2018 TEXAS MASTER NATURALIST ANNUAL MEETING
OUR 20th YEAR

eCoordinator - Admin 201

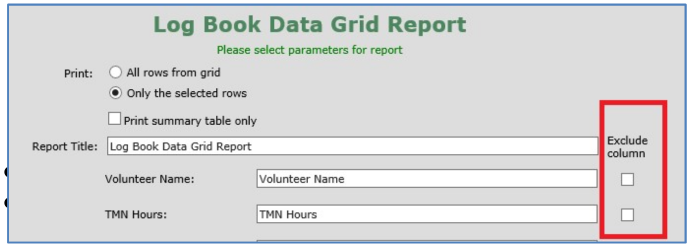
Saturday, October 27, 2018
3:00 PM - 5:00 PM

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.

<u>Export Data to Excel or PDFs</u>

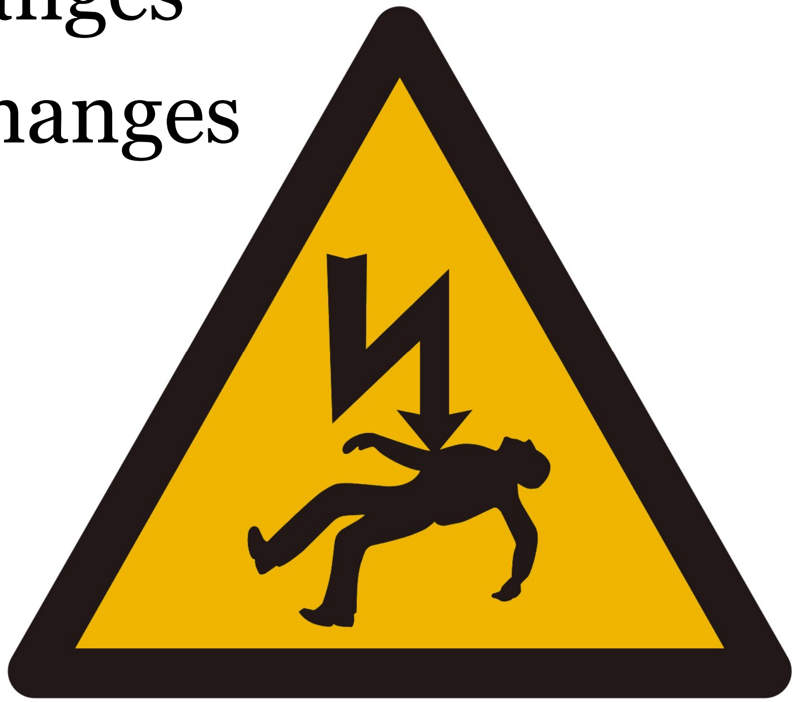
- From any grid:



- 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.

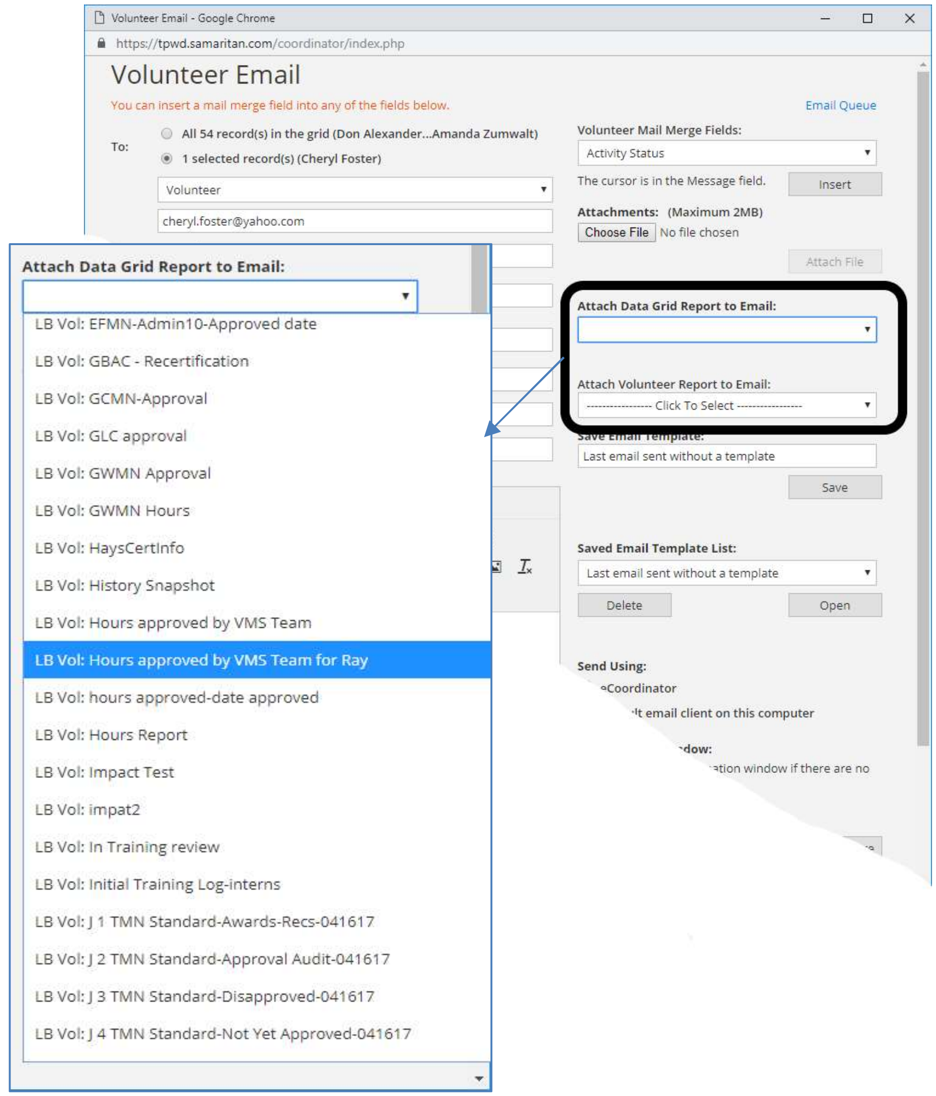
Attaching Grids & Reports to Emails

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
LBOpp = Opportunity Logbook grid



How would you use this functionality?

Dismissed/Dead/Deleted volunteers

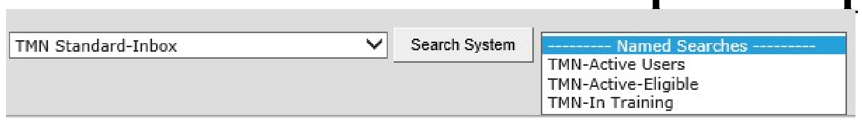
- In general – we don't delete volunteers, we just mark them TMN-Inactive.
- We move around a lot! Add a note to their profile – User Defined/Certifications/Master Naturalist Certification Comments (These comments can be seen by all divisions at TPWD, so be tactful & polite—in 255 characters or less..) 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.

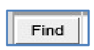
The Inbox – Cleanup & New Recruits

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

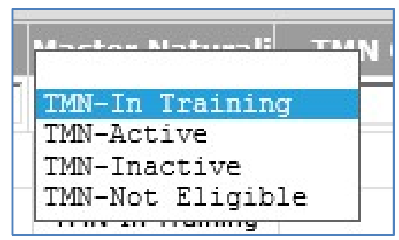


- You can use the column filters.
- There shouldn't be too many entries in the inbox. Our goal should be none (or at least very few).
- Your new recruits are here!
- Don't forget to take them out of the Inbox
- *When they sign up – they get an automatic email from TPWD, telling them you will contact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

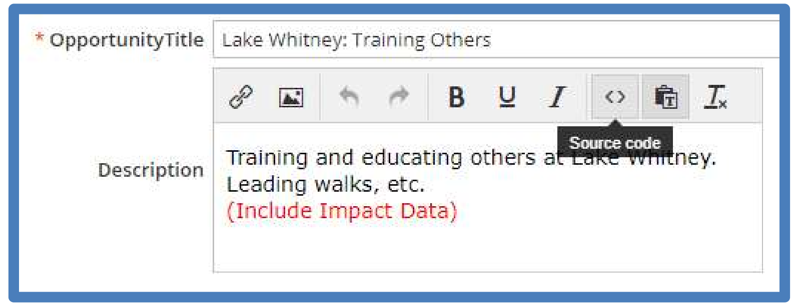


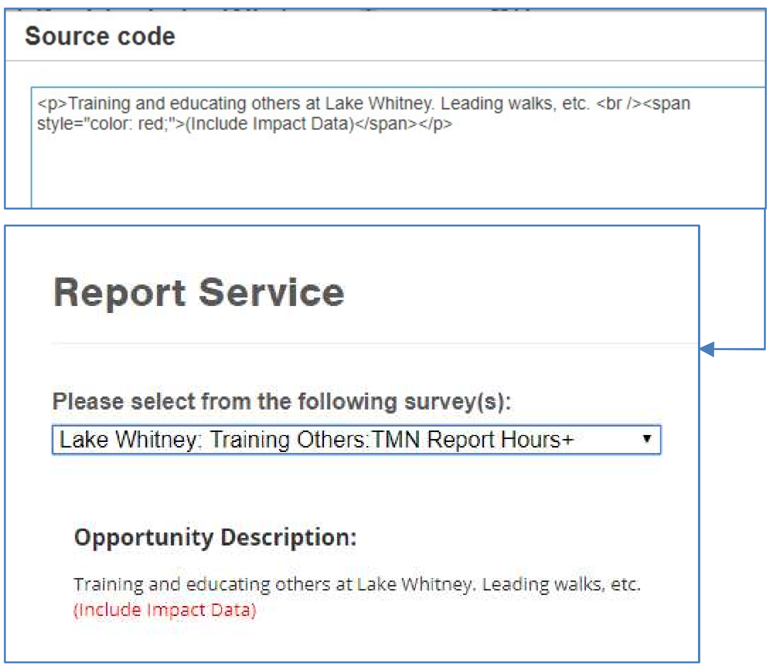
Organization/Opportunity Field

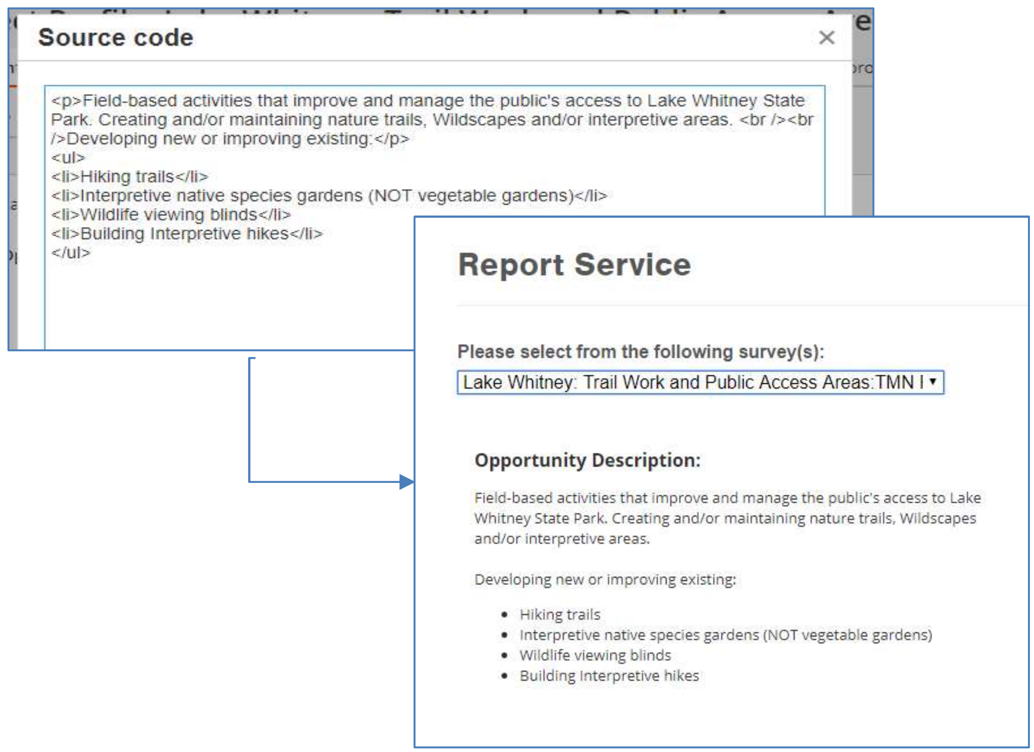
- The key to working in a State wide system.
- The organization field should contain the organization that sponsors the event or activity (such as 'Keep Waco Beautiful' or 'Davis Mountain Preserve'). If it's a local organization it should be spelled out as much as possible so that the statewide management 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.





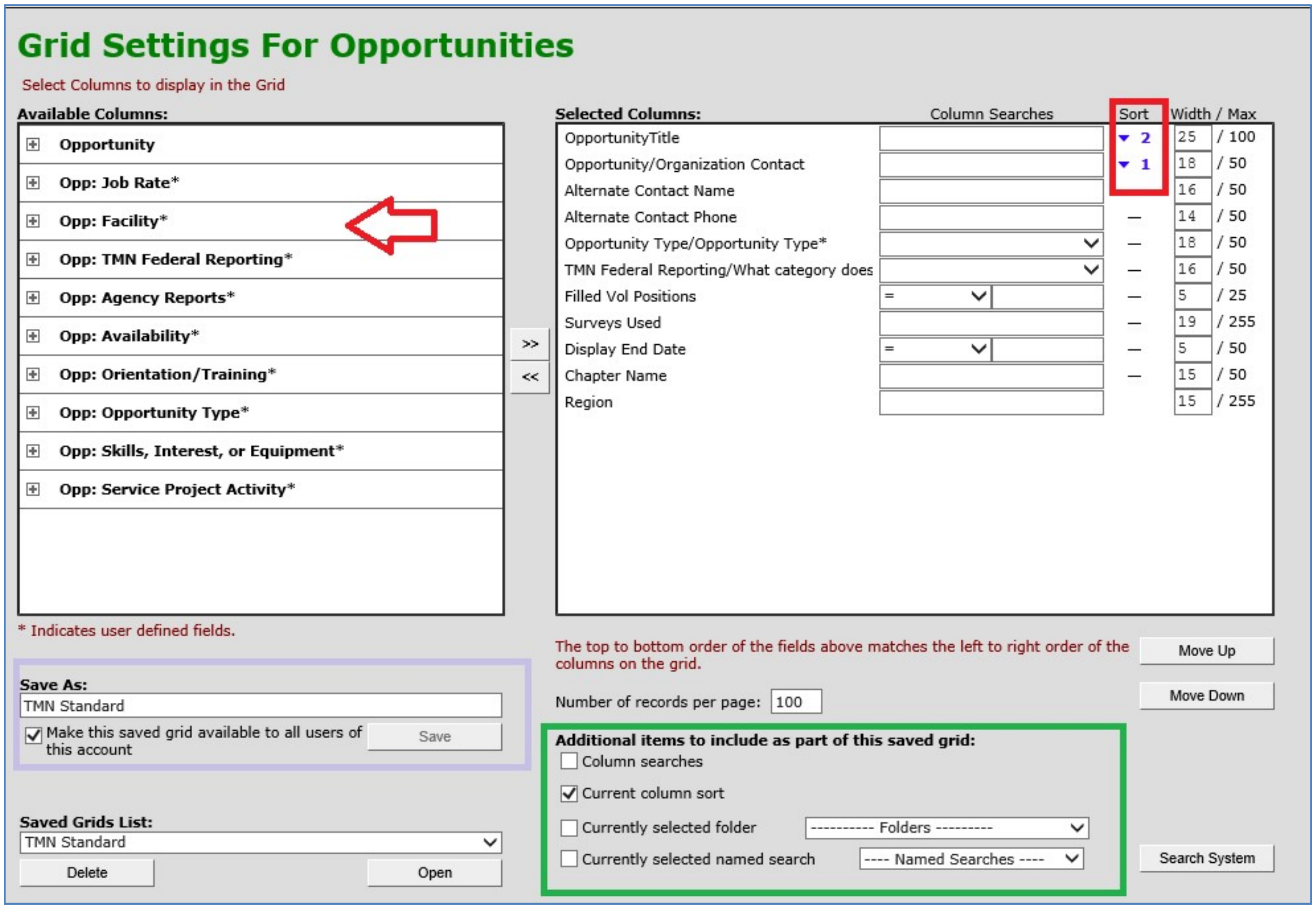


Creating Grids

- 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"

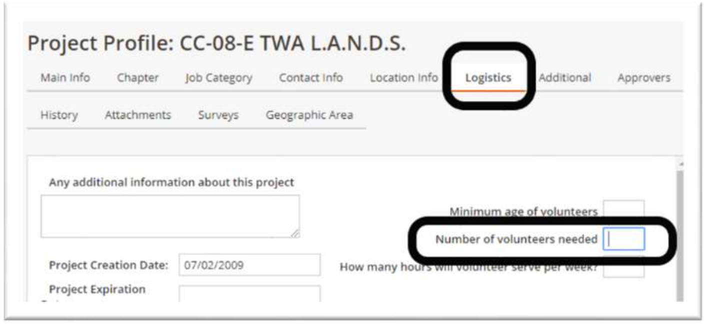
- The Available Columns will be contingent on where you were when you started (an opportunity, a volunteer or a logbook entry). They are grouped based on the tabs and groups in the profile.
- You can sort by selecting (carefully) the number and down arrow in the Selected Columns box.
- When you save 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

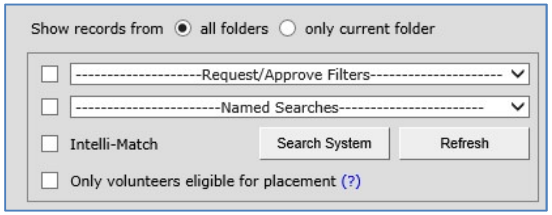


Approving subsets of Volunteers or Opportunities

- Use the Limit number of volunteers to restrict unnecessary approvals

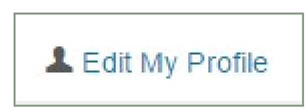


- Use the named searches field to show only a subset of your volunteers
- Examples:
  - From the Opportunity side: use the TMN-In Training search
  - From the volunteer side: use the TMN-Active Opportunities search



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.



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, someway 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?