Getting Started with the Virginia Master Naturalist Volunteer Management System (VMN-VMS): Instructions for Administrators

How To Get Help with the VMN-VMS

Help for the administrative functions of the VMN-VMS is available at http://ucanr.org/sites/vmshelp/VMS_Administration_Documentation111/. This documentation is a work in progress, so not every function has documentation yet. There is help for regular volunteer users at http://ucanr.org/sites/vmshelp/about/. If you cannot find the answer to your questions in either of these locations, please contact the Statewide Coordinator at masternaturalist@vt.edu. Any questions or requests for help must go through the Statewide Coordinator. Do not contact the University of California staff directly.

General Instructions

1. **Log on** using the information you received in an email from the system. Help for logging in is available at http://ucanr.org/sites/vmshelp/about/Accessing_VMS/. Any administrative options you have are listed as links under "Administration" on the left-hand side of the screen. You might have full administrative access, or access to only one or more administrative functions.

2. **Manage the VMN-VMS.** Under "Administration", click "Manage VMS". There you can use the following functions if you have been granted access:

    a. Add or remove administrators or change which functions they can access.
    b. Change the news that is shown on every member's Home Page.
    c. Change the message that is sent to new users of the VMN-VMS system in your chapter.
    d. Change which functions of the system are enabled for your chapter volunteers. For example, if you do not want to use "Event Calendars" or "Newsletters", you can disable those functions.
    e. Change the Web links that appear on every member's Home Page. Some links are set at the statewide level and can only be removed by the Statewide Coordinator. These include links to each of the sponsoring agency, the statewide Web site, the statewide blog, and the statewide photo sharing site.
    f. Manage reappointments. This is a function that the UC Master Gardeners use, and we may or may not use it for our program. Essentially, it allows you to have terms for reappointing the volunteers each year. For UC, these terms include having a driver's license on file for volunteers who will be driving, having a signed volunteer agreement on file, and having a signed Code of Conduct on file. Be aware that this function exists, and provide feedback to the State Coordinator about whether you think it would be useful for us to use.

3. **Manage the Roster.** Under "Administration", click "Manage Roster". There you can add hours for any member, add a new member, create mailing labels, or create an Excel spreadsheet with the member information. Using the sub-links under "Manage Roster", you can also "Manage Interests" and "Email Members". For "Manage Interests", you can create a list of possible interests that are shown on each member's profile page. These interests can help you track which members are interested in which kinds of projects. The "Email Members" function lets you email all members or a subset of members based on their interests, their projects, or their membership status.

4. **Use the Calendar.** If you choose to use the calendar function, click the "Add Calendar Event" link under "Administration". There you can add calendar events such as meetings, advanced trainings, and volunteer events. Remember, volunteer events are specific instances of projects. For example, you might have an approved project of "Trail Building at State Parks", and then add a calendar event for trail building at a specific

date, time, and location. There is a lot of optional information you can fill in about each calendar event, and you can also upload a file with additional information if you choose.

5. **Manage Projects.** By clicking “Manage Projects” under “Administration”, you can view the number of volunteers and number of hours associated with each project. You can also inactivate projects that are completed and add new projects. You should enter all of your approved projects as soon as possible so that they are included in the drop-down list that volunteers see when they enter their hours. When you add a new project, give it a name and write a short (1-2 sentences or phrases) for the description. There is another box for “Project Information” where you can put lots of details, copied from the project proposal form.

6. **Add Newsletters/Documents.** Click “Newsletters/Documents” under “Administration”. This can be a place to store not only your chapter newsletters, but also chapter documents such as by-laws, operating handbooks, and board meeting minutes. You can create different “Groups” for which you control the subscribers and decide whether an automated email goes out when you post a new document in that group. For example, you can set the system so that when you post a new chapter newsletter, all your chapters are automatically notified by email.

7. **Review Hour Reports.** Click “Hour Reports” under “Administration.” There you will see a list of volunteers, their status, and their number of Advanced Training (also called C.E. or Continuing Education) hours and volunteer hours. You can click each member to see his/her more detailed volunteering history. You can also filter the report by date if you want, for example, to just see the volunteer hours for the current calendar year. Finally, you can create an Excel spreadsheet of the data so that you can manipulate it in other ways.

8. **Contact Reports.** Click “Contact Reports” under “Administration.” There you can view the breakdown of face-to-face contacts for your chapter in total or sorted by project or volunteer.

9. **Photo Albums.** Click “Photo Albums” under “Administration”. There you can create photo albums and add images to them. You can choose to use this feature or not, but we hope you will still use the SmugMug site created for statewide photo sharing. The advantages of the Smugmug site are that you can upload many photos at one time, that it has unlimited storage so you can store files at maximum resolution, and that it is more accessible for the State Coordinator in terms of finding photos for publicity purposes. For more information on the SmugMug site, please contact the State Coordinator.

So, what to do first?

There are a few things you should do before opening up the system for your chapter members to use.

1. Make sure your approved projects are entered into the system. (See #5 above.)
2. Decide what system functions you want to use and enable or disable them as needed. You can always change this later, if you decide to add a function in the future. (See #2-d above.)
3. Enter the list of interests you want to use. You can always add interests later, but it would be helpful to have some listed the first time users go to update their profiles. (See #3 above.)
4. Update the Home Page with text and links. Remember, you can change this text at any time, so consider changing it frequently so that members get used to looking for new information there. (See #2-b and #2-e above.)
5. Update the text that is set to new users of the system. (See #2-c above.)

When you have completed steps 1-5, then you can invite each member to the system and send them automated login information by clicking “Manage Roster” under “Administration” and then clicking “Send Login Procedure” for each person, one at a time.