Virginia Master Naturalist Program
Instructions for Saving Data from the Old VMN-VMS
March 2021

What Reports We Are Saving at the State Level
We have already saved some basic reports as a reference for state program office use. They can also serve as a backup for you, but you may wish to run your own versions of these so that you can save and access them however you prefer. We have described how to do that in the information below. At the state level, we are saving:
- Complete program roster, including individuals in Inactive status
- Projects report, showing project name, description, category, and associated CE and volunteer service hours for every *active* project
- Contacts report by project, showing each chapter's project and associated contacts broken down demographically
- Contacts report by chapter, showing each chapter's total contacts summed over all years, broken down demographically
- Summary hours report, showing total CE and volunteer service hours for every volunteer who has ever reported hours into the VMN-VMS
- Detailed hours report for each chapter, showing every hours entry made by every volunteer

What Reports You May Want to Save at the Chapter Level
It is entirely up to your chapter whether you want to run and save these reports for any purpose. We have provided some basic instructions for all of the possible reports. We do recommend that you save the "Detailed Hours Report" so that you can track the CE hours for any volunteers that were working on their first Certification and may therefore need to be able to count their CE hours from 2020 or prior.

Roster
- **Roster information for individuals in Certified VMN, VMN Member, Trainee, and Chapter Partner/Instructor/Friend statuses.** Essentially all of this information was imported into Better Impact, but you may choose to keep it for historical purposes.
    1. Go to Manage Roster.
    2. Click Create Excel, found at the top of the roster list. The Excel file will automatically download.
    3. Open and save the resulting file with an appropriate name.
- **Roster information for individuals in Inactive Status.** The profiles for individuals in Inactive status were *not* imported into Better Impact. You may wish to keep a record of these individuals for your chapter, in case they contact you in the future or for the purposes of tracking how many total volunteers have been in your chapter over the years. Note that we have saved these records at the state level already.
    1. Go to Manage Roster.

2. Scroll to the bottom of the roster page to where you see "Status Totals".
3. Click on "Inactive". This will bring up an on-screen roster of individuals with Inactive status.
4. Click Create Excel. The Excel file will automatically download.
5. Open and save the resulting file with an appropriate name. Or, you may wish to copy and paste these data into your other roster spreadsheet, so that you only need to save one file instead of two.

Projects

- **Basic project information.** You may wish to save a spreadsheet with the project names, descriptions, and other information.
  1. Go to Manage Projects.
  2. Click Create Excel. The Excel file will automatically download. It will contain columns for Project name, project description, project information, number of volunteers needed, number of volunteers signed up, volunteer hours contributed to that project, and the project category. It does not download the "Project Contact", so if it is important to you to save that information, you will need to fill it in manually.
  3. Open and save the resulting file with an appropriate name.
  4. If you also want to save this information for Projects that you had labeled as Inactive, go to Manage Projects, then click View Inactive Projects. Repeat steps 2 and 3.

Hour Reports

- **Detailed hours data for all projects and volunteers.** All service hours through 2020 were imported into Better Impact as one lump sum for each volunteer, all dated 12/31/2020 so that they would not get counted on 2021 reports. These hours were not broken down by project or date, and they did not include Continuing Education hours. Hours entered for service performed in 2021 were not included. Hours entered into the system after mid-February were not included, even if they were for dates in 2020. You may wish to save a record of all the detailed hours information for your chapter as described here so that you can have an archive of CE hours, hours broken down by project and date, etc. We do highly recommend saving this report for any chapter that has basic training graduates from 2019 or later who were in the midst of working on their first Certification when we transitioned. Those volunteers may need to pool CE hours across multiple years and therefore may need to manually add their CE hours from 2020 and prior to Better Impact. We will provide more instructions on how to handle that situation.
  1. Go to Hours Reports.
  2. Click Expanded Report at the top. Be patient, because it may take a couple of minutes for the system to bring up the report. When the report has finished running, you should see a list of every hours entry made by each volunteer.

3. Note that even if an individual is in Inactive status, if they had ever reported hours, those hours will be included in this report. If an individual never reported any hours, then that person will not be in the report.
4. Click Create Excel. The Excel file will automatically download, but it may take several minutes. The resulting file will show CE hours from service hours in two different columns.
5. Open and save the resulting file with an appropriate name.

- **Summary hours data for all projects and volunteers.** This report will be a much simpler version, with just total hours for each volunteer, not broken down by date or project. Unlike the expanded, detailed report, this report includes mileage, should that be something you wish to save.
    1. Go to Hours Reports.
    2. Make sure you are looking at the Summary Report. You should see a list of the volunteers with just one entry each for miles driven, CE, and volunteer service.
    3. Note that even if an individual is in Inactive status, if they had ever reported hours, those hours will be included in this report. If an individual never reported any hours, then that person will not be in the report.
    4. Click Create Excel. The Excel file will automatically download, but it may take several minutes.
    5. Open and save the resulting file with an appropriate name.

Contact Reports
- **Summary counts and demographic data for educational contacts.** This report will show the total contacts made by volunteers in your chapter, broken down by race and gender.
    1. Go to Contact Reports.
    2. Click Create Excel. Note that the Excel file will have a more detailed breakdown than what appears on the online screen. The Excel file will automatically download.
    3. Open and save the resulting file with an appropriate name.
    4. Note that this file combines across all projects and years.
- **Project-based contacts data.** This report will show the total contacts reported for each project.
    1. Go to Contact Reports.
    2. Click Show Projects.
    3. Click Create Excel. Note that the Excel file will have a more detailed breakdown than what appears on the online screen. The Excel file will automatically download.
    4. Open and save the resulting file with an appropriate name.
    5. Note that this file combines across all years. If you need data separated by year, you will need to run separate reports using different Start and End Dates that you can fill in at the top of the screen before clicking "Submit".

- **Volunteer-based contacts data.** This report will show the contacts data associated with each hours entry every volunteer made. We can't think of a reason why you would need to save this report, but here are directions in case you want to anyway.
    1. Go to Contact Reports.
    2. Click Show Hours. It may take a little while to bring up the data. When it is ready, you should see a list of volunteers' hours entries with contacts data.
    3. Click Create Excel. The Excel file will automatically download, but it may take several minutes.
    4. Open and save the resulting file with an appropriate name.

Photo Albums, Newsletters/Documents, and Calendar Records
- If your chapter had any of the following: 1) photos stored in the photo albums, 2) documents stored in the newsletter and/or document folders, or 3) old calendar records; your chapter will be able to retrieve these items from an online folder created specifically for your chapter.
- Each chapter will be able to have up to three members given access to their chapter's folder.
- *These chapter members will have until April 30, 2021 to retrieve any items their chapter wishes to keep*.
- **IMPORTANT**: Beginning May 1, 2021, access to the folders will be removed and the documents deleted. The VMN State Program will NOT retain a copy of any of the photos, documents, newsletters or calendar items that were retrieved from individual chapter files in the Old VMS.
- To start the process of granting access, Tiffany Brown will send an email on or around April 1, 2021 to each chapter President asking them who should receive access for their chapter.
- From there, Tiffany will communicate directly with those chapter members to provide access to their chapter's folder, a description of what is in the folder and instructions on how to download the content.

Individual Volunteer Level
Some volunteers may wish to have their own detailed record of their service, including the dates they volunteered, the projects they did, etc. Volunteers who graduated from basic training in 2019 or later and who are still working on the hours for their first Certification should definitely save this report, because they likely will need to manually add their Continuing Education hours from 2020 and prior to Better Impact. It is very simple for each volunteer to get this report and save it for themselves. *We will be sending out these instructions to every volunteer, but we are including it here for the convenience of chapter administrators as well.
- **Detailed Report of Your Own Volunteer Service**
    1. Go to https://virginiamn.volunteersystem.org. Enter your email address and password. Note that these should be the login credentials you used with the *old* VMN-VMS, not the new ones you received to use with Better Impact! If you

have forgotten your password for the old system, use the "New User? Password Problems?" button to have the system automatically send you a new temporary login link.
2. In the Your Information box, go to View Your Hours.
3. On screen, you should be able to see each date you volunteered, the activity you entered, the project you chose, and what you reported for CE hours, volunteer service hours, and miles driven. Note that the miles driven field does not get included as part of the Excel download.
5. Click Create Excel. The Excel file will automatically download, but it may take several minutes.
6. Open and save the resulting file however you wish.
7. If you do not have a way to open Excel files, or if keeping this historical record of your miles driven is important to you, you could follow steps 1-3 and then take one or more screen shots of your data. See "Take a screenshot on your Mac" or use the PrtScn button on your PC, or see other options for Windows machines.