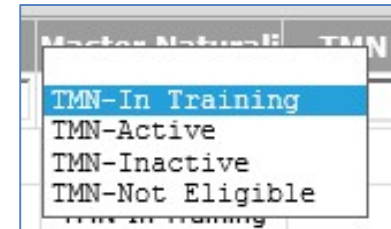
Named Searches

- TMN-Active Users
- TMN-Active-Eligible
- TMN-In Training

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

Training Classes

- All classroom work (and related field trips) should be applied to the 'Initial Training' opportunity for your chapter. The Initial Training opportunity does not have a federal category and does not count towards federal grants at the state level.
- When you start your class – before you setup your attendees in the system – check to see if they are in the TPWD 'Volunteer Cross Reference' list already (found on the Help Desk). If they are, contact the Help Desk to have TPWD share that volunteer with the Master Naturalists. This helps prevent duplicates in the system, and makes sure that the volunteer can see all their hours from all divisions in one place.
- Find Your Training Class:
 - Select Named Search: TMN-In Training volunteers
(Don't forget the  Button or Enter key)
 - Select Logbooks – for all volunteers in the grid
 - Logbook Grid: TMN Standard-Training Class. Opens in summary mode but you can change to detail mode.
- TIP: Use the 'limit number of volunteers' field to restrict approvals for your whole class at once

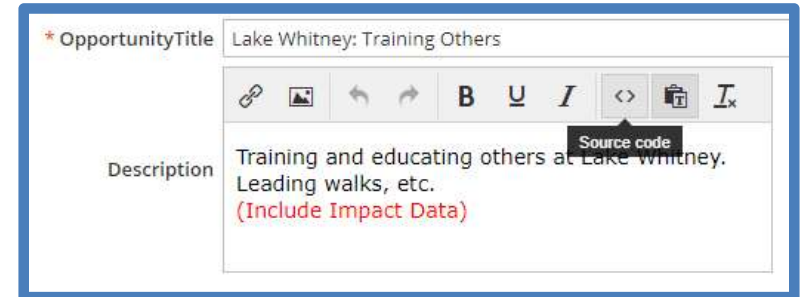


Organization/Opportunity Field

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

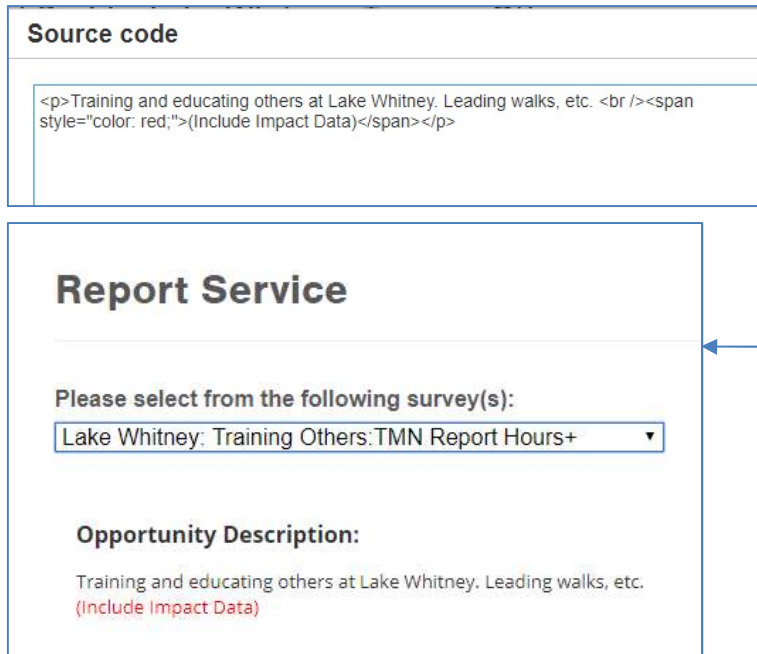
Opportunity Description Field

- Soon... We will add the description field to the surveys.
- Some basic HTML is OK.



* OpportunityTitle Lake Whitney: Training Others

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



Source code

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

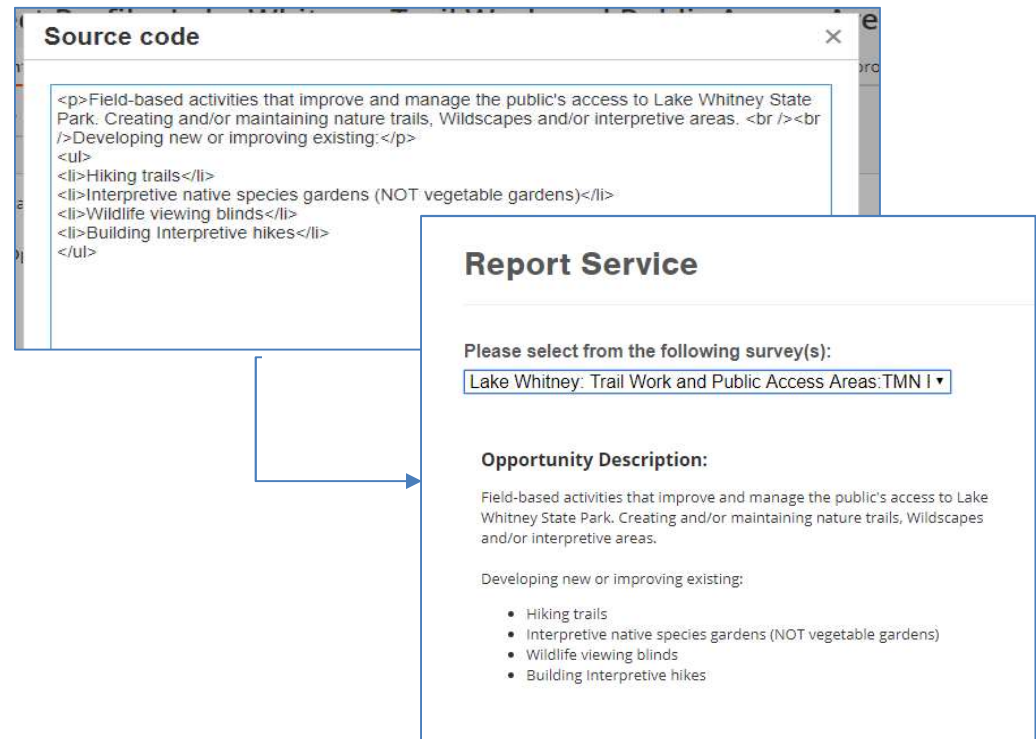
Report Service

Please select from the following survey(s):

Lake Whitney: Training Others:TMN Report Hours+

Opportunity Description:

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



Source code

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

Report Service

Please select from the following survey(s):

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

Opportunity Description:

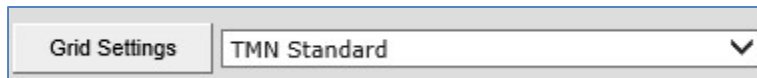
Field-based activities that improve and manage the public's access to Lake Whitney State Park. Creating and/or maintaining nature trails, Wildscapes and/or interpretive areas.

Developing new or improving existing:

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

Creating Grids

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



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

Creating Grids Window

Grid Settings For Opportunities

Select Columns to display in the Grid

Available Columns:

- Opportunity
- Opp: Job Rate*
- Opp: Facility*
- Opp: TMN Federal Reporting*
- Opp: Agency Reports*
- Opp: Availability*
- Opp: Orientation/Training*
- Opp: Opportunity Type*
- Opp: Skills, Interest, or Equipment*
- Opp: Service Project Activity*

>>

<<

Selected Columns:

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

* Indicates user defined fields.

Save As:

TMN Standard

☒ Make this saved grid available to all users of this account

Save

Saved Grids List:

TMN Standard

Delete

Open

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

Number of records per page: 100

Additional items to include as part of this saved grid:

- ☐ Column searches
- ☒ Current column sort
- ☐ Currently selected folder
- ☐ Currently selected named search

----- Folders -----

---- Named Searches ----

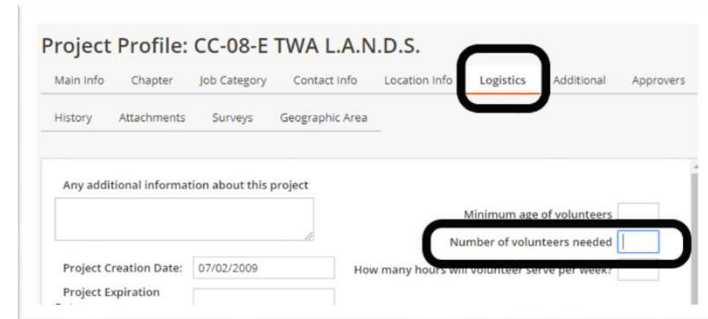
Search System

Move Up

Move Down

Approving subsets of Volunteers or Opportunities

- Use the Limit number of volunteers to restrict unnecessary approvals



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

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

History Attachments Surveys Geographic Area

Any additional information about this project

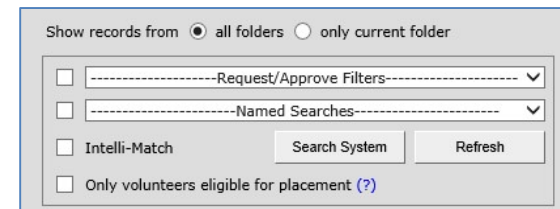
Project Creation Date: 07/02/2009 Project Expiration

How many hours will volunteer serve per week?

Minimum age of volunteers

Number of volunteers needed

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



Show records from ☒ all folders ☐ only current folder

☐ Request/Approve Filters

☐ Named Searches

☐ Intelli-Match

☐ Only volunteers eligible for placement (?)

Search System Refresh

Background Checks

- Annual background checks are now being done by TPWD through the VMS.
- Be sure your volunteers have put in their driver's license number, birthdate and have agreed and signed the Background Check Waiver in their profile.
- Texas A&M AgriLife Extension accepts the TPWD background check as listed on their 'prior approved screenings list'.
- Members can access their profile at the bottom of their eRecruiter Dashboard.

 [Edit My Profile](#)

Federal Category Clarifications

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

Impact Data

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

The Full Development List

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

* At the top of the overall priority list

The Full Development List

eCoordinator

* The ability to move LBEs from one opportunity to another

✓ Make columns stretchable

Select entries across grid pages

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

Increase Named Search Name limit

Fix online Samaritan documentation

Show number of opportunities assigned to people in volunteer tab

Right justify grid column summary totals

Change 'Show All' to 'Clear Filters'

Report Writer App

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

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

The Full Development List

Surveys & Other Problems

✓ * Pull selected opportunity description to the survey

If-Then-Else capability in survey designer

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

Future Date 'feature'

Start Date > End Date error

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

✓ Time-Out issue blows out volunteer information

Thumbnail Refresh Bug

What Changed this Year

- We can now do our own CBCs
 - Added TMN-Admin statuses
 - Added View by Date to the eRecruiter logbook
 - Working on our third 'Audit'
 - eCoordinator/eRecruiter update by Samaritan
 - Added TMN Hours to the Dashboard
 - Added Excel to the Report download list
- ➡ We will be adding descriptions to the surveys soon



Questions?