



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 called 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.

Account Tools Report All



TPWD - Master Naturalist: **Mid Coast**

Volunteers Opportunities Chapters

New Edit Delete Reports

Clear Filters Grid Settings Saved Grids List Filters

1 to 100 of 249 Volunteers Page 1 of 3

	Last Name ▼1	First Name	User ID	Master Naturalist Cert	Age	Home Phone	Cell Phone
Find							

Select the TMN Standard – Chapter Member Summary grid view from the Grid View selection dropdown box. This view contains all of the data columns needed for the Roster Report. Click on the Reports button.

TPWD - Master Naturalist : Mid Coast

The screenshot shows the TPWD Master Naturalist interface for the Mid Coast region. The 'Volunteers' tab is active. On the left sidebar, the 'Reports' button is highlighted with a red arrow. At the top of the main content area, the 'Grid Settings' dropdown menu is open, and 'TMN Standard-Chapter Member Summary' is selected, circled in red. Below this, a table displays a list of 88 volunteers, with the first few rows visible:

	Last Name	First Name	User ID	Home Phone	Cell Phone	Email Ad
<input type="checkbox"/>	Alison	Lane				
<input type="checkbox"/>	Amsler, III	Neill				
<input type="checkbox"/>	Baiamonte	Terry				
<input type="checkbox"/>	Bailey	Donna				
<input type="checkbox"/>	Barnhart	Claire				
<input type="checkbox"/>	Barron	Trey				
<input type="checkbox"/>	Barton	Karen				
<input type="checkbox"/>	Benson	Karen				
<input type="checkbox"/>	Berger	Allan				
<input type="checkbox"/>	Berger	Brigid				

Select Volunteer Data Grid from the Report button dropdown list.

TPWD - Master Naturalist : Mid Coast

The screenshot shows the TPWD Master Naturalist interface for the Mid Coast region. The 'Volunteers' tab is active. On the left sidebar, the 'Reports' button dropdown menu is open, and 'Volunteer Data Grid' is selected and highlighted with a red arrow. The main content area shows the same table of 88 volunteers as in the previous screenshot, with the first few rows visible:

	Last Name	First Name	User ID	Home Phone	Cell Phone	Email Ad
<input type="checkbox"/>	Alison	Lane				
<input type="checkbox"/>	Amsler, III	Neill				
<input type="checkbox"/>	Baiamonte	Terry				
<input type="checkbox"/>	Bailey	Donna				
<input type="checkbox"/>	Barnhart	Claire				
<input type="checkbox"/>	Barron	Trey				
<input type="checkbox"/>	Barton	Karen				
<input type="checkbox"/>	Benson	Karen				
<input type="checkbox"/>	Berger	Allan				
<input type="checkbox"/>	Berger	Brigid				
<input type="checkbox"/>	Boatman	Helen				

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.

Volunteer Data Grid Report

Please select parameters for report

Print: All records from grid
 Only the selected records

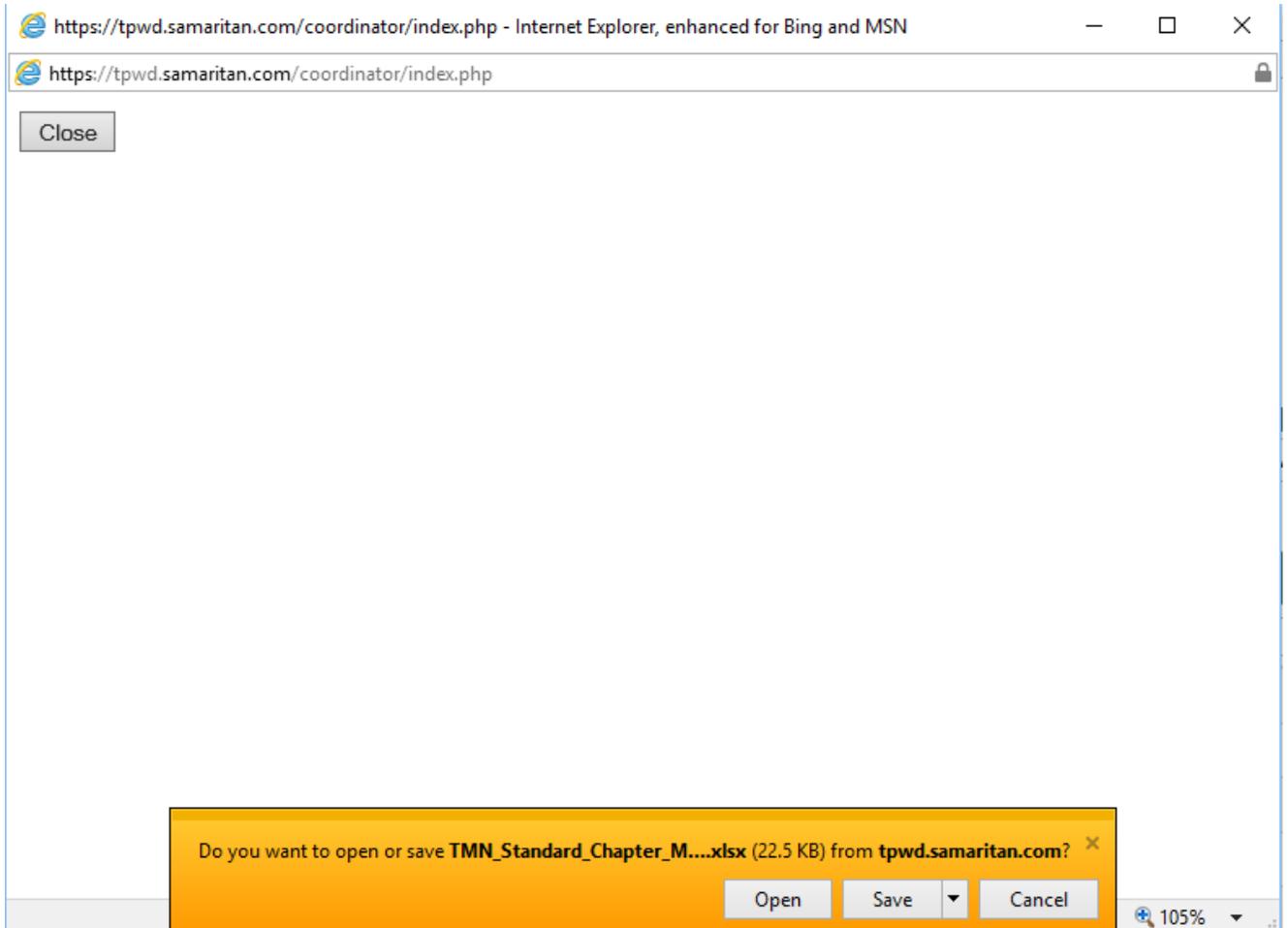
Report Title: Exclude column

Last Name:	<input type="text" value="Last Name"/>	<input type="checkbox"/>
First Name:	<input type="text" value="First Name"/>	<input type="checkbox"/>
User ID:	<input type="text" value="User ID"/>	<input type="checkbox"/>
Home Phone:	<input type="text" value="Home Phone"/>	<input type="checkbox"/>
Cell Phone:	<input type="text" value="Cell Phone"/>	<input type="checkbox"/>
Email Address:	<input type="text" value="Email Address"/>	<input type="checkbox"/>
Street Address 1:	<input type="text" value="Street Address 1"/>	<input type="checkbox"/>
City:	<input type="text" value="City"/>	<input type="checkbox"/>
Zip:	<input type="text" value="Zip"/>	<input type="checkbox"/>
Age:	<input type="text" value="Age"/>	<input type="checkbox"/>
Master Naturalist Certification Level:	<input type="text" value="Master Naturalist Certification Level"/>	<input type="checkbox"/>
Master Naturalist Dues:	<input type="text" value="Master Naturalist Dues"/>	<input type="checkbox"/>
Master Naturalist Class:	<input type="text" value="Master Naturalist Class"/>	<input type="checkbox"/>
Initial Certification:	<input type="text" value="Initial Certification"/>	<input type="checkbox"/>
Chapter Certified:	<input type="text" value="Chapter Certified"/>	<input type="checkbox"/>
Master Naturalist Cert Date:	<input type="text" value="Master Naturalist Cert Date"/>	<input type="checkbox"/>
Current Chapter:	<input type="text" value="Current Chapter"/>	<input type="checkbox"/>
CBC expiration date:	<input type="text" value="CBC expiration date"/>	<input type="checkbox"/>
250 Hrs Award Date:	<input type="text" value="250 Hrs Award Date"/>	<input type="checkbox"/>
500 TMN Hours Award Date:	<input type="text" value="500 TMN Hours Award Date"/>	<input type="checkbox"/>

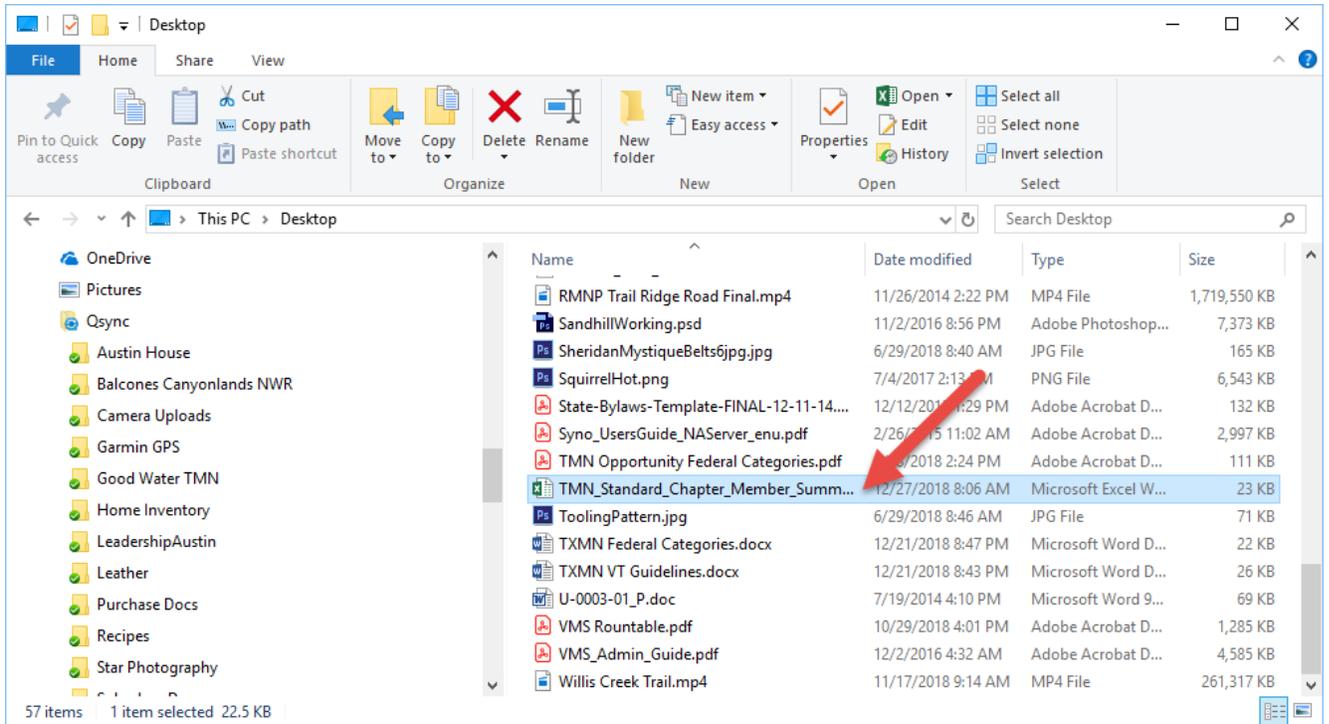
Click the OK button.

5,000 TMN Hours Award Date:	<input type="text" value="5,000 TMN Hours Award Date"/>	<input type="checkbox"/>
10,000 TMN Hours Award Date:	<input type="text" value="10,000 TMN Hours Award Date"/>	<input type="checkbox"/>
Global ID:	<input type="text" value="Global ID"/>	<input type="checkbox"/>
Attach/Profile Image Uploaded By:	<input type="text" value="Attach/Profile Image Uploaded By"/>	<input type="checkbox"/>
Date Registered:	<input type="text" value="Date Registered"/>	<input type="checkbox"/>
Report Format:	Excel (*.xlsx)	<input type="button" value="v"/>
Orientation:	<input checked="" type="radio"/> Portrait <input type="radio"/> Landscape	
		
<input type="button" value="OK"/> <input type="button" value="Cancel"/>		

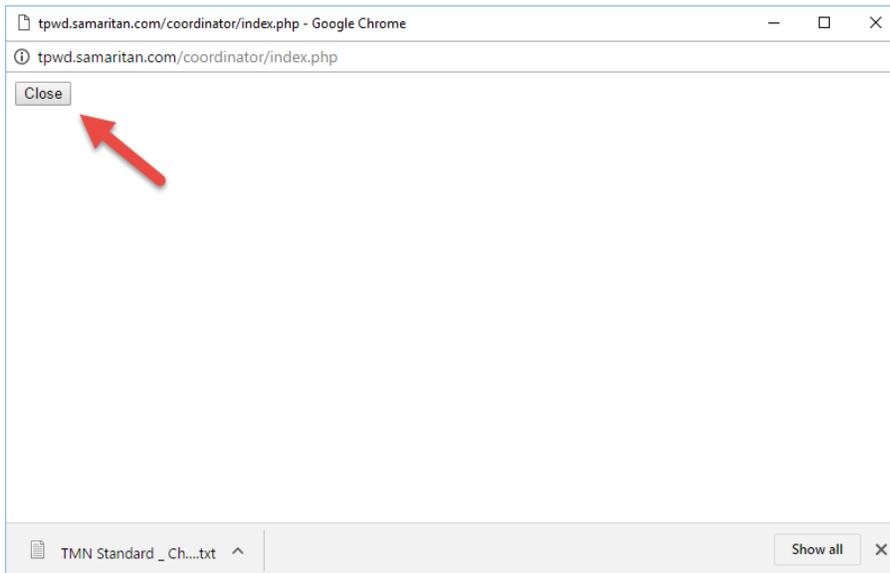
Depending on which internet browser software you are using the window shown below may be different. The purpose of this step is to save the data file from eCoordinator to your computer. In this example Internet Explorer is being used. Save the file and note where it is located on your computer. Often, 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.



The file has been saved in the desktop folder and is named TMN_Standard_Chapter_Member_Summary.xlsx



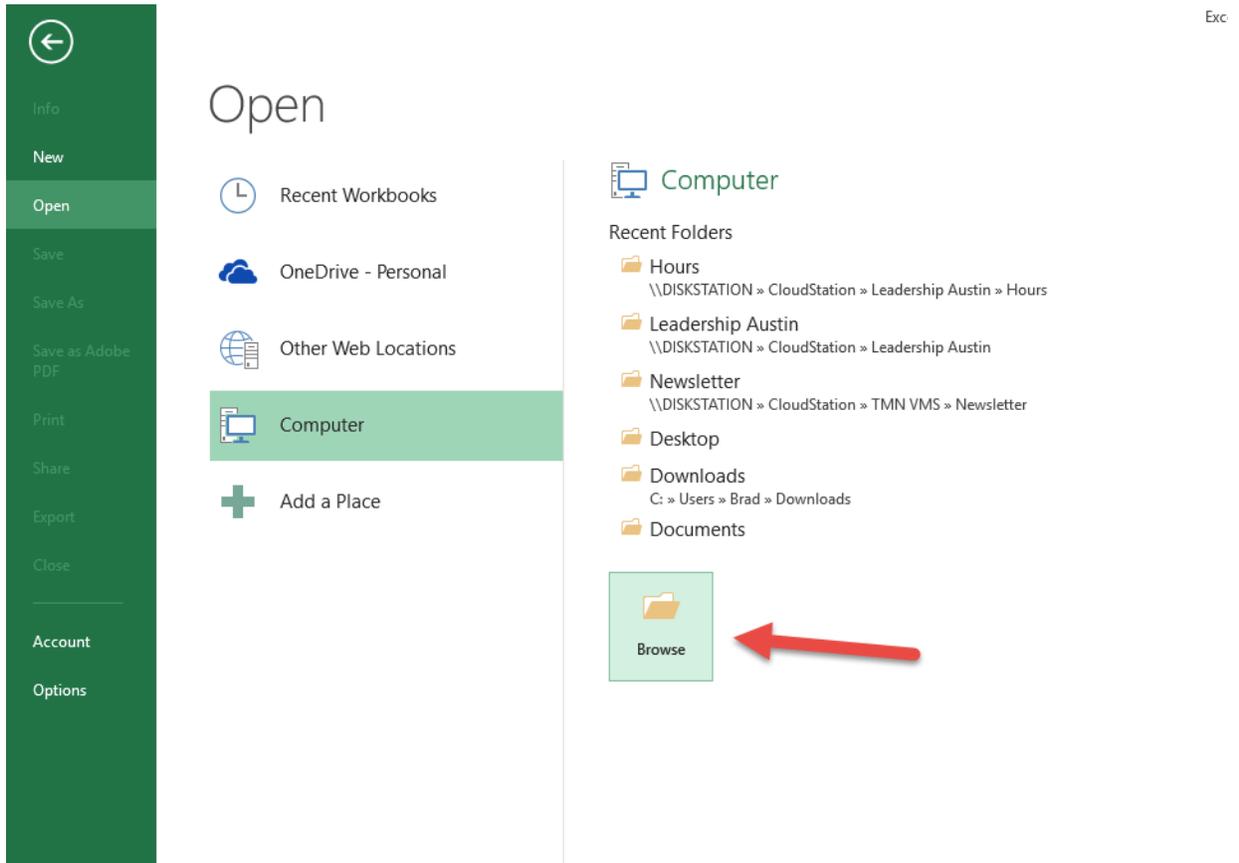
Click the Close button to return to the volunteer view.



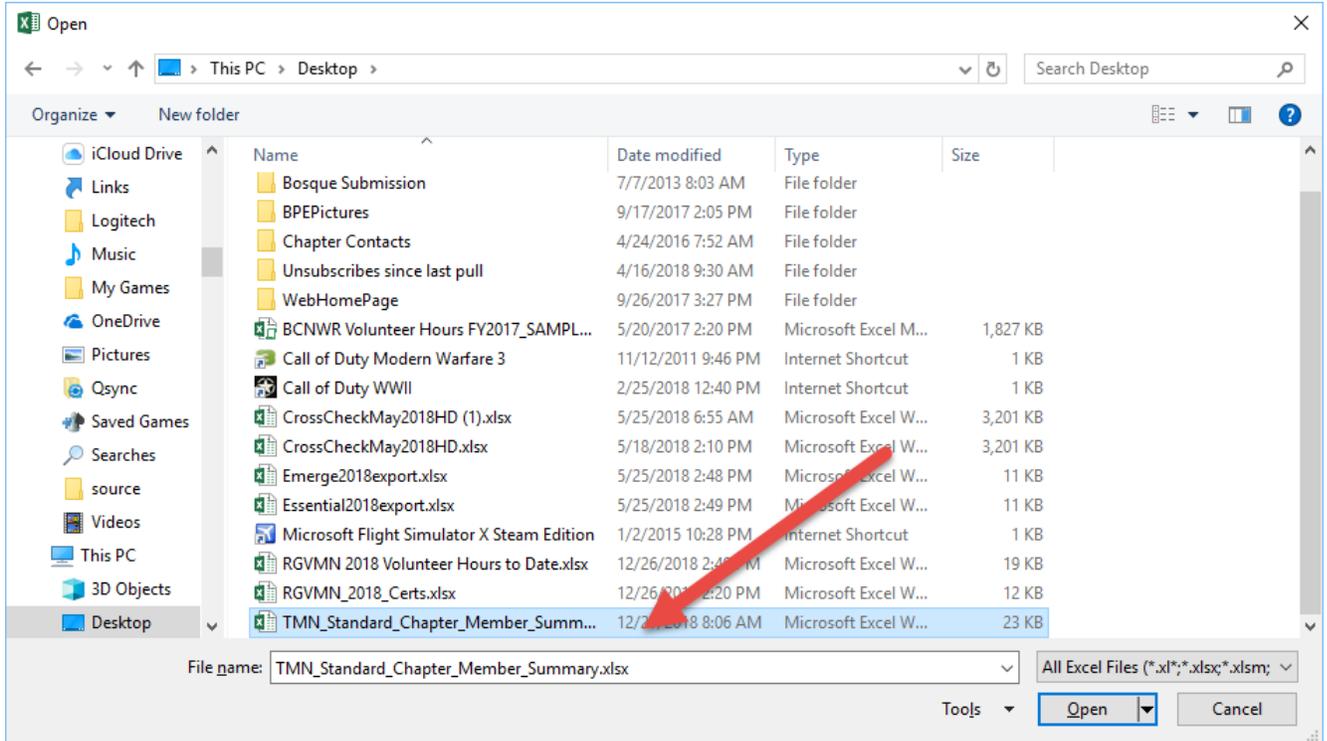
Open Microsoft Excel and choose Open Other Workbooks.



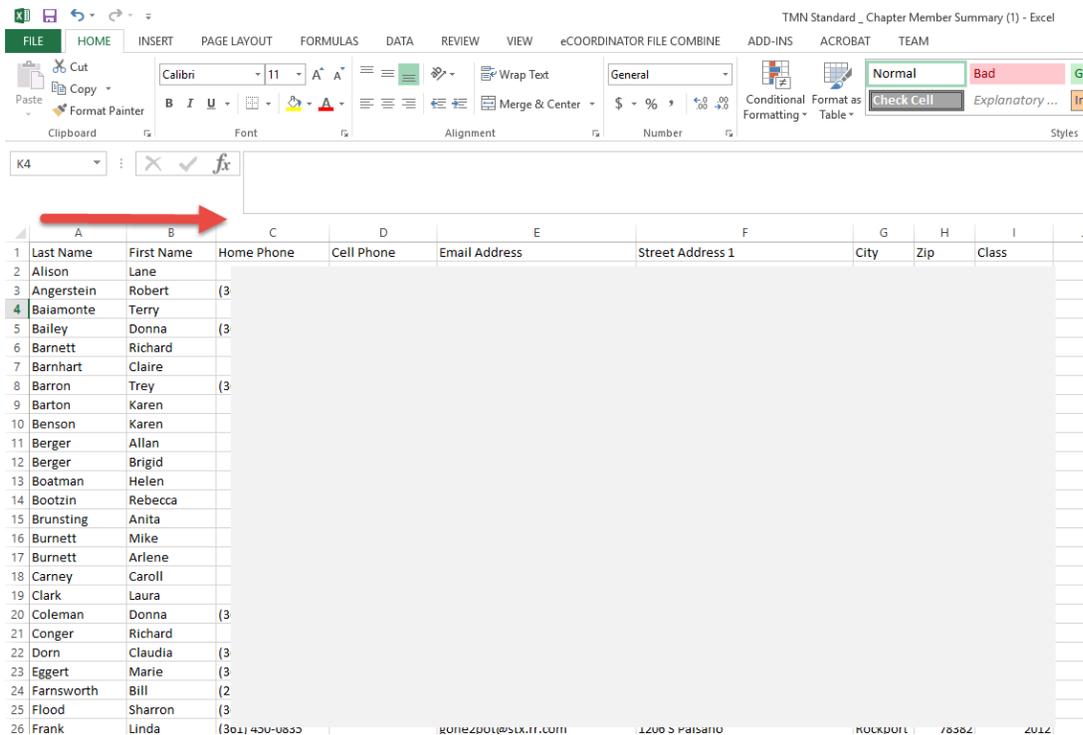
Select the Browse button.



Navigate to the location where the file was saved earlier. In this example, the file was saved in the desktop folder. Select your file and click on the Open button.



Now the information from eCoordinator is in Excel. Expand the column widths so that you can see the information. Select the FILE menu option at the top left of the screen to begin formatting and finishing the report.



Select the Print option.

TMN Standard _ CF

Info

TMN Standard _ Chapter Member Summary (1)
 C: » Users » Brad » Downloads

Protect Workbook
Control what types of changes people can make to this workbook.

Check for Issues
Before publishing this file, be aware that it contains:

- Absolute path
- Content that cannot be checked for accessibility issues because of the current file type

Manage Versions
There are no previous versions of this file.

Browser View Options
Pick what users can see when this workbook is viewed on the Web.

Properties

Size 9.
 Title A
 Tags A
 Categories A

Related Dates

Last Modified
 Created
 Last Printed

Related People

Author A
 Last Modified By N

Related Documenter

Open File Location
 Show All Properties

Print (highlighted with red arrow)

Select Page Setup.

Print

Copies: 1

Printer
 EPSON WF-2540 Series (FAX)
 Ready
[Printer Properties](#)

Settings

Print Active Sheets
 Only print the active sheets

Pages: to

Collated
 1,2,3 1,2,3 1,2,3

Portrait Orientation

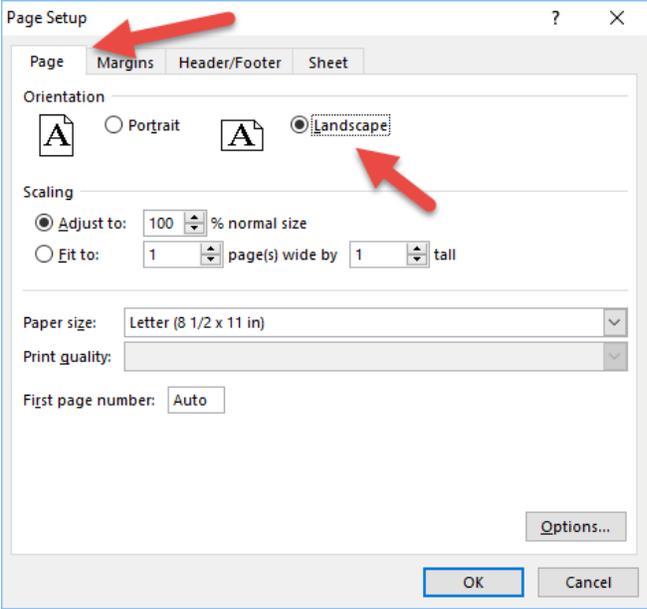
Letter (8 1/2 x 11 in)
 8.5" x 11"

Normal Margins
 Left: 0.7" Right: 0.7"

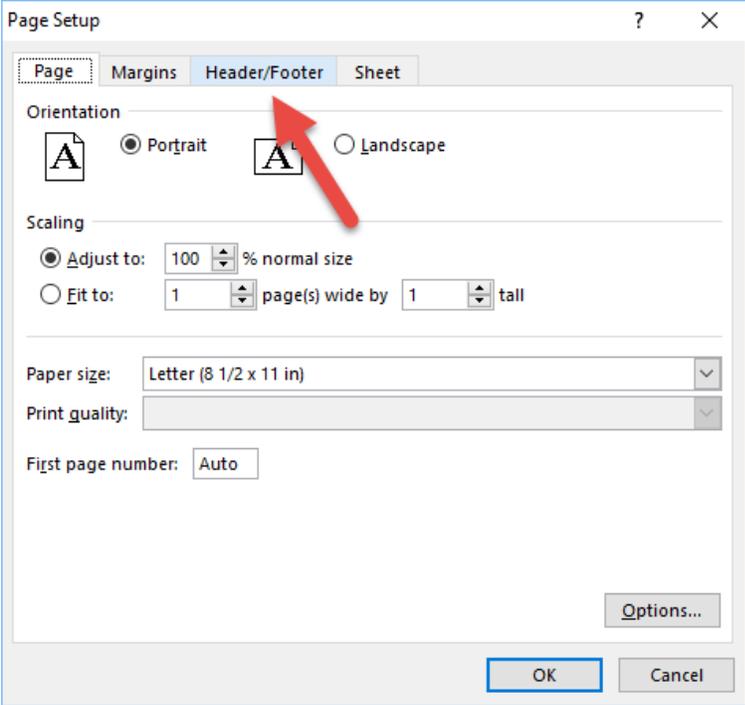
No Scaling
 Print sheets at their actual size

[Page Setup](#) (highlighted with red arrow)

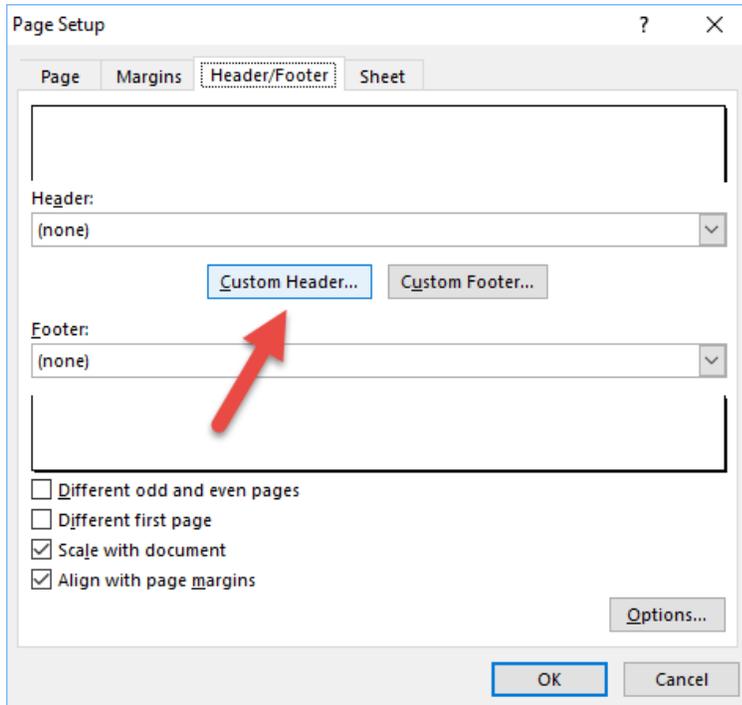
On the Page Setup | Page tab click on the Orientation Landscape radio button.



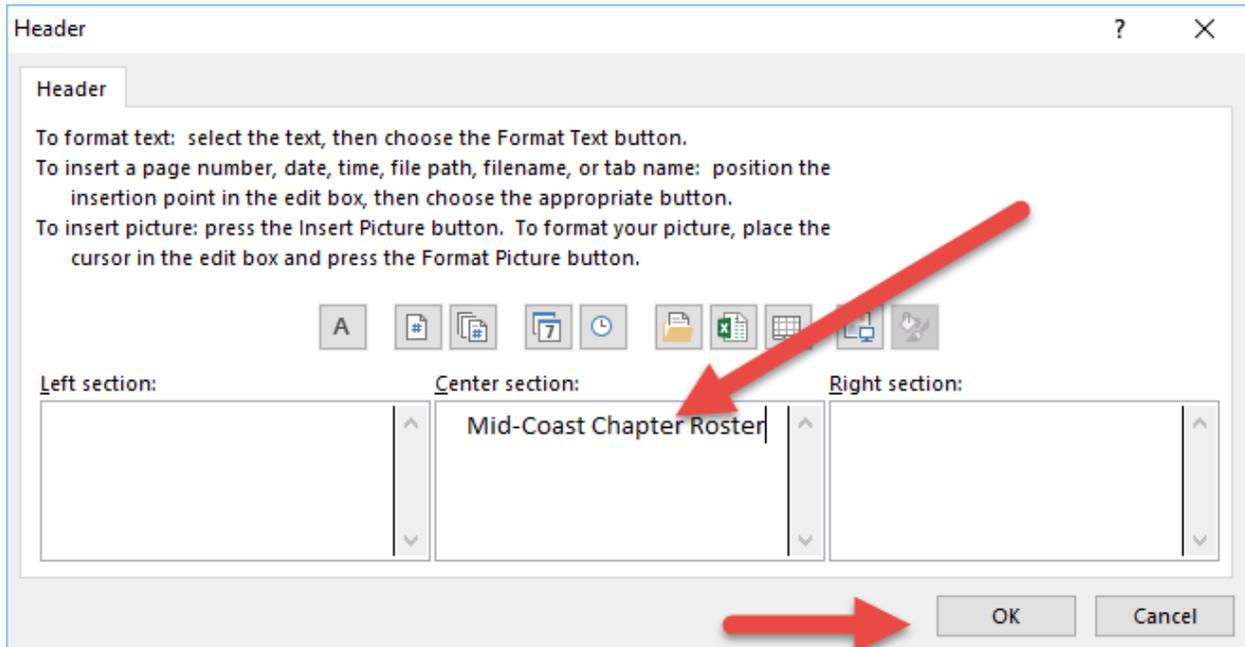
Select the Page Setup | Header/Footer tab.



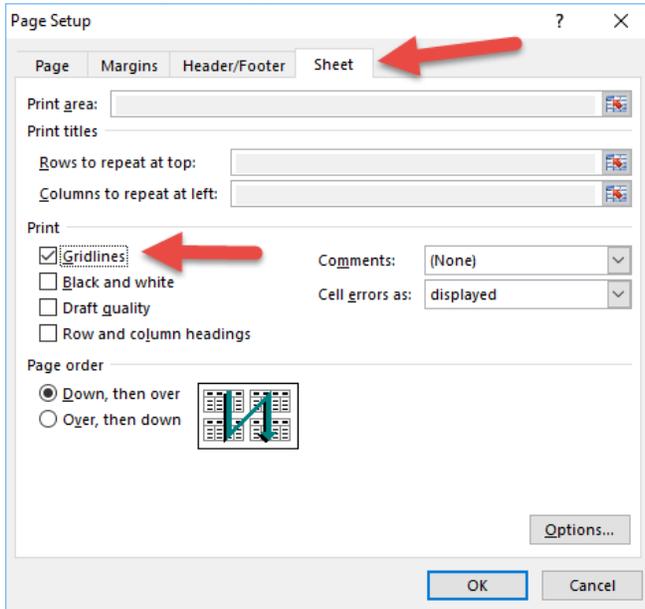
Click on the Custom Header button.



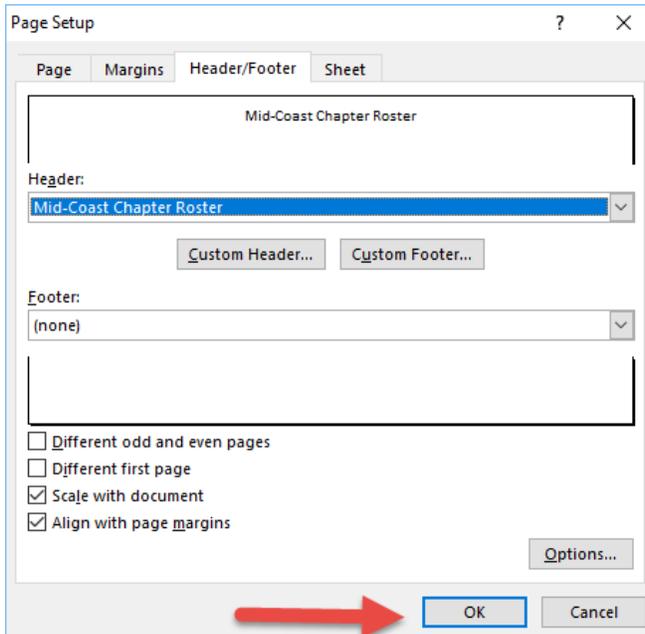
Type the name of your report. In this example, the title is Mid-Coast Chapter Roster. Click the OK button when finished.



Select the Page Setup | Sheet tab. Click on the Print Gridlines checkbox.



Click on the OK button.



From the Scaling dropdown list select the Fit All Columns on One Page. Note: this can also be accomplished on the Page Setup window.

Print



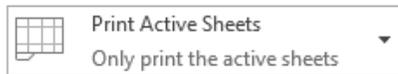
Copies: 1

Printer

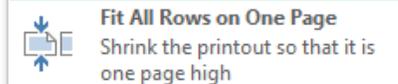
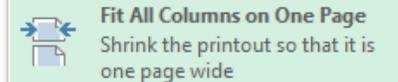
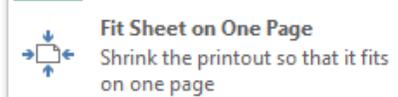
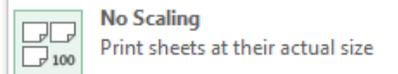
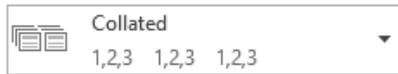


[Printer Properties](#)

Settings



Pages: [] to []



[Custom Scaling Options...](#)

Choose Microsoft Print to PDF selection from the Printer dropdown list. Click on the Print button to create the report.

TMN Standard _ Chapter Member

Last Name	First Name	Home Phone
Alison	Lane	
Angerstein	Robert	(361) 578-3355
Balamonte	Terry	
Bailey	Donna	(361) 255-4323
Barnett	Richard	
Barnhart	Claire	
Barron	Trey	(361) 576-0022
Barton	Karen	
Benson	Karen	
Berger	Allen	
Boatman	Heidi	
Bootslin	Rebecca	
Brunsting	Anita	
Burnett	Mike	
Burnett	Arlene	
Carney	Carroll	
Clark	Laura	
Coleman	Donna	(361) 293-3503
Conger	Richard	
Dorn	Claudia	(361) 729-3321
Eggert	Marie	(361) 741-6797
Farnsworth	Bill	(210) 999-5115
Flood	Sharon	(361) 727-9006 x
Frank	Linda	(361) 450-0835
Friedrichs	Bob	
Friedrichs	Irma	(925) 588-8445

The Save Print Output As window opens. Name your file and save it by clicking the Save button. Note the location.

File name: Mid-Coast Chapter Roster

Save as type: PDF Document (*.pdf)

Save

The completed report can now be view in Acrobat Reader or other PDF viewing software.

Mid-Coast Chapter Roster.pdf - Adobe Acrobat Reader DC

File Edit View Window Help

Home Tools Mid-Coast Chapter... x

1 / 2 112%

Mid-Coast Chapter Roster

Last Name	First Name	Home Phone	Cell Phone	Email Address	Street Address 1	City	Zip	Class
Alison	Lane							06
Angerstein	Robert	(3						00
Balamonte	Terry							12
Bailey	Donna	(3						
Barnett	Richard							21
Barnhart	Claire							29
Barron	Trey	(3						
Barton	Karen							14
Benson	Karen							11
Berger	Allan							27
Berger	Brigid							27
Boatman	Helen							24
Bootzin	Rebecca							14
Brunsting	Anita							15
Burnett	Mike							25
Burnett	Arlene							25
Carney	Caroll							24
Clark	Laura							14
Coleman	Donna	(3						
Conger	Richard							28
Dorn	Claudia	(3						11
Eggert	Marie	(3						13
Farnsworth	Bill	(2						26
Flood	Sharron	(3						10
Frank	Linda	(3						12
Friedrichs	Bob							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							22
Hartigan	Patrick							13
Hejtmancik	Gay							26
Henneke	Lawrence	(3						28
Hirsch	Norman	(3						22
Huber	Mollie	(9						12
James	Brad	(5						13
Jones	Barbara	(3						12
Kanak	Frances							13
Kirkwood	Raymond	(3						21

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

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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



TPWD - Master Naturalist : Mid Coast

Volunteers Opportunities Chapters

New Edit Delete Reports Calendar Request/Approve Log Book Email Share Automation Add Hours

Newly shared records Folder Manager

Clear Filters Grid Settings TMN Standard Filters TMN-Active/InTrain/NotEligible/

1 to 88 of 88 Volunteers

	Last Name v1	First Name	User ID	Master Naturalist Cert	Age	Home Phone
Find						
<input type="checkbox"/>	Alison	Lane				
<input type="checkbox"/>	Amsler, III	Neill				
<input type="checkbox"/>	Baiamonte	Terry				
<input type="checkbox"/>	Bailey	Donna				
<input type="checkbox"/>	Barnhart	Claire				
<input type="checkbox"/>	Barron	Trey				
<input type="checkbox"/>	Barton	Karen				
<input type="checkbox"/>	Benson	Karen				
<input type="checkbox"/>	Berger	Allan				
<input type="checkbox"/>	Berger	Brigid				
<input type="checkbox"/>	Boatman	Helen				
<input type="checkbox"/>	Bootzin	Rebecca				
<input type="checkbox"/>	Burge	William				

Click on the Filters button.

TPWD - Master Naturalist : Mid Coast

Volunteers Opportunities Chapters

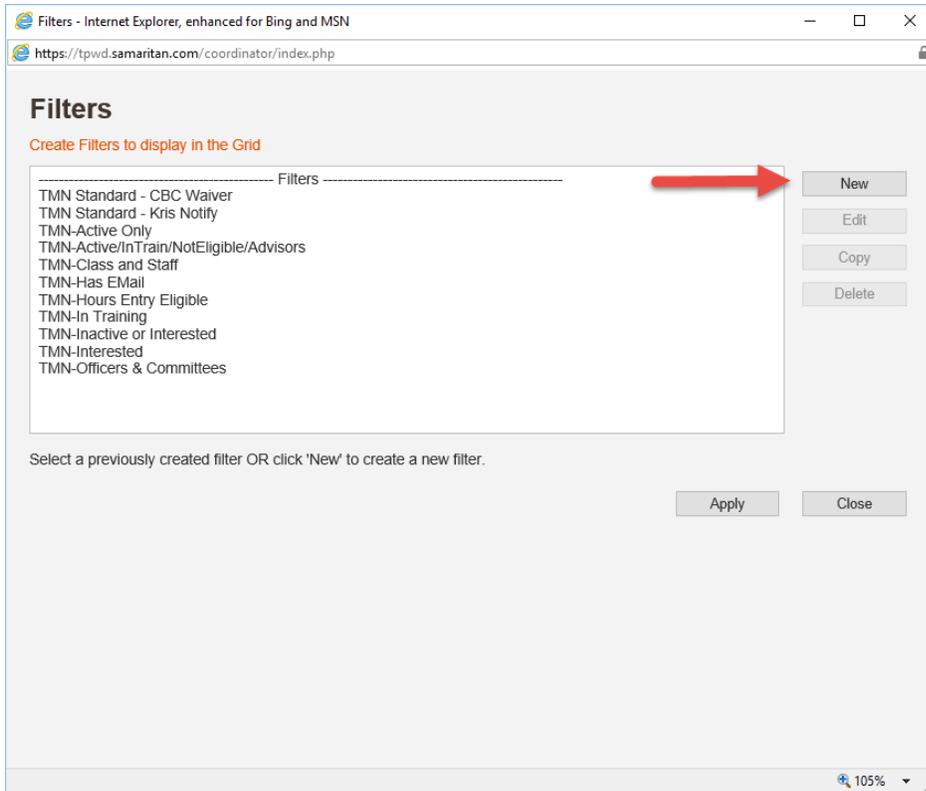
New Edit Delete Reports Calendar Request/Approve Log Book Email Share

Clear Filters Grid Settings TMN Standard Filters TMN-Active/InTrain/NotEligible/

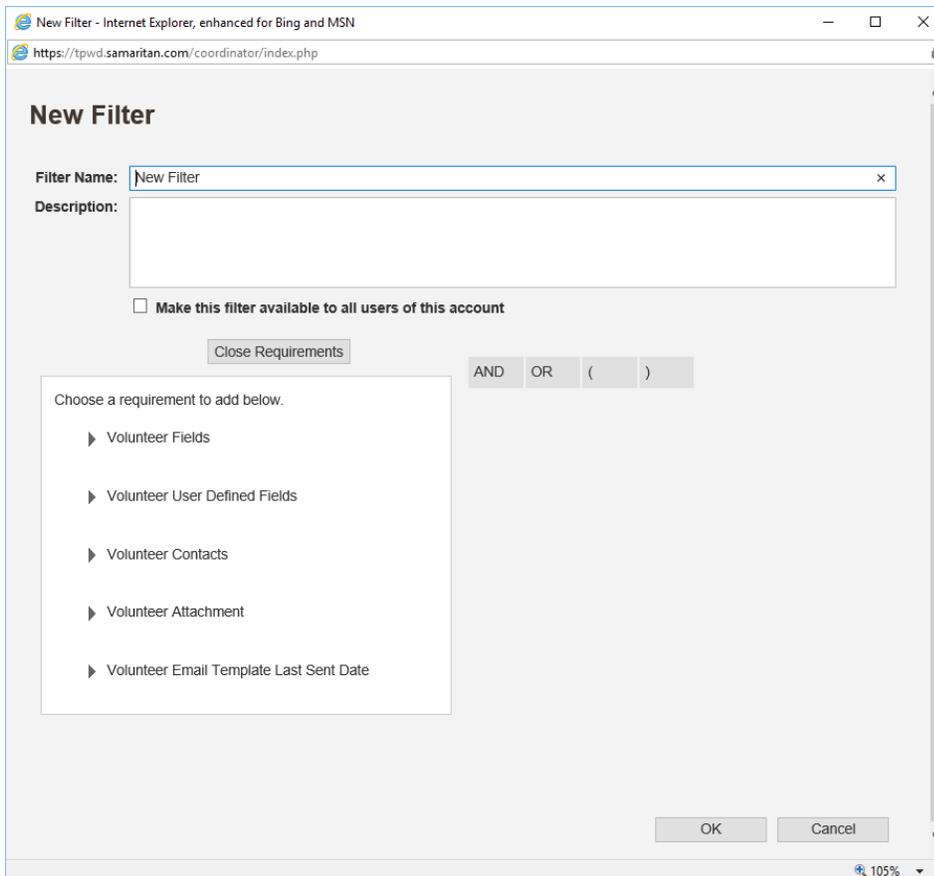
1 to 88 of 88 Volunteers

	Last Name v1	First Name	User ID	Master Naturalist Cert	Age	Home Phone
Find						
<input type="checkbox"/>	Alison	Lane	midcoast-LAlison	TMN-Active	70	(361)
<input type="checkbox"/>	Amsler, III	Neill	midcoast-namsler	TMN-Active	70	(361) 319-5252 (361)
<input type="checkbox"/>	Baiamonte	Terry	midcoast-TBaiamonte	TMN-Active	116	(361)
<input type="checkbox"/>	Bailey	Donna	midcoast-DBailey	TMN-Active	63	(361) 872-2264 (281)
<input type="checkbox"/>	Barnhart	Claire	midcoast-CBarnhart	TMN-Active	64	(361)
<input type="checkbox"/>	Barron	Trey	midcoast-tbarron	TMN-Advisor	116	(361) 576-0022
<input type="checkbox"/>	Barton	Karen	midcoast-KBarton	TMN-Active	67	(361)

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



The New Filter window is displayed.



In this case we are creating a filter for TMN-Active volunteers who have not 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.

New Filter - Internet Explorer, enhanced for Bing and MSN
https://tpwd.samaritan.com/coordinator/index.php

New Filter

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 ()

Choose a requirement to add below.

- ▶ Volunteer Fields
- ▶ Volunteer User Defined Fields
- ▶ Volunteer Contacts
- ▶ Volunteer Attachment
- ▶ Volunteer Email Template Last Sent Date

OK Cancel

105%

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

New Filter - Internet Explorer, enhanced for Bing and MSN
https://tpwd.samaritan.com/coordinator/index.php

New Filter

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 ()

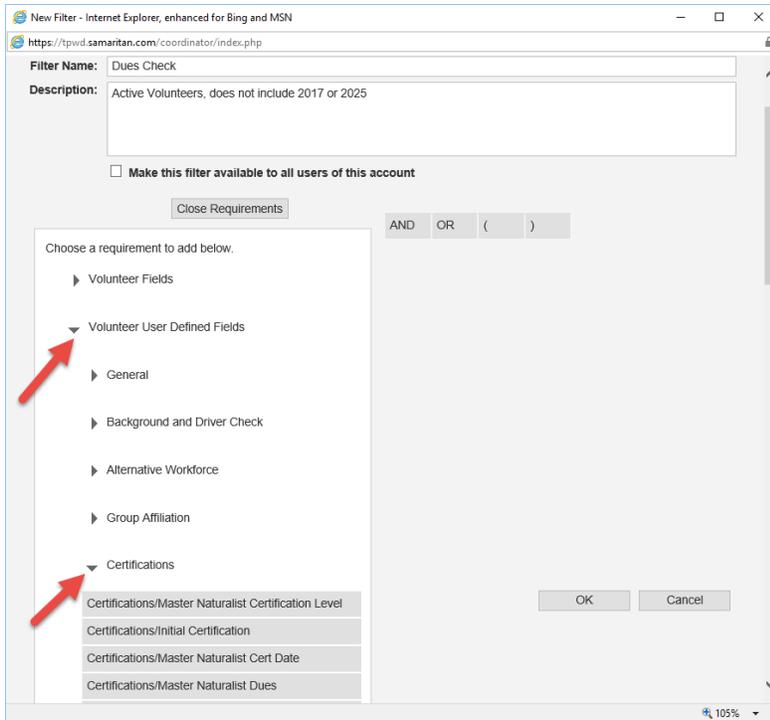
Choose a requirement to add below.

- ▼ Volunteer Fields
- Activity Status
- Activity Status Date
- Address is not work address
- Age
- Any additional information
- Availability
- Available hours
- Birthday

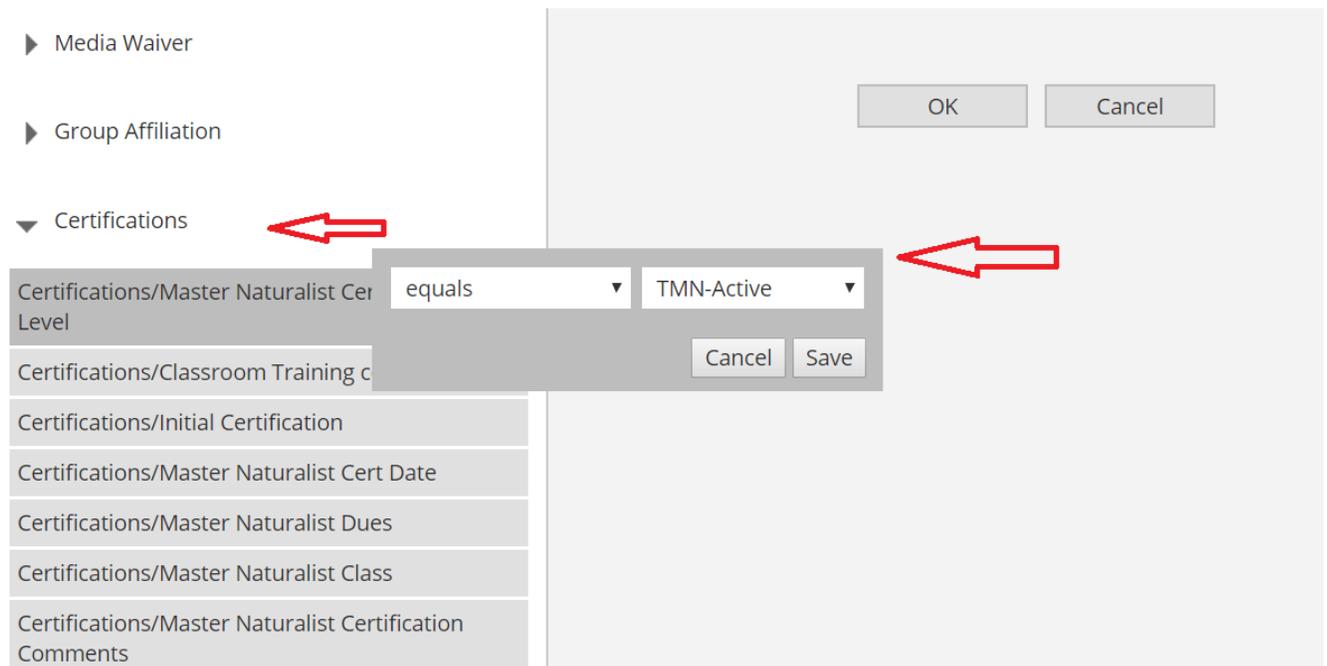
OK Cancel

105%

Expand the Certifications group list.



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.



Click the AND and (buttons.

New Filter

Filter Name: Dues Check

Description: Active Volunteers, does not include 2018 or 2025

Make this filter available to all users of this account

Close Requirements

Choose a requirement to add below.

- ▶ Volunteer Fields
- ▼ Volunteer User Defined Fields
 - ▶ General
 - ▶ Background and Driver Check
 - ▶ Alternative Workforce

AND OR ()

Certifications/Master Naturalist Certification Level equals TMN-Active

AND

(

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
- Certifications/Initial Certification
- Certifications/Master Naturalist Cert Date
- Certifications/Master Naturalist Dues
- Certifications/Master Naturalist Class
- 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

does not include 2017

OK Cancel

Cancel Save

Click the OR button.

New Filter

Filter Name: Dues Check

Description: Active Volunteers, does not in include 2018 or 2025

Make this filter available to all users of this account

Close Requirements

Choose a requirement to add below.

- ▶ Volunteer Fields
- ▼ Volunteer User Defined Fields
 - ▶ General
 - ▶ Background and Driver Check
 - ▶ Alternative Workforce
 - ▶ Group Affiliation

Logic Builder:

- Certifications/Master Naturalist Certification Level **equals** TMN-Active
- AND
- (
- Certifications/Master Naturalist Dues **does not include** 2017
- OR

In the Mid-Coast chapter volunteers with $\geq 5,000$ 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 qualifiers for the 2025 year just like 2017. Click the) button.

New Named Search

Search Name: Dues Check

Description: Active Volunteers, does not include 2017 or 2025

Make this named search available to all users of this account

Close Requirements

Choose a requirement to add below.

- ▶ Volunteer Fields
- ▼ User Defined Fields
- ▼ Certifications
 - Certifications/Project WILD Facilitator Modified Date
 - Certifications/Angler Ed Instructor Modified Date
 - Certifications/Fly Fishing Instructor Modified Date
 - Certifications/Area Chief Instructor Modified Date
 - Certifications/Master Naturalist Certification Level
 - Certifications/Master Naturalist Cert Date
 - Certifications/Master Naturalist Certification Comments

Logic Builder:

- Certifications/Master Naturalist Certification Level **equals** TMN-Active
- AND
- (
- Certifications/Master Naturalist Dues **does not include** 2017
- OR
- Certifications/Master Naturalist Dues **does not include** 2025
-)

This is the result we're looking for:

New Filter

Filter Name: Dues Check

Description: Active Volunteers, does not include 2018 or 2025

Make this filter available to all users of this account

Close Requirements

Choose a requirement to add below.

- ▶ Volunteer Fields
- ▼ Volunteer User Defined Fields
 - ▶ General
 - ▶ Background and Driver Check
 - ▶ Alternative Workforce
 - ▶ Group Affiliation
 - ▼ Certifications
 - Certifications/Master Naturalist Certification Level
 - Certifications/Initial Certification

AND OR ()

Certifications/Master Naturalist Dues **does not include** 2017

OR

Certifications/Master Naturalist Dues **does not include** 2025

)

OK Cancel

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

New Filter

Filter Name: Dues Check

Description: Active Volunteers, does not include 2018 or 2025

Make this filter available to all users of this account

Close Requirements

Choose a requirement to add below.

- ▶ Volunteer Fields
- ▼ Volunteer User Defined Fields
 - ▶ General
 - ▶ Background and Driver Check
 - ▶ Alternative Workforce
 - ▶ Group Affiliation
 - ▼ Certifications
 - Certifications/Master Naturalist Certification Level
 - Certifications/Initial Certification

AND OR ()

Certifications/Master Naturalist Dues **does not include** 2017

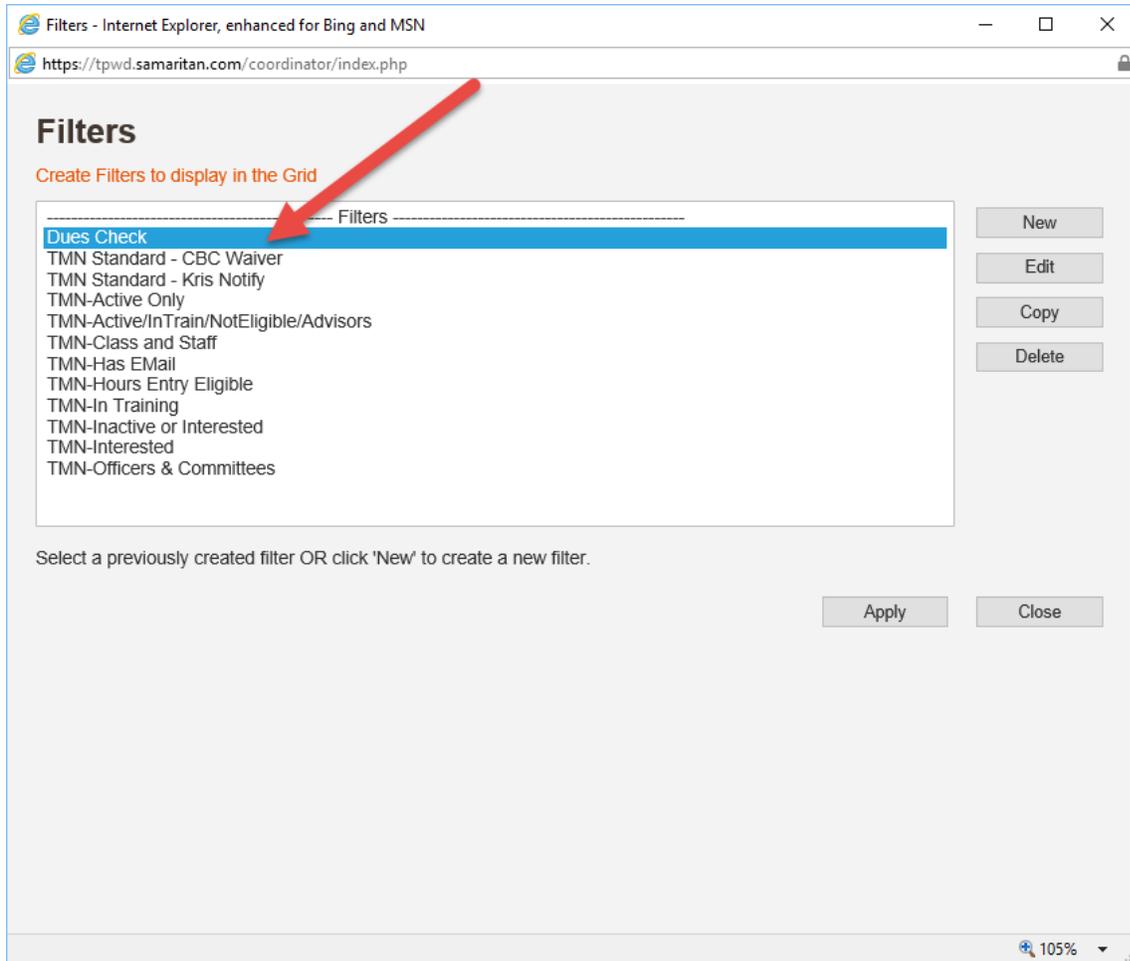
OR

Certifications/Master Naturalist Dues **does not include** 2025

)

OK Cancel

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



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

TPWD - Master Naturalist : Mid Coast

Volunteers | Opportunities | Chapters

New | Edit | Delete | Reports | Calendar | Request/Approve | I on Book

Clear Filters | **Grid Settings** | TMN Standard | Filters | TMN-Active/InTrain/NotEligible//

1 to 88 of 88 Volunteers

<input type="checkbox"/>	Last Name ▼ 1	First Name	User ID	Master Naturalist Cert	Age	Home Phone
Find	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Alison	Lane				
<input type="checkbox"/>	Amsler, III	Neill				
<input type="checkbox"/>	Baiamonte	Terry				
<input type="checkbox"/>	Bailey	Donna				

The Grid Settings for Volunteers window is shown.

Grid Settings For Volunteers

Select Columns to display in the Grid

Available Columns:

- Volunteer
- Vol: Email Template Last Sent Date
- Vol: General*
- Vol: Background and Driver Check*
- Vol: Alternative Workforce*
- Vol: Group Affiliation*
- Vol: Certifications*
- Vol: Contact*
- Vol: TMN Recognition*
- Vol: TMN Officers/Committees*

* Indicates user defined fields.

Selected Columns:

Column Searches	Sort	Width
Last Name	-	99
First Name	-	108
User ID	-	162
Certifications/Master Naturalist Certificat	▼	135
Age	=	50
Home Phone	-	153
Cell Phone	-	153
Email Address	-	270
TMN Officers/Committees/TMN Officer L	▼	135
TMN Officers/Committees/TMN Committ	-	135
Certifications/Current Chapter*	-	135

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: Click To Select
- Currently selected filter: TMN-Active/InTrain/Not

Save As: TMN Standard

Make this saved grid available to all users of this account

Saved Grids List: TMN Standard

Default Saved Grid At Login: Remember the last grid upon logout

Buttons: Move Up, Move Down, Apply, OK, Cancel, Delete, Open, Save

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.

Grid Settings For Volunteers

Select Columns to display in the Grid

Available Columns:

- Volunteer
- Vol: Email Template Last Sent Date
- Vol: General*
- Vol: Background and Driver Check*
- Vol: Alternative Workforce*
- Vol: Group Affiliation*
- Vol: Certifications*
- Vol: Contact*
- Vol: TMN Recognition*
- Vol: TMN Officers/Committees*

* Indicates user defined fields.

Selected Columns:

Column Searches	Sort	Width
First Name	-	108
User ID	-	162
Certifications/Master Naturalist Certificat	▼	135
Age	=	50
Home Phone	-	153
Cell Phone	-	153
Email Address	-	270
TMN Officers/Committees/TMN Officer L	▼	135
TMN Officers/Committees/TMN Committ	-	135
Certifications/Current Chapter*	-	135
Gender	▼	63

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

Save As: TMN Standard

Make this saved grid available to all users of this account

Buttons: Move Up, Move Down, Apply, OK, Cancel, Delete, Open, Save

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

Select Columns to display in the Grid

Available Columns:

- Volunteer
- Vol: Email Template Last Sent Date
- Vol: General*
- Vol: Background and Driver Check*
- Vol: Alternative Workforce*
- Vol: Group Affiliation*
- Vol: Certifications***
- Certifications/Master Naturalist Certification Level*
- Certifications/Initial Certification*
- Certifications/Master Naturalist Cert Date*
- Certifications/Master Naturalist Dues*
- Certifications/Master Naturalist Class*

* Indicates user defined fields.

Selected Columns:

Column Searches	Sort	Width
Last Name	—	99
First Name	—	108
Home Phone	—	153
Cell Phone	—	153
Email Address	—	270

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:

- Vol: Alternative workforce
- Vol: Group Affiliation*
- Vol: Certifications*
- Certifications/Master Naturalist Certification Level*
- Certifications/Initial Certification*
- Certifications/Master Naturalist Cert Date*
- 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.

Selected Columns:

Column Searches	Sort	Width
Last Name	—	99
First Name	—	108
Home Phone	—	153
Cell Phone	—	153
Email Address	—	270

The Dues field is now in the Selected Columns List.

Grid Settings For Volunteers

Select Columns to display in the Grid

Available Columns:

<input type="checkbox"/> Vol: Alternative workforce
<input checked="" type="checkbox"/> Vol: Group Affiliation*
<input type="checkbox"/> Vol: Certifications*
Certifications/Master Naturalist Certification Level*
Certifications/Initial Certification*
Certifications/Master Naturalist Cert Date*
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.

Selected Columns:

	Column Searches	Sort	Width
Last Name	<input type="text"/>	—	99
First Name	<input type="text"/>	—	108
Home Phone	<input type="text"/>	—	153
Cell Phone	<input type="text"/>	—	153
Email Address	<input type="text"/>	—	270
Certifications/Master Naturalist Dues*	<input type="text"/>	—	135



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.

Grid Settings For Volunteers

Select Columns to display in the Grid

Available Columns:

- Vol. Alternative workforce
- Vol: Group Affiliation*
- Vol: Certifications*
 - Certifications/Master Naturalist Certification Level*
 - Certifications/Initial Certification*
 - Certifications/Master Naturalist Cert Date*
 - Certifications/Master Naturalist Dues***
 - Certifications/Master Naturalist Class*
 - Certifications/Master Naturalist Certification Comments*
 - Certifications/Chapter Trained In*
 - Certifications/Chapter Certified*
 - Certifications/Current Chapter*

>> <<

Selected Columns:

Column Searches	Sort	Width
Last Name	—	99
First Name	—	108
Home Phone	—	153
Cell Phone	—	153
Email Address	—	270
Certifications/Master Naturalist Dues*	—	135

* 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

Default Saved Grid At Login
 Remember the last grid upon logout ▼

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: Move Up Move Down

Additional items to include as part of this saved grid:

- Column searches
- Current column sort
- Currently selected folder ▼
- Currently selected filter ▼

Filters

Apply OK 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

Select Columns to display in the Grid

Available Columns:

- Vol: Alternative Workforce
- Vol: Group Affiliation*
- Vol: Certifications*
- Certifications/Master Naturalist Certification Level*
- Certifications/Initial Certification*
- Certifications/Master Naturalist Cert Date*
- 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.

Save As: Dues Check

Make this saved grid available to all users of this account

Save

Saved Grids List: TMN Standard

Delete Open

Default Saved Grid At Login: Remember the last grid upon logout

Selected Columns:

Column Searches	Sort	Width
Last Name	—	99
First Name	—	108
Home Phone	—	153
Cell Phone	—	153
Email Address	—	270
Certifications/Master Naturalist Dues*	—	135

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: Mid Coast
- Currently selected filter: Dues Check

Apply OK Cancel

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

Grid Settings For Volunteers

Select Columns to display in the Grid

Available Columns:

- Vol: Alternative Workforce
- Vol: Group Affiliation*
- Vol: Certifications*
- Certifications/Master Naturalist Certification Level*
- Certifications/Initial Certification*
- Certifications/Master Naturalist Cert Date*
- 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.

Save As: Dues Check

Make this saved grid available to all users of this account

Save

Saved Grids List: TMN Standard

Delete Open

Default Saved Grid At Login: Remember the last grid upon logout

Selected Columns:

Column Searches	Sort	Width
Last Name	—	99
First Name	—	108
Home Phone	—	153
Cell Phone	—	153
Email Address	—	270
Certifications/Master Naturalist Dues*	—	135

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: Mid Coast
- Currently selected filter: Dues Check

Apply OK Cancel

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.

TPWD - Master Naturalist :  Mid Coast

Volunteers Opportunities Chapters

New Edit Delete Reports Calendar Request/Approve Log Book Email Share Automation Add Hours

Newly shared records Folder Manager

Clear Filters Grid Settings Dues Check Filters Dues Check

1 to 80 of 80 Volunteers

	Last Name ▼1	First Name	Home Phone	Cell Phone	Email Address	Master Naturalist Due
<input type="checkbox"/>	Alison	Lane				2018
<input type="checkbox"/>	Amsler, III	Neill				2018
<input type="checkbox"/>	Balamonte	Terry				2018
<input type="checkbox"/>	Bailey	Donna				2018
<input type="checkbox"/>	Barnhart	Claire				2018
<input type="checkbox"/>	Barton	Karen				2018
<input type="checkbox"/>	Benson	Karen				2018
<input type="checkbox"/>	Berger	Allan				2018
<input type="checkbox"/>	Boatman	Helen				2018
<input type="checkbox"/>	Bootzin	Rebecca				2018
<input type="checkbox"/>	Burge	William				2018
<input type="checkbox"/>	Burnett	Mike				2018
<input type="checkbox"/>	Burnett	Sam				2018

[Return to the Table of Contents](#)

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



TPWD - Master Naturalist :  Mid Coast

Volunteers Opportunities Chapters

New Edit Delete Reports Calendar Request/Approve Log Book Email Share Automation Add Hours

Newly shared records Folder Manager

Clear Filters Grid Settings **TMN Standard** Filters TMN-Active/InTrain/NotEligible/

1 to 88 of 88 Volunteers

	Last Name ▼1	First Name	User ID	Master Naturalist Cert	Age	Home Phone
<input type="checkbox"/>	Alison	Lane				
<input type="checkbox"/>	Amsler, III	Neill				
<input type="checkbox"/>	Balamonte	Terry				
<input type="checkbox"/>	Bailey	Donna				
<input type="checkbox"/>	Barnhart	Claire				
<input type="checkbox"/>	Barron	Trey				
<input type="checkbox"/>	Barton	Karen				
<input type="checkbox"/>	Benson	Karen				
<input type="checkbox"/>	Berger	Allan				
<input type="checkbox"/>	Berger	Brigid				
<input type="checkbox"/>	Boatman	Helen				
<input type="checkbox"/>	Bootzin	Rebecca				
<input type="checkbox"/>	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 - Master Naturalist : Mid Coast

Volunteers Opportunities Chapters

New Edit Delete Reports Calendar Request/Approve Log Book

Clear Filters Grid Settings **TMN Standard** Filters

1 to 88 of 88 Volunteers

	Last Name ▼ 1	First Name	User ID	Master Nat	Cell Phone
<input type="checkbox"/>	Alison	Lane			
<input type="checkbox"/>	Amsler, III	Neill			
<input type="checkbox"/>	Baiamonte	Terry			
<input type="checkbox"/>	Bailey	Donna			
<input type="checkbox"/>	Barnhart	Claire			

Filters: Dues Check, TMN Standard - CBC Waiver, TMN Standard - Kris Notify, TMN-Active Only, **TMN-Active/InTrain/NotEligible/Advisors**, TMN-Class and Staff, TMN-Has EMail, **TMN-Hours Entry Eligible**, TMN-In Training, TMN-Inactive or Interested, TMN-Interested, TMN-Officers & Committees

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

TPWD - Master Naturalist : Mid Coast

Volunteers Opportunities Chapters

New Edit Delete Reports Calendar Request/Approve Log Book Email Share Automation Add Hours Newly shared records

Clear Filters Grid Settings Saved Grids List Filters **TMN-Hours Entry Eligible**

1 to 85 of 85 Volunteers

	Last Name ▼ 1	First Name	User ID	Master Naturalist Cert	Age	Home Phone	Cell Phone
<input type="checkbox"/>	Alison	Lane	midcoast-LAlison	TMN-Active	70		(361) 790-3103
<input type="checkbox"/>	Amsler, III	Neill	midcoast-namsler	TMN-Active	70	(361) 319-5252	(361) 319-5252
<input type="checkbox"/>	Baiamonte	Terry	midcoast-TBaiamonte	TMN-Active	116		(361) 935-2322
<input type="checkbox"/>	Bailey	Donna	midcoast-DBailey	TMN-Active	63	(361) 872-2264	(281) 908-0000
<input type="checkbox"/>	Barnhart	Claire	midcoast-CBarnhart	TMN-Active	64		(361) 542-0348
<input type="checkbox"/>	Barton	Karen	midcoast-KBarton	TMN-Active	67		(361) 649-9305
<input type="checkbox"/>	Benson	Karen	midcoast-KBenson	TMN-Active	70		(361) 350-9999
<input type="checkbox"/>	Berger	Allan	midcoast-aberger	TMN-Active	68		(713) 829-2852
<input type="checkbox"/>	Berger	Brigid	midcoast-bberger	TMN-Active	57		(713) 825-1929
<input type="checkbox"/>	Boatman	Helen	midcoast-HBoatman	TMN-Active	79		(361) 649-4908
<input type="checkbox"/>	Bootzin	Rebecca	midcoast-RBootzin	TMN-Active	64		(361) 676-2883
<input type="checkbox"/>	Burge	William	midcoast-bburge	TMN-Active	61		(713) 828-3823

Select All volunteers in Grid option.

TPWD - Master Naturalist : Mid Coast

Volunteers Opportunities Chapters

New Edit Delete Reports Calendar Request/Approve All Volunteers in Grid All Volunteers in Account Share Automation Add Hours Newly shared records

Clear Filters Grid Settings ----- Saved Grids List ----- Filters TMN-Hours Entry I

1 to 85 of 85 Volunteers

<input type="checkbox"/>	Last Name v1	First Name	User ID	Master Naturalist Cert	Age
Find	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Alison	Lane			
<input type="checkbox"/>	Amsler, III	Neill			
<input type="checkbox"/>	Baiamonte	Terry			
<input type="checkbox"/>	Canley	Donna			
<input type="checkbox"/>	Barnhart	Claire			
<input type="checkbox"/>	Barton	Karen			
<input type="checkbox"/>	Benson	Karen			
<input type="checkbox"/>	Berger	Allan			
<input type="checkbox"/>	Berger	Brigid			
<input type="checkbox"/>	Boatman	Helen			
<input type="checkbox"/>	Bootzin	Rebecca			
<input type="checkbox"/>	Burge	William			

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 Book System

Specific Date Range: Start Date: Jan 1 2018 End Date: Dec 31 2018 Apply

All log book entries Applies to: Start Date Reset

Include entries with no start or end date if the "Date Entered" falls within the specified date range.

Summary mode: Summarize by: Volunteer Name

New Show All Refresh Grid Settings Saved Grids Filters

1 to 69 of 69 Rows

	Volunteer Name	Opportunity Title	Start Da	TMN Ho	AT Hour	TMN Init	Approval Status	Admin Activit	Approved By
<input type="checkbox"/>	Berger, Brigid	15 Opportunities	N/A	589.5	53		Not Yet Approved:6, Yes	Board/Committ	N/A
<input type="checkbox"/>	Garland, Patricia	13 Opportunities	N/A	488.75	24		Not Yet Approved:4, Yes	Board/Committ	N/A
<input type="checkbox"/>	Kirkwood, Raymond	17 Opportunities	N/A	479.25	33.25		Yes Approved:88	Board/Committ	N/A
<input type="checkbox"/>	Kirkwood, Kris	15 Opportunities	N/A	468.5	16.75		Yes Approved:187	Board/Committ	N/A
<input type="checkbox"/>	Shirey, Linda	11 Opportunities	N/A	310.5	15.5		Not Yet Approved:1, Yes	Board/Committ	N/A
<input type="checkbox"/>	Burge, William	10 Opportunities	N/A	294.25	23.75		Not Yet Approved:2, Yes	Board/Committ	N/A
<input type="checkbox"/>	Friedrichs, Bob	10 Opportunities	N/A	272	14.5		Yes Approved:47	Chapter Meetir	N/A
<input type="checkbox"/>	Ortego, Dora	9 Opportunities	N/A	255	21		Not Yet Approved:7, Yes	Chapter Meetir	N/A
<input type="checkbox"/>	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

Log Book System

Specific Date Range: Start Date: Jan 1 2018 End Date: Dec 31 2018 Apply

All log book entries Applies to: Start Date Reset

Include entries with no start or end date if the "Date Entered" falls within the specified date range.

Summary mode: Summarize by: Volunteer Name

New Show All Refresh Grid Settings TMN Standard-Awards & Recertificati Filters TMN-Vol Hours Approved

1 to 69 of 69 Rows

	Volunteer Name	TMN Hours	AT Hours	Master Naturalist Clas	Initial Certificati	Master Naturalis	250 TMN Hours Awarc	250 Hrs Awar
<input type="checkbox"/>	Bailey, Donna		4	2010	08/01/2012	06/02/2017	Yes	06/02/2017
<input type="checkbox"/>	Rios, Adrian			2018				
<input type="checkbox"/>	Nichols, Dianne		4.25	2012	01/01/2012	11/12/2016	Yes	12/31/2013
<input type="checkbox"/>	Crocker, Jeanne			2018				
<input type="checkbox"/>	Keene, Gay			2018				
<input type="checkbox"/>	Rios, Gloria		3	2018				
<input type="checkbox"/>	Wilson, Phoebe	5	14	2018				
<input type="checkbox"/>	Dorn, Claudia	6	11	2011	01/01/2011	12/31/2017	Yes	12/31/2013
<input type="checkbox"/>	Hejducek, Julie	9.25	7.25	2018				

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 Start Date: Jan 1 2018 End Date: Dec 31 2018 Apply
 All log book entries Applies to: Start Date Reset
 Include entries with no start or end date if the "Date Entered" falls within the specified date range.

Summary mode

Summarize by: Volunteer Name

New Show All Refresh Grid Settings TMN Standard-Awards & Recertificati Filters TMN-Vol Hours Approved

Details **1 to 69 of 69 Rows**

	Volunteer Name	TMN Hours	AT Hours	Master Naturalist Clas	Initial Certificati	Master Naturalis	250 TMN Hours Awarc	250 Hrs Awar
Find	<input type="text"/>	= <input type="text"/>	= <input type="text"/>	<input type="text"/>	= <input type="text"/>	= <input type="text"/>	<input type="text"/>	= <input type="text"/>
<input type="checkbox"/>	Bailey, Donna		4	2010	08/01/2012	06/02/2017	Yes	06/02/2017
<input type="checkbox"/>	Rios, Adrian			2018				
<input type="checkbox"/>	Nichols, Dianne		4.25	2012	01/01/2012	11/12/2016	Yes	12/31/2013
<input type="checkbox"/>	Crocker, Jeanne			2018				
<input type="checkbox"/>	Keene, Gay			2018				
<input type="checkbox"/>	Rios, Gloria		3	2018				
<input type="checkbox"/>	Wilson, Phoebe	5	14	2018				
<input type="checkbox"/>	Dorn, Claudia	6	11	2011	01/01/2011	12/31/2017	Yes	12/31/2013
<input type="checkbox"/>	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 Start Date: Jan 1 2018 End Date: Dec 31 2018 Apply
 All log book entries Applies to: Start Date Reset
 Include entries with no start or end date if the "Date Entered" falls within the specified date range.

Summary mode

Summarize by: Volunteer Name

New Show All Refresh Grid Settings ----- Saved Grids----- Filters TMN-Vol Hours Approved

Details **1 to 69 of 69 Rows**

	Volunteer Name	TMN Hours <input type="text"/>	AT Hours	Master Naturalist Clas	Initial Certificati	Master Naturalis	250
Find	<input type="text"/>	= <input type="text"/>	= <input type="text"/>	<input type="text"/>	= <input type="text"/>	= <input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Bailey, Donna		4	2010	08/01/2012	06/02/2017	
<input type="checkbox"/>	Rios, Adrian			2018			
<input type="checkbox"/>	Nichols, Dianne		4.25	2012	01/01/2012	11/12/2016	
<input type="checkbox"/>	Crocker, Jeanne			2018			
<input type="checkbox"/>	Keene, Gay			2018			
<input type="checkbox"/>	Rios, Gloria		3	2018			
<input type="checkbox"/>	Wilson, Phoebe	5	14	2018			
<input type="checkbox"/>	Dorn, Claudia	6	11	2011	01/01/2011	12/31/2017	

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 Book System

Specific Date Range: [v] Start Date: Jan 1 2018 End Date: Dec 31 2018 Apply [v] Summary mode: [v]
 All log book entries [v] Applies to: Start Date [v] Reset [v] Summarize by: Volunteer Name [v]
 Include entries with no start or end date if the "Date Entered" falls within the specified date range.

New Show All Refresh Grid Settings Saved Grids [v] Filters TMN-Vol Hours Approved [v]

1 to 34 of 34 Rows

	Volunteer Name	TMN Hours	AT Hours	Master Naturalist Clas	Initial Certificati	Master Naturalis	250 TMN Hours Awarc	250 H
Find	[v]	>= 80	>= 8	[v]	[v]	[v]	[v]	[v]
<input type="checkbox"/>	Snider, Sharon	83.75	20.25	2018	05/31/2018	11/02/2018		
<input type="checkbox"/>	Spurrell, Nelida	84	10	2017	01/08/2018	09/30/2018		
<input type="checkbox"/>	Snider, Robert	85.75	20.25	2018	05/31/2018	11/02/2018		
<input type="checkbox"/>	Rystad, KarenLee	87.5	8.5	2010	01/01/2010	08/16/2018	Yes	01/
<input type="checkbox"/>	Henneke, Lawrence	89.75	19.25	2008	01/01/2008	05/31/2018	Yes	01/
<input type="checkbox"/>	Threatt, Barbara	93	10.25	2008	01/01/2008	05/10/2018	Yes	01/
<input type="checkbox"/>	Dahms-Nelson, Debra	93	10	2018	05/31/2018			
<input type="checkbox"/>	Clark, Laura	98.5	20	2014	08/01/2014	11/02/2018	Yes	05/
<input type="checkbox"/>	Koenig, Catherine	104	36.25	2015	11/03/2015	05/31/2018	Yes	04/
<input type="checkbox"/>	Crane, Denise	105	26.25	2018	05/31/2018	08/20/2018		
<input type="checkbox"/>	Hudson, Beth	107.75	27	2016	11/14/2016	04/07/2018		
<input type="checkbox"/>	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.**

Log Book System

Specific Date Range: [v] Start Date: Jan 1 2018 End Date: Dec 31 2018 Apply [v] Summary mode: [v]
 All log book entries [v] Applies to: Start Date [v] Reset [v] Summarize by: Volunteer Name [v]
 Include entries with no start or end date if the "Date Entered" falls within the specified date range.

New Show All Refresh Grid Settings Saved Grids [v] Filters TMN-Vol Hours Approved [v]

1 to 34 of 34 Rows

	Volunteer Name	TMN Hours	AT Hours	Master Naturalist Clas	Initial Certificati	Master Naturalist Cert Date	250 TMN Hours Awarc	250 H
Find	[v]	>= 80	>= 8	[v]	[v]	[v]	[v]	[v]
<input type="checkbox"/>	Snider, Sharon	83.75	20.25	2018	05/31/2018	11/02/2018		
<input type="checkbox"/>	Spurrell, Nelida	84	10	2017	01/08/2018	09/30/2018		
<input type="checkbox"/>	Snider, Robert	85.75	20.25	2018	05/31/2018	11/02/2018		
<input type="checkbox"/>	Rystad, KarenLee	87.5	8.5	2010	01/01/2010	08/16/2018	Yes	0
<input type="checkbox"/>	Henneke, Lawrence	89.75	19.25	2008	01/01/2008	05/31/2018	Yes	0
<input type="checkbox"/>	Threatt, Barbara	93	10.25	2008	01/01/2008	05/10/2018	Yes	0
<input type="checkbox"/>	Dahms-Nelson, Debra	93	10	2018	05/31/2018			
<input type="checkbox"/>	Clark, Laura	98.5	20	2014	08/01/2014	11/02/2018	Yes	0
<input type="checkbox"/>	Koenig, Catherine	104	36.25	2015	11/03/2015	05/31/2018	Yes	0
<input type="checkbox"/>	Crane, Denise	105	26.25	2018	05/31/2018	08/20/2018		
<input type="checkbox"/>	Hudson, Beth	107.75	27	2016	11/14/2016	04/07/2018		
<input type="checkbox"/>	Crane, Gary	109.25	26.25	2018	05/31/2018	08/23/2018		
<input type="checkbox"/>	Smudy, Ron	111.75	8.5	2010	01/01/2010	11/02/2018	Yes	0

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

[Return to the Table of Contents](#)

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

TPWD - Master Naturalist **Mid Coast**

Volunteers Opportunities Chapters

New Edit Delete Reports Calendar Request/Approve Log Book Email Share Automation Add Hours

Newly shared records Folder Manager

Clear Filters Grid Settings **TMN Standard** Filters TMN-Active/InTrain/NotEligible/

1 to 88 of 88 Volunteers

	Last Name v1	First Name	User ID	Master Naturalist Cert	Age	Home Phone
Find						
<input type="checkbox"/>	Alison	Lane				
<input type="checkbox"/>	Amsler, III	Neill				
<input type="checkbox"/>	Balamonte	Terry				
<input type="checkbox"/>	Bailey	Donna				
<input type="checkbox"/>	Barnhart	Claire				
<input type="checkbox"/>	Barron	Trey				
<input type="checkbox"/>	Barton	Karen				
<input type="checkbox"/>	Benson	Karen				
<input type="checkbox"/>	Berger	Allan				
<input type="checkbox"/>	Berger	Brigid				
<input type="checkbox"/>	Boatman	Helen				
<input type="checkbox"/>	Bootzin	Rebecca				
<input type="checkbox"/>	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 - Master Naturalist : Mid Coast

Volunteers Opportunities Chapters

New Edit Delete Reports Calendar Request/Approve Log Book

Clear Filters Grid Settings **TMN Standard** Filters

1 to 88 of 88 Volunteers

	Last Name v1	First Name	User ID	Master Nat	Cell Phone
<input type="checkbox"/>	Alison	Lane			
<input type="checkbox"/>	Amsler, III	Neill			
<input type="checkbox"/>	Baiamonte	Terry			
<input type="checkbox"/>	Bailey	Donna			
<input type="checkbox"/>	Barnhart	Claire			

Filters: Dues Check, TMN Standard - CBC Waiver, TMN Standard - Kris Notify, TMN-Active Only, **TMN-Active/InTrain/NotEligible/Advisors**, TMN-Class and Staff, TMN-Has EMail, TMN-Hours Entry Eligible, TMN-In Training, TMN-Inactive or Interested, TMN-Interested, TMN-Officers & Committees

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

Volunteers Opportunities Chapters

New Edit Delete Reports Calendar Request/Approve Log Book Email Share Automation Add Hours

Clear Filters Grid Settings Saved Grids List Filters **TMN-Hours Entry Eligible**

1 to 85 of 85 Volunteers

	Last Name v1	First Name	User ID	Master Naturalist Cert	Age	Home Phone	Cell Phone
<input type="checkbox"/>	Alison	Lane	midcoast-LAlison	TMN-Active	70		(361) 790-3103
<input type="checkbox"/>	Amsler, III	Neill	midcoast-namsler	TMN-Active	70	(361) 319-5252	(361) 319-5252
<input type="checkbox"/>	Baiamonte	Terry	midcoast-TBaiamonte	TMN-Active	116		(361) 935-2322
<input type="checkbox"/>	Bailey	Donna	midcoast-DBailey	TMN-Active	63	(361) 872-2264	(281) 908-0000
<input type="checkbox"/>	Barnhart	Claire	midcoast-CBarnhart	TMN-Active	64		(361) 542-0348
<input type="checkbox"/>	Barton	Karen	midcoast-KBarton	TMN-Active	67		(361) 649-9305
<input type="checkbox"/>	Benson	Karen	midcoast-KBenson	TMN-Active	70		(361) 350-9999
<input type="checkbox"/>	Berger	Allan	midcoast-aberger	TMN-Active	68		(713) 829-2852
<input type="checkbox"/>	Berger	Brigid	midcoast-bberger	TMN-Active	57		(713) 825-1929
<input type="checkbox"/>	Boatman	Helen	midcoast-HBoatman	TMN-Active	79		(361) 649-4908
<input type="checkbox"/>	Bootzin	Rebecca	midcoast-RBootzin	TMN-Active	64		(361) 676-2883
<input type="checkbox"/>	Burge	William	midcoast-bburge	TMN-Active	61		(713) 828-3823

Newly shared records

Select All volunteers in Grid option.

TPWD - Master Naturalist : Mid Coast

Volunteers Opportunities Chapters

New Edit Delete Reports Calendar Request/Approve All Volunteers in Grid All Volunteers in Account Share Automation Add Hours Newly shared records

Clear Filters Grid Settings ----- Saved Grids List ----- Filters TMN-Hours Entry I

1 to 85 of 85 Volunteers

<input type="checkbox"/>	Last Name v1	First Name	User ID	Master Naturalist Cert	Age
Find	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Alison	Lane			
<input type="checkbox"/>	Amsler, III	Neill			
<input type="checkbox"/>	Baiamonte	Terry			
<input type="checkbox"/>	Canley	Donna			
<input type="checkbox"/>	Barnhart	Claire			
<input type="checkbox"/>	Barton	Karen			
<input type="checkbox"/>	Benson	Karen			
<input type="checkbox"/>	Berger	Allan			
<input type="checkbox"/>	Berger	Brigid			
<input type="checkbox"/>	Boatman	Helen			
<input type="checkbox"/>	Bootzin	Rebecca			
<input type="checkbox"/>	Burge	William			

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 Book System

Relative Date Range: Period: All Time Summary mode:

All log book entries Applies to: Start Date Summarize by: Volunteer Name

New Show All Refresh Grid Settings TMN Standard Filters TMN-Vol Hours Approved

Details 1 to 69 of 69 Rows

	Volunteer Name	Opportunity Title	Start Da	TMN Ho	AT Hour	TMN Init	Approval Status	Admin Activit	Approved By
<input type="checkbox"/>	Kirkwood, Raymond	34 Opportunities	N/A	11487.4	589.25		Yes Approved:384	Board/Committ	N/A
<input type="checkbox"/>	Kirkwood, Kris	33 Opportunities	N/A	10158.7	516.5		Yes Approved:766	Board/Committ	N/A
<input type="checkbox"/>	Berger, Brigid	26 Opportunities	N/A	5196	396.75		Yes Approved:520	Board/Committ	N/A
<input type="checkbox"/>	Smudy, Ron	16 Opportunities	N/A	4065.4	99.5		Yes Approved:156	Board/Committ	N/A
<input type="checkbox"/>	Berger, Allan	24 Opportunities	N/A	3677	347.75		Yes Approved:149	Chapter Meetir	N/A
<input type="checkbox"/>	Burnett, Mike	4 Opportunities	N/A	3524.5	189.75		Yes Approved:66		N/A
<input type="checkbox"/>	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: Period: All Time Summary mode:

All log book entries Applies to: Start Date Summarize by: Volunteer Name

New Show All Refresh Grid Settings Filters TMN-Vol Hours Approved

Details 1 to 20 of 20 Rows

	Volunteer Name	TMN Hours	Hours Award	Initial Certificati	Master Naturalist Clas
<input type="checkbox"/>	Alison, Lane	389.5	Yes	01/01/2007	2006
<input type="checkbox"/>	Bailey, Donna	407	Yes	08/01/2012	2010
<input type="checkbox"/>	Barton, Karen	307	Yes	10/02/2014	2014
<input type="checkbox"/>	Burge, William	352.25	Yes	12/31/2017	2017
<input type="checkbox"/>	Carney, Caroll	391.25	Yes	01/01/2006	2004
<input type="checkbox"/>	Clark, Laura	456	Yes	08/01/2014	2014
<input type="checkbox"/>	Cunningham, Robert	320.75	Yes	06/03/2017	2017
<input type="checkbox"/>	Eggert, Marie	264	Yes	12/31/2013	2013
<input type="checkbox"/>	Frank, Linda	418.75	Yes	01/01/2012	2012
<input type="checkbox"/>	Harlan, Greg	440.25	Yes	01/01/2002	2002
<input type="checkbox"/>	Hartigan, Patrick	421	Yes	12/31/2013	2013
<input type="checkbox"/>	Hudson, Beth	261.25		11/14/2016	2016

Saved Grids:

- 250 Hours
- Test Standard-Awards & Recertification
- TMN Admin-Snapshot
- TMN Standard
- TMN Standard Reporting - Detail
- TMN Standard Reporting - Summary
- TMN Standard Reporting - TX Waters
- TMN Standard With Approval Info
- TMN Standard-All Hours
- TMN Standard-Approval Audit
- TMN Standard-Awards & Recertification
- TMN Standard-Awards 00250 Hours**
- TMN Standard-Awards 00500 Hours
- TMN Standard-Awards 01000 Hours
- TMN Standard-Awards 02500 Hours
- TMN Standard-Awards 04000 Hours
- TMN Standard-Awards 05000 Hours
- TMN Standard-Awards 10000 Hours
- TMN Standard-Awards 15000 Hours
- TMN Standard-Awards 20000 Hours
- TMN Standard-Current Year Certifications
- TMN Standard-Disapproved
- TMN Standard-Hours Audit
- TMN Standard-IRS Details
- TMN Standard-Not Yet Approved
- TMN Standard-Training Class
- Volunteer Logbook Grid

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.

Log Book System - Internet Explorer, enhanced for Bing and MSN
 https://tpwd.samaritan.com/coordinator/index.php

Log Book System

Relative Date Range Period: All Time Summary mode

All log book entries Applies to: Start Date Summarize by: Volunteer Name

TMN Standard-Awards 00250 Hours TMN-Vol Hours Approved

1 to 20 of 20 Rows

	Volunteer Name <input type="text"/>	TMN Hours	AT Hours	250 Hrs Award Date	250 TMN Hours Awarded	Initial Certification	Master Naturalist Class
<input type="checkbox"/>	Alison, Lane	389.5	68.5	01/04/2011	Yes	01/01/2007	2006
<input type="checkbox"/>	Bailey, Donna	407	82.5	06/02/2017	Yes	08/01/2012	2010
<input type="checkbox"/>	Barton, Karen	307	63	07/01/2017	Yes	10/02/2014	2014
<input type="checkbox"/>	Burge, William	352.25	46.5	08/04/2018	Yes	12/31/2017	2017
<input type="checkbox"/>	Carney, Carroll	391.25	111.5	01/04/2008	Yes	01/01/2006	2004
<input type="checkbox"/>	Clark, Laura	456	181.5	05/15/2016	Yes	08/01/2014	2014
<input type="checkbox"/>	Cunningham, Robert	320.75	77.5	05/31/2018	Yes	06/03/2017	2017
<input type="checkbox"/>	Eggert, Marie	264	28	11/12/2016	Yes	12/31/2013	2013
<input type="checkbox"/>	Frank, Linda	418.75	120	08/01/2014	Yes	01/01/2012	2012
<input type="checkbox"/>	Harlan, Greg	440.25	60	10/31/2014	Yes	01/01/2002	2002
<input type="checkbox"/>	Hartigan, Patrick	421	134.75	02/01/2016	Yes	12/31/2013	2013
<input type="checkbox"/>	Hudson, Beth	261.25	65.75			11/14/2016	2016
<input type="checkbox"/>	Koenig, Catherine	485.75	158	04/04/2017	Yes	11/03/2015	2015
<input type="checkbox"/>	Konarik, Melanie	278.25	143.5	09/30/2018	Yes	07/01/2015	2015
<input type="checkbox"/>	Mathis, Barbara	492.25	143.5	04/04/2017	Yes	06/03/2015	2015

Check each of the milestone levels in the grid view dropdown list 2000, 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.

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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.

Account Tools Report All



TPWD - Master Naturalist Mid Coast

Volunteers Opportunities Chapters

New Edit Delete Reports Calendar Request/Approve Log Book Email Share Automation Add Hours

Newly shared records Folder Manager

Clear Filters Grid Settings **TMN Standard** Filters TMN-Active/InTrain/NotEligible/

1 to 88 of 88 Volunteers

	Last Name	First Name	User ID	Master Naturalist Cert	Age	Home Phone
<input type="checkbox"/>	Alison	Lane				
<input type="checkbox"/>	Amsler, III	Neill				
<input type="checkbox"/>	Baiamonte	Terry				
<input type="checkbox"/>	Bailey	Donna				
<input type="checkbox"/>	Barnhart	Claire				
<input type="checkbox"/>	Barron	Trey				
<input type="checkbox"/>	Barton	Karen				
<input type="checkbox"/>	Benson	Karen				
<input type="checkbox"/>	Berger	Allan				
<input type="checkbox"/>	Berger	Brigid				
<input type="checkbox"/>	Boatman	Helen				
<input type="checkbox"/>	Bootzin	Rebecca				
<input type="checkbox"/>	Burge	William				

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

TPWD - Master Naturalist : Mid Coast

Volunteers Opportunities Chapters

New Edit Delete Reports Calendar Request/Approve Log Book Email

Clear Filters **Grid Settings** **TMN Standard** Filters TMN-Active/InTrain/NotEligible/

1 to 88 of 88 Volunteers

	Last Name	First Name	User ID	Master Naturalist Cert	Age	Home Phone
<input type="checkbox"/>	Alison	Lane	midcoast-LAlison	TMN-Active	70	
<input type="checkbox"/>	Amsler, III	Neill	midcoast-namsler	TMN-Active	70	(361) 319-5252
<input type="checkbox"/>	Baiamonte	Terry	midcoast-TBaiamonte	TMN-Active	116	
<input type="checkbox"/>	Bailey	Donna	midcoast-DBailey	TMN-Active	63	(361) 872-2264
<input type="checkbox"/>	Barnhart	Claire	midcoast-CBarnhart	TMN-Active	64	
<input type="checkbox"/>	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.

Grid Settings For Volunteers

Select Columns to display in the Grid

Available Columns:

- Volunteer
- Vol: Email Template Last Sent Date
- Vol: General*
 - General/Nickname*
 - General/Co-resident*
 - General/Are you a TPWD Employee?*
 - General/Work Status*
 - General/Work History/Experience*
 - General/Reference Information*
 - General/Licensure/Certifications/Skills*
- Vol: Background and Driver Check*
- Vol: Alternative Workforce*

* Indicates user defined fields.

Selected Columns:

Column Searches	Sort	Width
Last Name	—	99
First Name	—	108
User ID	—	162
Certifications/Master Naturalist Certificat	▼	135
Age	= ▼	50
Home Phone	—	153
Cell Phone	—	153
Email Address	—	270
TMN Officers/Committees/TMN Officer L	▼	135
TMN Officers/Committees/TMN Committ	—	135
Certifications/Current Chapter*	—	135

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

Save As: TMN Standard

Buttons: Move Up, Move Down

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

Grid Settings For Volunteers

Select Columns to display in the Grid

Available Columns:

- Volunteer
- Vol: Email Template Last Sent Date
- Vol: General*
 - General/Nickname*
 - General/Co-resident*
 - General/Are you a TPWD Employee?*
 - General/Work Status*
 - General/Work History/Experience*
 - General/Reference Information*
 - General/Licensure/Certifications/Skills*
- Vol: Background and Driver Check*
- Vol: Alternative Workforce*

* Indicates user defined fields.

Selected Columns:

Column Searches	Sort	Width
Last Name	—	99
First Name	—	108
General/Work History/Experience*	—	135
User ID	—	162
Certifications/Master Naturalist Certificat	▼	135
Age	= ▼	50
Home Phone	—	153
Cell Phone	—	153
Email Address	—	270
TMN Officers/Committees/TMN Officer L	▼	135
TMN Officers/Committees/TMN Committ	—	135

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

Save As: TMN Standard

Make this saved grid available to all users of this account

Buttons: Move Up, Move Down

Additional items to include as part of this saved grid:

- Column searches
- Current column sort

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

Available Columns:

- Volunteer
- Vol: Email Template Last Sent Date
- Vol: General*
- Vol: Background and Driver Check*
- Vol: Alternative Workforce*
- Vol: Group Affiliation*
- Vol: Certifications*
- Vol: Contact*
- Vol: TMN Recognition*
- Vol: TMN Officers/Committees*

* Indicates user defined fields.

Selected Columns:

Column Searches	Sort	Width
Last Name	—	99
First Name	—	108
General/Work History/Experience*		135
User ID	—	162
Certifications/Master Naturalist Certificat	▼	135
Age	=	50
Home Phone	—	153
Cell Phone	—	153
Email Address	—	270
TMN Officers/Committees/TMN Officer L	▼	135
TMN Officers/Committees/TMN Committ	—	135

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 filter

Filters: TMN-Active/InTrain/Not

Save As: Volunteer Work History and Experience

Make this saved grid available to all users of this account

Save

Saved Grids List: Volunteer Work History and Experience

Delete Open

Default 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.

TPWD - Master Naturalist : All Data

Volunteers Opportunities Chapters

New Edit Delete Reports Calendar Request/Approve Log Book Email Share Automation Add Hours Newly shared records

Clear Filters Grid Settings Volunteer Work History and Experience Filters TMN-Active/InTrain/NotEligible//

1 to 100 of 5226 Volunteers Page 1 of 53

	Last Name	First Name	Work History/Experien	User ID	Master Naturalist Cert	Age	Ho
<input type="checkbox"/>	Abbott	Shelly	2013 - present: Homes				
<input type="checkbox"/>	Abbott	Thomas	Project Management, C				
<input type="checkbox"/>	Abel	Harriet	High School Physics an				
<input type="checkbox"/>	Abernathy	Ann	Auditor				
<input type="checkbox"/>	Abernathy	Sue					
<input type="checkbox"/>	Abernathy	Susan	CPA				
<input type="checkbox"/>	Abrahams	Petrine	Landscape Designer				
<input type="checkbox"/>	Abreu	James	Owned a motorcycle de				
<input type="checkbox"/>	Abright	William	Most Recent = Psychot				
<input type="checkbox"/>	Ackerman	Benjamin					
<input type="checkbox"/>	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.

TPWD - Master Naturalist : Mid Coast

Volunteers Opportunities Chapters

Clear Filters Grid Settings **TMN Standard-Chapter Member Summa** Filters TMN-Active/InTrain/NotEligible/

1 to 88 of 88 Volunteers

	Last Name ▼1	First Name	User ID	Home Phone	Cell Phone	Email Address
Find						
<input type="checkbox"/>	Alison	Lane				
<input type="checkbox"/>	Amsler, III	Neill				
<input type="checkbox"/>	Baiamonte	Terry				
<input type="checkbox"/>	Bailey	Donna				
<input type="checkbox"/>	Barnhart	Claire				
<input type="checkbox"/>	Barron	Trey				
<input type="checkbox"/>	Barton	Karen				
<input type="checkbox"/>	Benson	Karen				
<input type="checkbox"/>	Berger	Allan				
<input type="checkbox"/>	Berger	Brigid				
<input type="checkbox"/>	Boatman	Helen				



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

Volunteers Opportunities Chapter

New Clear Filters Grid Settings Saved Grids List Filters Filters

1 to 100 of 249 Volunteers Page 1 of 3

	Last Name v1	First Name	User ID	Master Naturalist Cert	Age	Home Phone	Cell Phone
<input type="checkbox"/>	Aldridge	Gill					
<input type="checkbox"/>	Aldridge	Kitty					
<input type="checkbox"/>	Alison	Lane					
<input type="checkbox"/>	Amsler, III	Neill					
<input type="checkbox"/>	Andrews	Steven					
<input type="checkbox"/>	Angerstein	Robert					
<input type="checkbox"/>	Arnold	Beverly					
<input type="checkbox"/>	Balamonte	Rob					
<input type="checkbox"/>	Balamonte	Terry					
<input type="checkbox"/>	Bailey	Donna					
<input type="checkbox"/>	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.

Grid Settings For Volunteers

Select Columns to display in the Grid

Available Columns:

- Volunteer
- Vol: Email Template Last Sent Date
- Vol: General*
- Vol: Background and Driver Check*
- Vol: Alternative Workforce*
- Vol: Group Affiliation*
- Vol: Certifications*
- Vol: Contact*
- Vol: TMN Recognition*
- Vol: TMN Officers/Committees*

* Indicates user defined fields.

Save As: TMN Standard-Chapter Member Summary

Make this saved grid available to all users of this account

Saved Grids List: TMN Standard-Chapter Member Summary

Default Saved Grid At Login: Remember the last grid upon logout

Selected Columns:

Column	Column Searches	Sort	Width
Cell Phone		-	108
Email Address		-	270
Street Address 1		-	180
City		-	99
Zip		-	54
Age	=		50
Certifications/Master Naturalist Certificat			135
Certifications/Master Naturalist Dues*			135
Certifications/Master Naturalist Class*	2016		135
Certifications/Initial Certification*	=		99
Certifications/Chapter Certified*			135

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

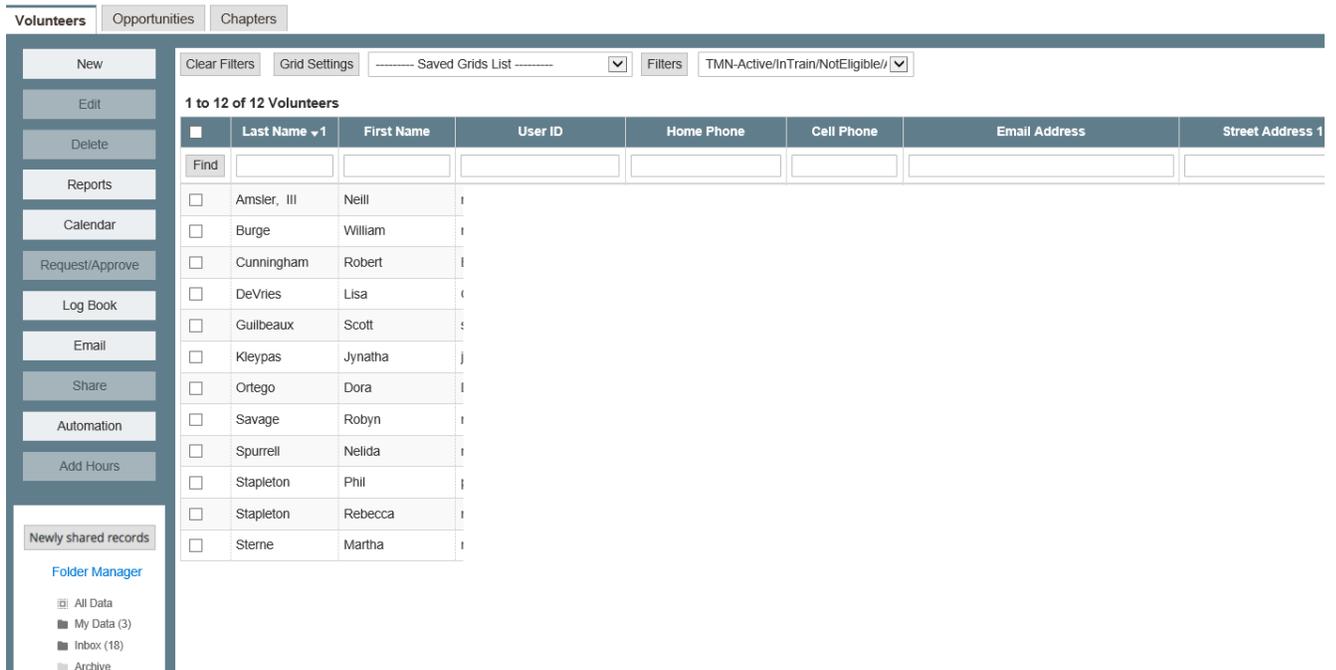
Additional items to include as part of this saved grid:

- Column searches
- Current column sort
- Currently selected folder
- Currently selected filter

Apply OK Cancel

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

TPWD - Master Naturalist : Mid Coast



Volunteers | Opportunities | Chapters

Clear Filters | Grid Settings: Saved Grids List | Filters: TMN-Active/InTrain/NotEligible/

1 to 12 of 12 Volunteers

	Last Name	First Name	User ID	Home Phone	Cell Phone	Email Address	Street Address 1
Find							
<input type="checkbox"/>	Amsler, III	Neill					
<input type="checkbox"/>	Burge	William					
<input type="checkbox"/>	Cunningham	Robert					
<input type="checkbox"/>	DeVries	Lisa					
<input type="checkbox"/>	Guilbeaux	Scott					
<input type="checkbox"/>	Kleypas	Jynatha					
<input type="checkbox"/>	Ortego	Dora					
<input type="checkbox"/>	Savage	Robyn					
<input type="checkbox"/>	Spurrell	Nelida					
<input type="checkbox"/>	Stapleton	Phil					
<input type="checkbox"/>	Stapleton	Rebecca					
<input type="checkbox"/>	Sterne	Martha					

Newly shared records

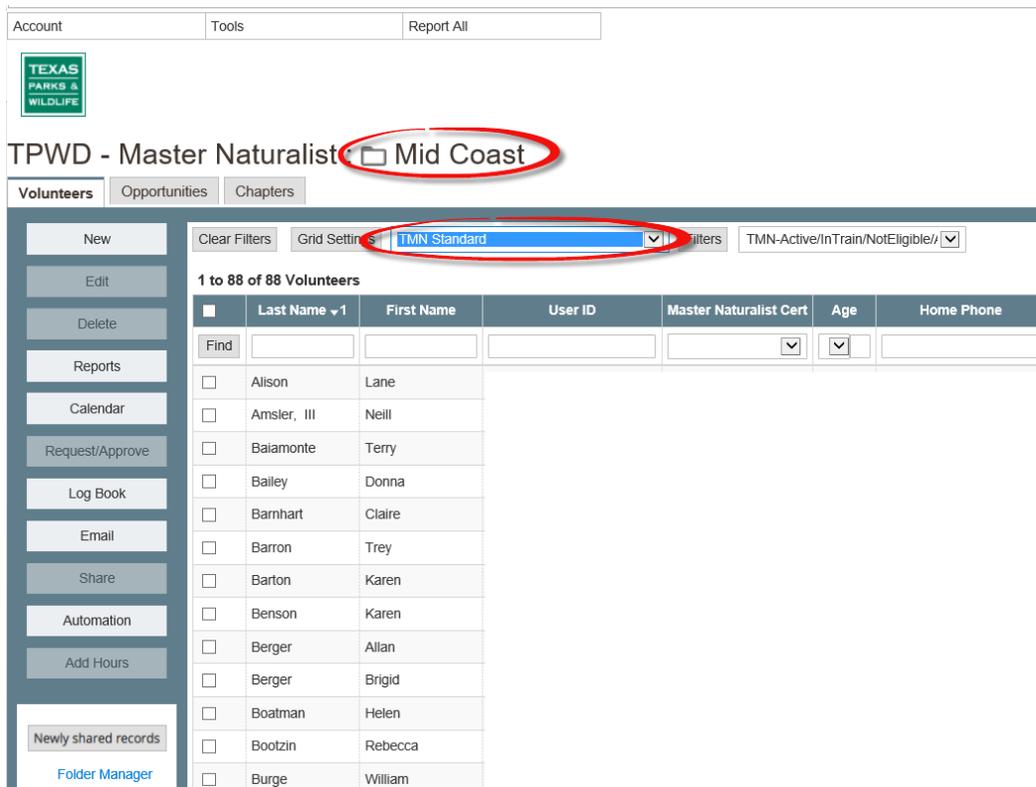
Folder Manager

- 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.



Account | Tools | Report All

TEXAS PARKS & WILDLIFE

TPWD - Master Naturalist : Mid Coast

Volunteers | Opportunities | Chapters

Clear Filters | Grid Settings: TMN Standard | Filters: TMN-Active/InTrain/NotEligible/

1 to 88 of 88 Volunteers

	Last Name	First Name	User ID	Master Naturalist Cert	Age	Home Phone
Find						
<input type="checkbox"/>	Alison	Lane				
<input type="checkbox"/>	Amsler, III	Neill				
<input type="checkbox"/>	Balamonte	Terry				
<input type="checkbox"/>	Bailey	Donna				
<input type="checkbox"/>	Barnhart	Claire				
<input type="checkbox"/>	Barron	Trey				
<input type="checkbox"/>	Barton	Karen				
<input type="checkbox"/>	Benson	Karen				
<input type="checkbox"/>	Berger	Allan				
<input type="checkbox"/>	Berger	Brigid				
<input type="checkbox"/>	Boatman	Helen				
<input type="checkbox"/>	Bootzin	Rebecca				
<input type="checkbox"/>	Burge	William				

Newly shared records

Folder Manager

The eCoordinator Volunteer Log Book Email window is shown.

Volunteer Log Book Email

You can insert a mail merge field into any of the fields below.

To: All 69 record(s) in the grid (Donna Bailey...Brigid Berger)

Reply To:

Sender Name:

Sender Organization:

Cc:

Bcc:

Subject:

Message:

Edit ▾ Insert ▾ View ▾ Format ▾ Table ▾

↶ ↷ Verdana 14px **B** *I* U

A **A** | |

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Hi [VOL:VOL_FIRST_NAME]:

You have recorded [LBE:TMN_HOURS:1] Volunteer Hours and [LBE:AT_HOURS:1] Advanced Training Hours.

You need 40 Volunteer Hours and 8 Advanced Training hours to recertify for this year.

Keep Busy!

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

Volunteer Log Book Email

You can insert a mail merge field into any of the fields below. Email Queue

To: All 69 record(s) in the grid (Donna Bailey...Brigid Berger)

Reply To:

Sender Name:

Sender Organization:

Cc:

Bcc:

Subject:

Message:

Edit ▾ Insert ▾ View ▾ Format ▾ Table ▾

↶ ↷ Verdana 14px **B** *I* U

A **A** [List Icons] [Link] [Image] [Table] [Code]

Hi [VOL:VOL_FIRST_NAME]:

You have recorded [LBE:TMN_HOURS:1] Volunteer Hours and [LBE:AT_HOURS:1] Advanced Training Hours.

You need 40 Volunteer Hours and 8 Advanced Training hours to recertify for this year.

Keep Busy!

Volunteer Mail Merge Fields:

The cursor is in the Message field.

Attachments: (Maximum 2MB)

Attach Data Grid Report to Email:

Attach Volunteer Report to Email:

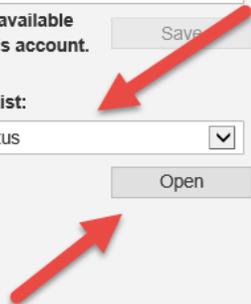
Report should include only recipient's data

Save Email Template:

 Make this template available to other users of this account.

Saved Email Template List:

Send Using:
 eCoordinator
 Default email client on this computer
 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.

Volunteer Log Book Email

You can insert a mail merge field into any of the fields below. Email Queue

To: All 69 record(s) in the grid (Donna Bailey...Brigid Berger)

Reply To:

Sender Name:

Sender Organization:

Cc:

Bcc:

Subject:

Message:

Edit ▾ Insert ▾ View ▾ Format ▾ Table ▾

↶ ↷ Verdana 14px **B** *I* U

A **A** [List Icons] [Link] [Image] [Table]

Hi [VOL:VOL_FIRST_NAME]:

You have recorded [LBE:TMN_HOURS:1] Volunteer Hours and [LBE:AT_HOURS:1] Advanced Training Hours.

You need 40 Volunteer Hours and 8 Advanced Training hours to recertify for this year.

Keep Busy!

Volunteer Mail Merge Fields:

The cursor is in the Message field.

Attachments: (Maximum 2MB)

Attach Data Grid Report to Email:

Attach Volunteer Report to Email:

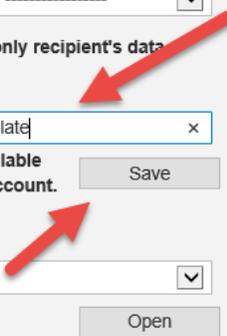
Report should include only recipient's data

Save Email Template:

 Make this template available to other users of this account.

Saved Email Template List:

Send Using:
 eCoordinator
 Default email client on this computer
 Send Email Results Report email.



Click the Preview button.

Message:

Edit ▾ Insert ▾ View ▾ Format ▾ Table ▾

↶ ↷ Verdana 14px **B** *I* U

A **A** [List icons] [Link icon] [Image icon] [Link icon]

<> [Fullscreen icon]

Hi [VOL:VOL_FIRST_NAME]:

You have recorded [LBE:TMN_HOURS:1] Volunteer Hours and [LBE:AT_HOURS:1] Advanced Training Hours.

You need 40 Volunteer Hours and 8 Advanced Training hours to recertify for this year.

Keep Busy!

Report should include only recipient's data

Save Email Template:

BJames Recertification Template

Make this template available to other users of this account. Save

Saved Email Template List:

TMN-Recertification Status ▾

Delete Open

Send Using:

eCoordinator

Default email client on this computer

Send Email Results Report email.

Reset Preview 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

https://tpwd.samaritan.com/coordinator/index.php

eCoordinator Email Preview

To: [redacted]@gmail.com

Reply To: youremail@here.com

Cc:

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 proper formatting of white space including spaces and blank lines.

Close

105%

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:

Edit ▾ Insert ▾ View ▾ Format ▾ Table ▾

↶ ↷ Verdana 14px **B** *I* U

A ▾ **A** ▾ [List Icons] [Link Icon] [Image Icon] [Link Icon] [Image Icon]

<> [Refresh Icon]

Hi [VOL:VOL_FIRST_NAME]:

You have recorded [LBE:TMN_HOURS:1] Volunteer Hours and [LBE:AT_HOURS:1] Advanced Training Hours.

You need 40 Volunteer Hours and 8 Advanced Training hours to recertify for this year.

Keep Busy!

Report should include only recipient's data

Save Email Template:

BJames Recertification Template

Make this template available to other users of this account.

Saved Email Template List:

TMN-Recertification Status ▾

Send Using:

eCoordinator

Default email client on this computer

Send Email Results Report email.

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.

[Return to the Table of Contents](#)

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.

TPWD - Master Naturalist : Mid Coast

Volunteers **Opportunities**

Clear Filters Grid Settings **TMN Standard** Filters

1 to 75 of 75 Opportunities

<input type="checkbox"/>	Opportunity Title <input type="text" value="▼1"/>	Description	<input checked="" type="checkbox"/>	Opportunity/Organization	Alternate Contact Name
<input type="checkbox"/>	Apply to the Mid-Coast Chapter	Apply to take certification training with Coast Texas Master Naturalist Chapt Coast Website Contact the Memberst	<input checked="" type="checkbox"/>	Mid Coast	
<input type="checkbox"/>	AT: Lecture Series presentation	Sessions that are part of a series offe	<input checked="" type="checkbox"/>	Mid Coast	
<input type="checkbox"/>	AT: Online Training	Approved online training listed on the	<input checked="" type="checkbox"/>	MC Hours-keeper	Brad James
<input type="checkbox"/>	AT: Single presentation	Approved training that is not part of a	<input checked="" type="checkbox"/>	MC Hours-keeper	Brad James
<input type="checkbox"/>	AT: Specific-Project	Approved training for a specific Chapt Heavy Equipment training, Matagorda MAPS bird- banding. Specify the partner & pi	<input checked="" type="checkbox"/>	Mid Coast	
<input type="checkbox"/>	AT: TX Waters Certification Training	This curriculum will allow Texas Mast focused educational activities at festi	<input checked="" type="checkbox"/>	TPWD-TX Waters	Johnnie E. Smith
<input type="checkbox"/>	AT: with Chapter Meeting	Advanced Training provided in conjun	<input checked="" type="checkbox"/>	Mid Coast	Brad James
<input type="checkbox"/>	AT: with State Meet	Advanced Training provided in conjun	<input checked="" type="checkbox"/>	TMN Statewide	Brad James
<input type="checkbox"/>	CB: Chapter Business	Includes attending chapter meetings, keeping, website, newsletter, hospital	<input checked="" type="checkbox"/>	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 Book System

Specific Date Range Start Date: Jan 1 2017 End Date: Dec 31 2017 Apply Reset

Summary mode: Summarize by: Opportunity Title

Applies to: Start Date Include entries with no start or end date if the "Date Entered" falls within the specified date range.

New Show All Refresh Grid Settings TMN Standard Reporting Filters

Details 1 to 60 of 60 Rows

	Opportunity Title ▼1	Volunteer User ID	Volunteer Name	AT Hours	TMN Hours	TMN Initial Tra	Start
<input type="checkbox"/>	AT: Lecture Series presentator	N/A	29 Volunteers	171.25			N/A
<input type="checkbox"/>	AT: Online Training	N/A	18 Volunteers	71.5			N/A
<input type="checkbox"/>	AT: Single presentation	N/A	51 Volunteers	388.5			N/A
<input type="checkbox"/>	AT: Specific-Project	N/A	38 Volunteers	329			N/A
<input type="checkbox"/>	AT: TX Waters Certification Tra	N/A	12 Volunteers	107.5			N/A
<input type="checkbox"/>	AT: with Chapter Meeting	N/A	38 Volunteers	90.5			N/A
<input type="checkbox"/>	AT: with State Meet	N/A	14 Volunteers	122.25			N/A
<input type="checkbox"/>	CB: Chapter Business	N/A	42 Volunteers		1141		N/A
<input type="checkbox"/>	FR: ANWR research	N/A	8 Volunteers		142.5		N/A
<input type="checkbox"/>	FR: Aquatic Life	N/A	3 Volunteers		3.75		N/A
<input type="checkbox"/>	FR: Bird Populations	N/A	33 Volunteers		2322.2		N/A

Click on the Reports button and choose Opportunity Data Grid.

Log Book System

Specific Date Range Start Date: Jan 1 2017 End Date: Dec 31 2017 Apply Reset

Summary mode: Summarize by: Opportunity Title

Applies to: Start Date Include entries with no start or end date if the "Date Entered" falls within the specified date range.

New Show All Refresh Grid Settings TMN Standard Reporting Filters

Details 1 to 60 of 60 Rows

	Opportunity Title ▼1	Volunteer User ID	Volunteer Name	AT Hours	TMN Hours	TMN Initial Tra	Start
<input type="checkbox"/>	AT: Lecture Series presentator	N/A	29 Volunteers	171.25			N/A
<input type="checkbox"/>	AT: Online Training	N/A	18 Volunteers	71.5			N/A
<input type="checkbox"/>	AT: Single presentation	N/A	51 Volunteers	388.5			N/A
<input type="checkbox"/>	AT: Specific-Project	N/A	38 Volunteers	329			N/A
<input type="checkbox"/>	AT: TX Waters Certification Tra	N/A	12 Volunteers	107.5			N/A
<input type="checkbox"/>	AT: with Chapter Meeting	N/A	38 Volunteers	90.5			N/A
<input type="checkbox"/>	AT: with State Meet	N/A	14 Volunteers	122.25			N/A
<input type="checkbox"/>	CB: Chapter Business	N/A	42 Volunteers		1141		N/A
<input type="checkbox"/>	FR: ANWR research	N/A	8 Volunteers		142.5		N/A
<input type="checkbox"/>	FR: Aquatic Life	N/A	3 Volunteers		3.75		N/A
<input type="checkbox"/>	FR: Bird Populations	N/A	33 Volunteers		2322.2		N/A

- Opportunity Roster
- Opportunities Registered
- Placement Report
- Referral Report
- Opportunity Schedule
- Opportunity Shift Placements
- Opportunity Report
- Log Book Data Grid Report

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.

Log Book Data Grid Report

Please select parameters for report

Print: All rows from grid
 Only the selected rows
 Print summary table only

Report Title: Exclude column

Opportunity Title:	<input type="text" value="Opportunity Title"/>	<input type="checkbox"/>
Volunteer User ID:	<input type="text" value="Volunteer User ID"/>	<input type="checkbox"/>
Volunteer Name:	<input type="text" value="Volunteer Name"/>	<input type="checkbox"/>
AT Hours:	<input type="text" value="AT Hours"/>	<input type="checkbox"/>
TMN Hours:	<input type="text" value="TMN Hours"/>	<input type="checkbox"/>
TMN Initial Training:	<input type="text" value="TMN Initial Training"/>	<input type="checkbox"/>
Start Date:	<input type="text" value="Start Date"/>	<input checked="" type="checkbox"/>
What category does the project fall under:	<input type="text" value="What category does the project fall under"/>	<input type="checkbox"/>
Chapter Name:	<input type="text" value="Chapter Name"/>	<input checked="" type="checkbox"/>
Service Performed:	<input type="text" value="Service Performed"/>	<input checked="" type="checkbox"/>
Grand Total:	<input type="text" value="Grand Total"/>	<input type="checkbox"/>
Adult Male Total:	<input type="text" value="Adult Male Total"/>	<input type="checkbox"/>
Adult Female Total:	<input type="text" value="Adult Female Total"/>	<input type="checkbox"/>
Adult Sub Total:	<input type="text" value="Adult Sub Total"/>	<input type="checkbox"/>
Youth Sub total:	<input type="text" value="Youth Sub total"/>	<input type="checkbox"/>
Adult White:	<input type="text" value="Adult White"/>	<input type="checkbox"/>
Adult Hispanic:	<input type="text" value="Adult Hispanic"/>	<input type="checkbox"/>
Adult Black:	<input type="text" value="Adult Black"/>	<input type="checkbox"/>
Adult Asian:	<input type="text" value="Adult Asian"/>	<input type="checkbox"/>
Adult Amer Ind / Alaskan:	<input type="text" value="Adult Amer Ind / Alaskan"/>	<input type="checkbox"/>

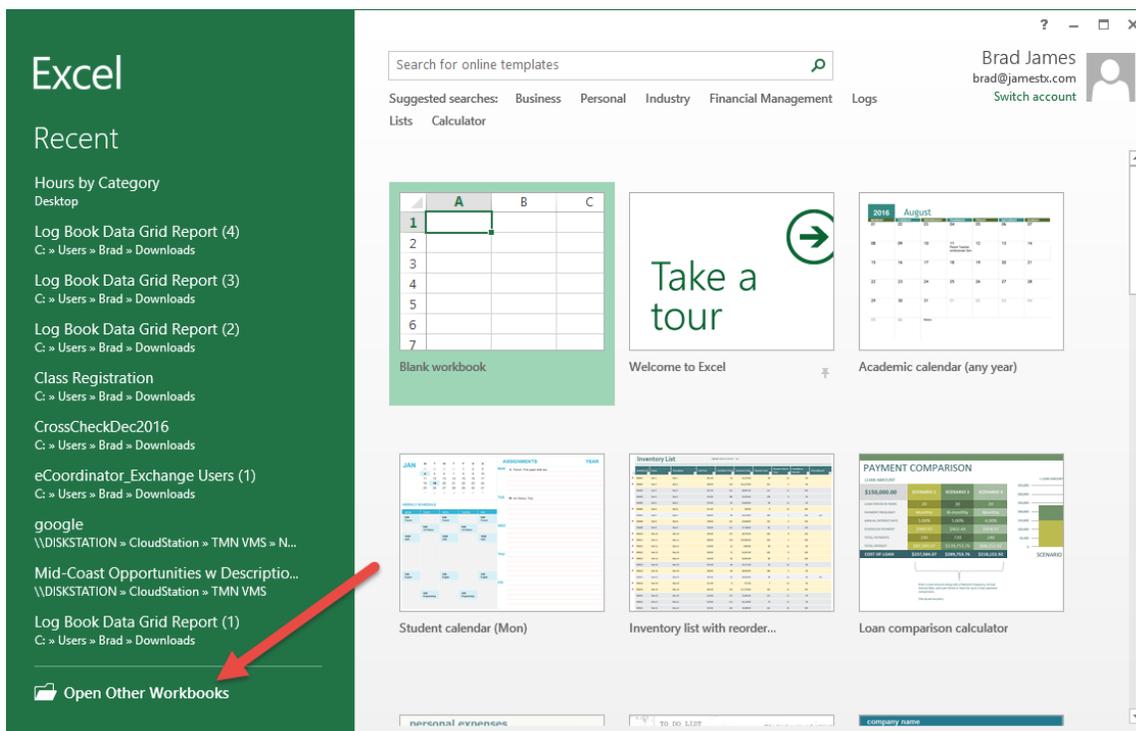
Report Format: ▼

Orientation: Portrait
 Landscape

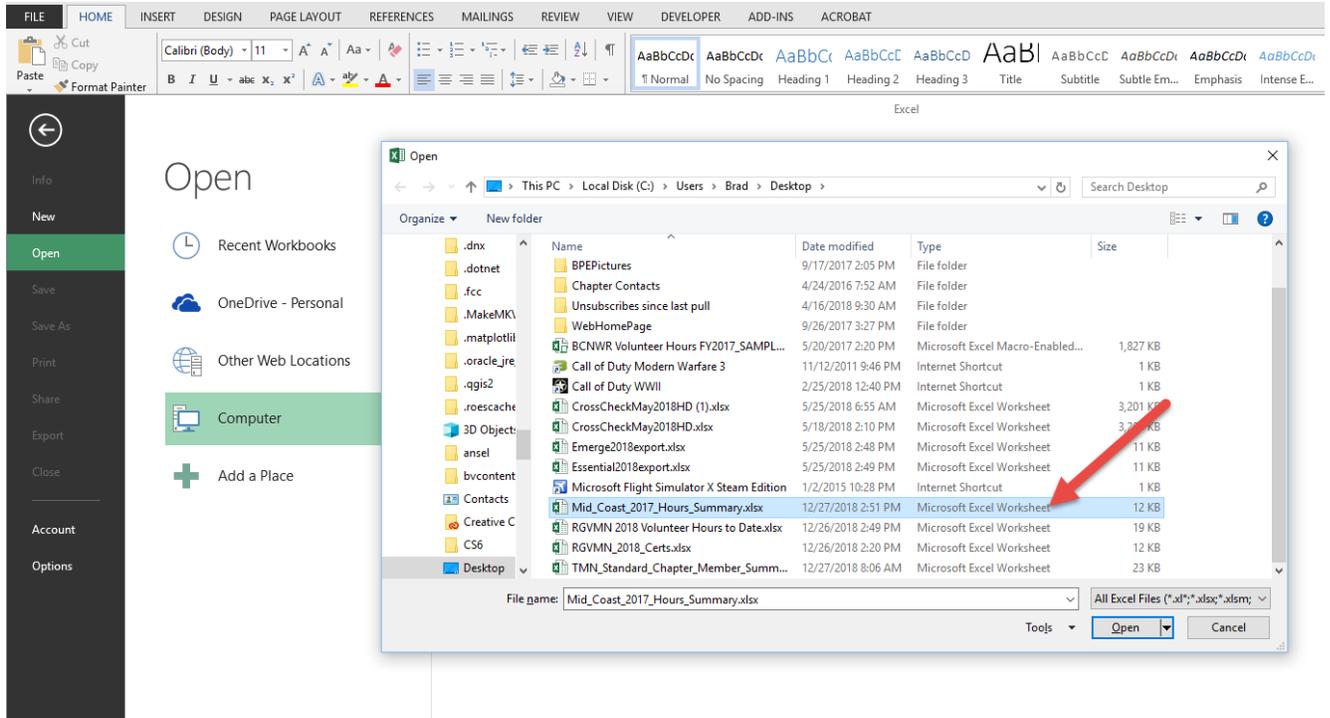
Depending on which internet browser software you are using the window shown below may be different. The purpose of this step is to save the data file from eCoordinator to your computer. In this example Internet Explorer is being used. Save the file and note where it is located on your computer. Often, 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.



The report data is now in Excel.

Opportunity Title	Volunteer User ID	Volunteer Name	AT Hours	TMN Hours	TMN Initial Training	What category does the project fall under
AT: Lecture Series presentation	N/A	29 Volunteers	171.25			Advance Training
AT: Online Training	N/A	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

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.

Opportunity Title	Volunteer User ID	Volunteer Name	AT Hours	TMN Hours	TMN Initial Training	What category does the project fall under
AT: Lecture Series presentation	N/A	29 Volunteers	171.25			Advance Training
AT: Online Training	N/A	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: Coletto 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

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.

Opportunity Title	Volunteer User ID	Volunteer Name	AT Hours	TMN Hours	TMN Initial Training	What category does the project fall under
RM: Aransas Pathways	N/A	19 Volunteers	194.25			Natural Resource Management
RM: Coletto Creek	N/A	1 Volunteer	6			Natural Resource Management
RM: Goose Island	N/A	2 Volunteers	38.50			Natural Resource Management
RM: Mad Island	N/A	5 Volunteers	141.05			Natural Resource Management
RM: MBNP	N/A	1 Volunteer	3			Natural Resource Management
RM: Other Locations	N/A	24 Volunteers	869.70			Natural Resource Management
RM: PAIS Sea Turtles	N/A	7 Volunteers	596.25			Natural Resource Management
RM: WWF	N/A	1 Volunteer	4			Natural Resource Management
TG: ANWR	N/A	5 Volunteers	139.50			Technical Guidance
TG: Aransas Pathways	N/A	6 Volunteers	40.50			Technical Guidance
TG: Balcones Canyonlands NWR	N/A	1 Volunteer	8.25			Technical Guidance
TG: City or County	N/A	3 Volunteers	4.75			Technical Guidance
TG: Mad Island	N/A	1 Volunteer	53.95			Technical Guidance
TG: Other Organizations	N/A	12 Volunteers	342.75			Technical Guidance
TG: TMN VMS Implementation and Support	N/A	1 Volunteer	130.25			Technical Guidance
TG: WWF	N/A	6 Volunteers	280.50			Technical Guidance
TR: ANWR direct education	N/A	3 Volunteers	17			Training & Educating Others (Direct)
TR: Coletto Creek	N/A	5 Volunteers	28			Training & Educating Others (Direct)
TR: Mad Island	N/A	1 Volunteer	6			Training & Educating Others (Direct)
TR: Other Organizations	N/A	18 Volunteers	831			Training & Educating Others (Direct)
TR: TMN VMS Implementation and Support	N/A	1 Volunteer	67			Training & Educating Others (Direct)
TR: WWF direct education	N/A	4 Volunteers	30.50			Training & Educating Others (Direct)
60 Opportunities	N/A	75 Volunteers	1,280.50	10,956.15	735.25	N/A

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.

	A	B	C	D	E	F	G	H	I	J
1	Opportunity Title	Volunteer User ID	Volunteer Name	AT Hours	TMN Hours	TMN Initial Training	What category does the project fall under	Grand Total	Adult Male Total	Adult Fem
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	N/A	38 Volunteers	329			Advance Training			
6	AT: TX Waters Certification Training	N/A	12 Volunteers	107.50			Advance Training			
7	AT: with Chapter Meeting	N/A	38 Volunteers	90.50			Advance Training			
8	AT: with State Meet	N/A	14 Volunteers	122.25			Advance Training			
9	CB: Chapter Business	N/A	42 Volunteers		1141		Chapter & Program Business/Administration			
10	FR: ANWR research	N/A	8 Volunteers		142.50		Field Research (including surveys)			
11	FR: Aquatic Life	N/A	3 Volunteers		3.75		Field Research (including surveys)			
12	FR: Bird Populations	N/A	33 Volunteers		2,322.20		Field Research (including surveys)			
13	FR: Insect Life	N/A	3 Volunteers		48		Field Research (including surveys)			
14	FR: Mad Island	N/A	1 Volunteer		16		Field Research (including surveys)			
15	FR: Other Partners	N/A	7 Volunteers		256.50		Field Research (including surveys)			
16	FR: TPWD	N/A	3 Volunteers		18		Field Research (including surveys)			
17	FR: Water Quality	N/A	2 Volunteers		28		Field Research (including surveys)			
18	FR: WWF research	N/A	2 Volunteers		13		Field Research (including surveys)			
19	Initial Training	N/A	16 Volunteers			735.25				
20	NPA: ANWR	N/A	3 Volunteers		92.50		Nature/Public Access			
21	NPA: Aransas Pathways	N/A	7 Volunteers		78.25		Nature/Public Access			
22	NPA: Coletto 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		66.75		Nature/Public Access			
25	OT: Partner Organization	N/A	9 Volunteers		203.50		Other	7	2	
26	PO: ANWR	N/A	18 Volunteers		1,192.25		Public Outreach (Indirect)	1799	66	
27	PO: Aransas Pathways	N/A	9 Volunteers		78.75		Public Outreach (Indirect)	258	23	
28	PO: ARH docent	N/A	3 Volunteers		48		Public Outreach (Indirect)	761		
29	PO: Balcones Canyonlands NWR	N/A	1 Volunteer		58.25		Public Outreach (Indirect)			
30	PO: Coletto Creek	N/A	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.

Create PivotTable

Choose the data that you want to analyze

Select a table or range

Table/Range:

Use an external data source

Choose where you want the PivotTable report to be placed

New Worksheet

Existing Worksheet

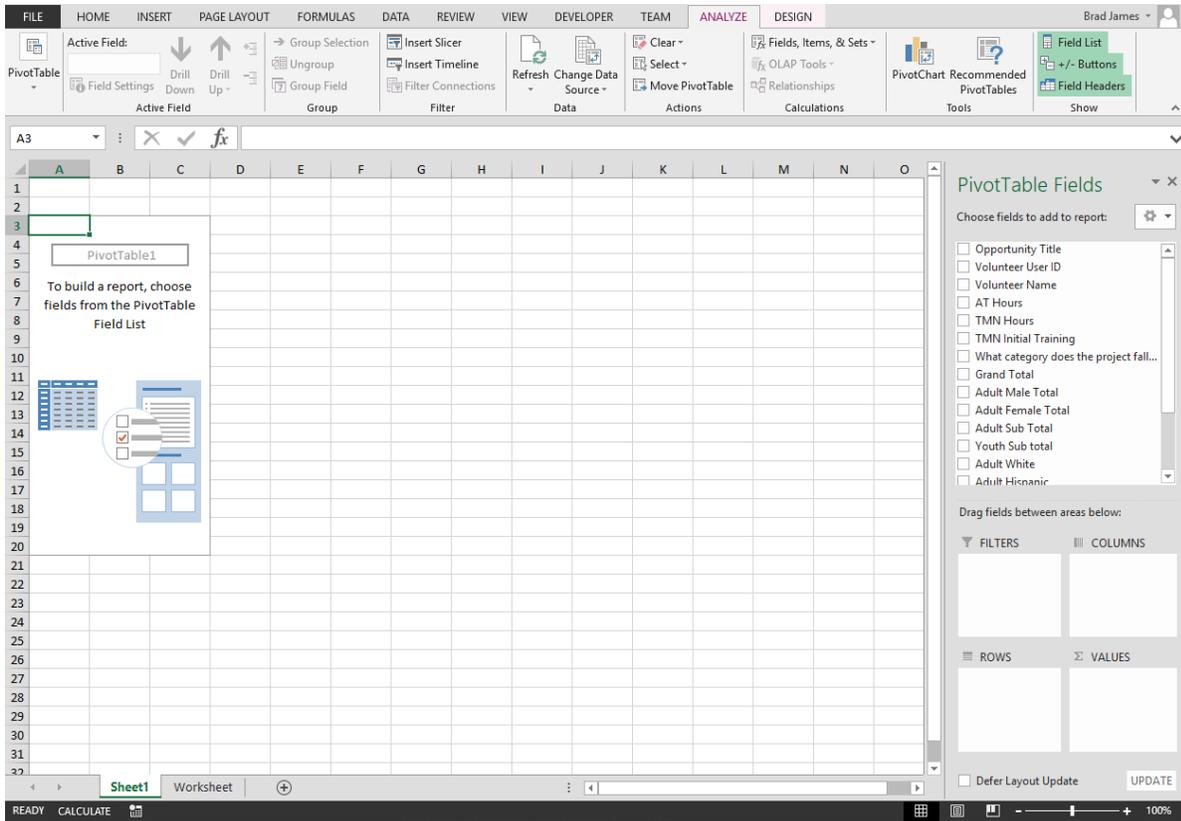
Location:

Choose whether you want to analyze multiple tables

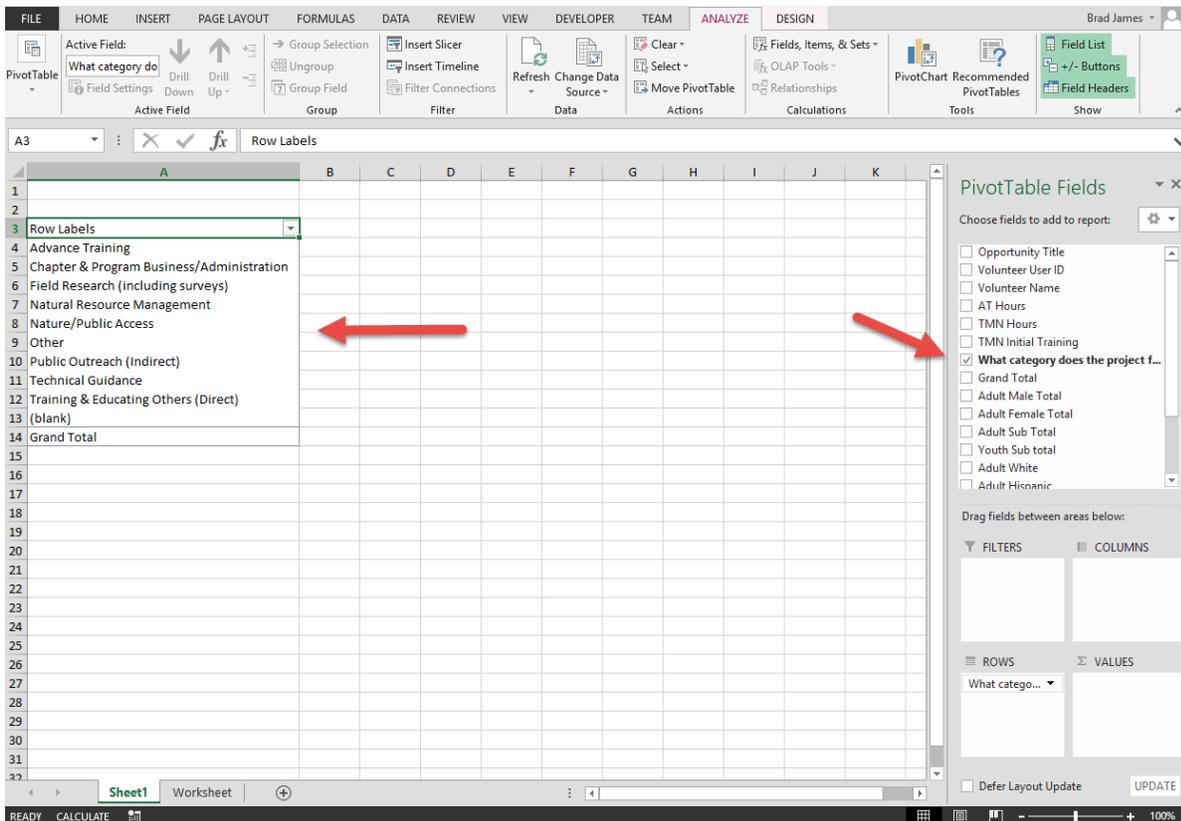
Add this data to the Data Model

	A	B	C	D	E	F	G	H	I
1	Opportunity Title	Volunteer User ID	Volunteer Name	AT Hours	TMN Hours	TMN Initial Training	What category does the project fall under	Grand Total	Adult
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	N/A	38 Volunteers	329			Advance Training		
6	AT: TX Waters Certification Training	N/A	12 Volunteers	107.50			Advance Training		
7	AT: with Chapter Meeting	N/A	38 Volunteers	90.50			Advance Training		
8	AT: with State Meet	N/A	14 Volunteers	122.25			Advance Training		
9	CB: Chapter Business	N/A	42 Volunteers		1141		Chapter & Program Business/Administration		
10	FR: ANWR research	N/A	8 Volunteers		142.50		Field Research (including surveys)		
11	FR: Aquatic Life	N/A	3 Volunteers		3.75		Field Research (including surveys)		
12	FR: Bird Populations	N/A	33 Volunteers		2,322.20		Field Research (including surveys)		
13	FR: Insect Life	N/A	3 Volunteers		48		Field Research (including surveys)		
14	FR: Mad Island	N/A	1 Volunteer		16		Field Research (including surveys)		
15	FR: Other Partners	N/A	7 Volunteers		256.50		Field Research (including surveys)		
16	FR: TPWD	N/A	3 Volunteers		18		Field Research (including surveys)		
17	FR: Water Quality	N/A	2 Volunteers		28		Field Research (including surveys)		
18	FR: WWF research	N/A	2 Volunteers		13		Field Research (including surveys)		
19	Initial Training	N/A	16 Volunteers			735.25			
20	NPA: ANWR	N/A	3 Volunteers		92.50		Nature/Public Access		
21	NPA: Aransas Pathways	N/A	7 Volunteers		78.25		Nature/Public Access		
22	NPA: Coletto 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		66.75		Nature/Public Access		
25	OT: Partner Organization	N/A	9 Volunteers		203.50		Other	7	2
26	PO: ANWR	N/A	18 Volunteers		1,192.25		Public Outreach (Indirect)	1799	66
27	PO: Aransas Pathways	N/A	9 Volunteers		78.75		Public Outreach (Indirect)	258	23
28	PO: ARH docent	N/A	3 Volunteers		48		Public Outreach (Indirect)	761	
29	PO: Balcones Canyonlands NWR	N/A	1 Volunteer		58.25		Public Outreach (Indirect)		
30	PO: Coletto Creek	N/A	11 Volunteers		96.75		Public Outreach (Indirect)	218	70

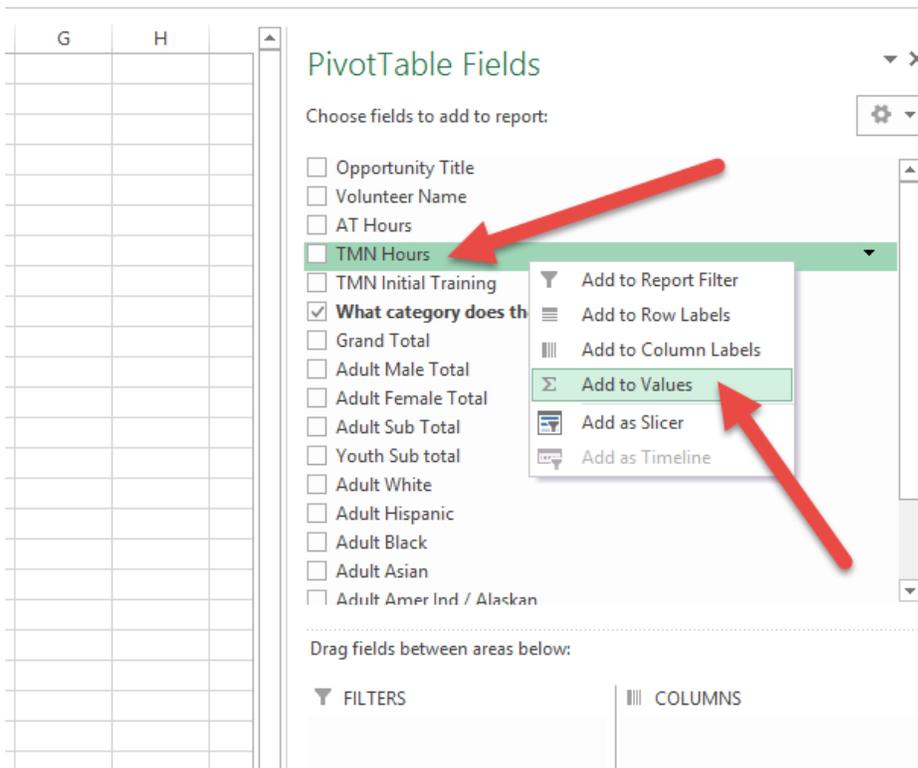
The new work sheet is shown with the pivot table.



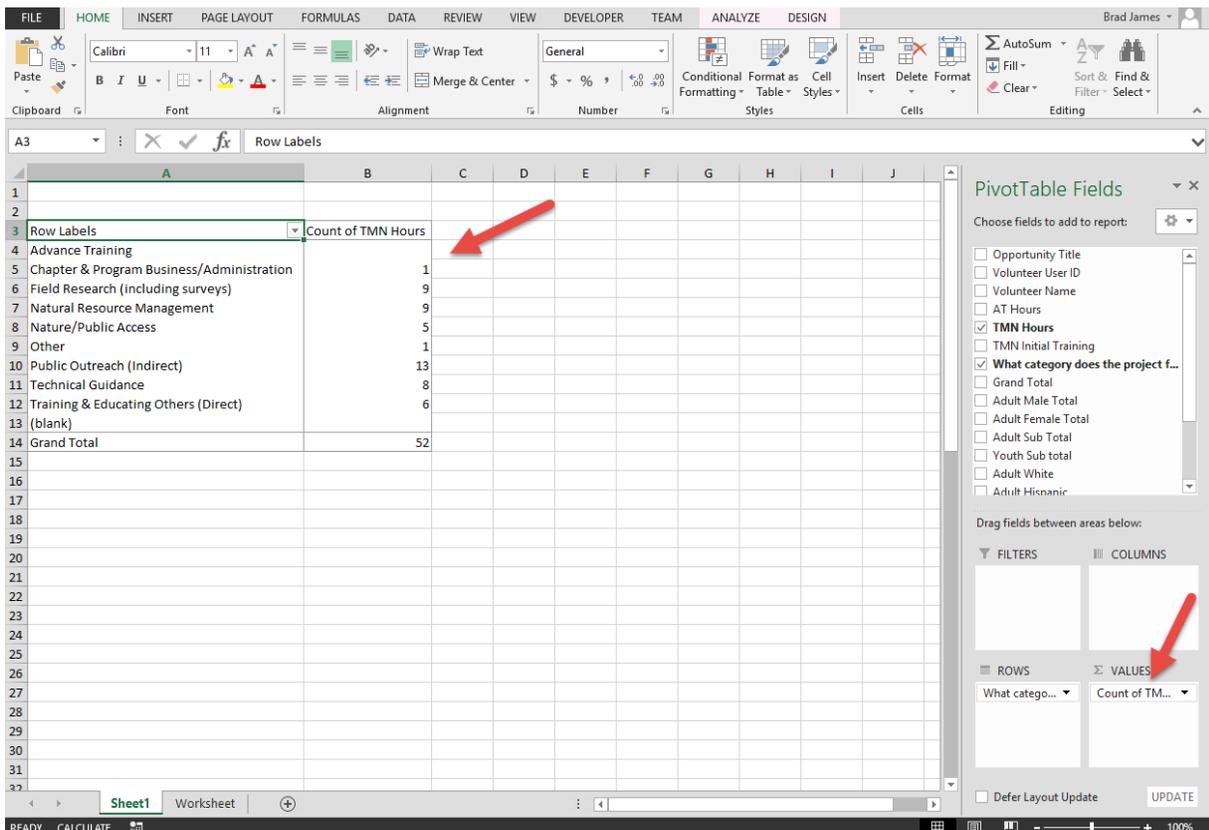
Click the “What category does the project fall under” checkbox to include this data in the table.



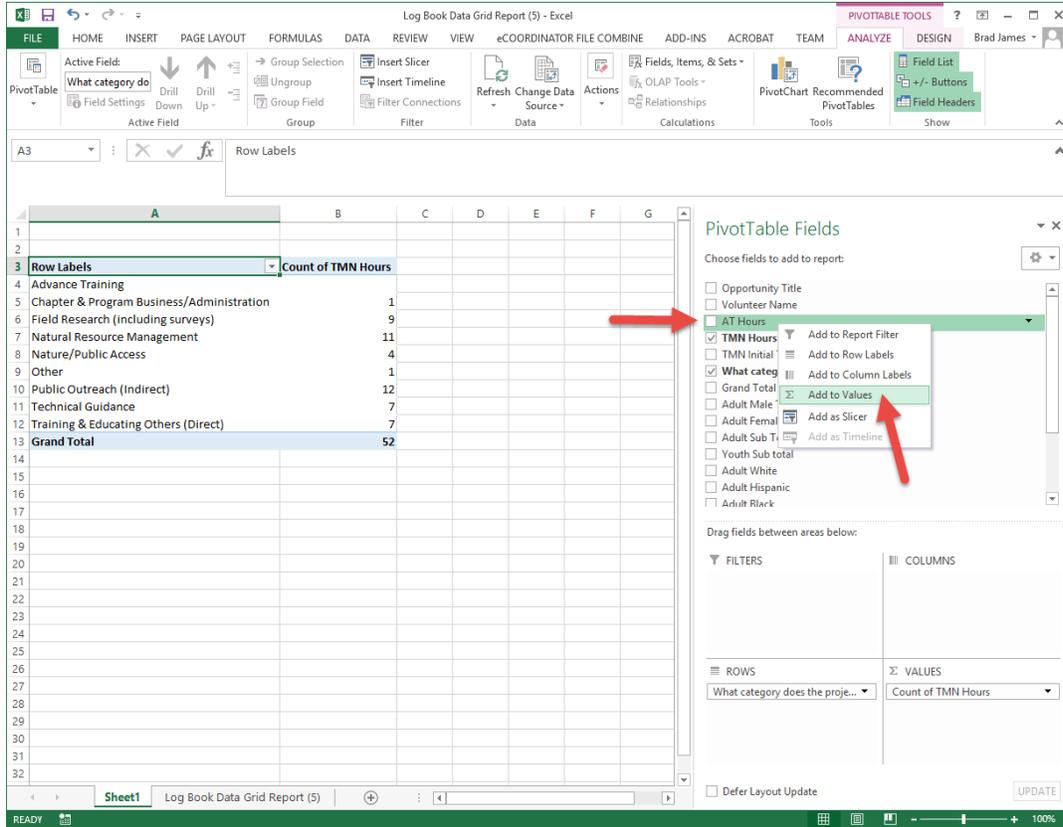
Position the mouse pointer over TMN Hours and right mouse click to show the Options dropdown list. Choose the Add to Values option.



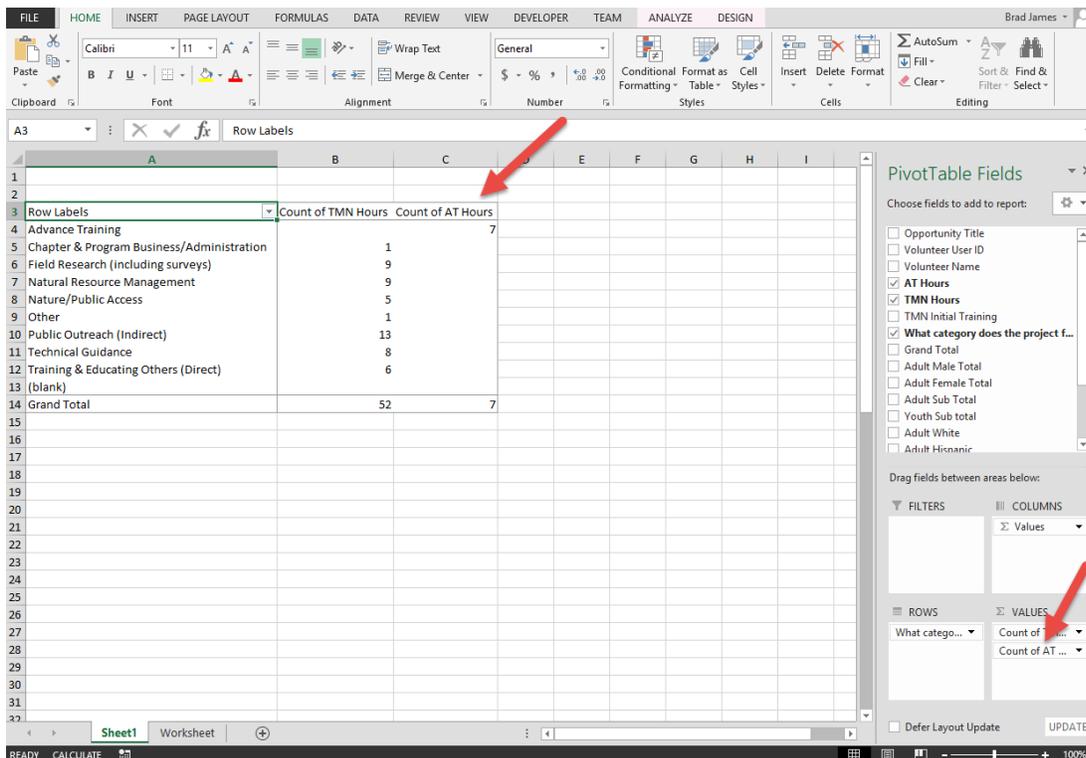
Count of TMN Hours has been added to the table.



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



Count of AT hours has been added to the table.



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

The screenshot shows a report builder interface with a pivot table on the left and a field list on the right. The pivot table has two columns: 'Count of TMN Hours' and 'Count of AT Hours'. The data rows are as follows:

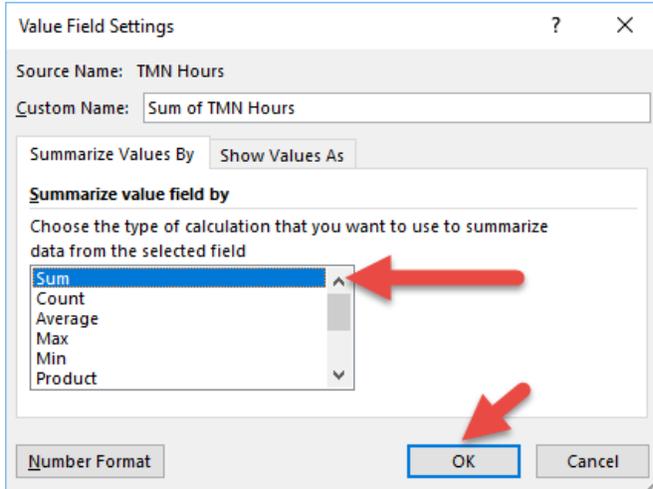
	Count of TMN Hours	Count of AT Hours
1		6
9		
11		
4		
1		
12		
7		
7		
52	6	

The field list on the right includes:

- Choose fields to add to report:
 - Opportunity Title
 - Volunteer Name
 - AT Hours
 - TMN Hours
 - TMN Initial Training
 - What category does the project fall under
 - Grand Total
 - Adult Male Total
 - Adult Female Total
 - Adult Sub Total
 - Youth Sub total
 - Adult White
 - Adult Hispanic
 - Adult Black
- Drag fields between areas below:
 - FILTERS
 - COLUMNS: Σ Values
 - ROWS: What category does the proje...
 - VALUES: Count of TMN Hours
- Defer Layout Update

A red arrow points to the 'Value Field Settings...' option in the dropdown menu for 'Count of TMN Hours'.

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.



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

TMN Hours	Count of AT Hours
1237.5	6
3038.51	
2927.3	
209.5	
111.25	
3167.25	
1649.2	
1391	
13731.51	6

Choose fields to add to report:

- Opportunity Title
- Volunteer Name
- AT Hours**
- TMN Hours**
- TMN Initial Training
- What category does the project fall under**
- Grand Total
- Adult Male Total
- Adult Female Total
- Adult Sub Total
- Youth Sub total
- Adult White
- Adult Hispanic
- Adult Black

Drag fields between areas below:

ROWS

What category does the proje...

COLUMNS

Σ Values

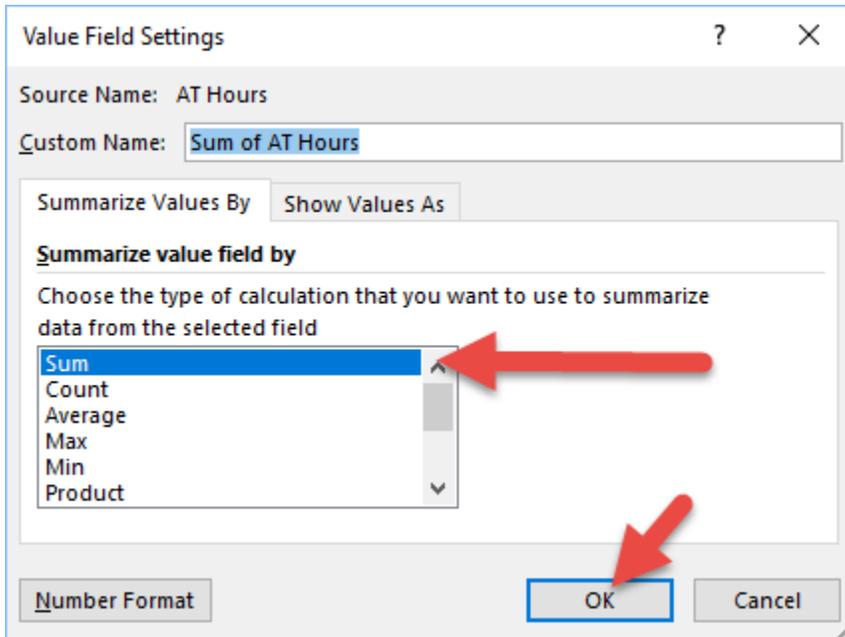
VALUES

Sum of TMN Hours

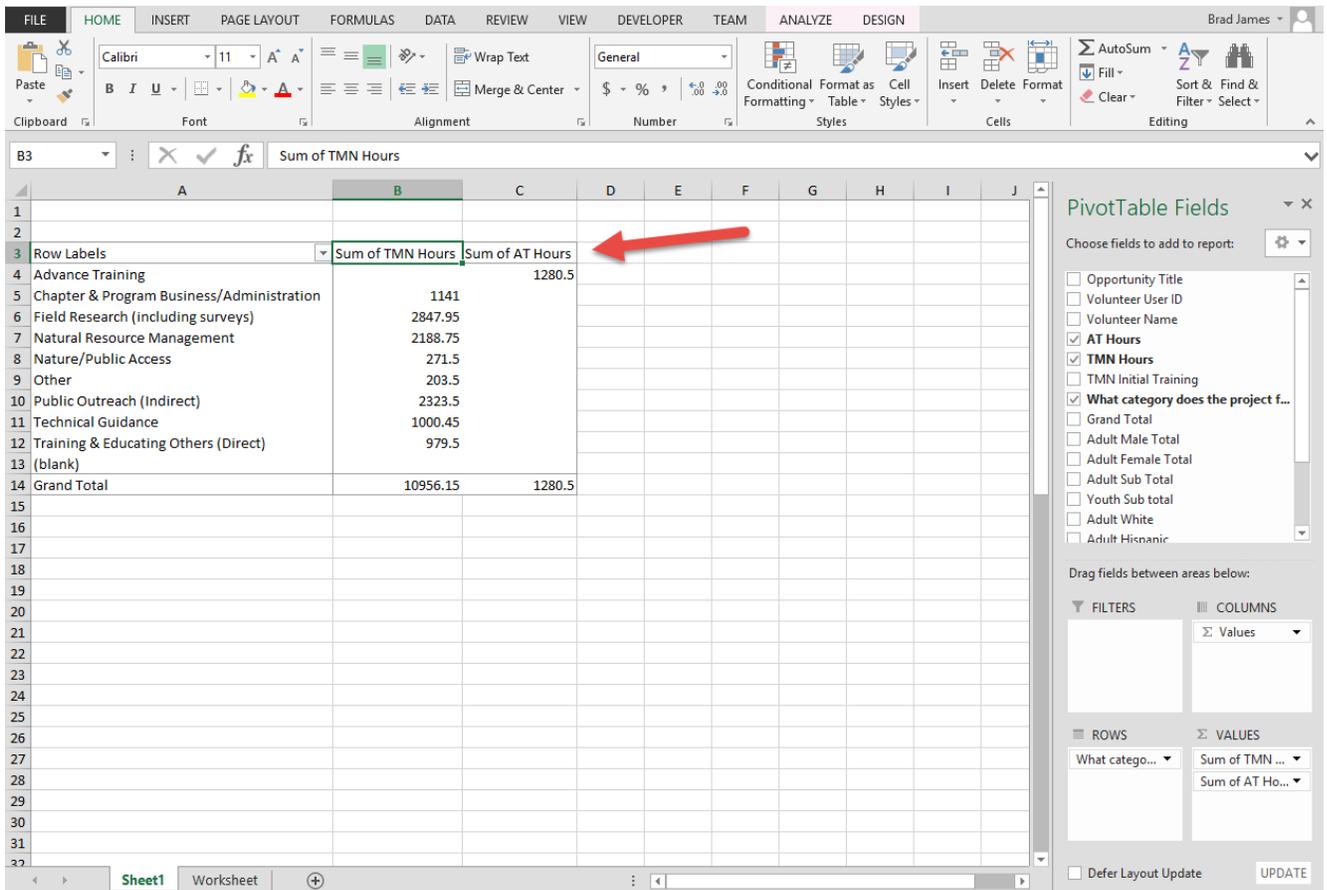
Count of AT Hours

- Move Up
- Move Down
- Move to Beginning
- Move to End
- Move to Report Filter
- Move to Row Labels
- Move to Column Labels
- Move to Values
- Remove Field
- Value Field Settings...**

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.



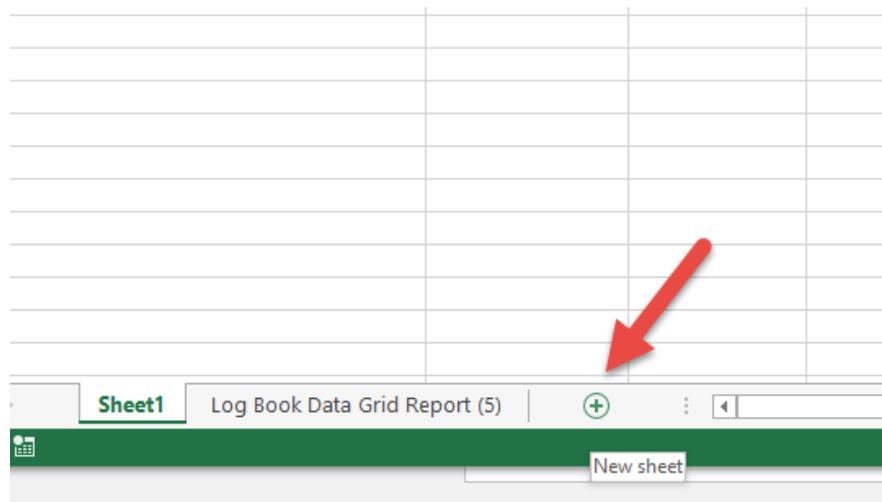
Now we are showing total hours for each of the nine categories.



Select title row through the last category and the three columns. Exclude the total line. Right click and select Copy.

Row Label	Sum of TMN Hours	Sum of ...
Advance Training		
Chapter & Program Business/Administration	1237.5	
Field Research (including surveys)	3038.51	
Natural Resource Management	2927.3	
Nature/Public Access	209.5	
Other	111.25	
Public Outreach (Indirect)	3167.25	
Technical Guidance	1649.2	
Training & Educating Others (Direct)	1391	
Grand Total	13731.51	1120.25

Select the New Sheet option and add a new sheet to the workbook.



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

The screenshot shows the Microsoft Excel interface with the following data in the spreadsheet:

1	Row Label	Sum of TN	Sum of AT Hours
2	Advance Training	1120.25	
3	Chapter &	1237.5	
4	Field Rese		
5	Natural Re		
6	Nature/Pu	123	
7	Other		
8	Public Out	3167	
9	Technical	1649.2	
10	Training &	1391	
11	Grand Tot	13731.51	1120.25

The 'Paste Options' menu is open over cell C4, showing options for pasting values, formulas, and styles. A red arrow points to the 'Values (V)' option.

At the bottom of the Excel window, a status bar displays the message: "Select destination and press ENTER or choose Paste".

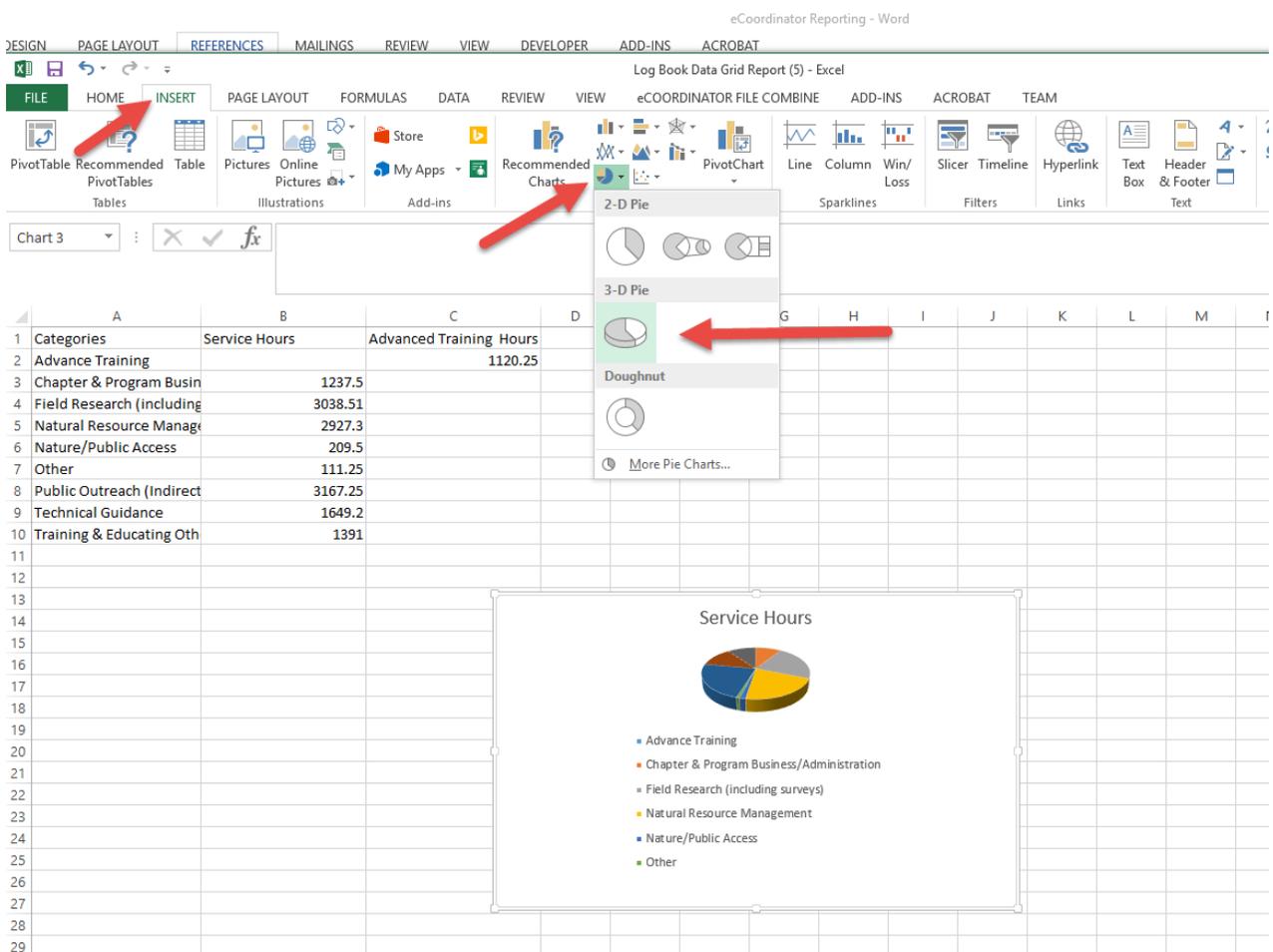
Adjust the column widths to see the data. Rename the column headings as shown below.

The screenshot shows the Microsoft Excel interface with the following data:

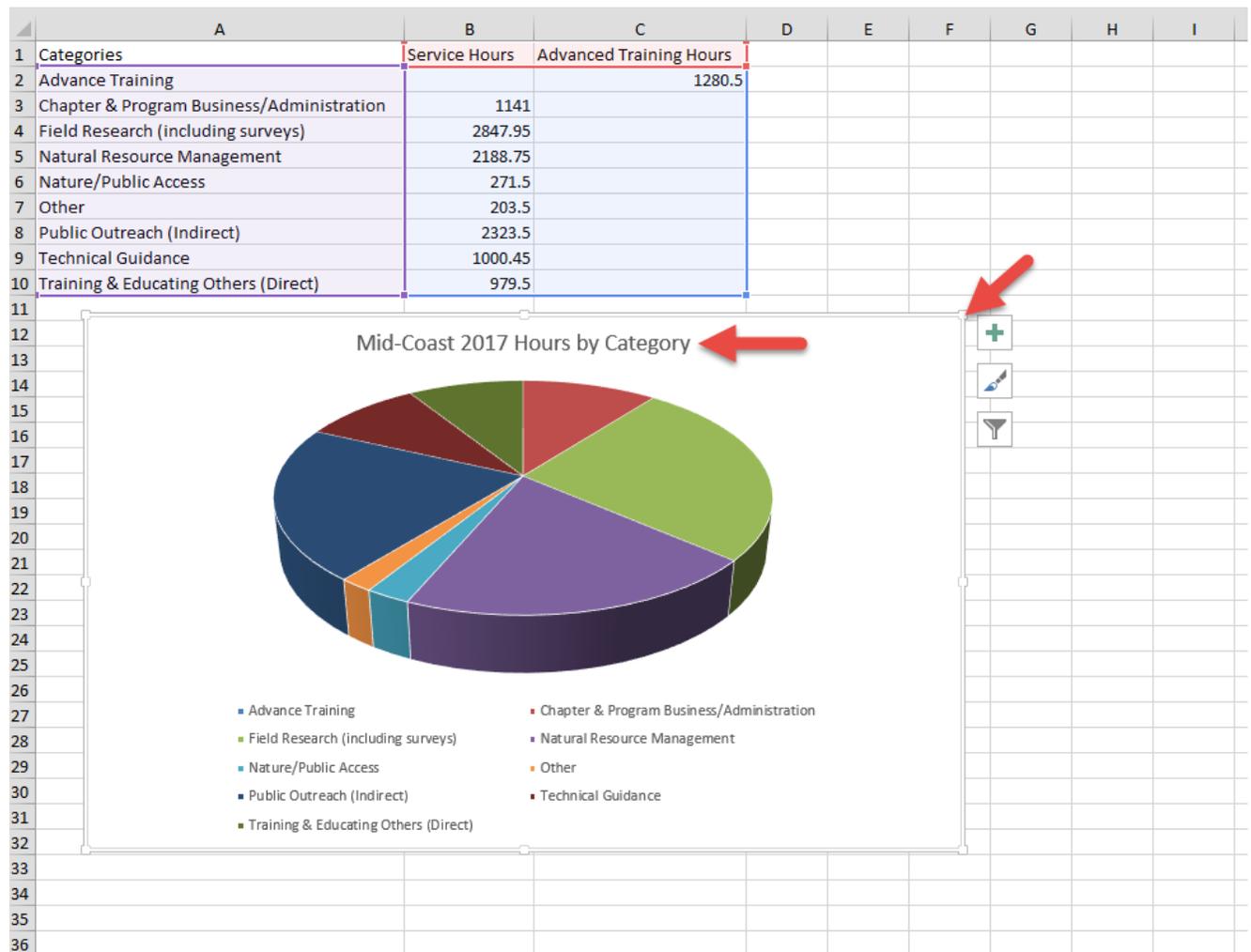
	A	B	C	D	E	F	G	H
1	Categories		Service Hours	Advanced Training Hours				
2	Advance Training			1280.5				
3	Chapter & Program Business/Administration		1141					
4	Field Research (including surveys)		2847.95					
5	Natural Resource Management		2188.75					
6	Nature/Public Access		271.5					
7	Other		203.5					
8	Public Outreach (Indirect)		2323.5					
9	Technical Guidance		1000.45					
10	Training & Educating Others (Direct)		979.5					
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								

Select the data cells in the worksheet.

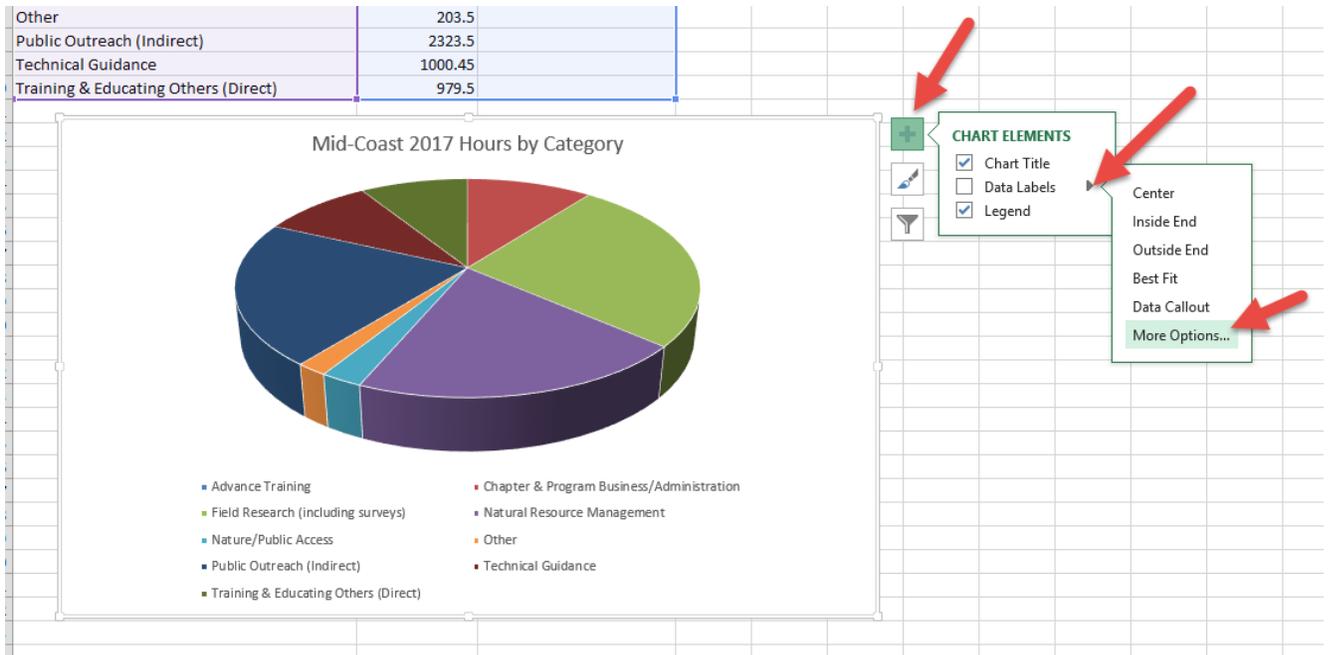
While the data cells are selected, choose the Insert tab on the menu and click on the Pie Chart icon on the Ribbon Bar. Choose the 3-D Pie chart option.



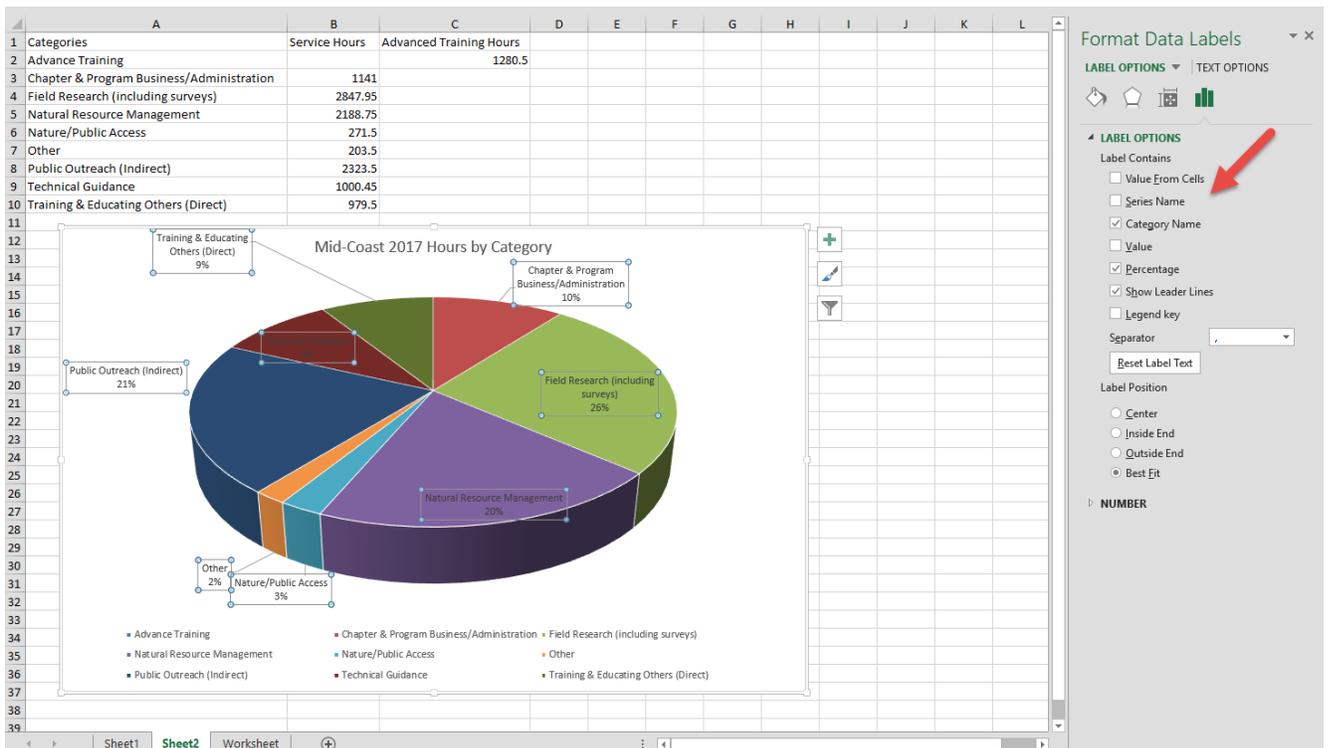
Adjust the size of the chart by grabbing the corners with the mouse pointer and holding down the left mouse button. Select the title box and type the title of your chart. In this example we're looking at the Mid-Coast 2017 Hours by Category.



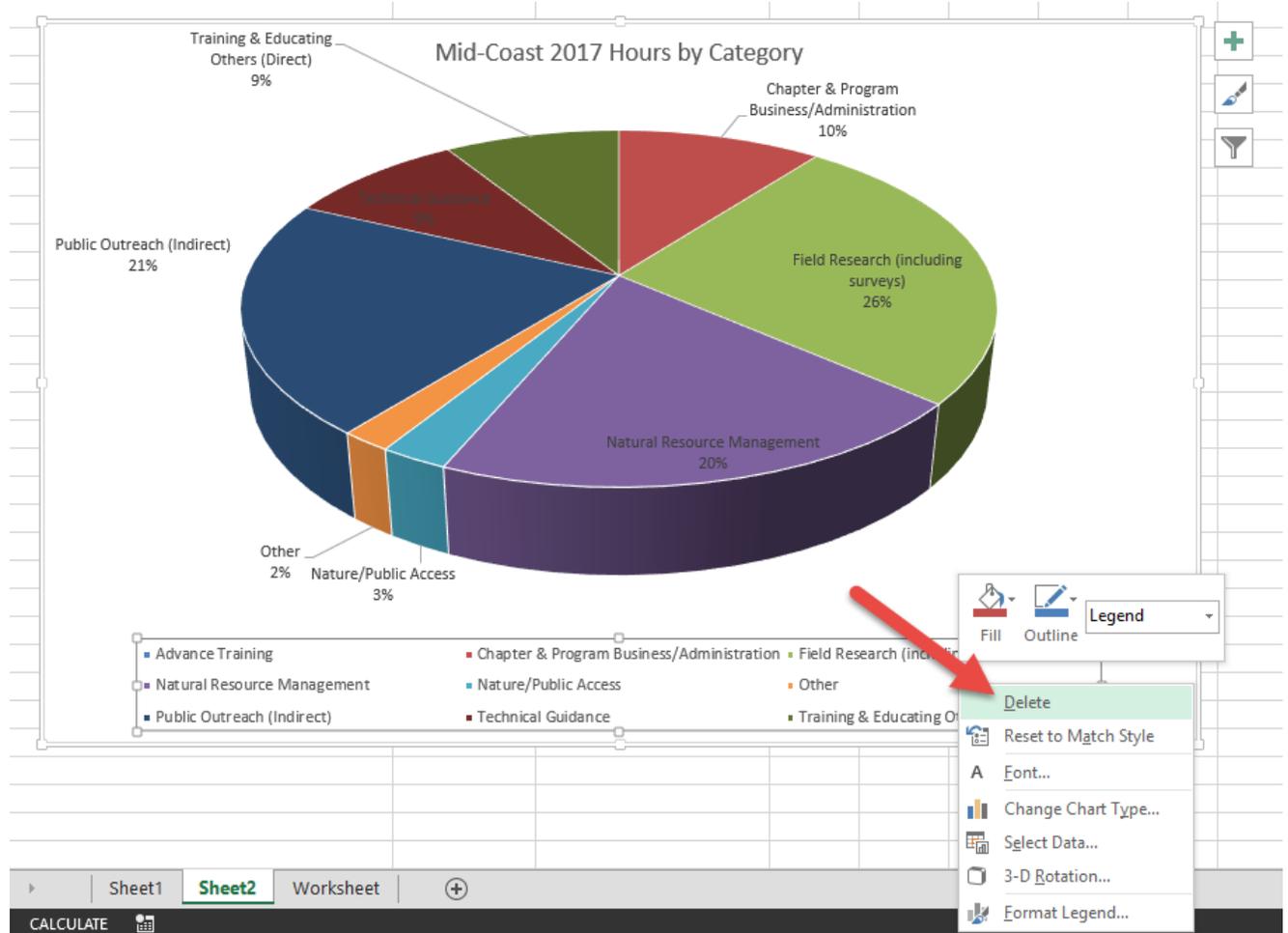
Click the Chart Elements + icon and expand the Data Labels selection. Choose More Options.



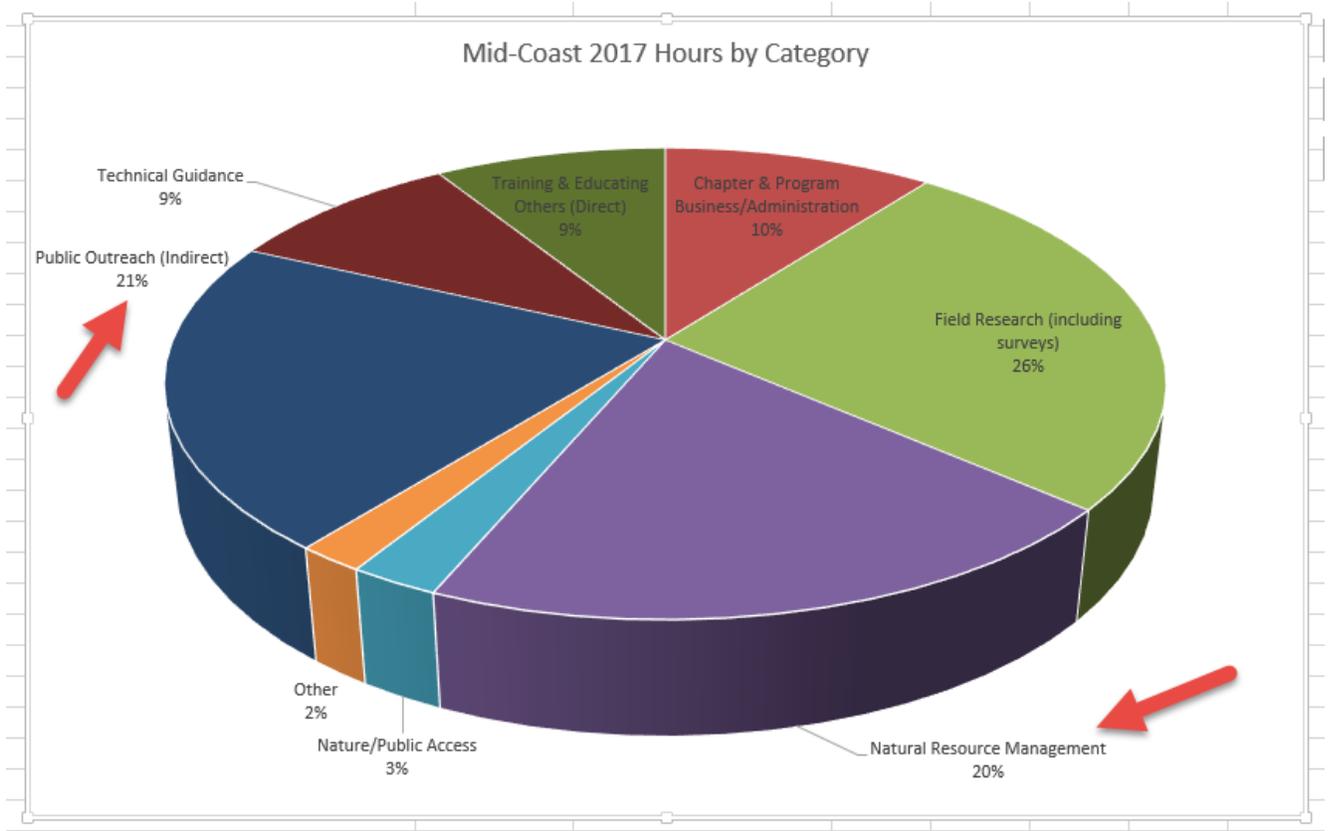
Format Data Labels is shown. Choose the Category Name and Percentage check boxes. Uncheck the value label. Click the X at the top of the Format Data Labels box to close it.



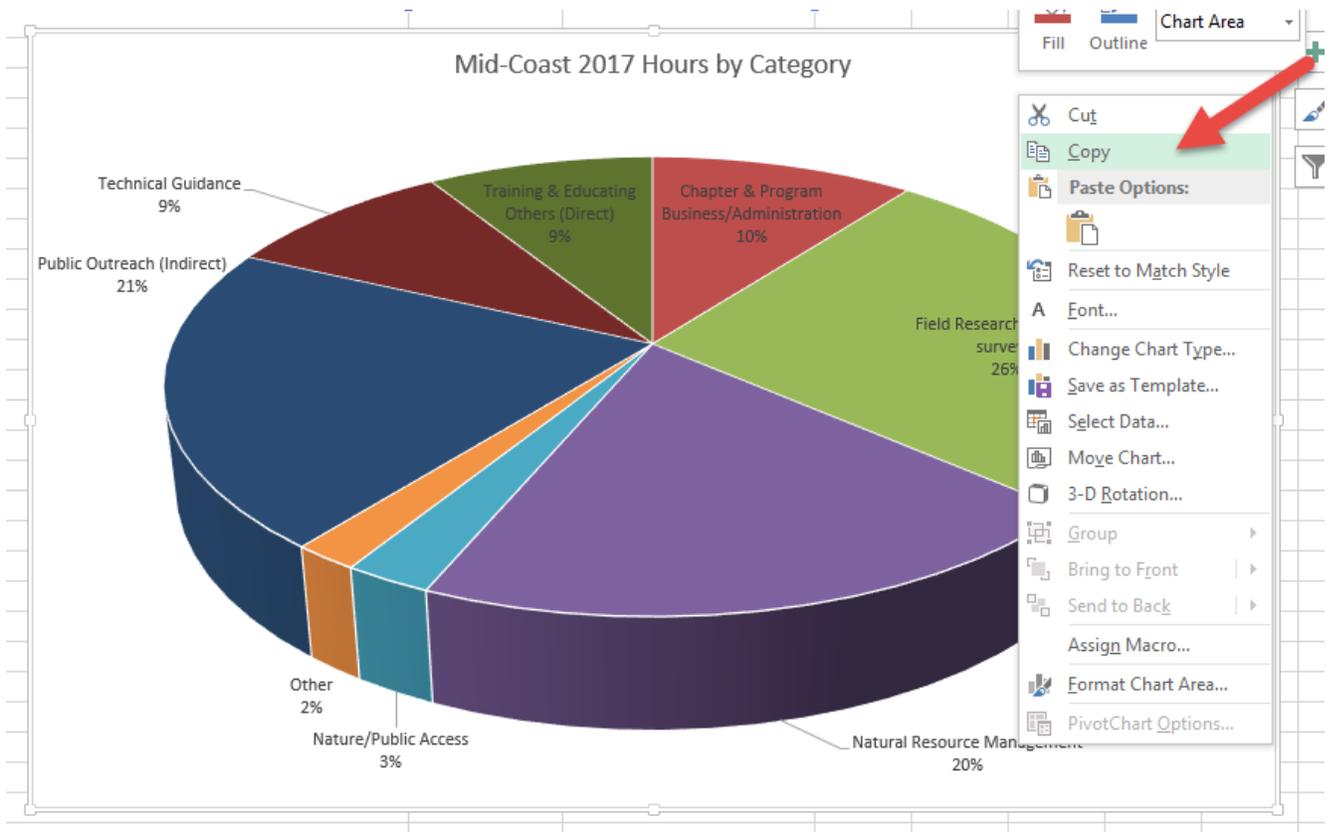
We now have the category names and percentage of the total hours in our pie chart. The legend at the bottom of the chart is redundant. Right mouse click on it and choose the delete option.



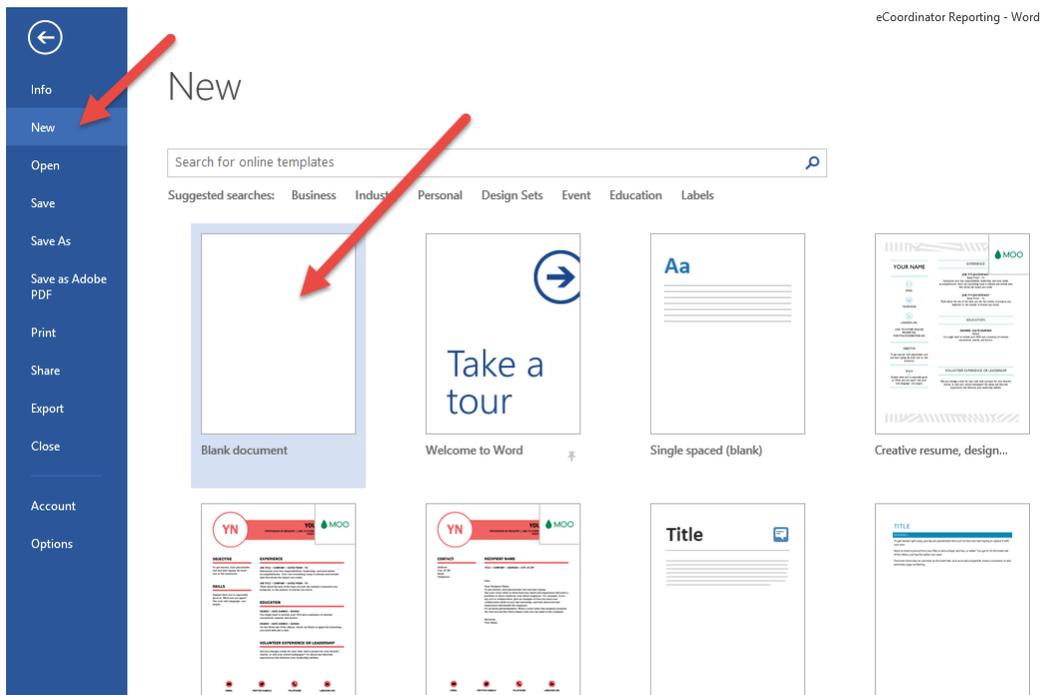
The chart is complete. If the text is hard to read within a slice. Drag it to an area where it is easier to read. Let's move it to something easier to send out to volunteers.



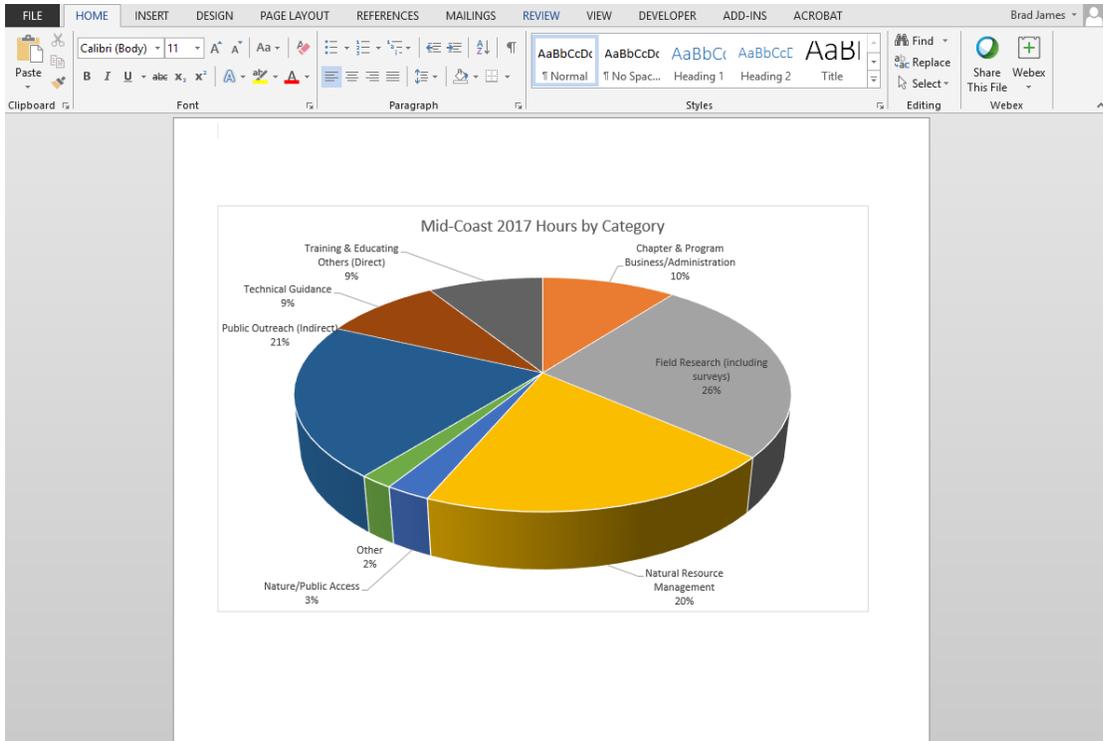
Right click on the chart and select Copy from the options list.



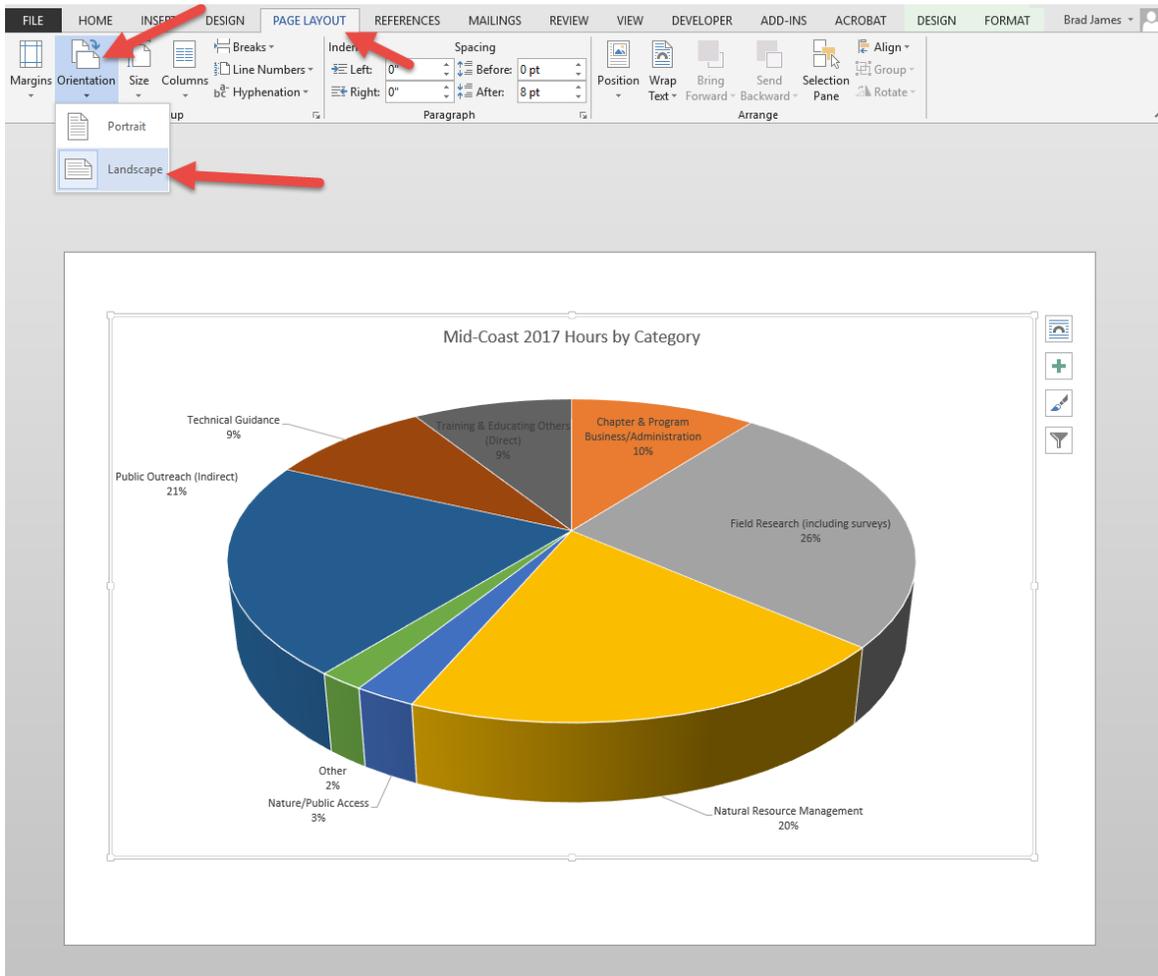
Open Microsoft Word and create a new blank document. Note: you could at this point paste this chart in applications other than Word. PowerPoint would be an example of one of these applications.



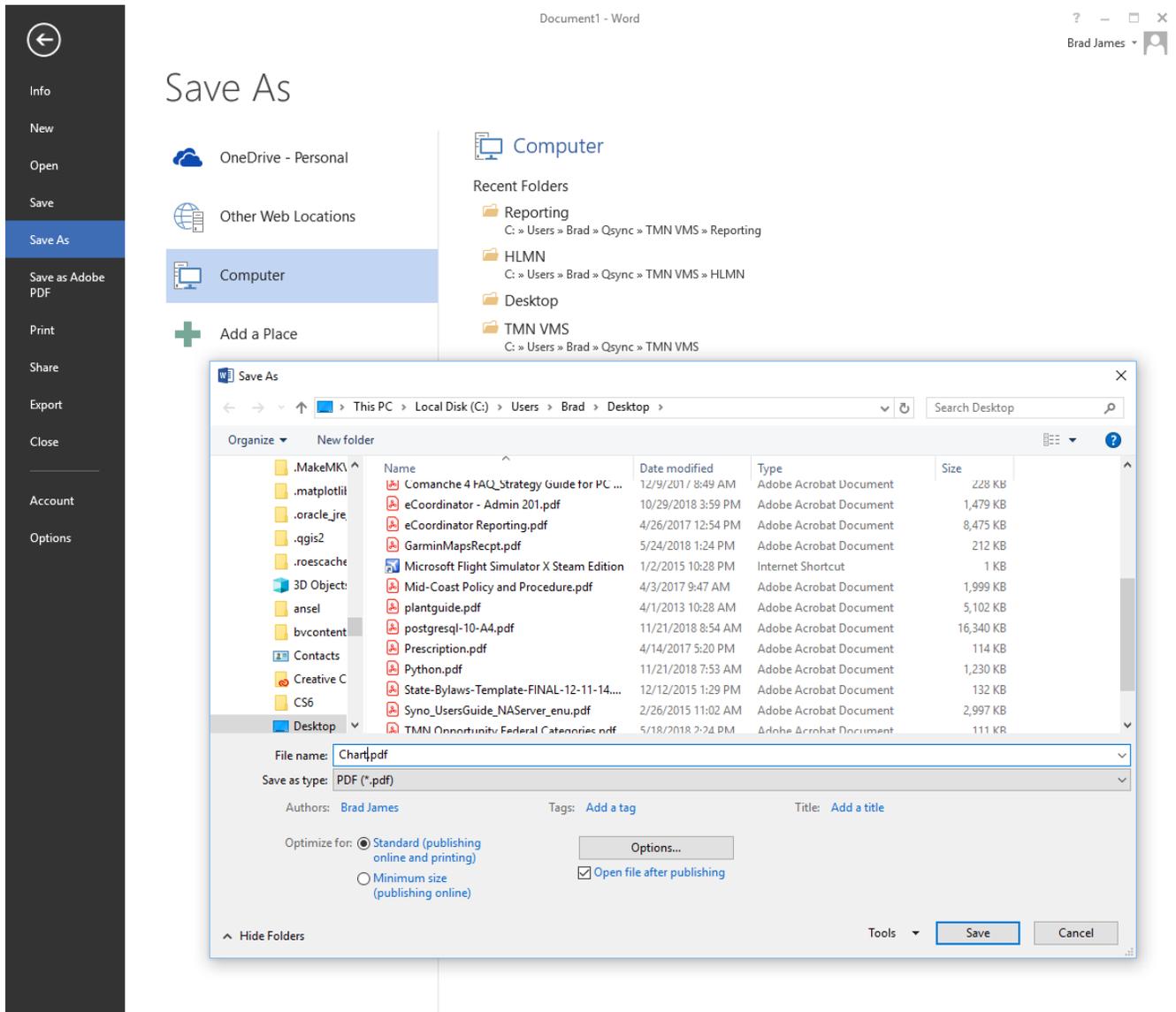
When the new Word document opens, click in the document space, right click and paste.



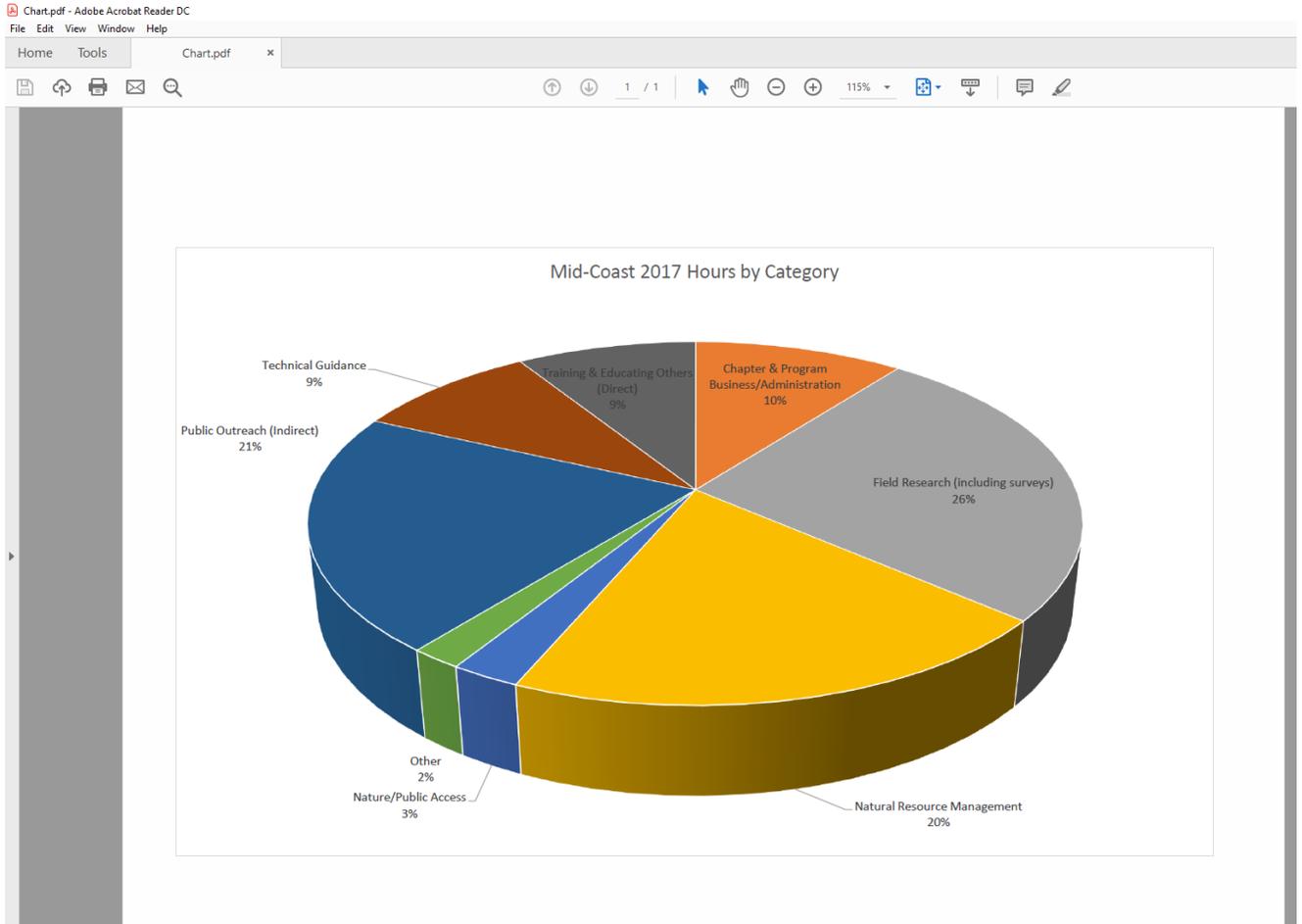
Choose Page Layout and change the page orientation to Landscape.



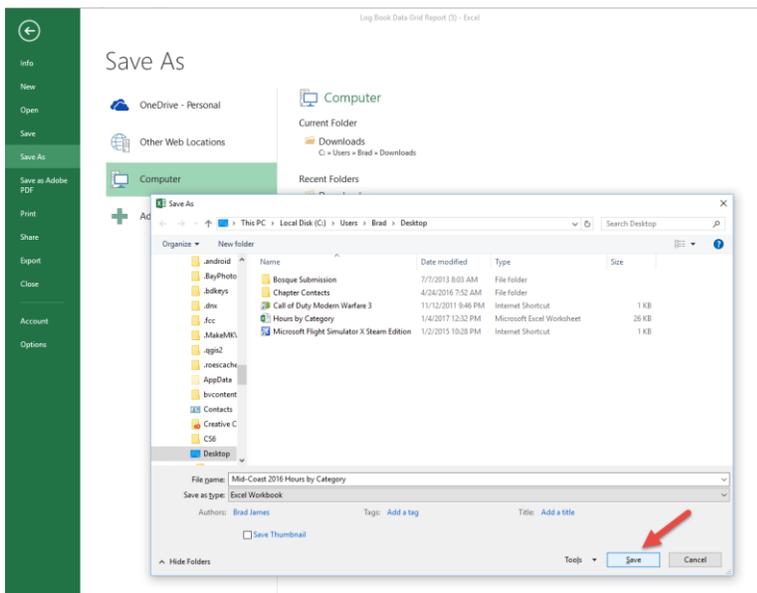
Choose the File menu, Save As, then choose a location to store the new document. Name your document and save the document as file type PDF. This will create a PDF document of your chart. This is a more secure document type to send via email.



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 - Master Naturalist : Mid Coast

Volunteers **Opportunities** Chapters

Clear Filters Grid Settings TMN Standard-AgriLife Training Filters TMN-AgriLife Training

1 to 23 of 23 Opportunities

<input type="checkbox"/>	Opportunity Title	Opportunity/Organization	Opportunity Type	What category does the projec	Filled V
<input type="checkbox"/>	PO: AgriLife Partner	Mid Coast	Service Project	Public Outreach (Indirect)	8.
<input type="checkbox"/>	PO: ANWR	Aransas National Wildlife Re	Service Project	Public Outreach (Indirect)	8.
<input type="checkbox"/>	PO: Aransas Pathways	Aransas Co-John Strothmar	Service Project	Public Outreach (Indirect)	8.
<input type="checkbox"/>	PO: ARH docent	Aquarium at Rockport Harbc	Service Project	Public Outreach (Indirect)	8.
<input type="checkbox"/>	PO: Balcones Canyonlands NWR	Balcones Canyonlands NWf	Service Project	Public Outreach (Indirect)	t
<input type="checkbox"/>	PO: Coletto Creek	Coletto Creek Park	Service Project	Public Outreach (Indirect)	8.
<input type="checkbox"/>	PO: HRC	Steve Baizinger	Service Project	Public Outreach (Indirect)	8.

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 - Master Naturalist : Mid Coast

Volunteers **Opportunities** Chapters

New Edit Copy Delete Calendar Reports Request/Approve **Log Book** Email Share Unshare

Clear Filters Grid Settings TMN Standard-AgriLife Training Filters TMN-AgriLife Training

1 to 23 of 23 Opportunities

Opportunity Title	Opportunity/Organization	Opportunity Type	What category does it
PO: Balcones Canyonlands NWR	Balcones Canyonlands NWR	Service Project	Public Outreach
PO: Coletto Creek	Coletto Creek Park	Service Project	Public Outreach
PO: H/BC	Steve Reisinger	Service Project	Public Outreach
PO: Incidental	Mid Coast	Service Project	Public Outreach
PO: MBNP	Matagorda Bay Nature Park	Service Project	Public Outreach
PO: MCBNC	Matagorda County Bird & N	Service Project	Public Outreach
PO: MCTMN Plant Sale	Mid Coast	Service Project	Public Outreach
PO: Mission-Aransas NERR	Mission-Aransas NERR	Service Project	Public Outreach
PO: Other Events/Partners	Mid Coast	Service Project	Public Outreach

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 Book System

Specific Date Range Start Date: Oct 1 2018 End Date: Dec 31 2018 Applies to: Start Date Summary mode Summarize by: Opportunity Title

Apply Reset

Include entries with no start or end date if the "Date Entered" falls within the specified date range.

New Show All Refresh Grid Settings TMN Standard-AgriLife Training Filters

1 to 10 of 10 Rows

Opportunity Title	What category does it	Start Date	TMN Hours	Volunteer Name	Chapter Name	Service Performance
PO: ANWR	Public Outreach (Indirect)	N/A	128	7 Volunteers	1 Park	N/A
PO: Aransas Pathways	Public Outreach (Indirect)	N/A	18.25	4 Volunteers	1 Park	N/A
PO: Coletto Creek	Public Outreach (Indirect)	N/A	26.75	2 Volunteers	1 Park	N/A
PO: Incidental	Public Outreach (Indirect)	N/A	29	2 Volunteers	1 Park	N/A
PO: MCTMN Plant Sale	Public Outreach (Indirect)	N/A	5	1 Volunteer	1 Park	N/A
PO: Other Events/Partners	Public Outreach (Indirect)	N/A	24.75	5 Volunteers	1 Park	N/A
PO: Texas State Aquarium	Public Outreach (Indirect)	N/A	15	1 Volunteer	1 Park	N/A
TR: Coletto Creek	Training & Educating Others	N/A	16	1 Volunteer	1 Park	N/A
TR: Other Organizations	Training & Educating Others	N/A	98	5 Volunteers	1 Park	N/A
TR: WWF direct education	Training & Educating Others	N/A	4.5	1 Volunteer	1 Park	N/A
Summary 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 Range: Start Date: Oct 1 2018 End Date: Dec 31 2018 Applies to: Start Date

Summary mode: Summarize by: Opportunity Title

Include entries with no start or end date if the "Date Entered" falls within the specified date range.

New Show All Refresh Grid Settings TMN Standard-AgriLife Training Filters

1 to 10 of 10 Rows

	Opportunity Title	What category does it	Start Date	TMN Hours	Volunteer Name	Chapter Name	Service Performe
<input type="checkbox"/>	PO: ANWR	Public Outreach (Indire	N/A	128	7 Volunteers	1 Park	N/A
<input type="checkbox"/>	PO: Aransas Pathways	Public Outreach (Indire	N/A	18.25	4 Volunteers	1 Park	N/A
<input type="checkbox"/>	PO: Coletto Creek	Public Outreach (Indire	N/A	26.75	2 Volunteers	1 Park	N/A
<input type="checkbox"/>	PO: Incidental	Public Outreach (Indire	N/A	29	2 Volunteers	1 Park	N/A
<input type="checkbox"/>	PO: MCTMN Plant Sale	Public Outreach (Indire	N/A	5	1 Volunteer	1 Park	N/A
<input type="checkbox"/>	PO: Other Events/Partners	Public Outreach (Indire	N/A	24.75	5 Volunteers	1 Park	N/A
<input type="checkbox"/>	PO: Texas State Aquarium	Public Outreach (Indire	N/A	15	1 Volunteer	1 Park	N/A
<input type="checkbox"/>	TR: Coletto Creek	Training & Educating O	N/A	16	1 Volunteer	1 Park	N/A
<input type="checkbox"/>	TR: Other Organizations	Training & Educating O	N/A	98	5 Volunteers	1 Park	N/A
<input type="checkbox"/>	TR: WWF direct education	Training & Educating O	N/A	4.5	1 Volunteer	1 Park	N/A
Summary 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

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

Log Book System

Specific Date Range: Start Date: Oct 1 2018 End Date: Dec 31 2018 Applies to: Start Date

Summary mode: Summarize by: Opportunity Title

Include entries with no start or end date if the "Date Entered" falls within the specified date range.

New Show All Refresh Grid Settings TMN Standard-AgriLife Training Filters

1 to 10 of 10 Rows

	nd Total	Adult Sub Tot:	Youth Sub tot:	Adult Male Tot	Adult Female	Adult White	Adult Hispanic	Adult Black	Adult Asian	Adult Amer Inc	Acn
		195	164	17	16	9					
		68	0	7	45	12					
		6	76								
		61	20	30	30	45	20	5			
		8	180								
		225	10	24	26	44					
		3									
	0	566	450	78	117	110	20	5	0	0	
	0	56.6	45	7.8	11.7	11	2	0.5	0	0	

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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.

TPWD - Master Naturalist : Mid Coast

Volunteers **Opportunities** Chapters

New Edit Copy Delete Calendar Reports Request/Approve **Log Book** Email Share Unshare Automation Folder Manager

Clear Filters Grid Settings Saved Grids List Filters Filters

1 to 75 of 75 Opportunities

	Opportunity Title ▼1	Opportunity/Organization	Opportunity Type	What category does the projec	Filled Vt	Surveys Used
<input type="checkbox"/>	Apply to the Mid-Coast Chapter	Mid Coast			1	
<input type="checkbox"/>	AT: Lecture Series presentation	Mid Coast	Advanced Training	Advance Training	84	TMN AT Report Hours
<input type="checkbox"/>	AT: Online Training	MC Hours-keeper	Advanced Training	Advance Training	84	TMN AT Report Hours
<input type="checkbox"/>	AT: Single presentation	MC Hours-keeper	Advanced Training	Advance Training	84	TMN AT Report Hours
<input type="checkbox"/>	AT: Specific-Project	Mid Coast	Advanced Training	Advance Training	84	TMN AT Report Hours
<input type="checkbox"/>	AT: TX Waters Certification Training	TPWD-TX Waters	Advanced Training	Advance Training	84	TMN AT Report Hours
<input type="checkbox"/>	AT: with Chapter Meeting	Mid Coast	Advanced Training	Advance Training	84	TMN AT Report Hours
<input type="checkbox"/>	AT: with State Meet	TMN Statewide	Advanced Training	Advance Training	84	TMN AT Report Hours
<input type="checkbox"/>	CB: Chapter Business	Mid Coast	Service Project	Chapter & Program Business/Ad	84	TMN Admin Report Ho
<input type="checkbox"/>	FR: ANWR research	Aransas National Wildlife R	Service Project	Field Research (including survey	84	TMN Field Research H
<input type="checkbox"/>	FR: Aquatic Life	Mid Coast	Service Project	Field Research (including survey	84	TMN Field Research H
<input type="checkbox"/>	FR: Bird Populations	Mid Coast	Service Project	Field Research (including survey	84	TMN Field Research H
<input type="checkbox"/>	FR: Insect Life	Mid Coast	Service Project	Field Research (including survey	84	TMN Field Research H

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 Book System

Specific Date Range ▼ Start Date: Jan 1 2018 End Date: Dec 31 2018 Applies to: Start Date Include entries with no start or end date if the "Date Entered" falls within the specified date range

Summary mode ▼ Summarize by: Opportunity Title ▼

Apply Reset

New Show All Refresh Grid Settings **TMN Standard Reporting** Filters

1 to 52 of 52 Rows

	Opportunity Title ▼1	Volunteer User ID	Volunteer Name	AT Hours	TMN Hours	TMN Initial Tra	Start
<input type="checkbox"/>	AT: Lecture Series presentati	N/A	31 Volunteers	165.5			
<input type="checkbox"/>	AT: Online Training	N/A	21 Volunteers	90.6			
<input type="checkbox"/>	AT: Single presentation	N/A	48 Volunteers	472.75			
<input type="checkbox"/>	AT: Specific-Project	N/A	30 Volunteers	255.5			
<input type="checkbox"/>	AT: TX Waters Certification Tra	N/A	8 Volunteers	26.25			
<input type="checkbox"/>	AT: with Chapter Meeting	N/A	31 Volunteers	61			
<input type="checkbox"/>	AT: with State Meet	N/A	4 Volunteers	51			
<input type="checkbox"/>	CB: Chapter Business	N/A	44 Volunteers		1783.5		
<input type="checkbox"/>	FR: ANWR research	N/A	4 Volunteers		55.5		
<input type="checkbox"/>	FR: Aquatic Life	N/A	4 Volunteers		11		
<input type="checkbox"/>	FR: Bird Populations	N/A	33 Volunteers		1900.75		
<input type="checkbox"/>	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

Include entries with no start or end date if the "Date Entered" falls within the specified date range.

Start Date: Jan 1 2018

End Date: Dec 31 2018

Applies to: Start Date

Summary mode

Summarize by: Opportunity Title

Filters

1 to 52 of 52 Rows

	Opportunity Title <input type="button" value="v"/>	Volunteer User ID	Volunteer Name	AT Hours	TMN Hours	TMN Initial Tra	Start Date	What categ
<input type="button" value="Find"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	= <input type="button" value="v"/>	= <input type="button" value="v"/>	= <input type="button" value="v"/>	: <input type="button" value="v"/>	<input type="text"/>
<input type="checkbox"/>	RM: Texas Zoo	N/A	1 Volunteer		6		N/A	Natur
<input type="checkbox"/>	RM: TMMSN	N/A	1 Volunteer		6		N/A	Natur
<input type="checkbox"/>	TG: ANWR	N/A	5 Volunteers		37.5		N/A	
<input type="checkbox"/>	TG: Aransas Pathways	N/A	1 Volunteer		1.5		N/A	
<input type="checkbox"/>	TG: City or County	N/A	2 Volunteers		12.75		N/A	
<input type="checkbox"/>	TG: Other Organizations	N/A	12 Volunteers		184		N/A	
<input type="checkbox"/>	TG: TMN VMS Implementation	N/A	1 Volunteer		2.5		N/A	
<input type="checkbox"/>	TG: WWF	N/A	1 Volunteer		18.5		N/A	
<input type="checkbox"/>	TR: ANWR direct education	N/A	2 Volunteers		22		N/A	Training
<input type="checkbox"/>	TR: Coletto Creek	N/A	1 Volunteer		16		N/A	Training
<input type="checkbox"/>	TR: Mad Island	N/A	2 Volunteers		13.75		N/A	Training
<input type="checkbox"/>	TR: Other Organizations	N/A	22 Volunteers		646.25		N/A	Training
<input type="checkbox"/>	TR: WWF direct education	N/A	2 Volunteers		36		N/A	Training
Summary info (for all 52 rows)								
	52 Opportunities	N/A	76 Volunteers	1122.6	9207.5	841	N/A	
Average info (for all 52 rows)								
	52 Opportunities:	N/A	1.462 Volunteers	21.588	177.067	16.173	N/A	

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

Log Book System

Relative Date Range: Period: All Time Summary mode:

Applies to: Start Date Summarize by: Opportunity Title

New Show All Refresh Grid Settings TMN Standard Reporting Filters

1 to 69 of 69 Rows

	Opportunity Title	Volunteer User ID	Volunteer Name	AT Hours	TMN Hours	TMN Initial Tra	Start Date	What category
<input type="checkbox"/>	TG: ARH operations	N/A	1 Volunteer		1.5		N/A	Te
<input type="checkbox"/>	TG: Balcones Canyonlands NM	N/A	1 Volunteer		8.25		N/A	Te
<input type="checkbox"/>	TG: City or County	N/A	8 Volunteers		58		N/A	Te
<input type="checkbox"/>	TG: Mad Island	N/A	1 Volunteer		175.95		N/A	Te
<input type="checkbox"/>	TG: Other Organizations	N/A	20 Volunteers		1093.65		N/A	Te
<input type="checkbox"/>	TG: TMN VMS Implementation	N/A	1 Volunteer		700.5		N/A	Te
<input type="checkbox"/>	TG: WWF	N/A	7 Volunteers		469.75		N/A	Te
<input type="checkbox"/>	TR: ANWR direct education	N/A	11 Volunteers		113.75		N/A	Training & I
<input type="checkbox"/>	TR: ARH direct education	N/A	2 Volunteers		23.75		N/A	Training & I
<input type="checkbox"/>	TR: Coletto Creek	N/A	6 Volunteers		65.25		N/A	Training & I
<input type="checkbox"/>	TR: Mad Island	N/A	4 Volunteers		55		N/A	Training & I
<input type="checkbox"/>	TR: Other Organizations	N/A	35 Volunteers		2679		N/A	Training & I
<input type="checkbox"/>	TR: TMN VMS Implementation	N/A	2 Volunteers		193.25		N/A	Training & I
<input type="checkbox"/>	TR: WWF direct education	N/A	7 Volunteers		161.25		N/A	Training & I
Summary info (for 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.

TPWD - Master Naturalist : Mid Coast

The screenshot shows the eCoordinator interface with the 'Opportunities' tab selected. A search filter 'anwr' is applied to the 'Opportunity Title' column. The table displays six opportunities, all with 84 hours filled and 0 surveys used. The 'Log Book' button is highlighted with a red arrow.

	Opportunity Title	Opportunity/Organization	Opportunity Type	What category does the projec	Filled V	Surveys Used	Sta
<input type="checkbox"/>	FR: ANWR research	Aransas National Wildlife Re	Service Project	Field Research (including survey	84	TMN Field Research Hours	0
<input type="checkbox"/>	NPA: ANWR	Aransas National Wildlife Re	Service Project	Nature/Public Access	84	TMN Report Hours	0
<input type="checkbox"/>	PO: ANWR	Aransas National Wildlife Re	Service Project	Public Outreach (Indirect)	84	TMN Report Hours	0
<input type="checkbox"/>	RM: ANWR	Aransas National Wildlife Re	Service Project	Natural Resource Management	84	TMN Report Hours	0
<input type="checkbox"/>	TG: ANWR	Aransas National Wildlife Re	Service Project	Technical Guidance	84	TMN Report Hours	0
<input type="checkbox"/>	TR: ANWR direct education	Aransas National Wildlife Re	Service Project	Training & Educating Others (Dir	84	TMN Report Hours	0

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.

Log Book System

Specific Date Range: Start Date: Jan 1 2018, End Date: Dec 31 2018, Applies to: Start Date, Summary mode, Summarize by: Opportunity Title, TMN Standard Reporting, Filters

1 to 5 of 5 Rows

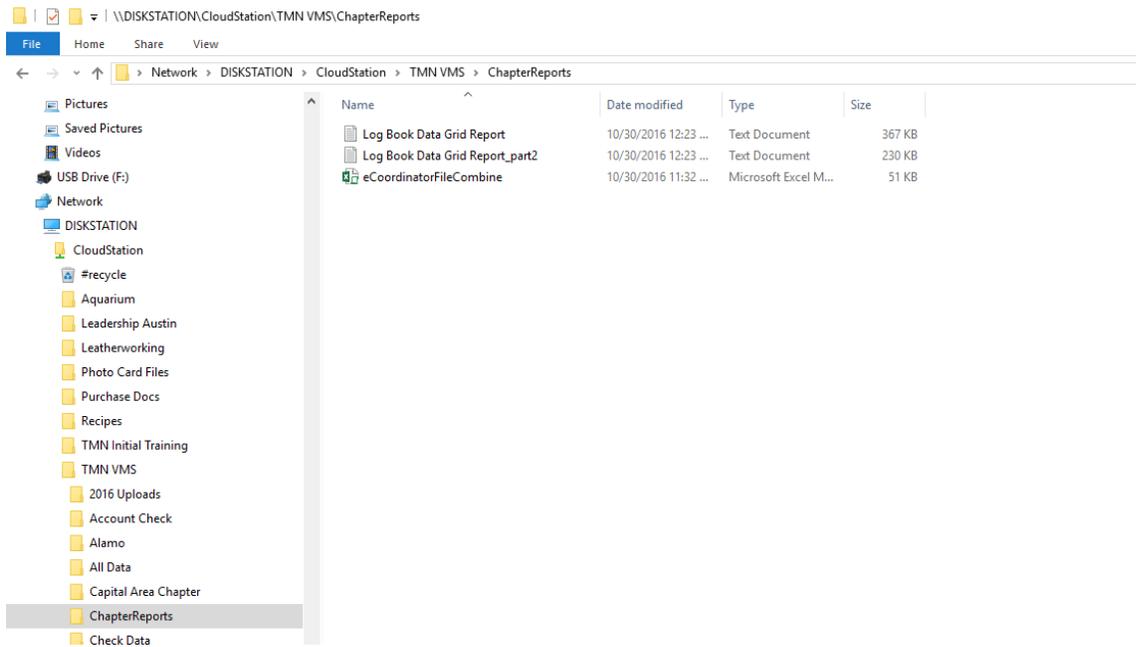
	Opportunity Title ▼1	Volunteer User ID	Volunteer Name	AT Hours	TMN Hours	TMN Initial Tra	Start Date	What category do
<input type="checkbox"/>	FR: ANWR research	N/A	4 Volunteers		55.5		N/A	Field Research
<input type="checkbox"/>	PO: ANWR	N/A	10 Volunteers		296.25		N/A	Public Ou
<input type="checkbox"/>	RM: ANWR	N/A	4 Volunteers		210.25		N/A	Natural Resc
<input type="checkbox"/>	TG: ANWR	N/A	5 Volunteers		37.5		N/A	Techni
<input type="checkbox"/>	TR: ANWR direct education	N/A	2 Volunteers		22		N/A	Training & Edu
Summary 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	

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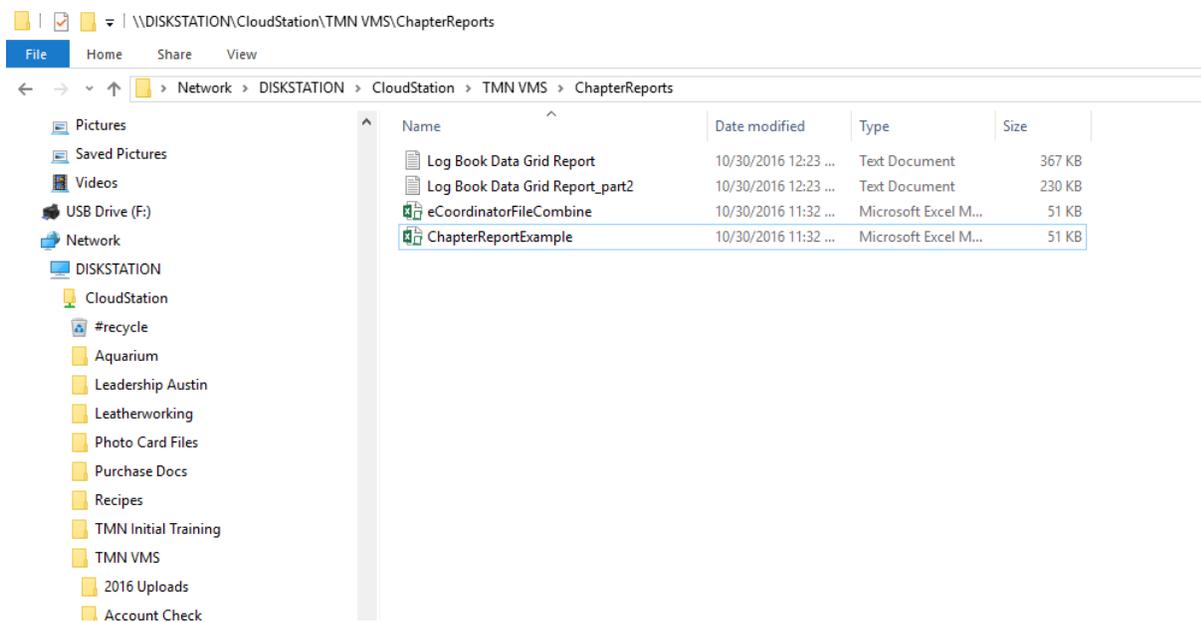
Using the eCoordinator Combine Multiple Export Files Tool

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.

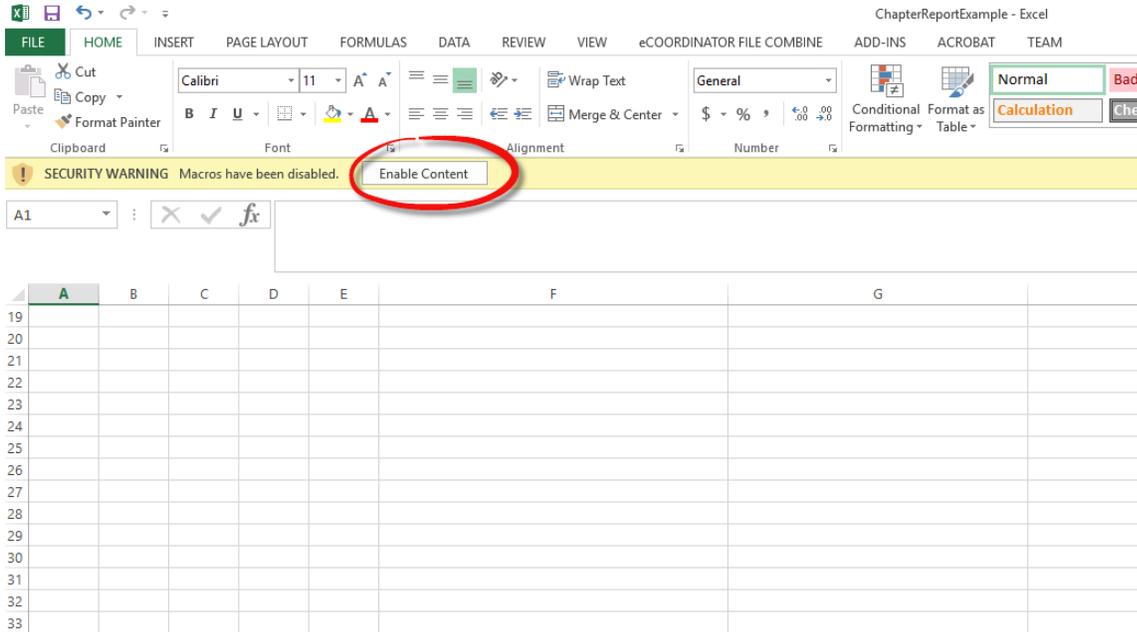
Create a directory to store the export files. Login to eCoordinator and create your export files (Text). Save them to the directory created in the step above. Copy the eCoordinatorFileCombine Excel file to the same directory.



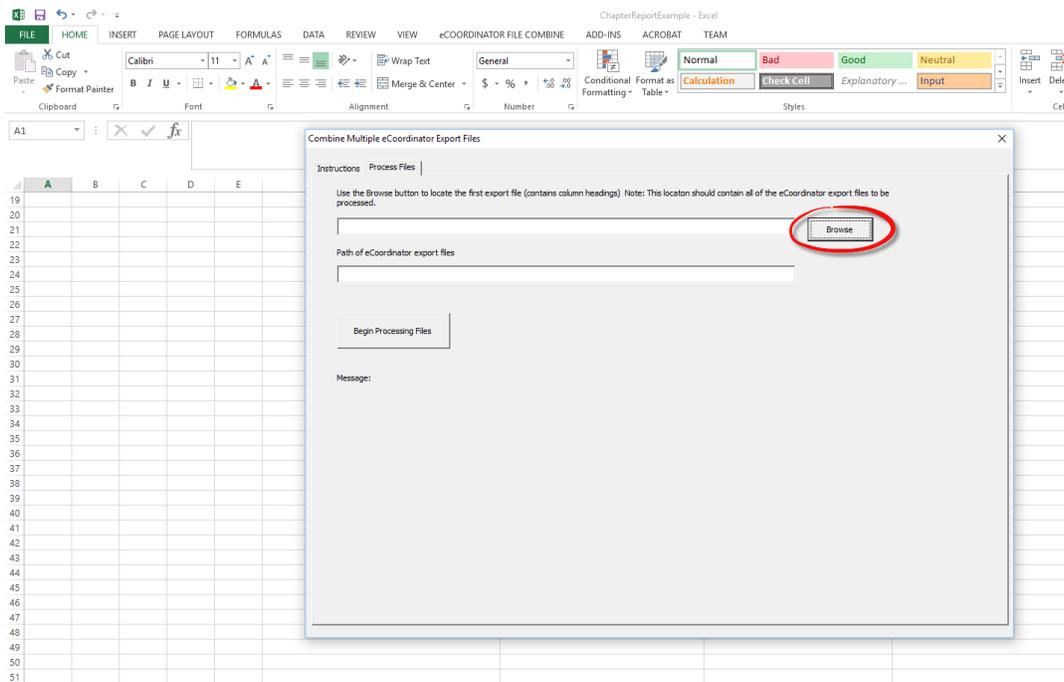
Make a copy of the eCoordinatorFileCombine Excel file and rename it. This will be your working copy of the file.



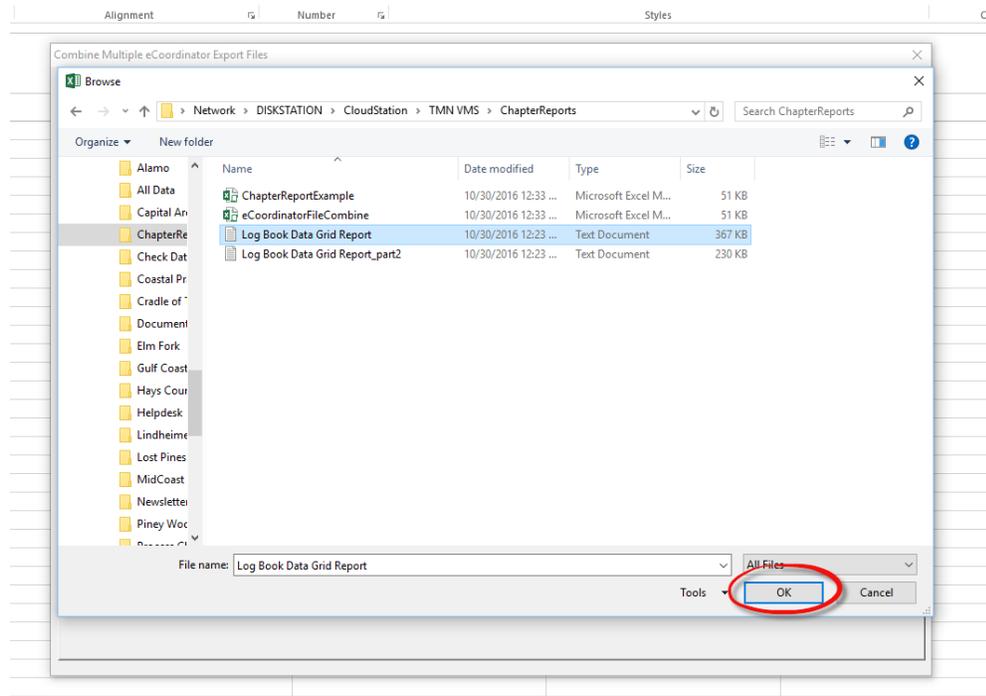
Open your working copy. This file contains code to process your export files. Because of this the Security warning will be shown the first time you open it. Check the Enable Content button.



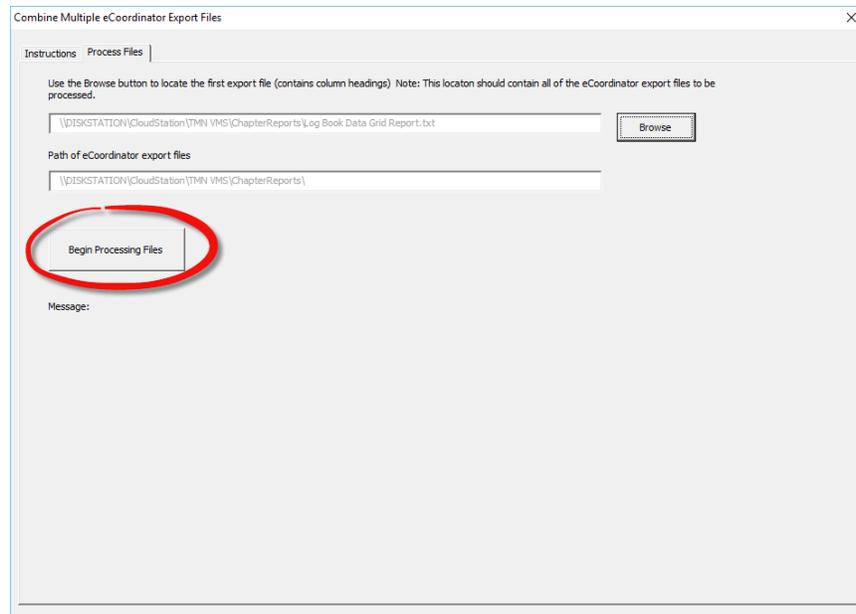
The Combine Multiple eCoordinator Export Files window will open. Click on the Browse button.



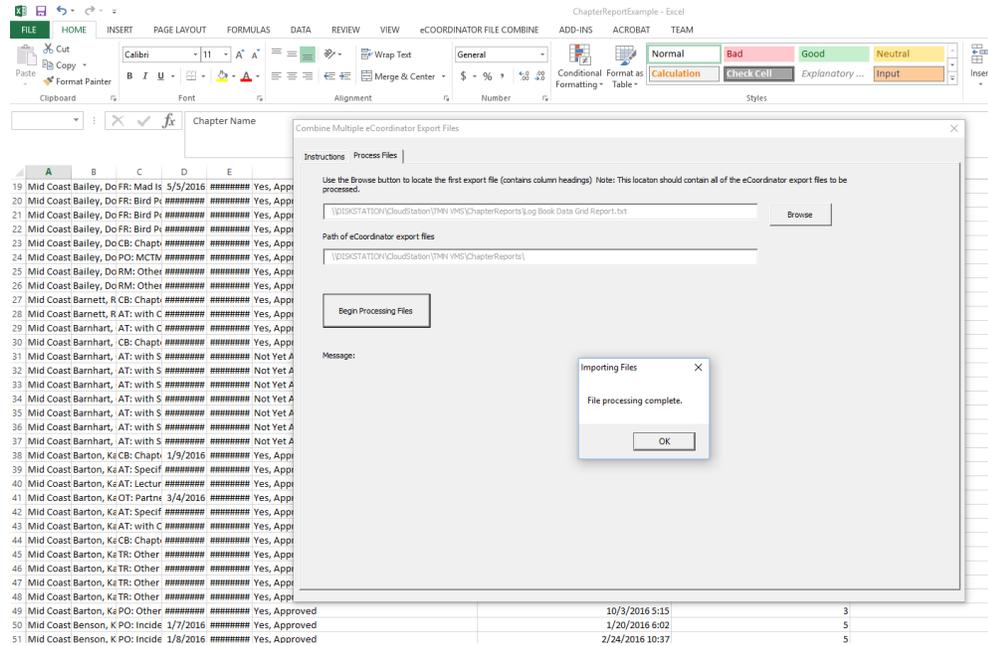
Locate the first export file and click on it. Click on the OK button. The first file is important because it contains the column headings used for all of the export files.



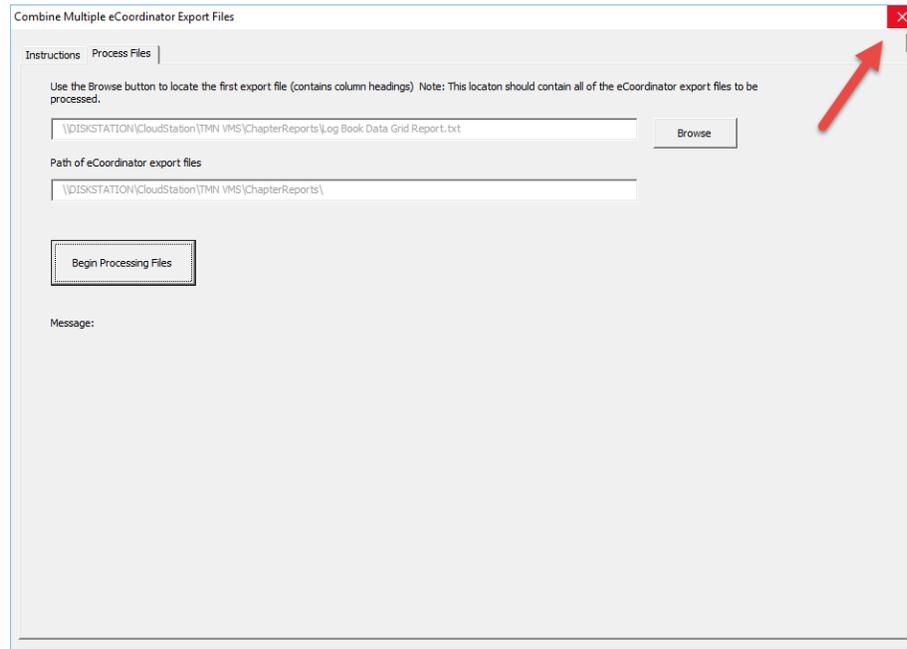
Verify your selection in the first export file and Path of eCoordinator export files text boxes. Note: The application expects that all of the export files to be processed are in the same directory as the first export file. Click on the Begin Processing Files button.



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.



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.



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.**

The screenshot shows the Microsoft Excel interface with the 'eCOORDINATOR FILE COMBINE' ribbon tab selected. The 'FileCombine' icon is circled in red. Below the ribbon, there is a 'Chapter Name' input field. The main data table is as follows:

Chapter Name	Volunteer Opportunity	Start Date	Date Entered	Approval Status	Approval Date	TMN Hours	AT Hc
1	Mid Coast Angerstei RM: Other			Yes, Approved	3/5/2016 10:56	5.25	
2	Mid Coast Angerstei RM: Other			Yes, Approved	3/5/2016 10:56	6.5	
3	Mid Coast Angerstei AT: with C			Yes, Approved	8/29/2016 8:43		
4	Mid Coast Angerstei CB: Chapti			Yes, Approved	8/29/2016 8:43	5.75	
5	Mid Coast Bailey, Do RM: Mad I			Yes, Approved	4/22/2016 5:59	6	
6	Mid Coast Bailey, Do FR: Mad Is			Yes, Approved	4/22/2016 5:59	7	
7	Mid Coast Bailey, Do FR: Mad Is	4/3/2016		Yes, Approved	4/22/2016 5:59	8	
8	Gulf Coast Bailey, Do AT: Single	4/9/2016		Yes, Approved	4/26/2016 18:04		
9	Gulf Coast Bailey, Do AT: Single			Yes, Approved	4/26/2016 18:04		
10	Mid Coast Bailey, Do RM: Mad I			Yes, Approved	4/22/2016 5:59	9	
11	Mid Coast Bailey, Do FR: Mad Is			Yes, Approved	4/22/2016 5:59	8	
12	Mid Coast Bailey, Do FR: Mad Is			Yes, Approved	5/7/2016 5:33	6	
13	Mid Coast Bailey, Do FR: Mad Is			Yes, Approved	5/7/2016 5:33	2.5	
14	Mid Coast Bailey, Do FR: Mad Is			Yes, Approved	5/7/2016 5:33	3.5	
15	Mid Coast Bailey, Do FR: Mad Is	5/1/2016		Yes, Approved	5/7/2016 5:33	2.5	
16	Mid Coast Bailey, Do FR: Bird Pt	5/9/2016		Yes, Approved	5/15/2016 10:34	2.5	
17	Mid Coast Bailey, Do FR: Mad Is	5/4/2016		Yes, Approved	5/15/2016 10:34	6	
18	Mid Coast Bailey, Do FR: Mad Is	5/5/2016		Yes, Approved	5/15/2016 10:34	9	
19	Mid Coast Bailey, Do FR: Bird Pt			Yes, Approved	7/1/2016 5:12	8	
20	Mid Coast Bailey, Do FR: Bird Pt			Yes, Approved	7/1/2016 5:12	7	
21	Mid Coast Bailey, Do FR: Bird Pt			Yes, Approved	7/1/2016 5:12	5.5	
22	Mid Coast Bailey, Do CB: Chapti			Yes, Approved	9/21/2016 9:28	7	
23	Mid Coast Bailey, Do PO: MCTV			Yes, Approved	9/21/2016 9:28	8	
24	Mid Coast Bailey, Do RM: Other			Yes, Approved	10/26/2016 8:32	7.5	
25	Mid Coast Bailey, Do RM: Other			Yes, Approved	10/26/2016 8:32	7.5	
26	Mid Coast Barnett, R CB: Chapti			Yes, Approved	3/1/2016 9:14	3	
27							

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