Volunteer Management System (VMS) User's Guide

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UNIVERSITY OF CALIFORNIA
Agriculture and Natural Resources

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Volunteer Management System (VMS)³·¹ Users Guide

Section 1 About VMS

1.1 General Information about VMS

In this section you will learn about elements of the home page, where they are located, and how they can be used:

1.1.1 System Overview
1.1.2 Volunteers and VMS
1.1.3 Coordinators / Administrators and VMS

1.1.1 System Overview

The Volunteer Management System (VMS) is an online system developed by University of California Agriculture and Natural Resources (UCANR) Communication Services and Information Technology (CSIT) team to assist volunteers in keeping accurate records of their volunteer activities. VMS allows volunteers to create a profile, log volunteer and continuing education hours, and report contacts. The program also provides a place for communication and collaboration within each county program with options to create calendar events, share photos and documents.

The system was designed to be:

- User-friendly for volunteers
- Modifiable by administrators, to provide a unique site to counties
- Vigorous enough to retain record tracking functions required by UC and the Statewide Master Gardener / Food Preserver Program

1.1.2 Volunteers and VMS

Volunteers use VMS to:

- View their county's calendar
- Volunteer for events
- Record volunteer and continuing education hours
- Report number of contacts made with the public
- View the roster of volunteers
- Complete Reappointment
- View home page news and statewide news
- View documents, presentations, newsletters
- View / upload / download photos
- Find useful links

1.1.3 Coordinators/Administrators and VMS

As a coordinator / administrator, VMS is the most helpful tool in your possession. You'll use it daily to accomplish the following tasks (and more!):

- View your roster of volunteers, including contact information and interests
- Manage roster by adding / removing / transferring / changing status of volunteers
- Communicate with volunteers through VMS messages and home page news
- Create and manage volunteer projects
- Create and manage volunteer calendar events
- View volunteer hour / continuing education and contact reports
- Upload documents, presentations, photos to share with group
- Manage and deploy an internal newsletter
- Manage annual reappointment process (occurs June-Aug. every year)

1.2 Accessing VMS

In this section you will learn about:
1.2.1 The UC ANR Portal
1.2.2 Accessing VMS for the first time
1.2.3. Returning to VMS
1.2.4 Accessing VMS when you've lost or forgotten your password

1.2.1 The UC ANR Portal

The Portal allows you to come to one place to access the University of California Agriculture and Natural Resources (UCANR) websites, utilities, and systems in which you are involved. Collaborative Tools, Surveys, Repository, ANR directory, IT help and VMS. The portal provides a simple yet secure way to get into important systems while only having to remember one username and password. All coordinators and UC Master Gardener / Food Preserver Volunteers have portal accounts.

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ANR Portal

To log into the portal for the first time:

- Go to: https://ucanr.edu/portal
- Click on the 'New user? Forgot your password? Click here' button.
- Enter your e-mail address and click the button.
- If your e-mail address is in our system, an e-mail will be sent which contains a link to access the portal.
- Click on this link to enter the system.
- The link will only work one time. If you forget your password again, you will need to re-submit the access request.
- Once you are in the system, you can change your password.
-

If you are an ANR employee you must be in the ANR Directory to access the portal. First, check to see if you are in the directory, it is possible that your e-mail may not match up with the directory listing.

If you are in the directory, you will be able to have account access information sent to you. If you are not in the directory, but feel that you should be. Contact your office manager or website liaison. Ask them to add you to the ANR directory. When you are added, you will receive portal access information.

1.2.2 Accessing VMS for the first time
Volunteer

1. Check your e-mail for a message with the subject line "Accessing Master Gardener system" or "Accessing Master Food Preserver system." This e-mail will have been sent to the e-mail address given to coordinator. Click on the link in the text of the email (this link can only be used once).

2. Enter a new password.

   - The password must be at least 12 characters in length with no space, not your account name or login ID and contain uppercase, lowercase, digits and symbols. The password is "case sensitive," i.e., upper and lower case letters are recognized by VMS.
   - Write down the password and keep it secure. No one including your coordinator or the statewide office will know it but you.

3. Retype the password exactly as you entered it in Step 2.

4. Select **Save Password**.

5. Your VMS home page is displayed, this unique to your, your hours and your county.

Coordinator

1. New coordinators will need to be added to the VMS system by someone with administrator privileges in their county (likely a Farm Advisor, County Director, or other office staff) or contact the statewide office to gain access.   Use your ucanr.edu email address when signing up for your staff account, which is especially important if you were formerly a volunteer.

2. Check with your County Director or local office administrator about getting an ucanr.edu staff email address.

1.2.3 Returning to VMS
1. Access your Internet browser. Enter the web address for VMS vms.ucanr.edu/mg (Master Gardener), vms.ucanr.edu/mfp (Master Food Preserver) access VMS through the portal ucanr.edu/portal
2. Enter e-mail address and password.

1.2.4 Accessing VMS when you've lost or forgotten your password
If you see a red error message when trying to access VMS, either the email address or password were entered incorrectly.

Access Options

The Username or Password is not correct. Please try again.

Troubleshooting:
- Try re-entering the e-mail address and password being especially careful about using the correct upper and lower case letters in your password.
- Make sure your **Caps Lock** is off.
- Clear the cookies on the computer http://www.wikihow.com/Clear-Your-Browser's-Cookies.
- Still not working? Select **Forgot Password?** And follow the prompts to reset your password.

If resetting your password fails contact your coordinator or designated VMS help person in your county to reset your password if you experiencing issues and need assistance with your password.

Section 2 Volunteers and VMS

Section 2.1 Volunteer Basics

In this section you will learn how to:
2.1.1 The Banner
2.1.2 News
2.1.3 Left Navigation Bar
2.1.4 Right Information Panel
2.1.5 Edit profile
2.1.6 Add / Edit Interests
2.1.7 Check Achievement / Status or Resign
2.1.8 Manage Email Preferences
2.1.9 Electronically Resign
2.1.10 View Roster
2.1.11 Log out

This section is written for viewing VMS on a desktop computer.

2.1.1 The Banner

Use the Banner located at the top of the page to:
- Search VMS
- View pending tasks and alerts
- Access VMS User's Guide
- View / edit your VMS profile
- Navigate to the UCANR portal
- Switch Programs
- Report a VMS bug
- Log out of VMS
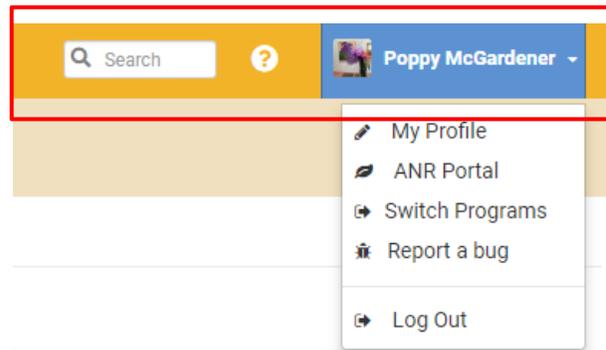
2.1.2 News

The center column of the VMS homepage is the **News** section and it includes Statewide News (generated by the statewide office) and county news. This section can be customized by VMS administrators to communicate with volunteers in their respective counties or designated to show a UCANR Blog feed.
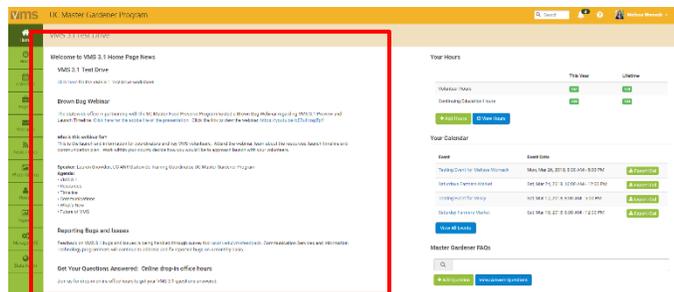
2.1.3 Left Navigation Bar

The majority of features in VMS can be accessed through clicking the navigation bar running down the left side of the home screen. The left navigation bar has the following features:

- **Home tab**- returns user to the Home Screen
- **Hours tab**- enter and view volunteer hours, continuing education hours and report contacts
- **Calendars tab**- view, search, and volunteer for events through calendars
- **Projects tab**- view / search and volunteer for projects
- **Messages tab**- view incoming messages sent through VMS
- **News / Docs tab**- view, save, print and subscribe to newsletters; view, save, print documents and presentations
- **Photo Albums tab**- upload / view/ download photos
- **Roster tab**- view list of county volunteers, including contact information
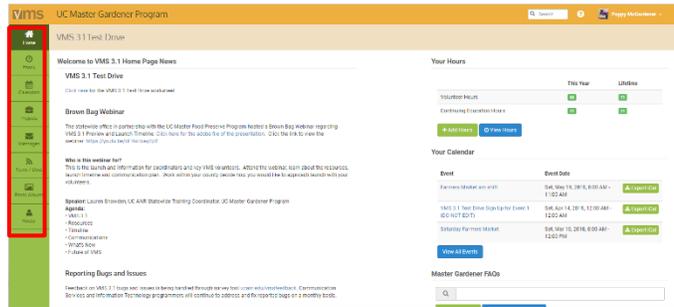
2.1.4 Right Information Panel

Some commonly used features are quickly accessed by looking at / and or clicking the information panel on the right hand side on the home screen. The right information panel has the following features:

- **Your Hours** - displays volunteer and continuing education hours associated with your logon, for the current volunteer year and the lifetime / total for all time.
- **Your Calendar- y**ou may not see this feature if you aren't currently volunteered for an upcoming event. This feature is displayed when volunteers sign up for an event on the calendar. The event is automatically added to the "Your Calendar" on the right information panel in VMS.
- **Master Gardener FAQs-** an online system to assist Master Gardener volunteers find answers to hotline / help desk questions. The FAQs system (Frequently Asked Questions) enable volunteers to provide feedback to other FAQs and the ability to post their own questions with descriptions and photographs. UCCE Master Gardeners can access the FAQs system through the (Volunteer management System) VMS, or through their UC portal. *FAQs PowerPoint Presentation* and *FAQs Tutorial Videos* are available at: http://ucanr.edu/sites/vmshelp/FAQ_System_on_the_VMS/
- **Links** - displays a list of standard links as well as a list of links that **Full Access** administrators can customize.
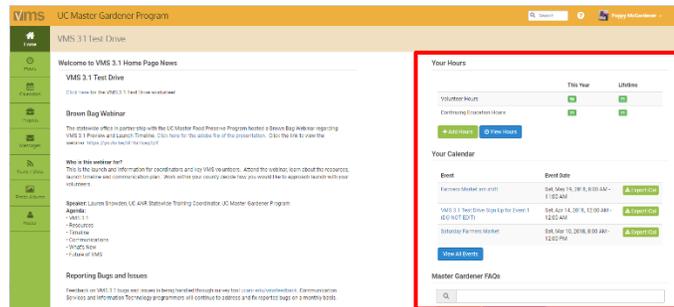
2.1.5 Edit Your Profile

- Log into VMS
- Select your **Name** from the banner
  - o   select ✎**My Profile** from the drop down menu
  - o   select the blue ✎**Edit** button
- Edit / update the **Personal** tab
  - o   **Change email address and password**
  - o   **Mailing address**
  - o   **Phone numbers**
  - o   **Upload a profile photo**
  - o   **Designate emergency contacts**
- Select the blue ✓**Save Profile** button to save changes
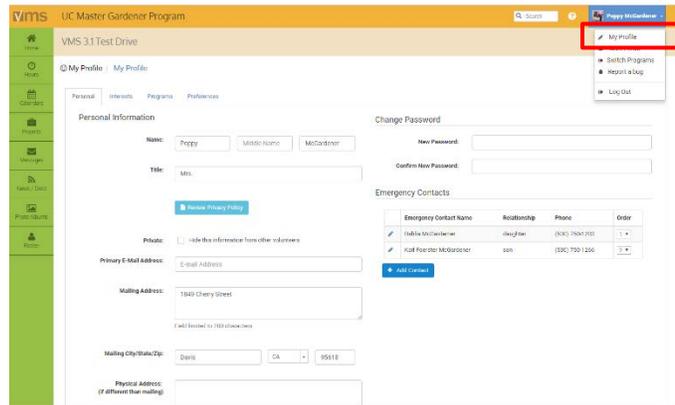
Note: Contact information can be made private by selecting **Hide this information from other volunteers**. Administrative VMS users with **Full Access** to the roster will be able to view all profile information.

2.1.6 Add / Edit Interests

- Log into VMS
- Select your **Name** from the banner
  - o   select ✎ **My Profile** from the drop down menu
- Select **Interests** tab
  - o   use the boxes to check off interest areas
  - o   type interests not listed in the **Other Interests** text box
  - o   select the blue ✓**Save** button to save changes
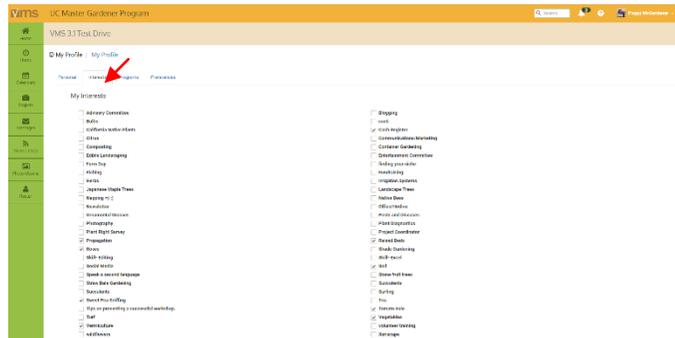
2.1.7 Check Achievement and Status

To check your achievement level and current status:

- Log into VMS
- Select your **Name** from the banner
  - o   select ✎**My Profile** from the drop down menu
- Select **Programs** tab
  - o   the list has the following information:
    - ▪   **Program Name**
    - ▪   **Date: Start – End**
    - ▪   **Achievement Level:**
      - •   **First Year Master Gardener / First Year Master Food Preserver**
      - •   **Gold Badge**
      - •   **Internal Administration**
      - •   **Master Gardener / Master Food Preserver**
      - •   **Platinum Badge**
      - •   **Trainee**

- UC Staff
    - **Status**
        - Active
        - Limited Active
        - Inactive Resigned
        - Deleted
        - Honorary
    - red **Resign** button

2.1.8 Electronically Resign

You may electronically resign from the UC Master Gardener / UC Master Food Preserver Program at any time. Please note you cannot undo this action electronically. If you have done this in error please contact your coordinator for assistance. To resign:

- Log into VMS
- Select your **Name** from the banner and
    - select ✎ **My Profile** from the drop down menu
- Select **Programs** tab
    - the list has the following information:
        - **Program Name**
        - **Date: Start – End**
        - **Achievement Level:**
            - First Year Master Gardener / First Year Master Food Preserver
            - Gold Badge
            - Internal Administration
            - Master Gardener / Master Food Preserver
            - Platinum Badge
            - Trainee
            - UC Staff
        - **Status**
            - Active
            - Limited Active
            - Inactive Resigned
            - Deleted
            - Honorary
        - Red **Resign** button
            - fill in the **Reason for Resignation** box (i.e. moving, lost interest, health reasons)
    - select the blue **Save** button, or;
    - select the white ← **Cancel** button, the white **Close** button or the **x** in the top corner of the pop up window to exit the window without saving

2.1.9 Manage Email Preferences

To manage your email preferences:

- Log into VMS
- Select your **Name** from the banner
  o select 🖉 **My Profile** from the drop down menu
- Select **Preferences** tab
- Toggle the green **Yes / No** in **Discussions**
  o receive email notification when discussion items are posted to Collaborative Tools
- Toggle the green **Yes / No** in **My Program(s)**
  o receive emails notification from VMS through the **Messages** function
- Select the blue ✓**Save** button to save preferences
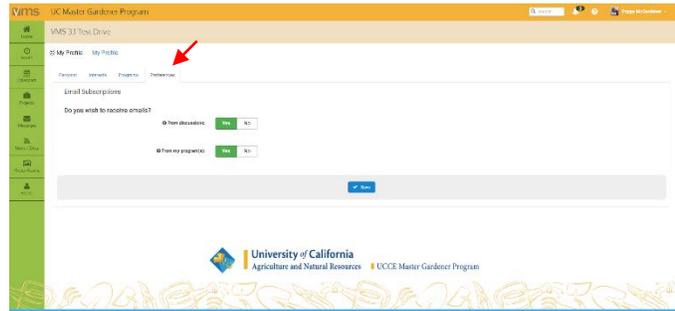
2.1.10 View Roster

Use the roster to find fellow volunteers email address and preferred phone number. To view the roster:

- Log into VMS
- Select **Roster** from the left navigation bar
  o the list has the following information:
    - **#**
    - **Name**
    - **City**
    - **Email**
    - **Preferred phone number**
    - **Start Date**
    - **Achievement**
    - can be sorted by name, city, email, preferred phone number, start date and achievement
- Select the volunteers **Name** to view individual profile
  o click **Email** address to send an email to that individual, or;
  o right click the email address and select **Copy email address / Copy shortcut**
    - select **Roster** tab from the navigation bar to return to the full list view
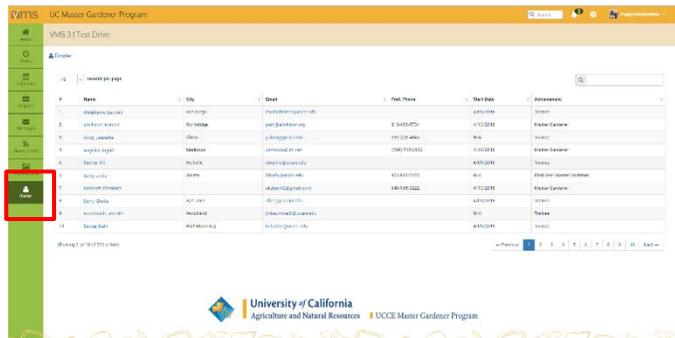
2.1.11 Log Out

Be sure to log out of VMS so as not to expose any of your own or other volunteers personal information: To log out of VMS:

- Be already logged into VMS
- Select your **Name** in the upper right hand side
  o select **Log Out** from the drop down menu
    - select the lighter blue **Logout of ANR Portal** button to completely log out, or;
    - select the dark blue **Go To ANR Portal** button to return to the portal and log back into VMS
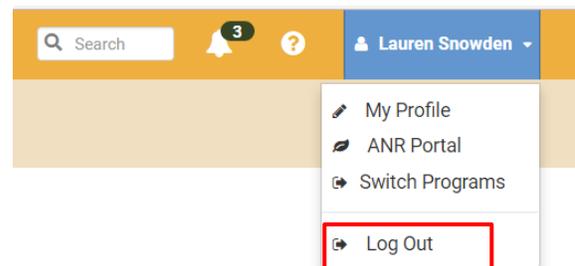
Section 2.2 Adding Hours and Reporting Contacts

In this section you will learn how to:

2.2.1 Add Volunteer and /or Continuing Education Hours with or without Contacts

2.2.2 Edit Volunteer and /or Continuing Education Hours with or without Contacts

2.2.3 Delete Volunteer and /or Continuing Education Hours with or without Contacts

2.2.4 Report Contacts

2.2.5 View Volunteer and Continuing Education Hours

2.2.6 Search Volunteer and Continuing Education Hours

2.2.7 Pending Tasks / Alerts

2.2.1 Add Volunteer and/or Continuing Education Hours with or without Contacts

To receive credit for volunteer and continuing education hours they must be entered into VMS. VMS offers multiple ways to add volunteer and continuing education hours. To enter hours:

Option 1:

- Log into VMS
- Find **Your Hours** on the right information panel
  - o select the green **+Add Hours** button

Option 2:

- Log into VMS
- Select **Hours** from the left navigation bar
  - o select the green **+Add New Hours** button
  - o select the project the hours will be applied towards by using the dropdown (*See Section 2.4.1 Project Categories* for project category definitions)
- **Is this a Calendared Event?**

- o A calendared event is defined as an event that is listed on the VMS calendar. If you do not see the calendared event on the dropdown list, select **See All Events?** and select the event from there.
- o toggle the white **Yes / No** button
  - ▪ if **Yes**- select the event from the drop down
  - ▪ if **No**- enter the **Event Name / Description** and **Event Date**
- Enter applicable information:
  - o **Volunteer Hours**
  - o **Continuing Education Hours**
  - o **Miles Driven,** to and from the event (miles driven is optional and for your personal use)
- **Do you have any Contact information to report?**
  - o toggle the green **Yes / No** button
    - ▪ if **Yes**- select yes and complete the form
    - ▪ if **No**- select no
- Enter any **Comments /** Note**s**
- Select the blue ✓**Save Hours** button

Note: VMS rounds up or down to the nearest quarter hour (i.e. 1.8 hours = 1.75 hours). Do **not** double count contact reporting, (i.e. if two volunteers teach a workshop to twenty people only twenty contacts should be reported for that event by one person, not both).

2.2.2 Edit Volunteer and/or Continuing Education Hours with or without Contacts

VMS offers multiple ways to edit entered volunteer and continuing education hours. To edit hours or contacts:

Option 1:
- Log into VMS
- Find **Your Hours** on the right information panel
  - o select the blue 🕐**View Hours**

Option 2:
- Log into VMS
- Select **Hours** from the left navigation bar

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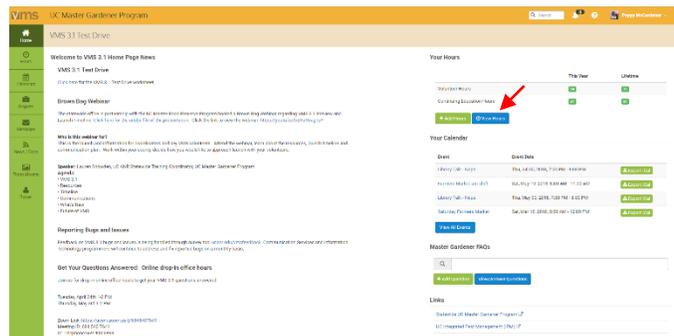
- In the **Action** column, select the green **View / Edit Hours** button for the event you want to edit
  - o if needed use the search bar provided to find the event
- Edit and / or enter fields as needed
- Select the blue ✓**Save Hours** button

2.2.3 Delete Volunteer and/or Continuing Education Hours with or without Contacts

VMS offers multiple ways to delete entered volunteer and continuing education hours. To delete hours or contacts:

Option 1:
- Log into VMS
- Find **Your Hours** on the right information panel
  - o   select the blue 🕐 **View Hours**

Option 2:
- Log into VMS
- Select **Hours** from the left navigation bar

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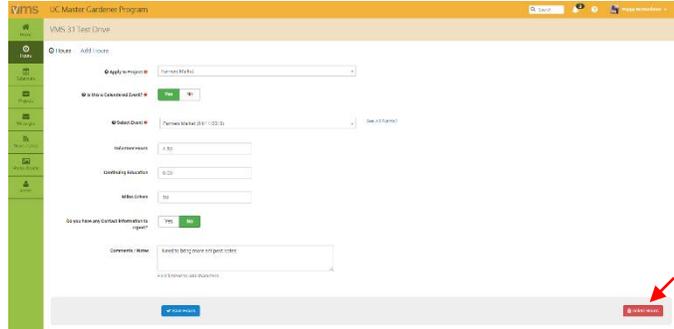
- In the Action column, Select the green View/Edit Hours button for the event hours you want to delete
  - o   if needed use the search bar provided to find the event
- Select the red 🗑**Delete Hours** button
  - o   select **OK** to confirm you want delete or;
  - o   select **Cancel** to go back without deleting

Note: Deleting hours is not reversible.

2.2.4. Report Contacts

As a federal and state funded program, it is the responsibility of the UC Master Gardener and UC Master Food Preserver Programs to ensure that it reaches all members of the community with scientific-based home horticulture or home food preservation information. In order to remain accountable to this mission and to celebrate our successes in this area, it is imperative that counties record and report the demographic make-up of clientele whenever possible.

Contact reporting data must be entered into the VMS system for accurate reporting and potential funding opportunities. Follow _Section 2.2.1 Add Volunteer and/or Continuing Education Hours with or without Contacts_ to report contact information.

Note: Do not double count contacts, (i.e. if two volunteers teach a workshop to twenty people only twenty contacts should be reported for that event by one person, not both).

2.2.5 View Volunteer and Continuing Education Hours

VMS offers multiple ways to your view your recorded volunteer and continuing education hours. To view your recorded hours:

Option 1:

- Log into VMS
- Find **Your Hours** on the right information panel
  - o **Volunteer** and **Continuing Education Hours** are displayed
    - ▪ **This year** (current fiscal year)
    - ▪ **Lifetime**
- For a detailed view select the blue **View Hours** button
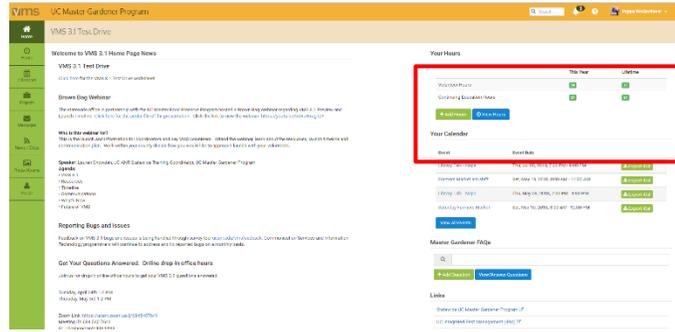
Option 2:

- Log into VMS
- Select **Hours** from the left navigation bar

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- **All Hours tab-** displays list of all entered hours that can be sorted by the column headers
  - o if needed use the search bar provided to find a specific entry
  - o to create an Excel document listing all your hours select the white **Create Excel** button
    - ▪ the document has the following information:
      - **Date**
      - **Event Name**
      - **Continuing Education Hours**
      - **Volunteer Hours**
      - **Mileage**
      - **Project Name**
- **Project Hours tab-** displays list of what hours have been entered and designated to a particular project type that can be sorted by the column headers
  - o if needed use the search bar provided to find a specific entry
  - o to create an Excel document listing all your hours select the white **Create Excel** button
    - ▪ **Project Name**
    - ▪ **Entries**
    - ▪ **Begin Date**
    - ▪ **End Date**
    - ▪ **Continuing Education Hours**
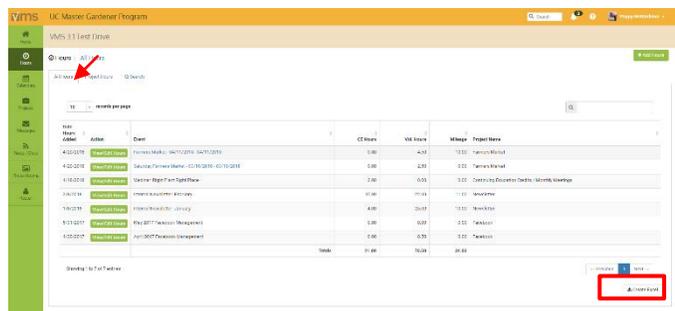
- ▪ **Volunteer Hours**
- ▪ **Mileage**

2.2.6 Search Volunteer and Continuing Education Hours
To search for volunteer or continuing education hours you recorded in VMS:
- Log into VMS
- Select **Hours** from the left navigation bar
- Select **Search** tab
- **Search tab-** allows for a detailed search of entered hours, search options include:
  - o **Event**
  - o **Start Date**
  - o **Keyword**
  - o **End Date**
  - o **Project**
- Enter search criteria and select the blue 🔍**Search** button
  - o the report will display below the search criteria
    - ▪ for a basic search of the results use the search bar provided
    - ▪ to clear the search fields select the white **Clear** button
    - ▪ to create an Excel document listing the search results select the white **Create Excel** button
      - **Date**
      - **Action**
      - **Event Name**
      - **Continuing Education Hours**
      - **Volunteer Hours**
      - **Mileage**
      - **Project Name**

2.2.7 Pending Tasks / Alerts
VMS has a pending tasks / alerts function that prompts users to enter hours for events they have volunteered for and complete reappointment. The alerts will clear once hours are entered or the task is completed. There are pending tasks / alerts when a number appears next to the bell icon in the header bar of VMS.

To utilize this feature:
- Log into VMS
- Select the bell icon in the header bar
  - o click the red **Please Enter Hours!** or **Please Complete!** next to the task
  - o enter hours, follow *Section 2.2.1 Add Volunteer and /or Continuing Education Hours with or without Contacts* or;
  - o complete the task

To view all pending tasks / alerts:
- Log into VMS
- Select the bell icon in the header bar
  - o click **View all tasks** located at the bottom of the list

- o   if needed use the search bar provided to find a specific entry
- o   the list has the following information:
    - ▪   **#**
    - ▪   **Icon**
    - ▪   **Type**
    - ▪   **Title**
    - ▪   **Description**
    - ▪   can be sorted by icon, type, title description
- •   Select **Icon, Type , Title** of the task to complete the action

Section 2.3 Volunteering for Events

In this section you will learn how to:

2.3.1 View Calendars in VMS

2.3.2 View all Events

2.3.3 Volunteer for an Event

2.3.4 Volunteer for a Shift at an Event

2.3.5 Unvolunteer for an Event or Shift

2.3.6 View and/or Volunteer to Bring a Resource

2.3.7 Unvolunteer to Bring a Resource

2.3.8 View Your Calendar

2.3.9 Export to iCalendar
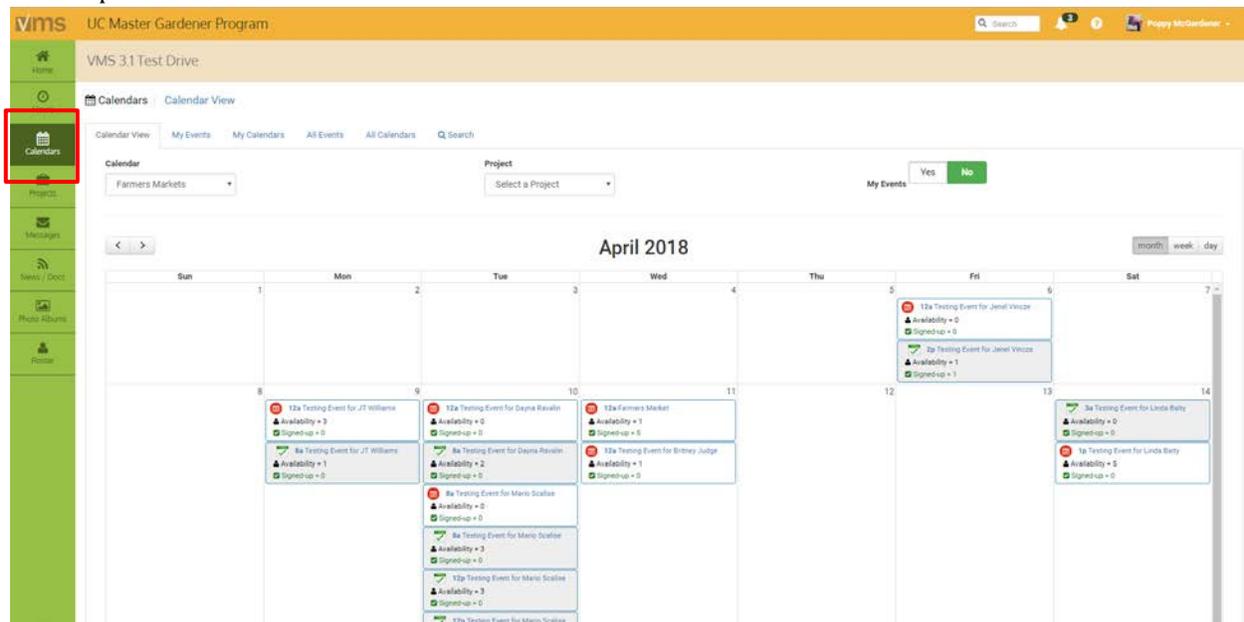
2.3.1 View Calendars in VMS

VMS offers multiple ways to view calendars and has extensive search capabilities. To view the calendar, select **Calendars** from the left navigation bar. The different views of the calendar are:

- •   **Calendar View**- displays monthly view of all calendared events
    - o   can be sorted by calendar, project and viewed by month, week or day
    - o   can toggle the green **Yes / No My Events** button
- •   **My Events**- displays list view of all past and future events that you volunteered for
    - o   search bar included
- •   **My Calendar**- shows list of calendars for events that you volunteered for

- o   search bar included
- **All Events**- displays list view of all past and future events of all calendars
  - o   search bar included
- **All Calendars**- displays list view of all of calendars
  - o   search bar included
- **Search**- allows for a detailed search by event, keyword, project, start date and/or end date

2.3.2 View all Events
VMS offers multiple ways to view all events. To view all events:

Option 1:
- Log into VMS
- Find **Your Calendar** on the right information panel
  - o   select the blue **View All Events** button
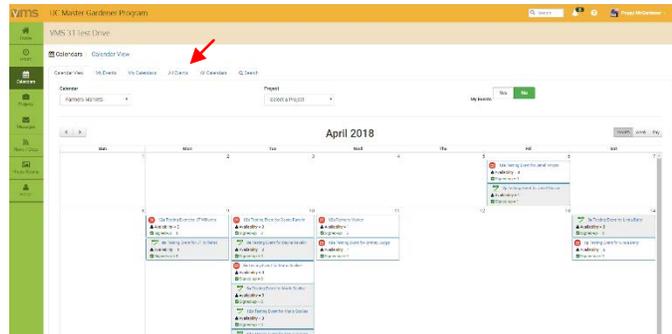
Option 2:
- Log into VMS
- Select **Calendar** from the left navigation bar

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- **Calendar View tab**- displays monthly view of all calendared events
  - o   if needed can be sorted by calendar, project and viewed by month, week or day
- **All Events tab**- displays list view of all past and future events of all calendars
  - o   if needed use the search bar provided to find specific entry
  - o   the list can be sorted by the column headers using the sort arrows located to the right of the column header

2.3.3 Volunteer for an Event
VMS offers multiple ways to volunteer for events, to volunteer for an event:

Option 1:
- Log into VMS
- Find **Your Calendar** on the right information panel
  - o   select the blue **View All Events** button

Option 2:
- Log into VMS
- Select **Calendar** from the left navigation bar

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- Find the event by using the tabs
  - o   **Calendar View**- displays monthly view of all calendared events
    - ▪   can be sorted by calendar, project and viewed by month, week or day
    - ▪   can toggle the green **Yes / No My Events** button
  - o   **All Events**- displays list view of all past and future events of all calendars
    - ▪   search bar included
  - o   **All Calendars**- display list view of all of calendars
    - ▪   search bar included

- o **Search**- allows for a detailed search by event, keyword, project, start date and or end date
- Click the **Event Name** to open it
  - o select the blue ✓**Volunteer for Event** button to sign up
    - VMS generates a confirmation email that includes an iCalendar
    - immediately generate an iCalendar by clicking the green **Export iCalendar** button in the upper right hand corner
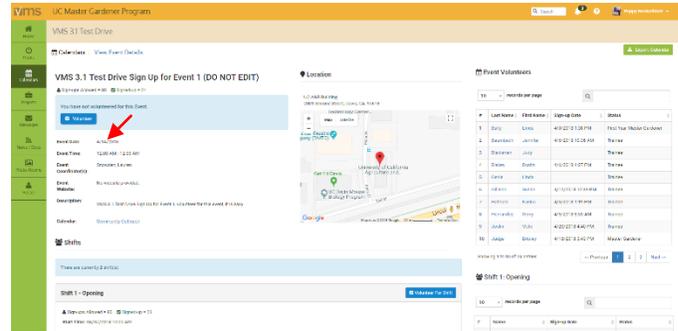
2.3.4 Volunteer for a Shift at an Event

VMS offers multiple ways to volunteer for an event shift, to volunteer for an event shift:

Option 1:
- Log into VMS
- Find **Your Calendar** on the right information panel
  - o select the blue **View All Events** button

Option 2:
- Log into VMS
- Select **Calendar** from the left navigation bar
_____

- Find the event by using the tabs
  - o **Calendar View**- displays monthly view of all calendared events
    - can be sorted by calendar, project and viewed by month, week or day
    - can toggle the green **Yes / No My Events** button
  - o **My Events**- displays list view of all past and future events that you volunteered for
    - search bar included
  - o **My Calendar**- shows list of calendars for events that you volunteered for
    - search bar included
  - o **All Events**- displays list view of all past and future events of all calendars
    - search bar included
  - o **All Calendars**- display list view of all of calendars
    - search bar included
  - o **Search**- allows for a detailed search by event, keyword, project, start date and or end date
- Click the **Event Name** to open it
  - o Select the blue ✓**Volunteer For Shift** button to sign up
    - VMS generates a confirmation email that includes an iCalendar
    - immediately generate an iCalendar by clicking the green **Export iCalendar** button in the upper right hand corner

Note: Volunteers are not limited in VMS to the number of shifts they can sign up for.

2.3.5 Unvolunteer for an Event or Shift

VMS offers multiple ways to unvolunteer for an event or shift. To unvolunteer for an event:

Option 1:
- Log into VMS
- Find **Your Calendar** on the right information panel
- Click the **Event Name** to open it

Option 2:
- Log into VMS
- Select **Calendar** from the left navigation bar
- Find the event by using the tabs
  - o **Calendar View**- displays monthly view of all calendared events
    - ▪ can be sorted by calendar, project and viewed by month, week or day
    - ▪ can toggle the green **Yes / No My Events** button
  - o **My Events**- displays list view of all past and future events that you volunteered for
    - ▪ search bar included
  - o **My Calendar**- shows list of calendars for events that were volunteered for
    - ▪ search bar included
  - o **All Events**- displays list view of all past and future events
    - ▪ search bar included
  - o **All Calendars**- display list view of all of calendars
    - ▪ search bar included
  - o **Search**- allows for a detailed search by event, keyword, project, start date and or end date
- Click the **Event Name** to open it

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Event
- Select the red 🗑**Unvolunteer** button, a pop up window will appear, either:
  - o select **OK** to confirm you want to unvolunteer for the event or;
  - o select **Cancel** to stay volunteered for the event

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Shift
- Select the red 🗑**Unvolunteer For Shift** button, a pop up window will appear, either:
  - o select **OK** to confirm you want to unvolunteer for the shift or;
  - o select **Cancel** to stay volunteered for the event

2.3.6 View and/or Volunteer to Bring a Resource

Supplies / resources may be needed at an event, to view and/or volunteer to bring a requested / listed resource to an event:
- Log into VMS
- Select **Calendar** from the left navigation bar
- Find the event by using the tabs
  - o **Calendar View**- displays monthly view of all calendared events
    - ▪ can be sorted by calendar, project and viewed by month, week or day

- can toggle the green **Yes / No My Events** button
  - o **My Events**- displays list view of all past and future events that you volunteered for
    - search bar included
  - o **My Calendar**- shows list of calendars for events that were volunteered for
    - search bar included
  - o **All Events**- displays list view of all past and future events
    - search bar included
  - o **All Calendars**- displays list view of all of calendars
    - search bar included
  - o **Search**- allows for a detailed search by event, keyword, project, start date and or end date
- Click the **Event Name** to open it
  - o locate the **Resources** list
    - toggle the green **No / Yes** button in the **I will supply** column to read **Yes**
      - if the **I will supply** column displays **N/A** that resource request has been filled
    - select the blue ✓**Save Resource Commitments** button

Note: There is currently **no** reminder or notice when volunteering or unvolunteering to bring a resource.

2.3.7 Unvolunteer to Bring a Resource

To unvolunteer to bring a resource:
- Log into VMS
- Select **Calendar** from the left navigation bar
- Find the event by using the tabs
  - o **Calendar View**- displays monthly view of all calendared events
    - can be sorted by calendar, project and viewed by month, week or day
    - can toggle the green **Yes / No My Events** button

  - o **My Events**- displays list view of all past and future events that you volunteered for
    - search bar included
  - o **My Calendar**- shows list of calendars for events that you volunteered for
    - search bar included
  - o **All Events**- displays list view of all past and future events of all calendars
    - search bar included
  - o **All Calendars**- displays list view of all of calendars
    - search bar included
  - o **Search**- allows for a detailed search by event, keyword, project, start date and or end date
- Click the **Event Name** to open it
  - o locate the **Resources** list
    - toggle the green **No / Yes** button in the **I will supply** column to read **No**
    - select the blue ✓**Save Resource Commitments** button

Note: There is currently **no** reminder or notice when volunteering or unvolunteering to bring a resource.

2.3.8 View Your Calendar

VMS offers multiple ways to view your calendar / the events you volunteered for:
Option 1:

- Log into VMS
- Find **Your Calendar** on the right information panel
  - ○ select the blue **View All Events** button
    - can be sorted by event name, event date, calendar or description
    - search bar included

Option 2:
- Log into VMS
- Select **Calendar** from the left navigation bar
  - ○ select the **My Events** tab- displays list view of all past and future events that you volunteered for
    - can be sorted by event name, event date, calendar or description
    - search bar included

Option 3:
- Log into VMS
- View **Your Calendar** on the right information panel
  - ○ displays the next five events that are volunteered for that start within the next 30 days
    - this feature will not display if you aren't currently volunteered for an upcoming events

2.3.9 Export to iCalendar

When volunteering for events in VMS you will receive a confirmation email that includes an iCalendar. An iCalendar is a computer file format which allows Internet users to send meeting requests and tasks to other Internet users by sharing or sending files in this format through various methods. You can save this file to your electronic calendar, set reminders, and add information as needed as it your very own calendar.

Where to download your iCalendar for an event you have volunteered for through VMS:

- Download the iCalendar from the automatic email generated by VMS when you sign up for an event
- Immediately generate an iCalendar for an event by clicking the green **Export iCalendar** button in the upper right hand corner when you volunteer for an event
- From your VMS home page find **Your Calendar** on the right information panel, generate an iCalendar for an event by clicking the green **Export iCalendar** button associated with the event

Section 2.4 Projects

In this section you will learn:
2.4.1 Project Categories
2.4.2 View Projects
2.4.3 Volunteer / Show Interest for a Project
2.4.4 View Your Projects
2.4.5 Unvolunteer for a Project
2.4.6 Volunteer for an Event through the Project Function

2.4.1 Project Categories
Does not apply to UC Master Food Preserver Program

There are 11 pre-defined categories in VMS that allow for consistent, compelling and accurate reporting across the statewide program. The data collection is important for program sustainability and is a great tool to share relevant information with stakeholders at the community, county, state and federal level. Below is a detailed description of the pre-defined project categories:

1. **Admin / Office**- any projects that fosters the administration of the UC Master Gardener program. Including board (or other leadership structure) meetings, and sub-committee meetings that do not belong in another category. May also include office duties completed by a volunteer at the request of program coordinator or UCCE staff person.

2. **Booth Display**- includes projects in which UC Master Gardeners represent the program, UCCE, or UC ANR at an event with a larger focus. Includes, but not limited to, preparation, attendance, or clean up from the following: farmer's markets, county fair booth, table at community events, home and garden show, etc.

3. **Demonstration Garden**- includes, but is not limited to: school gardens, community gardens, public landscaping projects.

4. **Farm Advisor Research**- any research done on behalf of a UCCE farm advisor, specialist or the statewide office. Includes PlantRight Nursery Survey.

5. **Help Desk / Hotline**- includes any activity in which UC Master Gardeners answer questions from the public about home horticulture and/or pests, typically on an individual basis. Hotlines, Helplines, answering "helpline" emails or phone calls, plant clinics, water walks, etc.

6. **Mass Media / Communications**- any communications intended for an external audience. Including, but not limited to, the development of material such as: flyers, newspaper articles, press releases, social media, blog posts, newsletters, direct mail, etc.

7. **Master Gardener Continuing Education**- any program coordinator-approved continuing education opportunities.

8. **Master Gardener Program Meeting**- internal meetings held for UC Master Gardener volunteers.

9. **Mentoring**- includes projects that cater to the internal development of UC Master Gardener volunteers and program leadership. Includes committees that facilitate new class trainings.

10. **Public Education**- any project in which a Master Gardener is educating the public (usually more than one at a time) on home horticulture topics. Workshops, classes, seminars, demonstrations, etc.

11. **Sales / Fundraising**- any project that leads to the sale of a product or fundraising opportunity. Examples: developing a county calendar for sale; plant propagation and maintenance for a plant sale; working on logistics and/or physically working in the garden preparing for a garden tour.

2.4.2 View Projects

View projects to see what types of volunteer opportunities are available. Some projects may not have calendared events associated with them (i.e. monthly newsletter, social media), to show interest in this type of volunteer opportunity volunteer for the project through the VMS Project function (*See Section 2.4.3 Volunteer for a Project*). **Project Contact(s)** may use this information and contact volunteers as needed for projects.

To view projects:
- Log into VMS
- Select **Projects** from the left navigation bar
    - **All Program Projects tab**- displays list of all active projects in that Program / County
    - **My Projects**- displays list of projects that you volunteered for (through the **Projects function**) and lists the number you attended and recorded hours for in VMS
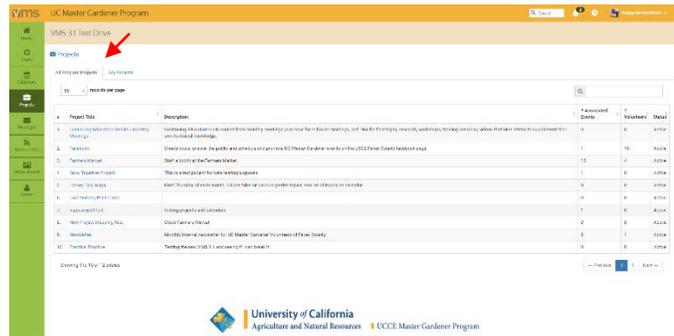
2.4.3 Volunteer / Show Interest for a Project

To volunteer / show interest for a project:
- Log into VMS
- Select **Projects** from the left navigation bar
- Find and click on the *Project Title* of the project you want to volunteer / show interest in
    - use the search bar if needed
- Select the blue **Sign-Up** button

2.4.4 View Your Projects

To view the projects you have volunteered for:
- Log into VMS
- Select **Projects** from the left navigation bar
- Select **My Projects** tab
    - displays lists of projects that you volunteered for (through the Projects function) and attended and recorded hours for in VMS

2.4.5 Unvolunteer for a Project

To unvolunteer for a project:

- Log into VMS
- Select **Projects** from the left navigation bar
- Select **My Projects** tab
  - o find and click on the *Project Title* of the project you want to unvolunteer for
  - o use the search bar if needed
- Select the blue **Unvolunteer** button 2.4.6 Volunteer for an Event through the Project Function
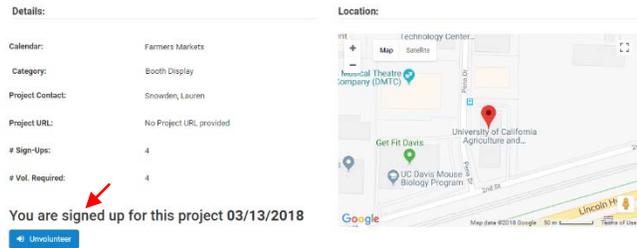
VMS offers multiple ways to volunteer for an event, one of those ways is through the **Projects** function. In order to volunteer through the **Projects** function you must first be volunteered for the project (*See Section 2.4.3 Volunteer / Show Interest for a Project*).

2.4.5 Volunteer for an Event through the Project Function

To volunteer for an event through the **Project** function:

- Log into VMS
- Select **Projects** from the left navigation bar
- Select **My Projects** tab
  - o find and click on the *Project Title*
  - o use the search bar if needed
- Find events listed for that project in the **Related Events** section on the right hand side of the screen
  - o click the *Event Title* of the event you want to volunteer for
  - o click the blue **Volunteer for Event** button
    - ▪ VMS generates a confirmation email that includes an iCalendar
    - ▪ immediately generate an iCalendar by clicking the green **Export iCalendar** button in the upper right hand corner
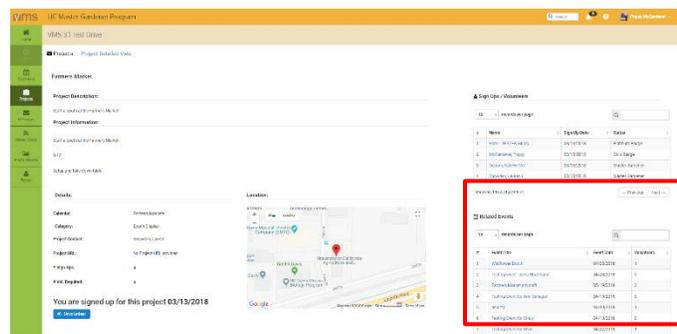
Section 2.5 Messages

In this section you will learn how to:
2.5.1 View Messages in VMS Inbox
2.5.2 Delete Message
2.5.3 Make a Message a Favorite
2.5.4 Un-favorite a Message
2.5.5 Send a Message through VMS
2.5.6 View Message History through VMS

2.5.1 View Messages in VMS Inbox

All VMS users have the ability to send messages to those listed on their county roster if the option has been enabled by VMS Administrators in that county. All messages that are sent can be viewed by the targeted recipients and also by anyone on the roster as well, even if they weren't included on the initial message. The messaging system in VMS is not private and is a way to communicate generally while utilizing the VMS roster. If an intended recipient of the message it will appear in **Messages - Your Inbox** section of VMS and appear in your email inbox. To view your VMS messages:

- Log into VMS
- Select **Messages** from the left navigation bar
  o **Your Inbox** will be displayed
  o to view a message click the **From, Subject or Date Sent**
    ▪ click the blue ⬅**Inbox** button to return to **Your Inbox**
    ▪ click the red 🗑**Delete Message** to delete from **Your Inbox**
    ▪ click the blue **Next** button to view the next message in **Your Inbox**
    ▪ click the blue **Previous** button to view the previous message in **Your Inbox**
    ▪ click the blue **Favorite** button to save message as a favorite

Note: If you are not the intended recipient of the message it can be viewed in **Messages - Your Inbox** section of VMS

2.5.2 Delete Message

To delete a message in the VMS inbox:
- Log into VMS
- Select **Messages** from the left navigation bar
  o find and click the **From, Subject or Date Sent** of the message to be deleted
  o use the search bar if needed
- Select the red 🗑**Delete Message** button
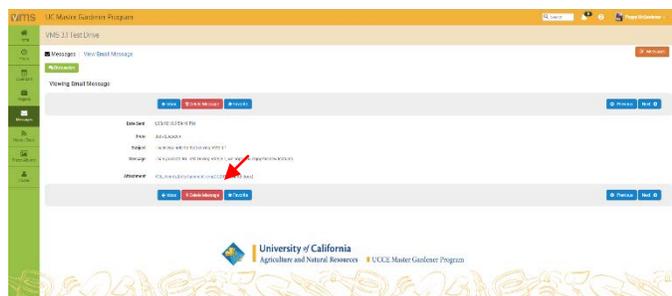
2.5.3 Make a Message a Favorite

To mark a message as a favorite in the VMS inbox:

- Log into VMS
- Select **Messages** from the left navigation bar
  - o find and click the **From, Subject or Date Sent** of the message to make favorite
  - o use the search bar if needed
- Select the blue ★**Favorite** button
  - o a black star will appear in the first column of the line of the favorited message

Note: By making a message a favorite you can sort and find that email by using the sort function in the ★ column. You can still delete favorite messages.

2.5.4 Un-favorite a Message

To Un-favorite a message in the VMS inbox:

- Log into VMS
- Select **Messages** from the left navigation bar
  - o find and click the **From, Subject or Date Sent** of the message to make un-favorite
  - o use the search bar if needed
- Select the blue ★**Un-Favorite** button
  - o the black star will disappear in the first column of the line of the message

2.5.5 Send a Message through VMS

The function to send messages through VMS by volunteers can be turned on and off by Full Access administrators of VMS at the county level. To send a message through VMS:

- Log into VMS
- Select **Messages** from the left navigation bar
- Select the orange **Messages** button at the top right
- Select the green ✉ **Send New Email** button
  - o Click the blue ✉ **Create Email to All Active/Limited Active Volunteers**; or
  - o enter information as needed to customize your recipient list:
    - ▪ **Name**
    - ▪ **Status**
      - • **Active**
      - • **Limited Active**
      - • **Inactive Resigned**
      - • **Honorary**
    - ▪ **Achievement**
      - • use dropdown to select multiple options
        - o **First Year Master Gardener / First Year Master Food Preserver**
        - o **Gold Badge**
        - o **Internal Administration**
        - o **Limited Active**
        - o **Master Gardener / Master Food Preserver**
        - o **Platinum Badge**
        - o **Trainee**
        - o **UC Staff**
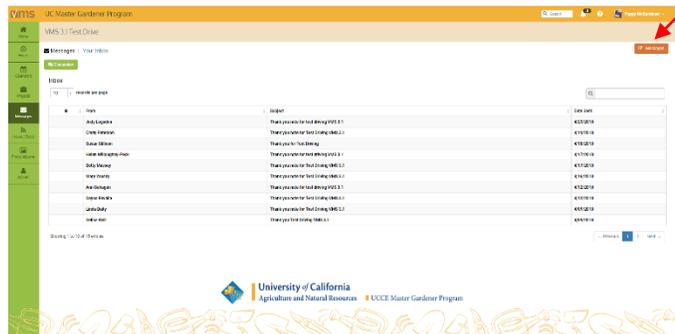
- **Interests**
  - use dropdown to select multiple options
- **Projects**
  - use dropdown to select multiple options
- **Events**
  - use dropdown to select multiple options
- **Start Date**
- **End Date**
- check box **Email all volunteers**
  - select the blue **Create** email button
- enter information:
  - deselect any volunteers who should **NOT** receive this email
  - **Additional Emails**
  - **Subject**
  - **Message**
  - **Attachments**
    - up to three attachments allowed
    - total of attachments cannot exceed 5MB
  - check box **Copy Me** (send me a copy of the email)
    - to send select the blue **Send Email** button
    - to go back or cancel select the blue **Back** button

Note: The sender of the email will be displayed as "YourEmailAddress.com on behalf of YOUR NAME <no-reply@ucanr.edu>. The body of the email will state that *"This email was sent from the COUNTY Master Gardener Volunteer Management System," or "This email was sent from the COUNTY Master Food Preserve Volunteer Management System."*

2.5.6 View Message History through VMS

To view the messages history in VMS:
- Log into VMS
- Select **Messages** from the left navigation bar
- Select the orange **Messages** button at the top right
- **Email History** will be displayed
  - o to view a message click the **Subject**
  - o use the search bar to help find a specific email
  - o can be sorted by favorite, from, subject, and date sent
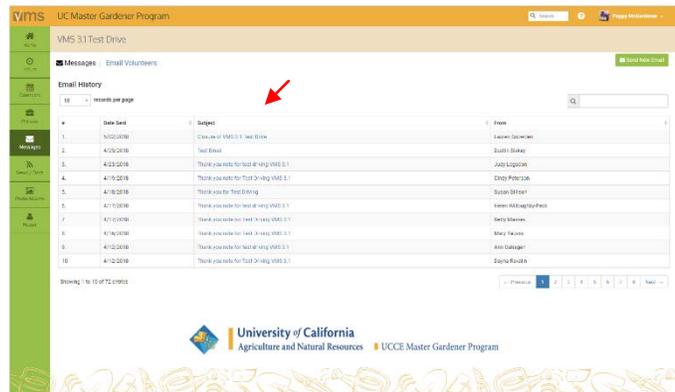
2.5.7 Jump to Collaborative Tools

To jump to Collaborative Tools:

- Log into VMS
- Select **Messages** from the left navigation bar
- Select the green **Discussion** button

Note: Collaborative Tools is a tool developed by UC ANR's Communication Services and Information Technology (CSIT) team to allow groups within ANR to both communicate and collaborate.

Section 2.6 Newsletters and Documents

In this section you will learn how to:
2.6.1 View / Print / Subscribe to Newsletter
2.6.2 Unsubscribe from a Newsletter
2.6.3 View / Print Documents / Presentations
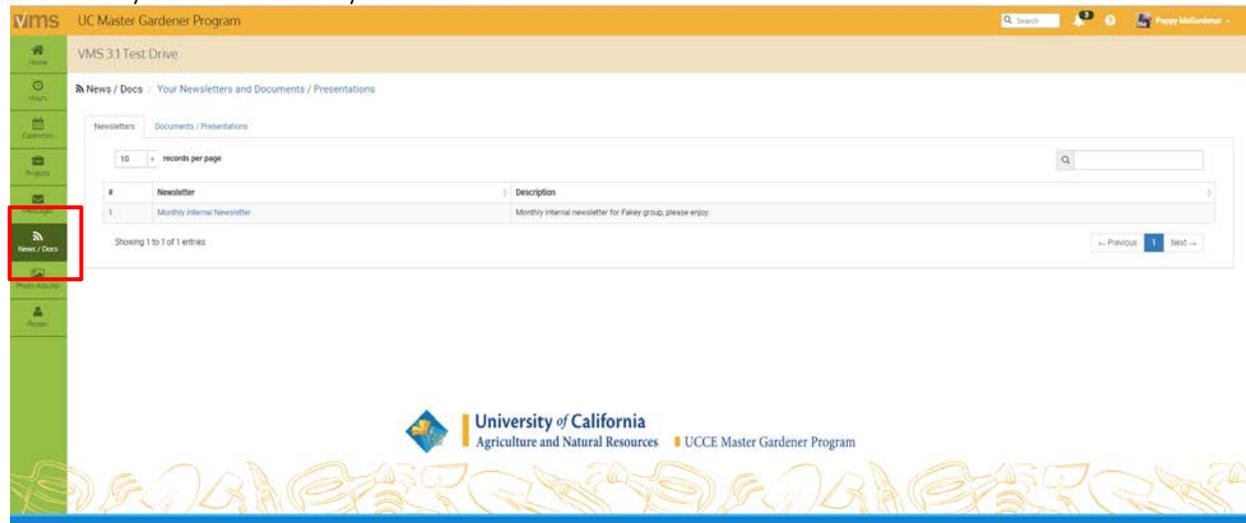
2.6.1 View / Print / Subscribe to Newsletter

To view / print / subscribe to a newsletter in VMS:

- Log into VMS
- Select **News / Docs** from the left navigation bar
  - o **Newsletter** tab- displays list view of Newsletters
    - ▪ search bar included
  - o click on the *Newsletter Title* to display list of issues
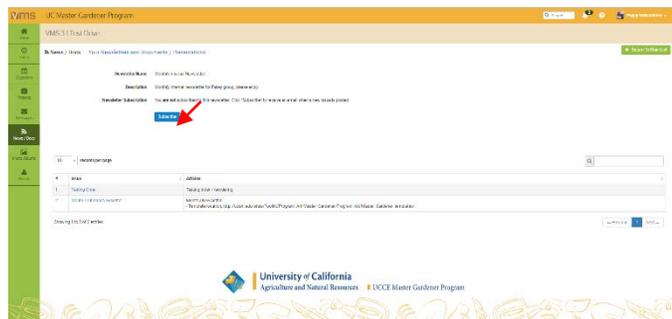
- select the blue **Subscribe** button to receive an email when a new issue is posted
- search bar included
  - o click the *Newsletter Title* to open the document
    - view and / or print the document
    - if not still in VMS select the back button to return to VMS
      - o select the green ←**Return to Main List** button

2.6.2 Unsubscribe from a Newsletter

To unsubscribe from a newsletter in VMS:
- Log into VMS
- Select **News / Docs** from the left navigation bar
  - o **Newsletter** tab- displays list view of Newsletters
    - search bar included
  - o click on the *Newsletter Title* to display list of issues
    - select the blue **Unsubscribe** button to stop receiving an email when a new issue is posted
      - select **OK** to confirm you want to unsubscribe or;
      - select **Cancel** to go back without unsubscribing

2.6.3 View / Print Documents / Presentations

To view / print / document / presentations in VMS:
- Log into VMS
- Select **News / Docs** from the left navigation bar
  - o **Documents / Presentations** tab- displays list view of **Document Groups**
    - search bar included
  - o click the *Document Group Title* to display the list of documents
    - search bar included
  - o click the *Document Title* to open the document
    - view and print the document
    - if not still in VMS select the back button to return to VMS
      - o select the green ←**Return to Main List** button
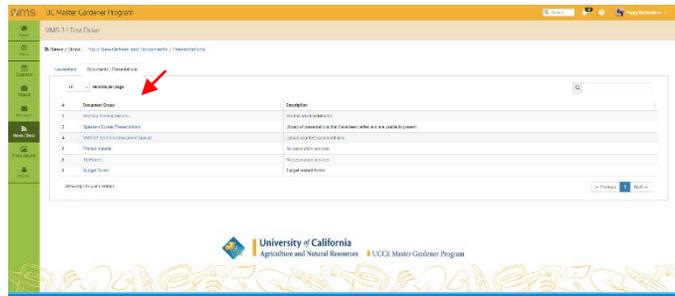
Section 2.7 Photo Albums

In this section you will learn how to:
2.7.1 View / Download Photo Album
2.7.2 Create Photo Album and Upload Photos
2.7.3 Upload Photos to a Photo Album

2.7.1 View / Download Photo Album

To view / download a photo album:
- Log into VMS
- Select **Photo Albums** from the left navigation bar

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- **Gallery View**- displays *Photo Album Name* with cover photo
  - o scroll through images in gallery view using the ◀ ▶ slide view arrows or;
  - o select the ▶ play button located in the bottom right corner to play slideshow automatically
  - o click the blue 👁**View** button to display thumbnail view of photos in the albums
  - o click on an individual photo for larger display
  - o right click and select *Save Picture As* to save image file
- **List View**- displays *Photo Album Name* number of pictures in each album
  - o select **List** tab, then *Photo Album Name* to display a thumbnail view of photos in the albums
  - o click on an individual photo for larger display
  - o right click and select *Save Picture As* to save image file

2.7.2 Create a Photo Album and Upload Photos

To create a photo album and upload photos:
- Log into VMS
- Select **Photo Albums** from the left navigation bar
- Select the green ➕**Create Photo Album** button
  - o enter the name of the new *Photo Album* and select the blue ✓**Create Album** button
  - o the **Upload** tab will appear
    - ▪ drag and drop photos to the **Photo Uploader** field or;
    - ▪ select the blue 🔍**Browse Files** button, select a photo file, and select **Open**
      - the photo will appear in the **Photo Uploader** field
    - ▪ select the blue **Upload Photos** button
    - ▪ confirm and/or re-order photos
      - to not publish a photo click off the checkbox located next to **Publish**✓
      - to revise / change the order that the photo will appear in the album click the drop down menu next to the photo and choose what number it should appear as
    - ▪ select the blue **Publish Photos** button to publish photos
    - ▪ select the green ⬅**Back** button to return to the main **Photo Albums** page

2.7.3 Upload Photos to a Photo Album

VMS offers multiple ways to upload photos to an already existing Photo Album:

Option 1:

- Log into VMS
- Select **Photo Albums** from the left navigation bar
- Select the blue ✎**Edit** button associated with the *Photo Album* you wish to upload to

Option 2:

- Log into VMS
- Select **Photo Albums** from the left navigation bar
- Click the *Photo Album name*
- Select the green ✎**Edit Photo Album** button
_____
- o select **Upload** tab
  - ▪ drag and drop photos to the **Photo Uploader** field or;
  - ▪ select the blue 🔍**Browse Files** button and select a photo file, and click **Open**
- o the photo will appear in the **Photo Uploader** field
- o select the blue **Upload Photos** button
  - ▪ the next screen photos can be confirmed and/or re-ordered
- o to not publish a photo click off the checkbox location next to **Publish** ✓
- o to revise / change the order that the photo will appear in the album click the drop down menu next to the photo and choose what number it should appear as
  - ▪ select the blue **Publish Photos** button to publish photos
    - • to delete a photo click on the checkbox located next to **Delete**✓
    - • to revise / change the order that the photo will appear in the album click the drop down menu next to the photo and choose what number it should appear as
  - ▪ select the blue ✓**Update Photos** button
  - ▪ select the green ⬅**Back** button to return to the main **Photo Albums** page
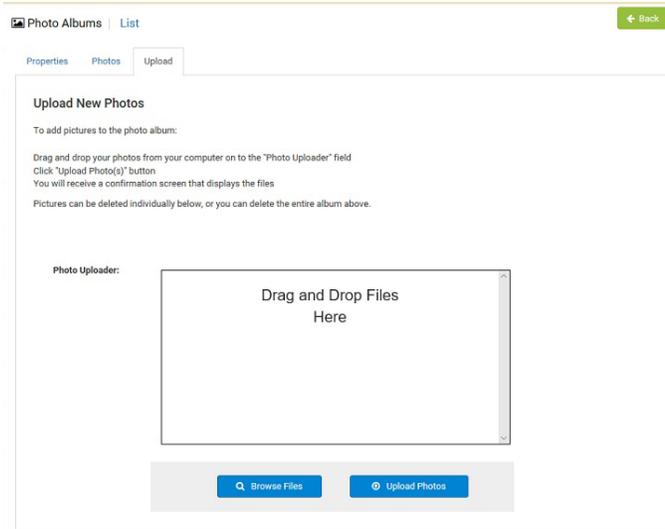
Section 2.8 Reappointment

In this section you will learn how to:
2.8.1 What is Reappointment?
2.8.2 VMS and Reappointment
2.8.3 Annual Reappointment Quiz for UC Master Food Preservers
2.8.4 Reappointment Extras

2.8.1 What is Reappointment?

Reappointment is the process by which all UCCE Master Gardeners and UCCE Master Food Preservers remain certified in their program. Annual reappointment begins on June 1 and is a requirement for all UCCE Master Gardeners and UCCE Master Food Preservers. The reappointment year runs on the state fiscal year July 1, 20## through June 30, 20##.

The minimum hours required to remain a certified volunteer are:
• 25 hours - Volunteer
• 12 hours - Continuing education

Note: First years are required to complete a minimum of 50 volunteer hours (no continuing education requirement) before the next reappointment cycle.

2.8.2 VMS and Reappointment

VMS will prompt users to electronically complete the appropriate agreements, releases and waivers to successfully reappointment. If a volunteer is not seeking reappointment, or is seeking limited/active status, they only complete the *Annual Volunteer Agreement and Request for Reappointment*.

Screenshot of VMS UC Master Gardener Reappointment:

Reappointment

Releases	Status
Annual Volunteer Agreement and Request for Reappointment	**Please Complete!**
Code of Conduct/Responsibilities and Rights	**Please Complete!**
Proof of California Driver License and Automotive Liability Insurance	**Please Complete!**

Screenshot of VMS UC Master Food Preserver Reappointment:

Reappointment

Releases	Status
Annual Volunteer Agreement and Request for Reappointment	**Please Complete!**
Code of Conduct/Responsibilities and Rights	**Please Complete!**
Proof of California Driver License and Automotive Liability Insurance	**Please Complete!**
Waiver of Liability, Assumption of Risk, and Indemnity Agreement	**Please Complete!**
Preparing/Serving Food Release Statement	**Please Complete!**

To begin reappointment log into VMS select any of the individual releases listed under the Volunteer Agreement and Release:

- *Annual Volunteer Agreement and Request for Reappointment*
  - o from the Drop down select the type of agreement the best suits your situation
    - ▪ *Completed Hours and Seeking Reappointment*
      - • read and click the blue **I Accept the Terms Presented Here** button
    - ▪ *Not Completed Hours and Seeking Reappointment*
      - • answer the three questions and;
      - • click the blue **I Accept the Terms Presented Here** button
    - ▪ *Seeking Limited Active Status*
      - • indicate your reason for requesting limited active status in the text box

- click the blue **I Accept the Terms Presented Here** button
  - *Do not With to be Reappointment*
    - click the blue **I Accept the Terms Presented Here** button
  - *1st Year Volunteer*
    - click the blue **I Accept the Terms Presented Here** button
- *Code of Conduct / Responsibilities and Rights*
  - read and click the blue **I Accept the Terms Presented Here** button
- *Proof of Insurance*
  - read and click **True** or **False**
    - if **True** is selected input your California Drivers' License Expiration Date
      - click the blue **I Accept the Terms Presented Here** button
    - if **False** is selected click the blue **I Accept the Terms Presented Here** button

Additional Master Food Preserver requirements:
- *Waiver of Liability, Assumption of Risk, and Indemnity Agreement*
  - read and click the blue **I Accept the Terms Presented Here** button
- *Preparing / Serving Food Release Statement*
  - read and click **Yes** or **No**
    - click the blue **I Accept the Terms Presented Here** button

Optional:
- Print the digitally signed agreements, releases and waivers
  - click **View / Print Agreement** to display all signed agreements, releases and waivers
  - click **Print Complete Release** to send to printer

Once all agreements, releases and waivers are completed (displays a green current date in the date completed column) all traces of reappointment on the home screen are gone until the next reappointment period.

Reappointment

View/Print Agreement

Thank you for considering reappointment into the Master Gardener Program. We value your service and thank you for sharing your valuable time as a volunteer for the Master Gardener Program. We hope you will consider joining as an agent of UC for another program year.

Complete the following three sections to fulfill the county requirements for participation in the Master Gardener program. If you are not seeking reappointment, or you are seeking limited/active status, please complete section one only.

Release Name	Date Completed
Annual Volunteer Agreement and Request for Reappointment	**1/26/2018**
Code of Conduct/Responsibilities and Rights	**1/26/2018**
Proof of California Driver's License and Automotive Liability Insurance	**1/26/2018**

2.8.3 Annual Reappointment Quiz for Master Food Preservers

In conjunction with reappointment UCCE Master Food Preserver volunteers must also pass the annual reappointment quiz. The quiz ranges from 10 to 15 questions and is administered online. Volunteers are allowed two attempts to pass with a score of 85% or better. Volunteers should reach out to the county coordinator if they were unable to successfully pass the quiz within two attempts.

The reappointment quiz is created by the statewide office and is managed at the county level, contact the county coordinator with questions and assistance with your quiz.

2.8.4 Reappointment Extras

Reappointment occurs at the same time statewide for the UC Master Gardener and UC Master Food Preserver volunteers. It does not matter if you just filled out paperwork or releases a few months before reappointment, everyone will complete their paperwork again so as to be on the same reappointment schedule as the rest of the entire Programs volunteers.

Insurance or program fees are collected at the county level. Volunteers should direct questions and payments to their local office.

Section 2.9 VMS Help

In this section you will learn about VMS help:
2.9.1 Accessing help with VMS
2.9.2 "How-To" Video Series
2.9.3 County level help

2.9.1 Accessing help with VMS

Written instruction and video help can be accessed logged into or out of VMS.
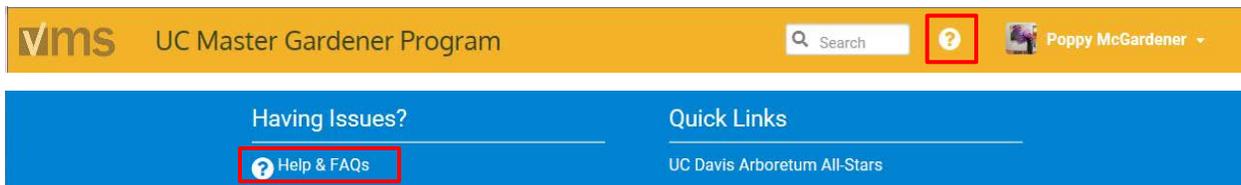
There are two ways to access help while logged into VMS:
- Select the question mark icon located in the header of VMS or;
- Select **Help and FAQs** located in the footer of VMS
  - o opens a new internet browser tab to the Volunteer Management System Help page
    - Volunteer Management System User's Guide
    - "How-To" Training Videos
    - New VMS Informational One Sheets

There are two ways to access help when *not* logged into VMS:
- Using your internet browser type directly into your address bar: ucanr.edu/sites/vmshelp/
  - o opens the Volunteer Management System Help page
    - Volunteer Management System User's Guide
    - "How-To" Training Videos
    - New VMS Informational One Sheets
_____

- Google "UCANR VMS User's Guide"
  - o look for the website in the search results, and click the link
  - o opens the Volunteer Management System Help page
    - Volunteer Management System User's Guide
    - "How-To" Training Videos
    - New VMS Informational One Sheets

Note: Bookmark or make the page a favorite

2.9.2 "How–To" Video Series

To access the "How-To" video series while logged into VMS:
- Select the question mark icon located in the header of VMS or;
- Select **Help and FAQs** located in the footer of VMS
  - opens a new internet browser tab to the Volunteer Management System Help page
    - "How-To" Training Videos are located down the right hand side of the screen

There are two ways to access the "How-To" video series when not logged into VMS:
- Google "UC Master Gardeners You Tube"
  - look for the website in the search results, and click the link
  - opens the UC Master Gardener YouTube channel
    - select the **Playlists** tab
    - find and select the Volunteer Management System (VMS) "How-To" Series
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- Using your internet browser type directly into your address bar: ucanr.edu/sites/vmshelp/
  - opens the Volunteer Management System Help page
    - "How-To" Training Videos are located down the right hand side of the screen

2.9.3 County Level Help

For help resetting your password, entering hours, reappointment and general questions contact your county coordinator, volunteer lead or designated Volunteer Management System contact person.

- UC Master Gardener coordinator contacts- mg.ucanr.edu/Contact_Us_/Program_Coordinators_/
- UC Master Food Preserver coordinator contacts- mfp.ucanr.edu/Contact/Program_Coordinators/

Section 3 Administrator

3.1 VMS Administration Overview

In this section you will learn about:

3.1.1 Types of Administrators

3.1.2. Accessing Admin Mode

3.1.3 Left Navigation Bar for Admin

3.1.4 Right Information Panel

3.1.1 Types of Administrators

The designated **Owner** of VMS has **Full Access** and the ability to grant administrative access to those volunteers and staff that require it. There are seven different options for admin access, users may have one, several or *all* levels by being designated **Full Access**. If individual admin access is granted the user will only have **Admin Mode** in those designated areas; while **Full Access** includes all admin functions.

Administrative access options:
- **Roster**
- **Projects**
- **Calendar**
- **Newsletters / Documents**
- **Volunteer Hours**
- **Photo Albums**
- **Full Access** (includes all admin functions)

3.1.2 Accessing Admin Mode

The **Admin** button appears in areas where **Admin** functions are enabled (see the list in *Section 3.1.1 Types of Administrators*). Admin mode is accessed by clicking the orange **Admin** button. Once in **Admin** mode an orange bar will appear to designate the user is operating in Admin mode.

To exit **Admin** mode click on any of the tabs from the toolbar on the left.
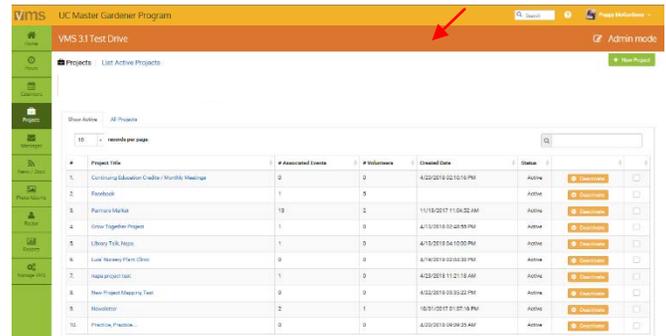
3.1.3 Left Navigation Bar for Administrator

The majority of features in VMS can be accessed through clicking the navigation bar running down the left side of the home screen. The **Full Access** administrator left navigation bar has the following features:

Home- returns user to the Home Screen

Hours- enter and view volunteer hours, continuing education hours and report contacts. **Note:** If you are an employee and a volunteer do not use your employee VMS account to keep track of volunteer hours. Only enter your volunteer hours in your volunteer account.

Calendars- view, search, and volunteer for events through calendars **ADMIN MODE:** Create / add / edit and archive calendars. Create / delete / edit events, add shifts and resources.

Projects- view and search projects. **ADMIN MODE:** create / add and edit projects.
Messages- view incoming messages sent through VMS. **ADMIN MODE:** Send message through VMS to volunteers using interest, project, group or email all volunteers. Message will appear in VMS and messages and in the volunteers email inbox.

News / Docs- view, save, print and subscribe to newsletters; view, save, print documents and presentations. **ADMIN MODE:** Create / delete / archive document groups, add newsletters / documents, mange newsletter subscribers.

Photo Albums- create / edit / delete photo albums, upload / view/ delete / download photos

Roster- view list of county volunteers, including contact information **ADMIN MODE:** Add a new volunteer, send new volunteer email, create mailing labels, and create / export excel spreadsheet of volunteer roster.

Reports- does not appear as a volunteer option, admin function only **ADMIN MODE:** Run / view / save / export the reports.
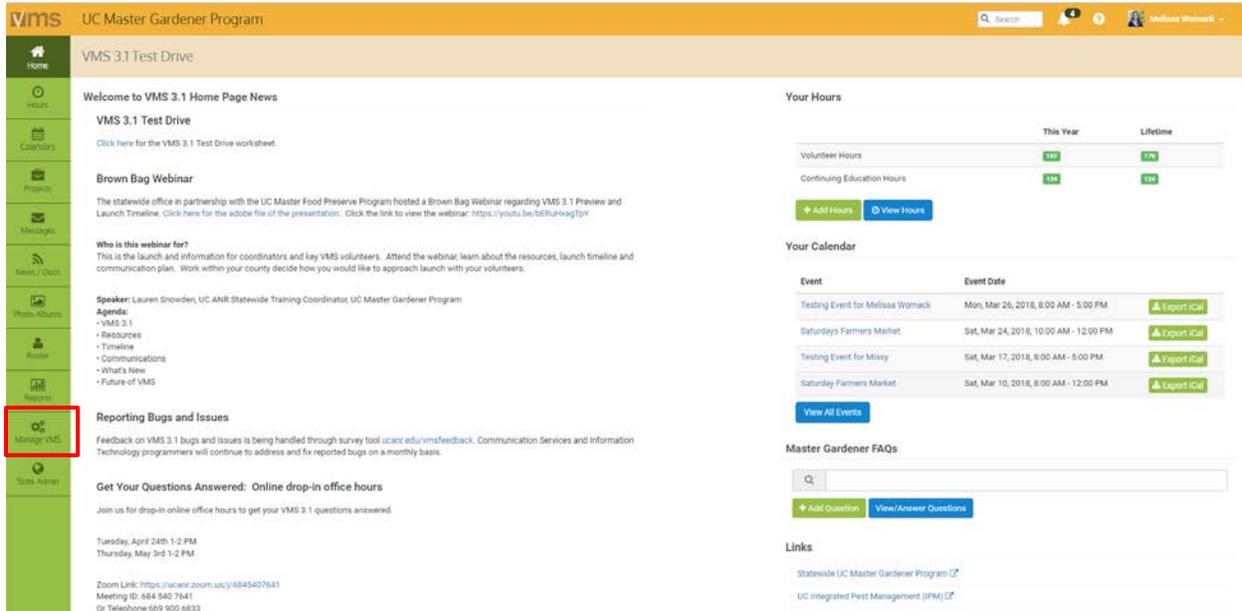
Manage VMS- does not appear as a volunteer option, admin function **ADMIN MODE:** the following sections will set up some basic information for your county VMS site.

- **Manage Administrators-** keep track of who is managing what with the VMS admin management tool, add or remove administrators, change level of administrative rights
- **Home Page News-** add news to the county's VMS home page, or elect to use the ANR blog system to drive your news and keep track of older news
- **Volunteer Options**- enable / disable features in VMS
- **Home Page Links-** create links for the home page to anywhere on the web
- **New Member Email-** create a custom message that will go to new members added to the roster
- **Program Contact Info-** manage your program's address, phone and email (appears in VMS footer)
- **Manage Reappointments-** manage, track, submit paper, reset terms, send list to Director, email unappointed volunteers and create excel report
- **Manage Interests-** add, edit, or delete interests, run / view interest report
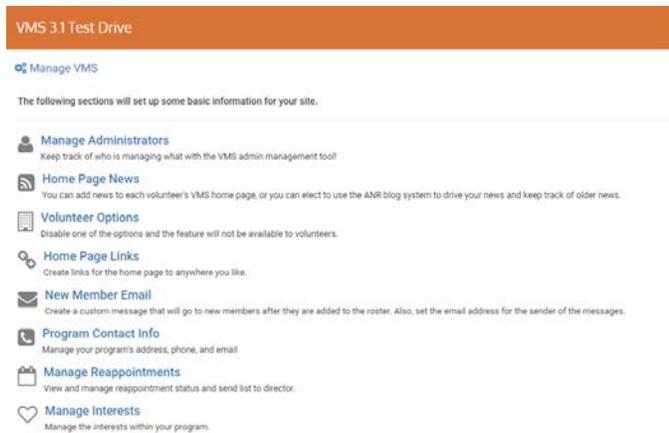
3.1.4 Right Information Panel

Some commonly used features are quickly accessed by looking at and / or clicking the information panel on the right hand side on the home screen. The right information panel has the following features:

Your Hours - displays volunteer and continuing education hours associated with your logon, for the current volunteer year and the lifetime / total for all time. If a coordinator is also a MG/MFP volunteer they should not log and record, report or volunteer for events under their Staff Profile.

Continuing Education Hours- displays continuing education hours associated with your logon, if a coordinator is also a MG/MFP volunteer they should **not** log and record, report or volunteer for events as under their Staff Profile.

Your Calendar- you may not see this feature as you don't volunteer under your Staff Profile. This feature is displayed when volunteers sign up for an event on the calendar. The event is automatically added to the "**Your Calendar**" on the right hand side of the VMS screen.

Master Gardener FAQs- an online system to assist Master Gardener volunteers find answers to hotline / help desk questions. The FAQs system (Frequently Asked Questions) enables volunteers to provide feedback to other FAQs and the ability to post their own questions with descriptions and photographs.

UCCE Master Gardeners can access the FAQs system through the (Volunteer Management System) VMS, or through their UC portal. *FAQs PowerPoint Presentation* and *FAQs Tutorial Videos* are available at: http://ucanr.edu/sites/vmshelp/FAQ_System_on_the_VMS/.

Links -this displays the links that are featured in **Manage VMS**, **Home Page Links** feature. Follow *Section 3.8.5 Manage Home Page Links* to add or edit links.

3.2 VMS Calendar, Events, Shifts and Resources

In this section you will learn how to:
3.2.1 Admin VMS Calendar Functions
3.2.2 Add a New Calendar
3.2.3 Edit a Calendar's Name
3.2.4 Change a Calendar's Status
3.2.5 Merge Calendars
3.2.6 Add an Event
3.2.7 Add a Recurring Event
3.2.8 Edit / Delete Event
3.2.9 Add Shift(s) to an Event

3.2.10 Edit / Delete Shift(s)
3.2.11 Add Resources to an Event
3.2.12 Edit / Delete Resources for an Event
3.2.13 Add / Assign a Volunteer to Event / Shift
3.2.14 Remove Volunteer from an Event / Shift
3.2.15 Assign / Remove Volunteer to Shift Resources
3.2.16 Delete / Remove Volunteer from a Shift Resource
3.2.17 Export Events
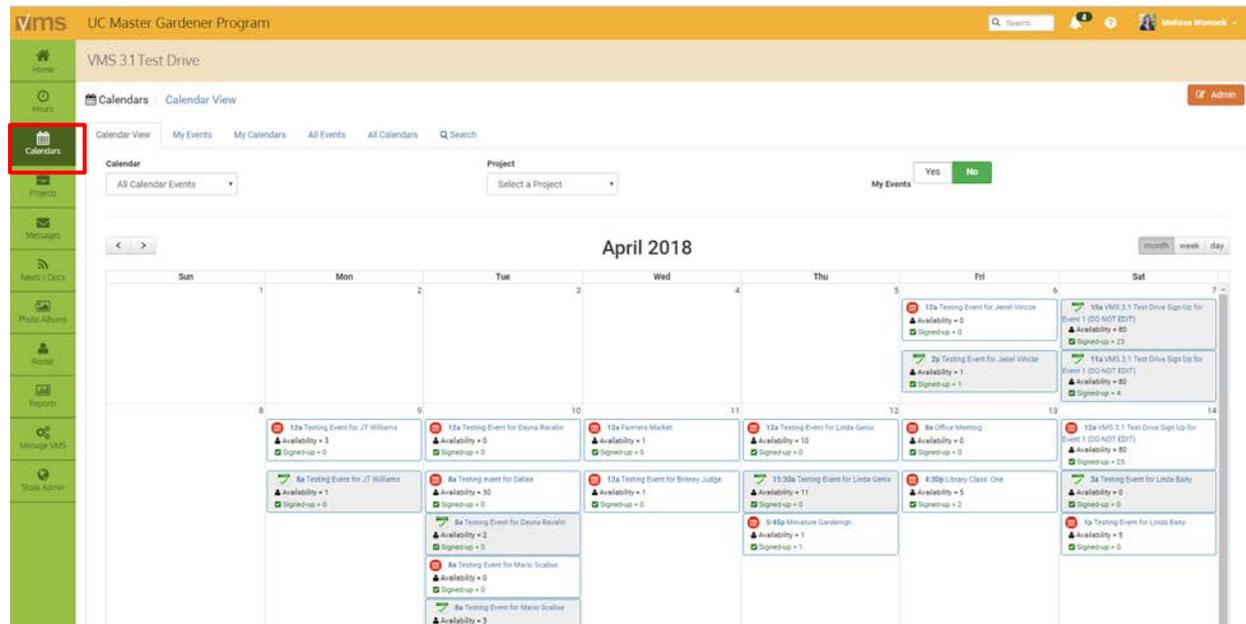
3.2.1 Admin VMS Calendar Functions

Full Access and **Calendar** administrators are able to manage all calendar functions including: adding / activating / deactivating / exporting calendars, adding / editing / deleting events, adding / deleting shifts and resources, adding / removing volunteers from events. VMS offers multiple ways to view calendars in Admin Mode and has extensive search capabilities.

Admin mode calendars:
- **Calendar View**- displays monthly view of calendared events
  - o can be sorted by calendar, project and viewed by month, week or day
  - o can toggle **Yes / No** green **My Events** button to display what you volunteered for
- **Upcoming Events-** view the list of upcoming events and the number of volunteers signed up
  - o delete and export selected events
  - o search bar included
- **All Events**- displays list view of all past and future events and the number of volunteers signed up
  - o delete and export selected events
  - o search bar included
- **All Calendars**- view the list of calendars, including inactive
  - o search bar included
- **Active Calendars**- view the list of calendars
  - o search bar included
- **Search**- allows for a detailed search by event, keyword, project, start date and or end date

3.2.2 Add a New Calendar

Calendars are used by volunteers to sign up for volunteer opportunities and find information about events. Create different calendars for easy searching and organizing of events (i.e. farmer's market, help desk/hotline, speaker's bureau, workgroups and internal meetings). To add a new calendar:

- Log into VMS
- Select **Calendars** from the left navigation bar
- Select the orange **Admin** button to administer the calendar
- Select the green **+New Calendar** button
- Enter **Calendar Name**
  - to link to a project toggle the green **No** button to **Yes**
  - select the project
- Select the blue **+Create Calendar** button to save, or;
  - select the white **← Cancel** button or the **x** in the top corner of the pop up window to exit the window without saving
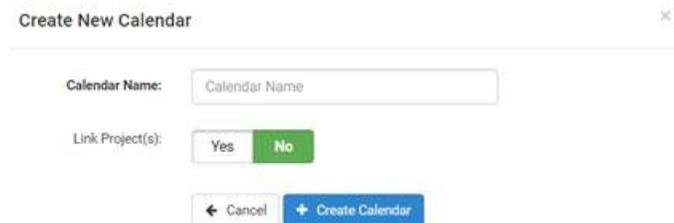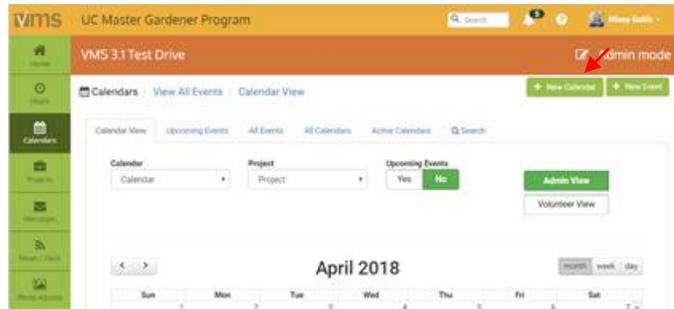
3.2.3 Edit a Calendar's Name

To edit a calendar:

- Log into VMS
- Select **Calendars** from the left navigation bar
- Select the orange **Admin** button to administer the calendar
  - select **All Calendars** tab
  - find and select the **Calendar** you want to delete
  - if needed use the search bar provided to find the event
- Select the blue ✏ **Edit Calendar** button
  - edit **Calendar Name**
    - select the blue ✓**Save Change** button
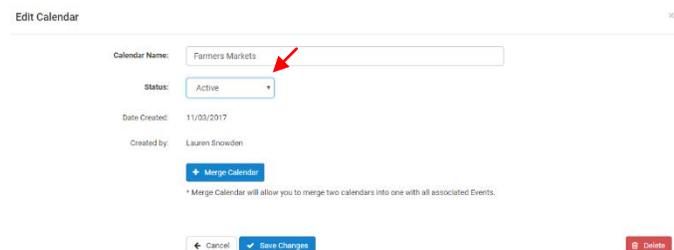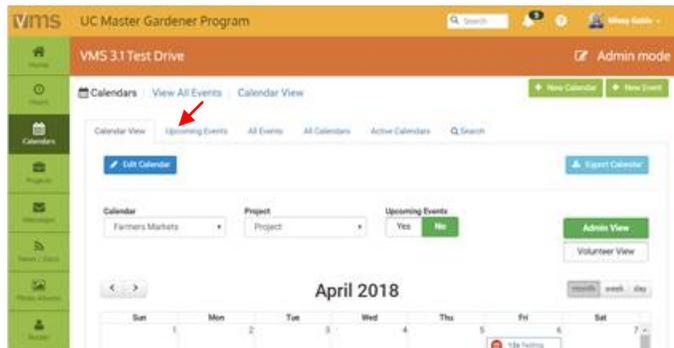
3.2.4 Change a Calendar's Status

To change the status of a calendar:

- Log into VMS
- Select **Calendars** from the left navigation bar
- Select the orange **Admin** button to administer the calendar
  - select **All Calendars** tab
  - find and select the **Calendar** you want change the status of
  - if needed use the search bar provided to find the event
- Select the blue ✏ **Edit Calendar** button

- o use the dropdown to change Status, status options include:
  - **Active**
  - **Inactive**
- o select the blue ✓**Save Change** button or;
- o select the white ← **Cancel** button or the **x** in the top corner of the pop up window to exit the window without saving or deleting

Note: Calendars can also be deleted by selecting the red 🗑**Delete** button

3.2.5 Merge Calendars

To merge two existing calendars together:
- Log into VMS
- Select **Calendars** from the left navigation bar
- Select the orange **Admin** button to administer the calendar
  - o select **Active Calendars** tab to view list of active calendars, or;
  - o select **All Calendars** tab to view list of all calendars
    - ▪ find and select the Calendar Title of one of the calendars you want to merge
    - ▪ if needed use the search bar provided to find the calendar
- Select the blue 🖊**Edit Calendar** button
  - o select the blue **Merge Calendar** button
  - o select the calendar to merge with from the **With** drop down box
    - ▪ select teal blue **Confirm Merge** button
      - select **OK** from the pop up window to confirm merge
      - select **Cancel** to not merge
    - ▪ select the white ←**Cancel** button or the **x** in the top corner of the pop up window to exit the window without saving
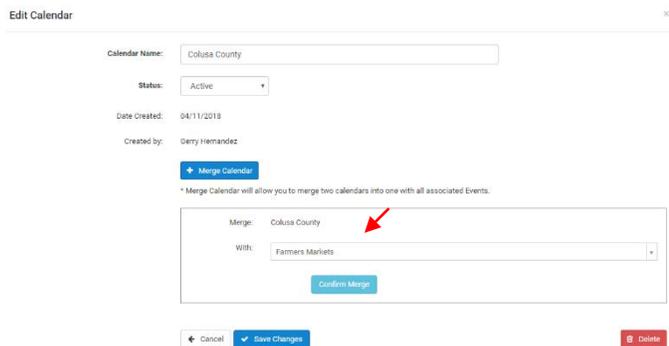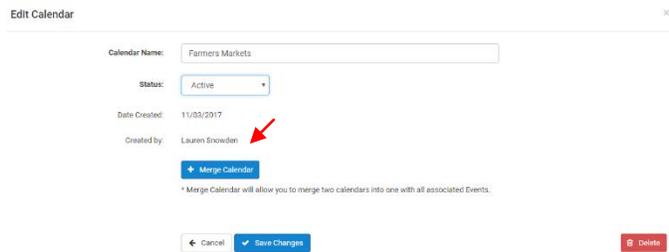
Note: Merges are not reversible, the merged calendar will take the name of the calendar picked from the dropdown list of calendars. Edit the merged calendar by following *Section 3.2.3 Edit a Calendar*.

3.2.6 Add an Event

Events can be entered as a one-time or reoccurring event with or without shifts and resources. The event information will be displayed in the calendar for all volunteers to view. The event may be used to have volunteers sign up or be listed for information only purposes. To add an event to a calendar:
- Log into VMS
- Select **Calendars** from the left navigation bar
- Select the orange **Admin** button to administer the calendar
- Select the green ➕**New Event** button
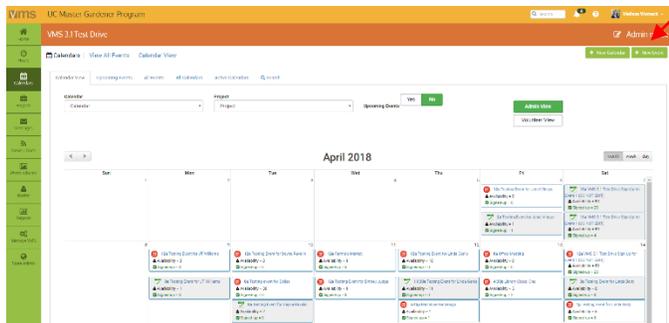
- to copy a previous event **Select from Previous Event** dropdown list or click **Show More Events** and click the event to copy, or;
- enter / add all new information:

Event Details

- **Event Name**
- **Start Date, End Date**
- **Event Time**
- **Recurring**
- **Event Information**
- **✚Attachments** - add up to three attachments

Calendar Details

- **Calendar**
- **Project**
- **Event Coordinator ✚**
- Toggle the green **No / Yes** for email notification of sign-ups
- add another event coordinator by selecting the blue **✚Add Event Coordinator**
  - **Select Event Coordinator**
  - toggle the green **No / Yes** for email notification of sign-ups
- **Event Website**
- **Location, Street Address, City, State, Zip**

Volunteer Details

- **Total Volunteers needed**
- toggle the green **No / Yes** button to turn on off the following features:
  - **Bring Guest(s)- Yes** option allows guests and can set the number of total number of guests allowed at event
  - **Display Sign-Ups- Yes** options shows the list of who is volunteering
  - **Block Sign-Up / Out- Yes** option shuts down signups and unvolunteering for the event X number of days before the event
  - **Set Event Publication Date-Yes** option allows to choose a future date for the event to be published in VMS calendars
- Select the blue **✚Save Event** button to save.

3.2.7 Add a Recurring Event

To add a reoccurring event to a calendar:
- Log into VMS
- Select **Calendars** from the left navigation bar
- Select the orange **Admin** button to administer the calendar
- Select the green **✚New Event** button
  - to copy a previous event **Select from Previous Event** dropdown list or click **Show More Events** and click the event to copy, or;
  - enter / add all new information, be sure to select the blue **Recurring Event** button to display the recurring event options:

Event Details

- **Event Name**
- **Start Date-** start date of recurring event

- **End Date-** end/last date of recurring event
- **Event Time**
- **Recurring**
  - **None -** If you setup a recurring event, you will not be able to track signups for each occurrence of the event. Also, you will not be able to use the Shift Options. (See note below)
  - **Daily**
    - Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday
  - **Weekly**
    - Every # week(s), beginning with start date
  - **Monthly**
    - First, Second, Third, Fourth
    - Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday
    - or **Repeat based on Start Date**
- **Event Information**
- **✚Attachments** - add up to three attachments

Calendar Details

- **Calendar**
- **Project**
- **Event Coordinator ✚**
- **Email Coordinator** toggle the green **Yes / No** for email notification of sign-ups
- add another event coordinator by selecting the blue **✚Add Event Coordinator**
  - **Select Event Coordinator**
  - toggle the green **Yes / No** for email notification of sign-ups
- **Event Website**
- **Location, Street Address, City, State, Zip**

Volunteer Details

- **Total Volunteers needed**
- toggle the green **No / Yes** button to turn on off the following features:
  - **Bring Guest(s)- Yes** option allows guests and can set the number of total number of guests allowed at event
  - **Display Sign-Ups- Yes** options shows the list of who is volunteering
  - **Block Sign-Up / Out- Yes** option shuts down signups and unvolunteering for the event X number of days before the event
  - **Set Event Publication Date-Yes** option allows to choose a future date for the event to be published in VMS calendars
- Select the blue **✚Save Event** button to save.

Note: Once a recurring event is created the events are considered individual and must be edited individually. Shifts, different event coordinators and other details may be added and changed after the creation, this features allows the ability to customize details for recurring events on only one day.

3.2.8 Edit / Delete Event

There is one way to edit and event and two ways to delete a calendared event. To edit or delete an event:

- Log into VMS
- Select **Calendars** from the left navigation bar
- Select the orange **Admin** button to administer the calendar
  - o select **All Events** tab
  - o find and select the *Event Title* of the event you want to edit
  - o if needed use the search bar provided to find the event
- Select the blue 🖊 **Edit Event** button
  - o edit content as needed
- Select the blue ＋**Save Event** button to save, or;
  - o select the red 🗑**Delete Event** button to delete the event
  - o select the white ←**Cancel** button to exit the window without saving

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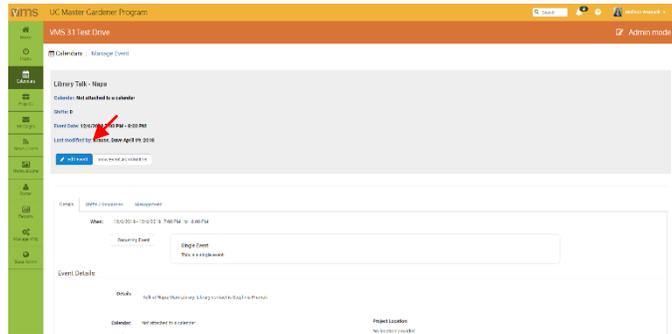
Delete an event or multiple events:

- Log into VMS
- Select **Calendars** from the left navigation bar
- Select the orange **Admin** button to administer the calendar
  - o select **All Events** tab
  - o find event(s) to be deleted and click the check box in the last column
  - o select the red 🗑**Delete Selected Events** button to delete selected events
    - ▪ select ok to confirm, or;
    - ▪ select the white ←**Cancel** button or the **x** in the top corner of the pop up window to exit the window without saving
  - o green bar will appear to confirm the number of events successfully

Note: Event deletions are not reversible.

3.2.9 Add Shift(s) to an Event

To add a shift(s) an event must be created and saved first, follow *Section 3.2.6 Add an Event*. To add shift(s) to an event:

- Log into VMS
- Select **Calendars** from the left navigation bar
- Select the orange **Admin** button to administer the calendar
  - o find and select the *Event Title* of the event you want to add a shift(s) to
  - o if needed use the search bar provided to find the event
- Select the blue 🖊 **Edit Event** button
  - o select **Shifts / Resources** tab
- Select the blue ＋**Add New Shift** button
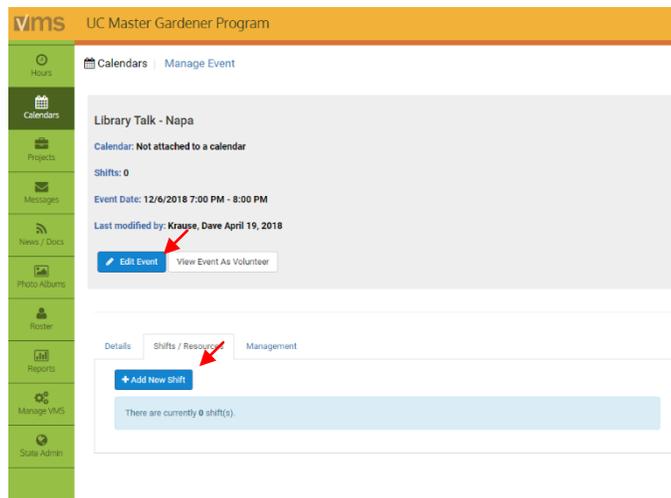
o enter information:
  - **Shift Name**
  - **Start Date, End Date**
  - **Start Time, End Time**
  - **Total Volunteers**
  - **Shift Details**

- Select the blue ✚**Create Shift** button to save, or;
  o select the white ←**Cancel** button or the **x** in the top corner of the pop up window to exit the window without saving
- Continuing adding shifts by selecting the blue ✚**Add New Shift** button
- Select ✎**Save Changes** when done adding shifts

Note: Sign up a volunteer for the shift by selecting the blue ✚**Add Volunteer** button

3.2.10 Edit / Delete Shift(s)
To edit / delete shift(s):
- Log into VMS
- Select **Calendars** from the left navigation bar
- Select the orange **Admin** button to administer the calendar
  o find and select the *Event Title* of the event you want to edit the shift(s) of
  o if needed use the search bar provided to find the event
- Select **Shifts / Resources** tab
- Select the blue ✎ **Edit Shift** button
  o edit content as needed
- Select the blue ✚**Save Shift** button to save, or;
  o select the red ⌫**Delete Shift** button to delete the event
  o select the white ←**Cancel** button or the **x** in the top corner of the pop up window to exit the window without saving
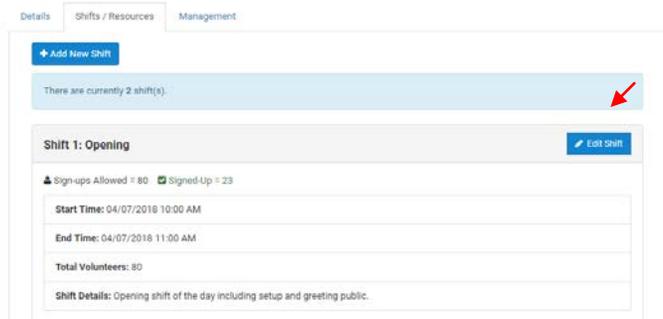
3.2.11 Add Resources to an Event
To add resources (i.e. handouts, pens, banner, event signage, cash register, shade tent) to an event, an event must be created that has at least one shift, follow *Sections 3.2.6 Add an Event* and *3.2.9 Add Shift(s) to an Event*. To add resources to an event:
- Log into VMS
- Select **Calendars** from the left navigation bar
- Select the orange **Admin** button to administer the calendar
  o find and select the *Event Title* of the event you want to add resources to
  o if needed use the search bar provided to find the event
- Select **Shifts / Resources** tab
- Select the blue ✚**Add Resource** to the appropriate shift
  o enter information:
    - **Resource Name**
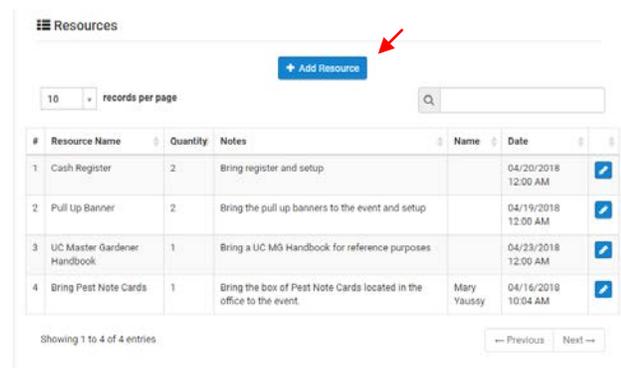
- ▪ **Quantity**
- ▪ **Notes**
- ▪ **Volunteer Name**
  - • leave blank to allow someone to volunteer
  - • select a **Volunteer Name** from the dropdown to assign
- ▪ **Date**
  - • leave blank if no date applicable
  - • select a date if resource needed before event (i.e. pick up cash register from office and deliver to coordinator)
- • Select the blue ✚**Add Resource** button to save, or;
  - o select the white ⬅**Cancel** button the white **Close** button or the **x** in the top corner of the pop up window to exit the window without saving

Note: When adding a resource put each resources on a separate line as volunteers cannot designate a quantity to what they are able to bring. (i.e. If you need three cases put them as three separate entries)

3.2.12 Edit / Delete Resources for an Event

To edit / delete resources that have been added to an event:
- • Log into VMS
- • Select **Calendars** from the left navigation bar
- • Select the orange **Admin** button to administer the calendar
  - o find and select the *Event Title* of the event you want to add resources to
  - o if needed use the search bar provided to find the event
- • Select **Shifts / Resources** tab
- • Find and select the blue 🖊 **Edit** button from the **Resource List** located in the last column of the resource to be edited
  - o if needed use the search bar provided to find the resource
  - o edit content as needed

#	Resource Name	Quantity	Notes	Name	Date	
1	Fundamentals of Consumer Food Safety and Preservation Master Handbook	3	Bring the UC MFP Training book for reference purposes		04/04/2018 1:40 PM	🖊
2	Roll-up Banner	2	Bring the roll-up banner to the event at setup		04/04/2018 1:40 PM	🖊
3	MFP Brochures	50	Bring brochures to hand out to members of the public		04/04/2018 1:40 PM	🖊

- • Select the blue ✚**Save Resource** button to save, or;
  - o select the red 🗑**Delete Resource** button to delete the resource
  - o select the white ⬅**Cancel** button, the white **Close** button or the **x** in the top corner of the pop up window to exit the window without saving

3.2.13 Add / Assign a Volunteer to Event / Shift

To add / assign a volunteer to an event or event shift:
- • Log into VMS
- • Select **Calendars** from the left navigation bar
- • Select the orange **Admin** button to administer the calendar
  - o find and select the *Event Title* of the event to add the volunteer to
  - o if needed use the search bar provided to find the event
- • Select **Shifts / Resources** tab
  - o select the blue ✚**Add Volunteer** button
- • Select **Volunteer Name** from the dropdown menu
- • Select the blue ✚**Signup Volunteer** button to save, or;

☰ Signups

✚ Add Volunteer

#	Name	Sign-up Date	Status	
1	Melissa Womack	02/28/2018 09:49:39	Master Gardener	
2	Missy Gable	03/12/2018 12:27:05	Master Gardener	
3	Mario Scalise	04/06/2018 20:59:20	Trainee	
4	Judy Logsdon	04/23/2018 13:18:59	Master Gardener	

Showing 1 to 4 of 4 entries

← Previous   Next →

o   select the white ←Cancel button the white Close button or the x in the top corner of the pop up window to exit the window without saving

3.2.14 Remove Volunteer from an Event / Shift

To remove a volunteer from an event or event shift:

- Log into VMS
- Select **Calendars** from the left navigation bar
- Select the orange **Admin** button to administer the calendar
  o   find and select the *Event Title* of the event you want to add resources to
  o   if needed use the search bar provided to find the event
- Select **Shifts / Resources** tab
- Find the shift to remove the volunteer from, and find their name
  o   if needed use the search bar provided to find the volunteer
- Select the red 🗑**Delete** button to remove the volunteer from the shift
  o   select **OK** from the pop up window to confirm deletion
  o   select **Cancel** to not delete

Signup Roster Volunteer to Shift

The options below will allow you to signup new roster volunteers to the shift

Volunteer Name   Ogburn, Katelyn

🗑 Delete Volunteer Signup   ← Cancel

3.2.15 Assign Volunteer a Shift Resource

To assign a volunteer to a shift resource for an event, after the event and resource list have already been created:

- Log into VMS
- Select **Calendars** from the left navigation bar
- Select the orange **Admin** button to administer the calendar
  o   find and select the *Event Title* of the event you want to assign the volunteer to
  o   if needed use the search bar provided to find the event
- Select **Shifts / Resources** tab
- Find and select the blue ✏ **Edit** button from the **Shift Resource List** located in the last column of the resource to be assigned
  o   if needed use the search bar provided to find the resource
  o   select a volunteer from the **Volunteer Name** dropdown menu
- Select the blue ＋**Save Resource** button to save, or;
  o   select the red 🗑**Delete Resource** button to delete the resource
  o   select the white ←Cancel button the white Close button or the x in the top corner of the pop up window to exit the window without saving

Volunteer Name   McMasters, Peach

04/04/2018   📅

＋ Save Resource   🗑 Delete Resource   ← Cancel

3.2.16 Delete / Remove Volunteer from a Shift Resource

To delete / remove a volunteer from a shift resource:

- Log into VMS
- Select **Calendars** from the left navigation bar
- Select the orange **Admin** button to administer the calendar
  o   find and select the *Event Title* of the event you want to assign the volunteer to

- if needed use the search bar provided to find the event
- Select **Shifts / Resources** tab
- Find and select the blue ✎ **Edit** button from the **Shift Resource List** located in the last column
  - if needed use the search bar provided

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- To unassign a resource to a volunteer **Select a Roster Name** from the dropdown menu
  - select the blue **+Save Resource** button to save, or
- Select the red 🗑 **Delete Resource** button to delete the resource entirely, or;
  - select the white **←Cancel** button the white **Close** button or the **x** in the top corner of the pop up window to exit the window without saving

3.2.17 Export Events

To export events:
- Log into VMS
- Select **Calendars** from the left navigation bar
- Select the orange **Admin** button to administer the calendar
  - select **All Events** tab to view list of all events, or;
  - select **Upcoming Events** tab to view list of all upcoming events
  - if needed use the search bar provided to find the events to export
    - select the check box in the last column of the event or events to export
- Select the blue **Export Selected Events** button to create an Excel document
  - the document has the following information:
    - **Event Title**
    - **Calendar**
    - **Start Date**
    - **End Date**
    - **Time**
    - **# of Volunteers**
    - **Explanation**
    - **Location**
    - **Address**
    - **Contact**
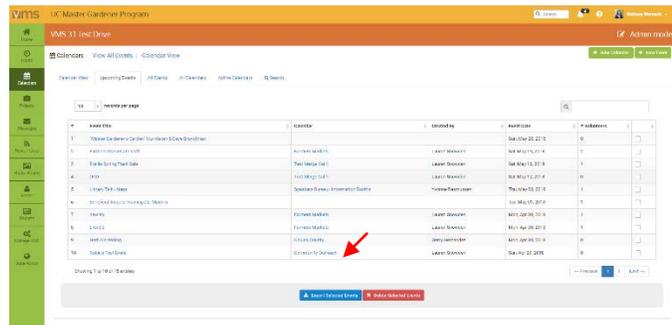
3.3 Manage Projects

In this section you will learn:

3.3.1 VMS Project Categories
3.3.2 View Project List
3.3.3 Export Project List
3.3.4 Add New Project
3.3.5 Edit Project
3.3.6 Deactivate a Project
3.3.7 Reactivate a Project
3.3.8 Merge Projects

3.3.9 Enroll Volunteer(s) in a Project
3.3.10 Un-Enroll Volunteer(s) in a Project
3.3.11 Email Volunteer(s) Enrolled in a Project
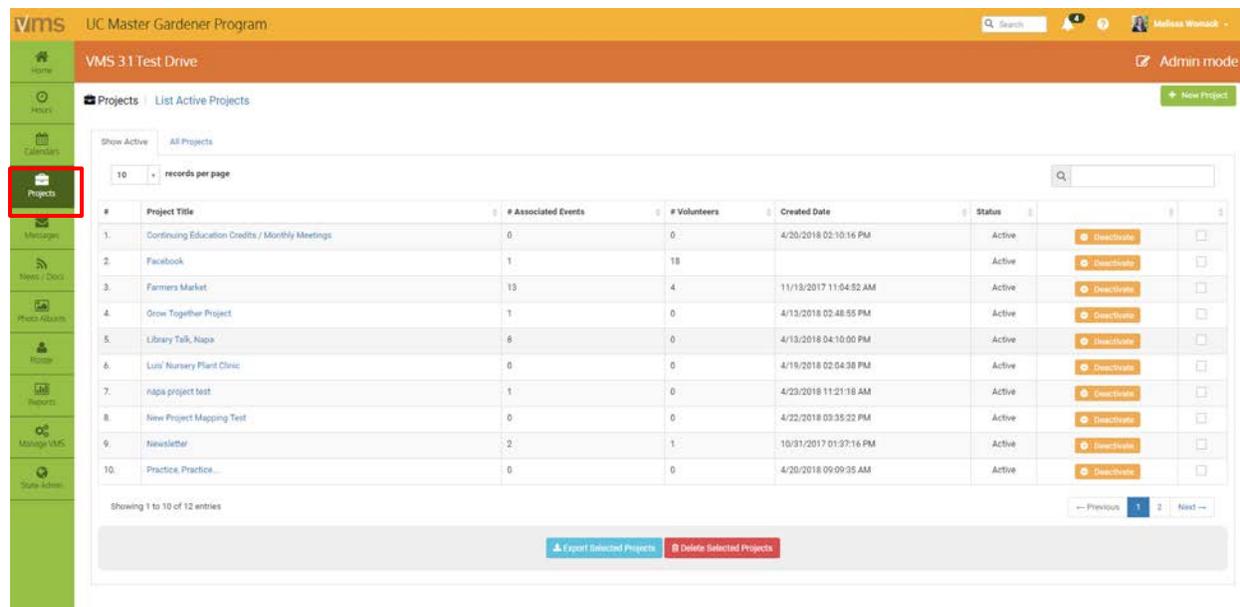
3.3.1 VMS Project Categories
Does not apply to UC Master Food Preserver Program

There are 11 pre-defined categories in VMS that allow for consistent, compelling and accurate reporting across the statewide program. The data collection is important for program sustainability and is a great tool to share relevant information with stakeholders at the community, county, state and federal level.

When creating a new project, simply select the category from the dropdown menu and save.

1. **Admin/Office**- any projects that fosters the administration of the UC Master Gardener program. Including board (or other leadership structure) meetings, and sub-committee meetings that do not belong in another category. May also include office duties completed by a volunteer at the request of program coordinator or UCCE staff person.

2. **Booth Display**- includes projects in which UC Master Gardeners represent the program, UCCE, or UC ANR at an event with a larger focus. Includes, but not limited to, preparation, attendance, or clean up from the following: farmer's markets, county fair booth, table at community events, home and garden show, etc.

3. **Demonstration Garden**- includes, but is not limited to: school gardens, community gardens, public landscaping projects.

4. **Farm Advisor Research**- any research done on behalf of a UCCE farm advisor, specialist or the statewide office. Includes PlantRight Nursery Survey.

5. **Help Desk / Hotline**- includes any activity in which UC Master Gardeners answer questions from the public about home horticulture and/or pests, typically on an individual basis. Hotlines, Helplines, answering "helpline" emails or phone calls, plant clinics, water walks, etc.

6. **Mass Media/ Communications**- any communications intended for an external audience. Including, but not limited to, the development of material such as: flyers, newspaper articles, press releases, social media, blog posts, newsletters, direct mail, etc.

7. **Master Gardener Continuing Education**- any program coordinator-approved continuing education opportunities.

8. **Master Gardener Program Meeting**- internal meetings held for UC Master Gardener volunteers.

9. **Mentoring**- includes projects that cater to the internal development of UC Master Gardener volunteers and program leadership. Includes committees that facilitate new class trainings.

10. **Public Education**- any project in which a Master Gardener is educating the public (usually more than one at a time) on home horticulture topics. Workshops, classes, seminars, demonstrations, etc.

11. **Sales/Fundraising**- any project that leads to the sale of a product or fundraising opportunity. Examples: developing a county calendar for sale; plant propagation and maintenance for a plant sale; working on logistics and/or physically working in the garden preparing for a garden tour.

3.3.2 View Project Lists

To view active project list:
- Log into VMS
- Select **Projects** from the left navigation bar
- Select the orange **Admin** button to administer projects
  - ○ select **Show Active** tab to view list of active projects
  - ○ the list has the following information:
    - ▪ **Project Title**
    - ▪ **# of Associated Events**
    - ▪ **# of Volunteers**
    - ▪ **Created Date**
    - ▪ **Status**
      - • **Active**
    - ▪ use the search bar provided to find a specific project
    - ▪ use the **Start and End Date** boxes to display results for a determined time frame
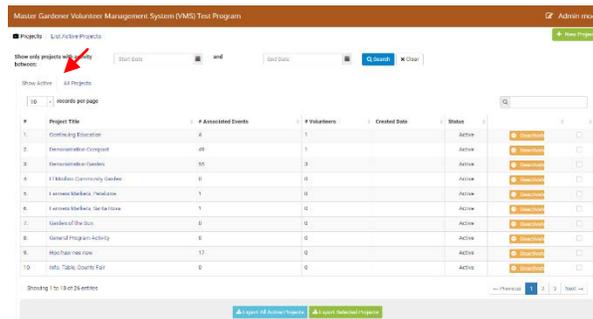
To view all projects list:
- Log into VMS
- Select **Projects** from the left navigation bar
- Select the orange **Admin** button to administer projects
  - ○ select **All Projects** tab to view list of all projects
  - ○ the list has the following information:
    - ▪ **Project Title**
    - ▪ **# of Associated Events**
    - ▪ **# of Volunteers**
    - ▪ **Created Date**
    - ▪ **Status**
      - • **Active**
      - • **Inactive**
      - • **Archived**
    - ▪ use the search bar provided to find a specific project

- use the **Start and End Date** boxes to display results for a determined time frame

3.3.3 Export Project List

To export a project list:

- Log into VMS
- Select **Projects** from the left navigation bar
- Select the orange **Admin** button to administer projects
  - o Select **Show Active** tab to view list of active projects, or;
  - o select **All Projects** tab to view list of all projects
  - o if needed use the search bar provided to find the project or projects to export
    - select the check box in the last column of the project or projects to export
  - o if needed use the **Start and End Date** boxes to display results for a determined time frame
- Select the blue **Export all Projects** button or the green button to create an Excel document
  - o the document has the following information:
    - **Project Name**
    - **Description**
    - **Information**
    - **Location**
    - **Address**
    - **Address (2)**
    - **City**
    - **Postal Code**
    - **# of Volunteer Required**
    - **# of Volunteers Signed UP**
    - **# of Total Volunteer Hours**
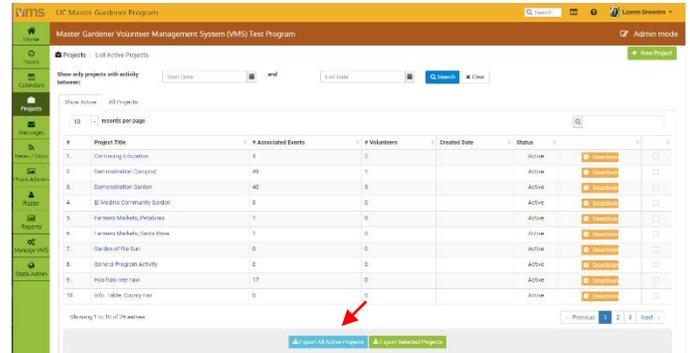
3.3.4 Add New Project

To add a new project:

- Log into VMS
- Select **Projects** from the left navigation bar
- Select the orange **Admin** button to administer projects
- Select the green **✚New Project** button
  - o enter information
    - **Project Name** (i.e. Library Talking Series)
    - **Project Categories** (dropdown)
      - **Admin/ Office**
      - **Booth Display**
      - **Demonstration Garden**
      - **Farm Advisor Research**
      - **Help Desk/ Hotline**
      - **Mass Media/ Communications**
      - **Master Gardener Continuing Education**
      - **Master Gardener Program Meeting**
      - **Mentoring**
      - **Public Education**
      - **Sales/ Fundraising**
    - **Project Description**
    - **Project Information**
    - **Select Calendar** (dropdown)
    - Toggle the green **Yes / No** for email notification of sign-ups
    - **Project URL**
    - Toggle the green **Yes / No** for display sign-ups
    - **Number of Volunteer Needed**
    - **Project Location**
      - **Location Name**
      - **Address / Address 2**
      - **City**
      - **State**
      - **Zip Code**
- Select the blue **✓Create Project** button, or;
  - o select the back button on your browser to exit without saving
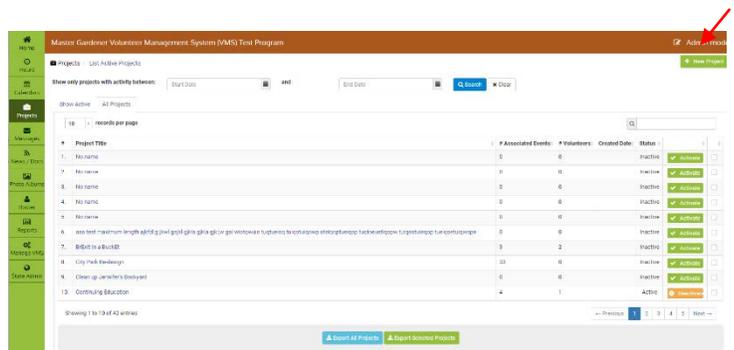
3.3.5 Edit Project

To edit an existing project:

- Log into VMS
- Select **Projects** from the left navigation bar
- Select the orange **Admin** button to administer projects
  - o select **Show Active** tab to view list of active projects, or;
  - o select **All Projects** tab to view list of all projects
    - ▪ find and select the *Project Title* of the project you want to edit
    - ▪ if needed, use the search bar provided to find the project
- Select the blue 🖊**Edit Project** button
  - o edit content as needed
- Select the blue 🖊**Save Changes** button to save, or;
  - o select the white ←**Cancel** button to exit the window without saving changes
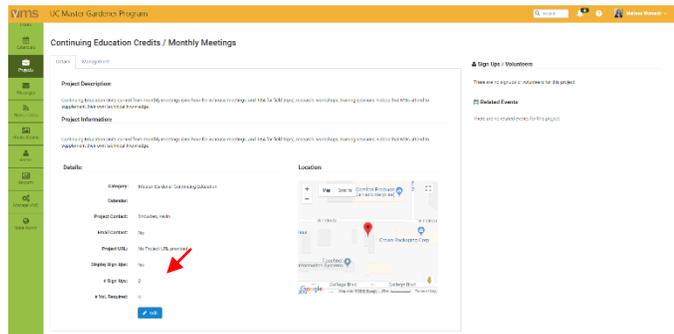
3.3.6 Deactivate a Project

To deactivate a project:

- Log into VMS
- Select **Projects** from the left navigation bar
- Select the orange **Admin** button to administer projects
- Select **Show Active** tab
  - o find the *Project Title* of the project you want to deactivate
  - o if needed use the search bar provided to find the project
    - ▪ select the gold **Deactivate** button
      - • select **OK** from the pop up window to confirm deactivation
      - • select **Cancel** to not deactivate
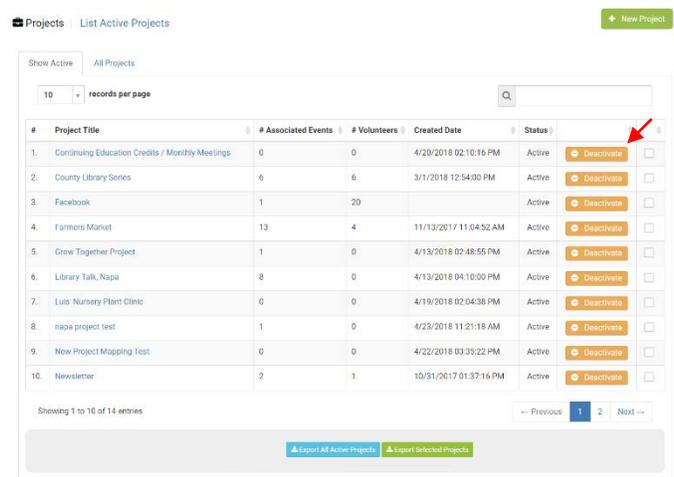
3.3.7 Reactivate Project

To reactivate a project:

- Log into VMS
- Select **Projects** from the left navigation bar
- Select the orange **Admin** button to administer projects
- Select **All Projects** tab
  - o find the *Project Title* of the project you want to reactivate
  - o if needed use the search bar provided to find the project
    - ▪ select the green ✓**Activate** button
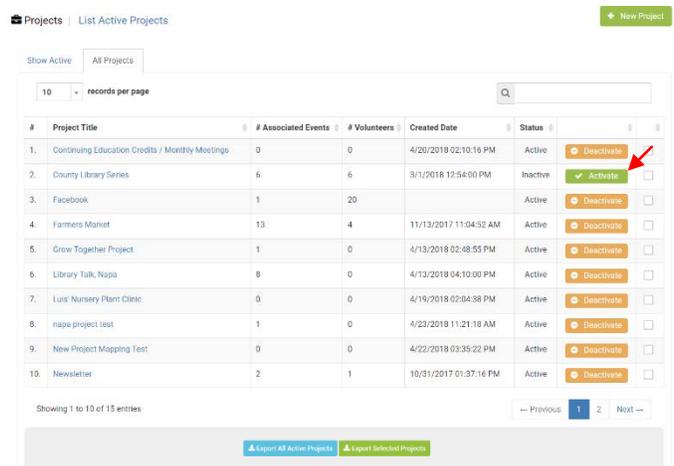
3.3.8 Merge Projects

To merge two existing projects together:
- Log into VMS
- Select **Projects** from the left navigation bar
- Select the orange **Admin** button to administer projects
  - o select **Show Active** tab to view list of active projects, or;
  - o select **All Projects** tab to view list of all projects
    - ▪ find and select the *Project Title* of one of the projects you want to merge
    - ▪ if needed use the search bar provided to find the project(s)
- Select the blue ✎**Edit** button
- Select **Management** tab
  - o select the blue **Merge Projects** button
  - o select the project to merge with from the **Merge With** drop down box
    - ▪ select the red **Confirm Merge** button
      - • select **OK** from the pop up window to confirm merge
      - • select **Cancel** to not merge
    - ▪ select the white ←**Cancel** button, the white **Close** button or the **x** in the top corner of the pop up window to exit the window without saving

Note: Merges are not reversible, the merged projects will take the name of the project picked from the dropdown list of projects. Edit the merged project by following *Section 3.3.5 Edit a Project*.

3.3.9 Enroll Volunteer(s) in a Project

To enroll volunteer(s) in a project:
- Log into VMS
- Select **Projects** from the left navigation bar
- Select the orange **Admin** button to administer projects
  - o select **Show Active** tab to view list of active projects, or;
  - o select **All Projects** tab to view list of all projects
    - ▪ find and select the *Project Title*

- if needed use the search bar provided to find the project
- Select **Management** tab
  - o toggle the green **Yes / No** for **Enroll from Roster**
  - o select the volunteers to add to the project by checking box in the last column
    - if needed use the search bar provided to find a volunteer
  - o select the blue **✚Enroll Selected Users**

3.3.10 Un-Enroll Volunteer(s) in a Project

To un-enroll volunteer(s) in a project:
- Log into VMS
- Select **Projects** from the left navigation bar
- Select the orange **Admin** button to administer projects
  - o select **Show Active** tab to view list of active projects, or;
  - o select **All Projects** tab to view list of all projects
    - find and select the *Project Title*
    - if needed use the search bar provided to find the project
- Select **Management** tab
  - o select the volunteers to remove from the project by checking box in the last column
    - if needed use the search bar provided to find a volunteer
  - o select the red 🗑**Remove Selected Users**

3.3.11 Email Volunteer(s) Enrolled in a Project

To email volunteer(s) enrolled in a project:
- Log into VMS
- Select **Projects** from the left navigation bar
- Select the orange **Admin** button to administer projects
  - o select **Show Active** tab to view list of active projects, or;
  - o select **All Projects** tab to view list of all projects
    - find and select the *Project Title*, or;
    - if needed use the search bar provided to find the project
- Select **Management** tab
  - o select the volunteers to email by checking box in the last column

- Select the blue **Email Volunteers** button
  - o enter information:
    - deselect any volunteers who should NOT receive this email
    - **Additional Emails**
    - **Subject**
    - **Message**
    - **Attachment**
    - check box **Copy Me** (send me a copy of the email)
  - o to send select the blue **Send Email** button
  - o to cancel select the blue **Back** button
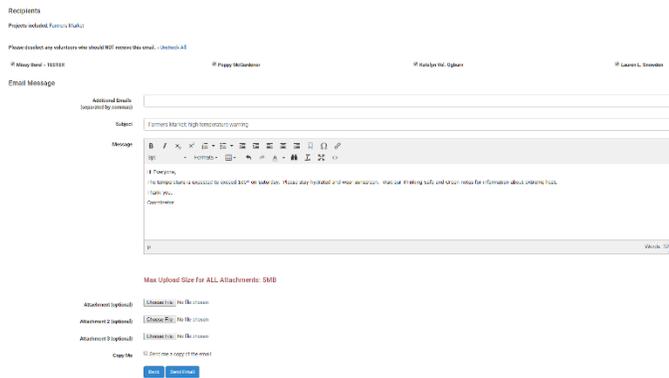
3.4 Admin Messages

In this section you will learn how to:
3.4.1 Send a Message through VMS
3.4.2 View / Search Email History
3.4.3 Delete Email Message

Note: *See Section 2.5 Messages*, for basic user message instructions:
2.5.1 View Messages in VMS Inbox
2.5.2 Delete Message
2.5.3 Make a Message a Favorite
2.5.4 Un-favorite a Message
2.5.5 Send a Message through VMS
2.5.6 View Message History through VMS
2.5.7 Jump to Collaborative Tools

3.4.1 Send a Message through VMS
The ability to send messages through VMS by volunteers is a function can be turned on and off by **Full Access** administrators of VMS at the county level. This feature may not be available in your county if it is turned off (*to turn on/off go to Mange VMS << Volunteer options*). **Full Access** administrators can send messages through VMS regardless. To send an email message using VMS:
- Log into VMS
- Select **Messages** from the left navigation bar
- Select the orange **Messages** button to enter **Admin** mode and administer messages
- Select the blue ⊠**Create Email To All Active/Limited Active Volunteers** to skip to sending email to all active/limited active volunteers on the roster
- Select the green ⊠**Send New Email** button
  - o enter information as needed:
    - **Name** (Name, City, etc.)
    - **Status**
      - o **Active**
      - o **Limited Active**
      - o **Inactive Resigned**
      - o **Honorary**
    - **Achievement**
      - use dropdown to select multiple options
        - o **Trainee**
        - o **Master Gardener / Master Food Preserver**
        - o **First Year Master Gardener / First Year Master Food Preserver**
        - o **Gold Badge**
        - o **Platinum Badge**
        - o **Internal Administration**
        - o **UC Staff**
    - **Interests**
      - use dropdown to select multiple options
    - **Projects**
      - use dropdown to select multiple options
    - **Events**
      - use dropdown to select multiple options
    - **Start Date**
    - **End Date**
    - enter information:
      - deselect any volunteers who should NOT receive this email
      - **Additional Emails**
      - **Subject**
      - **Message**
      - **Attachment**
      - check box **Copy Me** (send me a copy of the email)
        - to send select the blue **Send Email** button
        - to cancel select the blue **Back** button

Note: The sender of the email will be displayed as "YourEmailAddress.com on behalf of YOUR NAME <no-reply@ucanr.edu>. The body of the email will state that *"This email was sent from the COUNTY Master Gardener Volunteer Management System," or "This email was sent from the COUNTY Master Food Preserve Volunteer Management System."*

3.4.2 View / Search Email History

To view / search VMS email history:

- Log into VMS
- Select **Messages** from the left navigation bar
- Select the orange **Messages** button to administer messages
  - o email history is displayed in list form:
    - ▪ **#**
    - ▪ **Date Sent**
    - ▪ **Subject**
    - ▪ **From**
    - ▪ **Action**
  - o find and select the email in the list, or;
  - o if needed use the search bar provided to find the email

3.5 Newsletter / Documents

In this section you will learn how to:

3.5.1 Add New Group

3.5.2 Edit / Delete Group Information

3.5.3 Add a Newsletter Issue

3.5.4 Add a Document

3.5.5 Delete a Newsletter Issue or Document

3.5.6 View or Manage Subscribers

3.5.1 Add New Group

Add groups of newsletters or documents for volunteers to use or view. Before a newsletters or document can be uploaded there must be a group to add them to. To add a new document group:

- Log into VMS
- Select **News / Docs** from the left navigation bar
- Select the orange **Admin** button to administer the **News / Docs**
- Select the green **✚Add New Group** button
  o enter information
    ▪ **Group Name** (i.e. Monthly Newsletter)
    ▪ **Description**
    ▪ **Sender Email address**
    ▪ **Group Type** (select one)
      - **Newsletter**
      - **Document**
      - **Archived**
    ▪ **Newsletter Subscription**
      - allows volunteers to subscribe to newsletter, they will receive a reminder via email every time a new document is posted to the group. This is highly recommended for newsletters

- **Add Volunteers**
  - will add all volunteers to subscriber list
- Select the blue ✓**Save** button, or;
  - o   select the white ←**Cancel** button to exit without saving

Note: VMS will email the newsletter to all subscribers, be sure to select the check box **Newsletter Subscription** to activate this feature. *See Section 3.5.6 View or Manage Subscribers* to manage who receives the notifications.

3.5.2 Edit / Delete Group Information

To edit / delete group information:
- Log into VMS
- Select **News / Docs** from the left navigation bar
- Select the orange **Admin** button to administer the News / Docs
  - o   find and select the **Group Name** of the group you want to edit
  - o   if needed use the search bar provided to find the group
- Select the green ✎ **Edit Settings** button
  - o   edit content as needed
- Select the blue ✓**Save Document Group**/✓**Save Newsletter** button, or;
  - o   select the red 🗑**Delete Document Group/** 🗑**Delete Newsletter** button to delete the group
  - o   select the white ←**Cancel** button to exit without saving
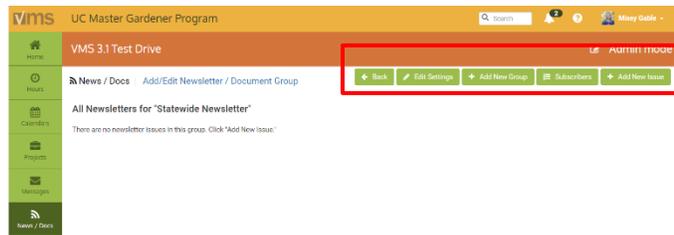
3.5.3 Add a Newsletter Issue

Before you can upload newsletters or documents you must have a document group to assign it to, *see Section 3.5.1 Add New Document Group* for instructions. There are two ways to add a newsletter issues, to add a newsletter issue:
- Log into VMS
- Select **News / Docs** from the left navigation bar
- Select the orange **Admin** button to administer the News / Docs
  - o   select **Newsletters** tab
  - o   find and select the **Group Name** of the group you want to add the issue to
  - o   if needed use the search bar provided to find the group
- Select the green **➕Add New Issue** button
  - o   enter information:
    - **Newsletter Issue**
    - **Description of Newsletter Issue**
  - o   click **Browse…**and select the newsletter file
- Select the blue **Upload Newsletter Issue** button
  - o   click the green ✉**E-Mail Issue to Subscribers** to send to subscriber list
    - select **OK** from the pop up window to confirm sending
  - o   select **Cancel** to not send

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- Log into VMS
- Select **News / Docs** from the left navigation bar
- Select the orange **Admin** button to administer the News / Docs

- Select Add New Issue under the **Issue** column
  - o enter information:
    - ▪ **Newsletter Issue**
    - ▪ **Description of Newsletter Issue**
  - o click **Browse...**and select the newsletter file
- Select the blue **Upload Newsletter Issue** button
  - o select **Add New Issue** from the **Issue** column
  - o enter information:
    - ▪ **Newsletter Issue**
    - ▪ **Description of Newsletter Issue**
  - o click **Browse...**and select the newsletter file
- Select the blue **Upload Newsletter Issue** button
  - o click the green ⊠**E-Mail Issue to Subscribers** to send to subscriber list
    - ▪ select **OK** from the pop up window to confirm sending
  - o select **Cancel** to not send

Note: For easy viewing by multiple users with different computers and programs convert newsletters to PDF files before uploading (Portable Document Format).

3.5.4 Add a Document
There are two ways to add a document, to add a document:
- Log into VMS
- Select **News / Docs** from the left navigation bar
- Select the orange **Admin** button to administer the News / Docs
  - o select **Document Groups** tab
  - o select the **Document Group Name** of the group you want to add the document to
  - o if needed use the search bar provided to find the group
- Select the green **＋Add New Document** button
  - o enter information:
    - ▪ **Document Name**
    - ▪ **Description of Document**
  - o click **Browse...**and select the document file
- Select the blue **Upload Document** button

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- Log into VMS
- Select **News / Docs** from the left navigation bar
- Select the orange **Admin** button to administer the News / Docs
  - o select **Document Groups** tab
- Select **Add New Document** from the **Issue** column
  - o enter information:
    - ▪ **Document Name**
    - ▪ **Description of Document**
  - o click **Browse...**and select the document file
- Select the blue **Upload Document** button

Note: For easy viewing by multiple users with different computers and programs convert newsletters to PDF files before uploading (Portable Document Format).

3.5.5 Delete a Newsletter Issue or Document

To edit / delete a newsletter issue of document:

- Log into VMS
- Select **News / Docs** from the left navigation bar
- Select the orange **Admin** button to administer the News / Docs

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Delete newsletter issue:

- Select **Newsletter** tab
  - o find and select the **Group Name** of the newsletter to be deleted
  - o if needed use the search bar provided to find the group
- Select the _Newsletter Issue_ to be deleted
  - o select the red 🗑**Delete This Newsletter Issue** button to delete the issue
    - ▪ select **OK** from the pop up window to confirm deletion
    - ▪ select **Cancel** to not delete
  - o select the green **←Back** button to exit without saving

Delete document or presentation:

- Select **Document Groups** tab
  - o find and select the **Document Group Name** of the newsletter to be deleted
  - o if needed use the search bar provided to find the group
- Select the _Newsletter Issue_ to be deleted
  - o select the red 🗑**Delete This Document** button to delete the document
    - ▪ select **OK** from the pop up window to confirm deletion
    - ▪ select **Cancel** to not delete
  - o select the green **←Back** button to exit without saving

Note: Deletions are not reversible.

3.5.6 View or Manage Subscribers

Volunteers may subscribe to Newsletter Groups and Document Groups through **News / Docs**. To view and manage these subscribers:

- Log into VMS
- Select **News/ Docs** from the left navigation bar
- Select the orange **Admin** button to administer the News / Docs
- Select **View Subscribers** next to the group you want to view the subscribers for
- Manage volunteers by clicking their names to move them on and off of the subscriber list.
  - o click the green **✚Add all Current Volunteer to List** to move all volunteers to the subscribed list
    - ▪ **Subscribe all**- will move all volunteers listed under **Unsubscribed** to **Subscribed** column
    - ▪ **Unsubscribe all**- will move all volunteers listed under **Subscribed** to **Unsubscribed** column
  - o if needed use the search bar provided to find a particular subscriber
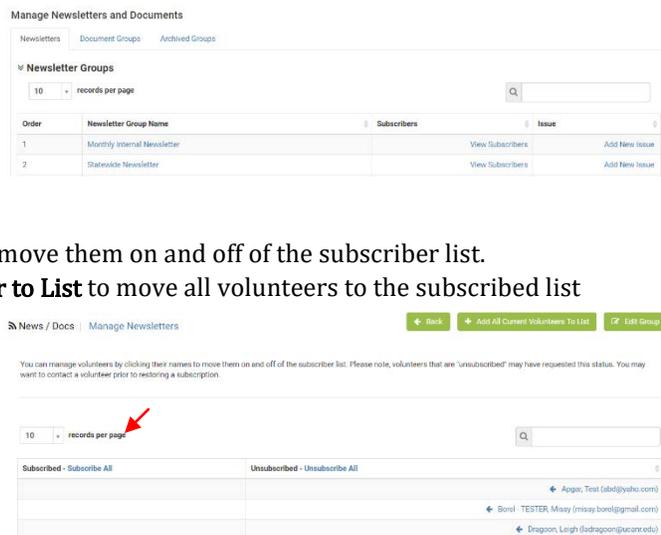
Note: If the check box **Newsletter Subscription** was selected when adding the group the subscribers of that group will receive an email notification with the subject line "*Group Name*" Newsletter subscription.

Volunteers that are "unsubscribed" may have requested this status, contact the volunteer prior to restoring a subscription

3.6 Roster

In this section you will learn how to:

3.6.1 Add a New Volunteer
3.6.2 Import Volunteers
3.6.3 Send / Resend Welcome Email
3.6.4 View Volunteer Profile
3.6.5 Edit Volunteer Profile
3.6.6 Change Volunteer Status and/or Achievement
3.6.7 Reinstate a Volunteer
3.6.8 Transfer Volunteer
3.6.9 Proxy in as Volunteer
3.6.10 Search Volunteers
3.6.11 Reset a Volunteer's Password
3.6.12 Export Roster Data
3.6.13 Create Mailing List

3.6.1 Add a New Volunteer

To add a new volunteer to VMS:

- Log into VMS
- Select **Roster** from the left navigation bar
- Select the orange **Admin** button to administer the roster
- Select **＋Add A New Volunteer** from the top navigation bar

To prevent duplicate user accounts, you will be prompted to start a search of the user database (valid email address or last name) for the person you want to add to the program roster.

- **Enter email** or **last name** into the **Find Volunteer** box
- Select the blue **Search** button

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When User not found:

- Select the blue **Create a New Volunteer** button
- Add New Volunteer will be displayed, **e**nter / add information
  - o **First Name**
  - o **Last Name**
  - o **Valid Email Address**
  - o select blue ✓**Add Volunteer** button
- New volunteers will immediately receive an email with access instructions to VMS
  - o to customize this message see *Section 3.8.6 Manage New Member Email* for directions
- Update the **Personal** tab user profile as needed, select the blue ✓**Save Profile** button
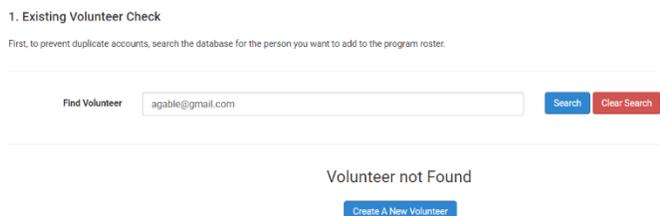
When matches are found:

- A list of matches is displayed, to add a match click **Add to Roster** under the **Action column** on the line associated with the correct match.
  - o if none of the matches are correct, select the blue **Create a New Volunteer** button and follow the above instructions.
- **Edit Roster Profile** will be displayed
  - o update **Personal** tab user profile as needed**,** select the blue ✓**Save Profile** button
  - o update **Program** tab**:**
    - ▪ select an **Achievement** from the dropdown
    - ▪ select a **Status** from the dropdown
    - ▪ click the gold ⊟**Update Status** button
- Volunteers will receive an email with access instructions to VMS
  - o to customize this message see *Section 3.8.6 Manage New Member Email* for directions
- Update **Personal** tab user profile as needed, select the blue ✓**Save Profile** button
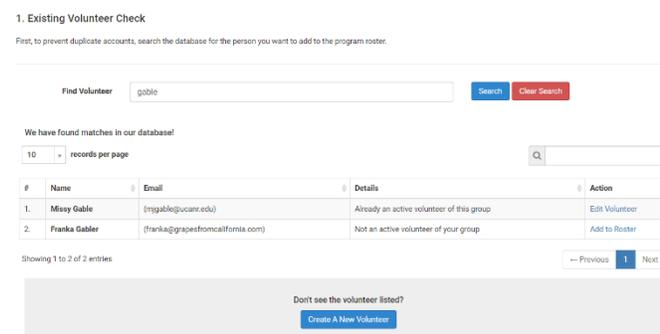
Note: Only admins can enter start dates and should do so at this time. If you do not enter this information incorrect date information may be pulled in VMS retention reports for your county.

3.6.2 Import Volunteers

The Import Volunteers functions allows the user to add a large group of new volunteers. The import function will comb the list and not allow duplicate entry of volunteers. Successfully imported new volunteers will have Trainee Achievement and Active Status in their profile as well as receive the new volunteer email. To import new volunteers:

- Log into VMS
- Select **Roster** from the left navigation bar
- Select the orange **Admin** button to administer the roster
- Select **Import Volunteers** tab
  - select **Download Excel Import Template**
  - enter data in each column:
    - **First Name**
    - **Last Name**
    - **Email**
    - **Start Date** (format: 00/00/0000)
  - save the Import Template
- Click **Browse…**and select the Import Template
  - to link to an event or project toggle the green **No** button to **Yes**
  - assign the event or project using the dropdown
- Select the blue **Import Volunteers** button
  - a green bar will appear at the top of the screen indicating the import was successful or not
  - the imported list will appear on the screen
    - select the white ← **Cancel** button to exit the window without saving
  - select the blue ✓**Confirm** button to save
  - the confirmed list will appear with updated import status
    - **Result**
    - **First Name**
    - **Last Name**
    - **Email**
    - **Start Date** (format: 00/00/0000)
    - **Account Create?**- status of account creation
      - **Directory account created and added to Roster**
      - **Directory account exists, added as a VMS user**
    - **Email Sent?** (welcome email)
      - **success**
      - **blank** (no email was sent)
  - a green bar will appear at the top of the screen reporting actions taken
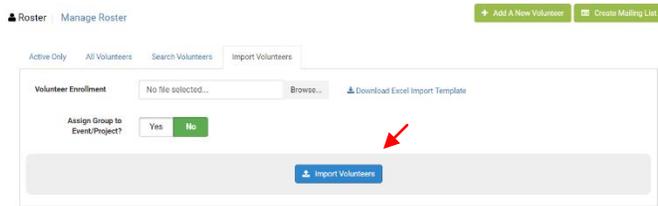
Note: To customize the welcome email that is sent see *Section 3.8.6 Manage New Member Email* for directions.

Only admins can enter start dates and should do so at this time. If you do not enter this information incorrect date information may be pulled in VMS retention reports for your county.

3.6.3 Send / Resend Welcome Email

Utilize this feature to send / resend the "Welcome Email" with log on instructions for the UC ANR Portal (Access to VMS) to individual volunteers. To email volunteers a custom email (not the "Welcome Email") and/or to send an email to more than one volunteer utilize the **Messages** tab located on the left navigation bar. (*See Section 3.4.1 Send a Message through VMS*).

- Log into VMS
- Select **Roster** from the left navigation bar
- Select the orange **Admin** button to administer the roster
- Select the check box located in the far right column of the volunteer or volunteers who should receive the email
  - o select the blue **Send Welcome Email** button to send the email
    - ▪ email will come from: noreply@ucanr.edu (or designated email address)
    - ▪ subject: Accessing Master Gardener System or;
    - ▪ subject: Accessing Master Food Preserver System
    - ▪ body: log on instructions for ANR Portal
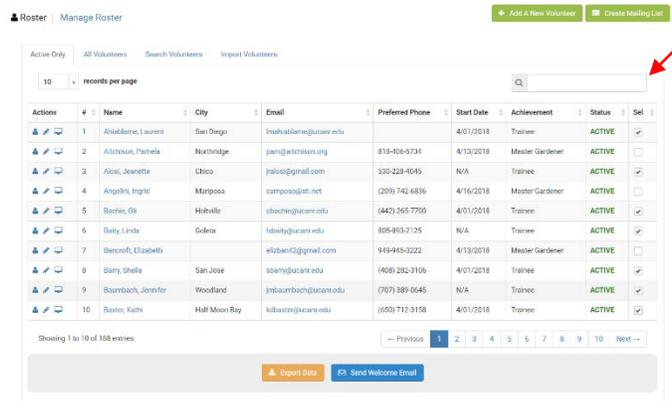
Note: The from email address and the message can be customized. (*See Section 3.8.6 Manage New Member Email*)

3.6.4 View Volunteer Profile

To view a volunteer's profile:

- Log into VMS
- Select **Roster** from left navigation bar
- Select the orange **Admin** button to administer the roster
  - o select **Active Only** or **All Volunteers** tab and use the search bar to look up the volunteer, or;
  - o select **Search Volunteers** tab and use to look up the volunteer
    - Select the 👤 profile icon located in the **Action**s column of the to view the profile

3.6.5 Edit Volunteer Profile

To edit a volunteer's profile:

- Log into VMS
- Select **Roster** from left navigation bar
- Select the orange **Admin** button to administer the roster
  - o select **Active Only** or **All Volunteers** tab and use the search bar to look up the volunteer, or;
  - o select **Search Volunteers** tab and use to look up the volunteer,
- Select the 🖊 pencil icon located in the **Actions** column of the user to edit profile
- Select the blue 🖊 **Edit** button to start editing
- Select the blue ✓**Save Profile** button to save changes, or
  - o select the white ←**Cancel** button to exit without saving
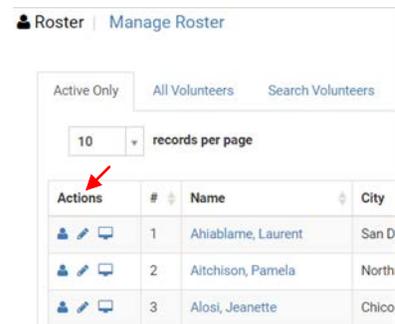
Note: If you change a volunteer's password, advise the volunteer of their new temporary password and instruct them to logon and create a new password that only they know. (*See Section 3.6.11 Reset a Volunteer's Password*)

3.6.6 Change Volunteer Status and/ or Achievement

To change the status of a volunteer:

- Log into VMS
- Select **Roster** from left navigation bar
- Select the orange **Admin** button to administer the roster
    o   find volunteer to be updated
    o   if needed use the search bar provided to find the volunteer
- Select the ✎pencil icon to **Edit volunteer profile**
    o   select **Programs** tab

- Find the program listed in the **Program Name** column to be changed
    o   in the achievement column select the appropriate **Achievement** using the dropdown menu
    o   achievement options:
        ▪   **First Year Master Gardener / First Year Master Food Preserver**
        ▪   **Gold Badge**
        ▪   **Internal Administration**
        ▪   **Master Gardener / Master Food Preserver**
        ▪   **Platinum**
        ▪   **Trainee**
        ▪   **UC Staff**
    o   in the status column select the appropriate **Status** using the dropdown menu
    o   status options:
        ▪   **Active**
        ▪   **Limited Active**
        ▪   **Deleted***
        ▪   **Honorary**
        ▪   **Inactive Resigned***

            • *****use the red **x Resign button** to resign a volunteer and or delete them after changing their status
                o   enter the **Reason** for resignation in the text box
                o   select the blue Save button, or;
                o   select the white ←**Cancel** button, the white **Close** button or the **x** in the top corner of the pop up window to exit the window without saving
            • resignation confirmation email is automatically sent to the volunteer from VMS (no-reply@ucanr.edu) and the designated owner of that VMS instance thanking the volunteer for their volunteer service and confirming their resignation.
- Select the gold **Update Status** button to save changes
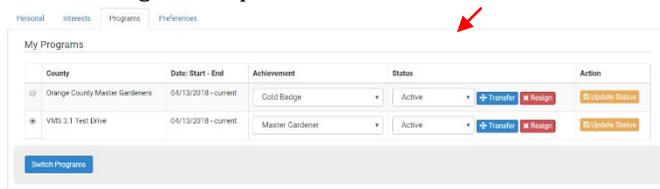
Note: Volunteers have the ability to electronically resign. If a volunteer does electronically resign an email is sent to the owner of that VMS instance notifying them of the resignation.

Achievement Definitions:

1. **Trainee-** is an approved enrolled volunteer actively participating in the UC MGP / MFP training program. A Trainee immediately becomes a First-Year Master Gardener or First-Year Master Food Preserver by attending the mandatory trainings and passing the qualifying exam. See the UCCE Master Gardener Program Administrative Handbook for Program Staff, Chapter 3 Volunteer Status, Section III. Training ("MG Volunteer Trainee" Status)

2. **Master Gardner / Master Food Preserver-** is a UC MGP / MFP volunteer in good standing who has completed the normal UC MGP / MFP volunteer service requirements and completed reappointment annually. See the UCCE Master Gardener Program Administrative Handbook for Program Staff, Chapter 3 Volunteer Status, Section VI. Reappointment (Second and Subsequent years of UCCE MGP Service)

3. **First-Year Master Gardener / First-Year Master Food Preserver-** is a trainee who has attended the mandatory trainings and passed the qualifying exam and is now a "certified" UC MG / MFP. See the UCCE Master Gardener Program Administrative Handbook for Program Staff, Chapter 3 Volunteer Status, Section V. Appointment (First Year of UCCE MGP Service)

4. **Gold Badge** – is a UC MG / MFP volunteer who has completed a minimum of one thousand (1,000) hours of service and is in good standing. See the UCCE Master Gardener Program Administrative Handbook for Program Staff, Chapter 3 Volunteer Status, Section XII. MG Volunteer Recognition.

5. **Platinum Badge-** is a UC MG / MFP volunteer who has completed a minimum of two thousand five hundred (2,500) hours of service in good standing.

6. **Internal Administration-** VMS status reserved for program developers, and individuals with a statewide appointment (ie: CSIT, Statewide Evaluation Coordinator).

7. **UC Staff-** VMS status reserved for University of California or University of California Cooperative Extension staff, and County staff who support the UC MG / MFP Program.

Status Definitions:

1. **Active-** is a volunteer in good standing who has completed the normal UC MG / MFP volunteer service requirements and completed reappointment annually.

2. **Limited Active-** is a UC MG / MFP volunteer who has requested to be put on Limited Active status to maintain their standing as active during a period in which they are unable to complete the normal UC MG / MFP Program volunteer service requirements due to major difficulties. (May not exceed one year). See the UCCE Master Gardener Program Administrative Handbook for Program Staff, Chapter 3 Volunteer Status, Section XI. Limited Active Status Reappointment

3. **Honorary-** is a volunteer who has supported the principles and goals of the UC MG / MFP Program and who has made outstanding contributions to the UC MG / MFP Program and is recognized by the County Director as an Honorary UC MG / MFP. See the UCCE Master Gardener Program Administrative Handbook for Program Staff, Chapter 3 Volunteer Status, Section XII. MG Volunteer Recognition.

4. **Inactive Resigned-**
   Inactive- is a UC MG / MFP volunteer who does not fulfill the reappointment requirements, and cannot participate in UC MG / MFP Program activities. See the UCCE Master Gardener Program Administrative Handbook for Program Staff, Chapter 3 Volunteer Status, Section VII. Inactive Active Status.

Note: If status is changed to inactive/resigned the UC MG / MFP volunteer still has access to the Collaborative Tools System (CTS) and will have to be managed manually in CTS to remove them from the list.

5. **Deleted-** is for a UC MG / MFP volunteer who has transferred to another county, passed away or after thirteen months of Inactive Resigned status has not returned to the program.

3.6.7 Reinstate a Volunteer

A volunteer has thirteen months to seek reinstatement and return to Active UC Master Gardener / UC Master Food Preserver Status. See the UCCE Master Gardener Program Administrative Handbook for Program Staff, Chapter 3 Volunteer Status, Section VIII. Reinstatement. To reinstate a volunteer on VMS:

- Log into VMS
- Select **Roster** from left navigation bar
- Select the orange **Admin** button to administer the roster
  - o   select **All Volunteers** tab and use the search bar to look up the volunteer, or;
  - o   select **Search Volunteers** tab and use to look up the volunteer

If the volunteer is found, click the volunteer's name located in the **Name** column

- Select the ✏ pencil icon to **Edit volunteer profile**
  - o   select **Programs** tab
- Find the program listed in the **County** column requiring a volunteer's status update
  - o   in the status column select the status using the dropdown
- Select the gold **Update Status** button to save
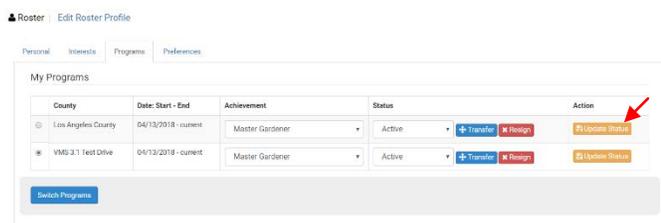
If the volunteer is not found, click the blue **Create a New Volunteer** button and follow the directions in *Section 3.6.1 Add a New Volunteer.*

3.6.8 Transfer Volunteer

Volunteers seeking to transfer must follow the steps outlined in the UCCE Master Gardener Program Administrative Handbook for Program Staff, Chapter 3 Volunteer Status, Section X. Transfer of Appointment from One California County to Another. **Do not** make a transfer without the permission or approval of the other county. Once a transfer is approved the volunteer may be transferred in VMS from the originating county to the new county. To transfer a volunteer to another program:

- Log into VMS
- Select **Roster** from left navigation bar
- Select the orange **Admin** button to administer the roster
  - o   find volunteer to be transferred
    - ▪   if needed use the search bar provided to find the volunteer
- Select the ✏ pencil icon to **Edit volunteer profile**
  - o   select **Programs** tab
- Find the program listed in the **County** column to be changed
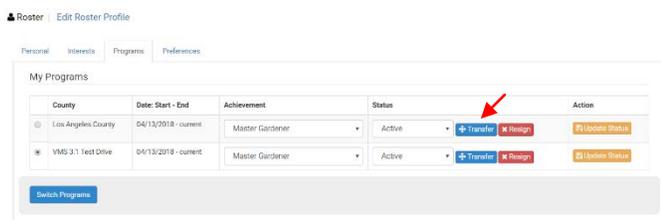
- o in the status column select the blue **Transfer** button
- o select the **Transfer To**: program using the dropdown
- Select the blue **+Save** button to save, or;
  - o select the white **←Cancel** button, the white **Close** button or the **x** in the top corner of the pop up window to exit the window without saving
- Update the volunteers status to **Deleted** to remove them from your program roster, _see Section 3.6.6 Change Volunteer Status and/or Achievement_

Note: There is no manual transfer or manual entry of hours needed. Do not manual enter hours, this is considered double counting and is not allowed. The hours earned by the volunteer follow their profile (Lifetime Hours), as well as stay in the originating county on reports.

3.6.9 Proxy in as Volunteer

From the roster **Full Access** and **Roster** administrators can proxy in as another volunteer, which enables the administrator to take action on behalf of the volunteer. This may be necessary to assist volunteers, help identify problems and troubleshoot reported issues.

- Log into VMS
- Select **Roster** from left navigation bar
- Select the orange **Admin** button to administer the roster
- From either **Active Only** tab or the **All Volunteers** tab, select the ⌨ computer screen icon located in the **Actions** column of the volunteer to proxy in as
  - o once proxied in a pink bar will appear at the top the screen reminding the user they are in the proxy function
- Click the red **End Proxy Session** button located in the pink bar at the top of the screen
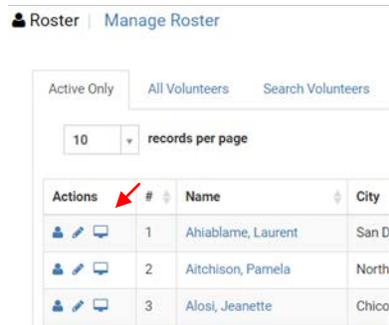
Note: When proxying in for another volunteer be sure to do so for business purposes only. If action is taken or changes made notify the volunteer of those actions and changes.

3.6.10 Search Volunteers

Search the roster for a particular volunteer(s):
- Log into VMS
- Select **Roster** from left navigation bar
- Select the orange **Admin** button to administer the roster
  - o for a basic search use the search bar provided
  - o for a more detailed search select **Search Volunteers** tab. Search options include:
    - **First Name**
    - **Last Name**
    - **Start Date**
    - **End Date**
    - **Project**
    - **Email**
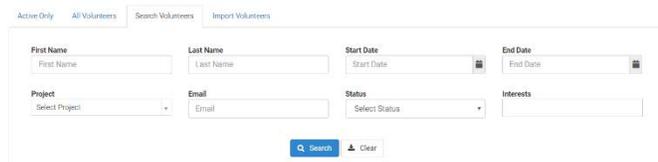
- **Status**
- **Interest-** can search for multiple interests at a time

o enter search criteria and select the blue 🔍**Search** button
- the report will display below the search criteria
  - for a basic search of the report use the search bar provided
  - select the gold **Export Data** button to create an Excel report
  - to clear the search fields select the white **Clear** button, select **Search Volunteers** tab to return to the detailed search

3.6.11 Reset a Volunteer's Password

In the event that a volunteer is unable to reset their own password following the instructions provided after following the **Forgot Password** instructions at log in **Full Access** and **Roster** administrators can reset passwords. To reset a volunteer's password:

- Log into VMS
- Select **Roster** from left navigation bar
- Select the orange **Admin** button to administer the roster
- From either **Active Only** tab or **All Volunteers** tab, select the ✎ pencil icon located in the **Actions** column of the user to edit profile
- Select the blue ✎ **Edit** button to start editing
- Enter a new password into the **Change Password** box. Passwords must be at least 7 characters in length with no spaces and contain a number of special character.
- Select the blue ✓**Save Profile** button to save changes
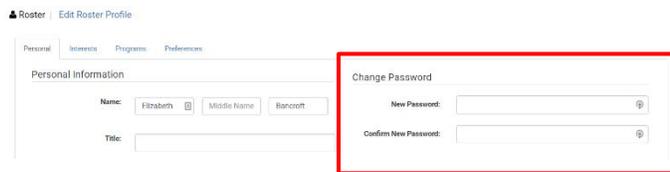
Note: Advise the volunteer of their new temporary password and instruct them to logon and create a new password that only they know.

Staff profiles cannot be edited in VMS as they are connected to the UC ANR Directory.

3.6.12 Export Roster Data

To export roster data:
- Log into VMS
- Select **Roster** from left navigation bar
- Select the orange **Admin** button to administer the roster
- Select the gold **Export Data** button at the bottom of the screen
- Excel document will be generated with the following information:
  o **Last Name**
  o **First Name**
  o **City**
  o **Email**
  o **Preferred Phone**
  o **Interests**
  o **Achievement**
  o **VMS Status**
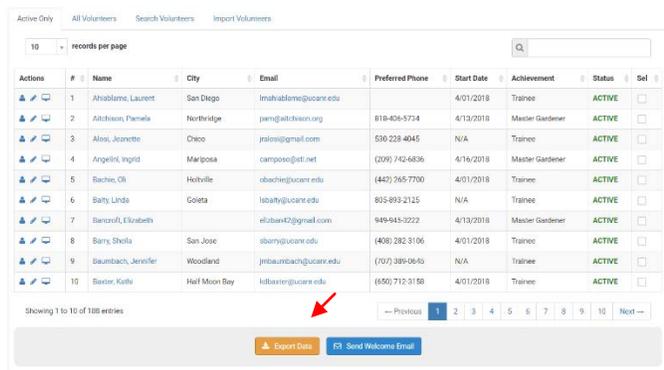
Note: To obtain a roster that includes Emergency Contacts run a Roster Report, *see Section 3.7.5 Run Roster Report*

3.6.13 Create Mailing List

This section is for postal mail, if you need electronic mail *see Section 3.4 Admin Messages*.
To create a (postal) mailing list:

- Log into VMS
- Select **Roster** from left navigation bar
- Select the orange **Admin** button to administer the roster
- Select the green ▦ **Create Mailing List** button
- Excel document will be generated with the following information:
  - First Name
  - Last Name
  - Address
  - City
  - State
  - Zip

Note: Directions on how to *Mail merge using an Excel spreadsheet* can be found online. Mail merge is used to create multiple documents at once. These documents have identical layout, formatting, text, and graphics. Only specific sections of each document varies and is personalized. The documents Word can create with mail merge include bulk labels, letters, envelopes, and emails.

3.7 Reports

*** VMS 3.1 Reports has been updated as of May, 2019, if reports is not working or displaying information as you expect it to submit a bug report. ***

In this section you will learn how to run:
3.7.1 Reports
3.7.2 Contacts Report
3.7.3 Expanded Hours Report
3.7.4 Retention (duration) Report
3.7.5 Roster Report
3.7.6 Volunteer Commitment Report
3.7.7 Volunteer Hours Report
3.7.8 Save a Report
3.7.9 Make a Favorite Report
3.7.10 Delete a Saved or Favorite Report
3.7.11 Legacy Category Report
3.7.12 Legacy Contact Reports
3.7.13 Legacy Hour Reports
3.7.14 Legacy Retention Reports
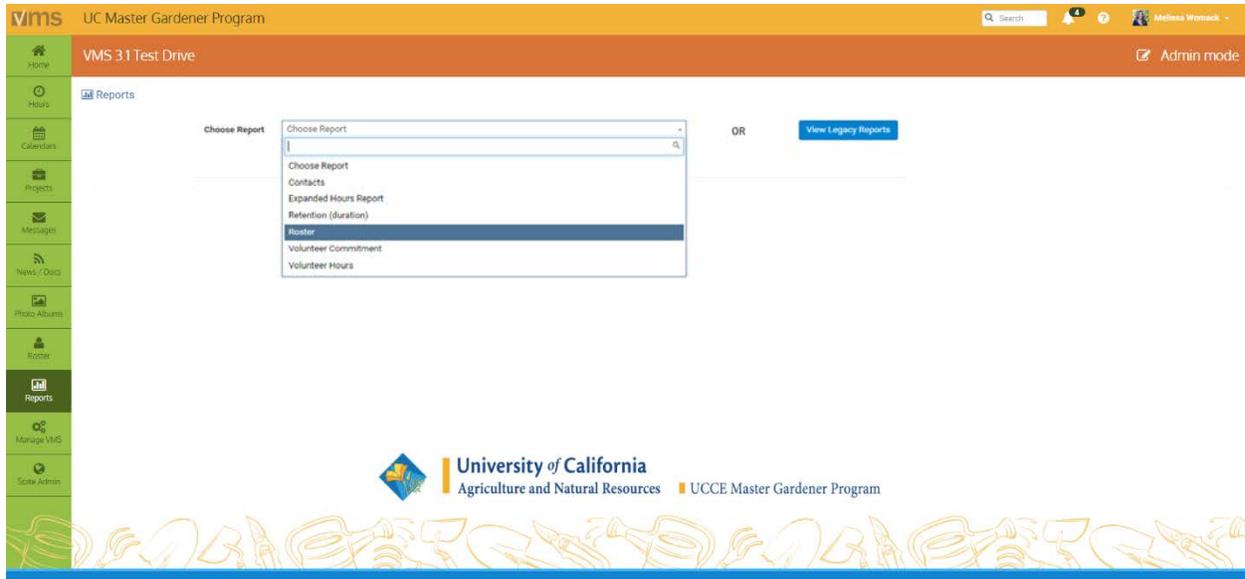
3.7.1 Reports

Full Access and **Roster** administrators can run / view /save / export a variety of set reports in VMS. The **Choose Report** allows user to customize reports in a variety of way and save the report for future searches. The **Legacy Reports** allows the user to look at complete reports of the roster in a variety of ways without entering search criteria.

- Contacts Report
- Expanded Hours Report
- Retention (duration)
- Roster Report
- Volunteer Commitment
- Volunteer Hours
- Legacy Category Reports
- Legacy Contact Reports
- Legacy Hour Reports
- Legacy Retention Report

3.7.2 Contacts Report

The information for this report is compiled from the **Contact** data entered by volunteers in VMS when they enter hours. The standards on race and ethnicity are modeled after the standard race and ethnicity classifications in Federal program administrative reporting and statistical data. The choices are as follows:

- **White**- A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.
- **Black**- A person having origins in any of the black racial groups of Africa.
- **American Indian**- A person having origins in any of the original peoples of North America, and who maintains cultural identification through tribal affiliations or community recognition.
- **Hispanic**- A person of Mexican, Puerto Rican, Cuban, Central or South American or other Spanish culture or origin, regardless of race.
- **Asian**- A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

- **Hawaiian Pacific Islander**-A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- **Unknown**-observer cannot identify
- **Gender-** Male or Female
- **Youth**- seventeen years of age or younger
- **Adult**- eighteen year of age or older

To run a **Contacts** report:
- Log into VMS
- Select **Reports** from left navigation bar
- Using the **Choose Report** dropdown select **Contacts**
    - report options include:
        - **Program**
        - **Achievement Level**
        - **Status**
        - **Race / Ethnicity**
        - **Project Name**
        - **Event (Last year)**
        - **Event Name (all)**
        - **Start Date**
        - **End Date**
    - enter desired criteria and select the blue **Run Report** button
- The report is generated with the following information:
    - **Last Name**
    - **First Name**
    - **White Male Adult**
    - **White Male Youth**
    - **White Female Adult**
    - **White Female Youth**
    - **Black Male Adult**
    - **Black Male Youth**
    - **Black Female Adult**
    - **Black Female Youth**
    - **American Indian Male Adult**
    - **American Indian Male Youth**
    - **American Indian Female Adult**
    - **American Indian Female Youth**
    - **Hispanic Male Adult**
    - **Hispanic Male Youth**
    - **Hispanic Female Adult**
    - **Hispanic Female Youth**
    - **Asian Male Adult**
    - **Asian Male Youth**
    - **Asian Female Adult**
    - **Asian Female Youth**
    - **Hawaiian & Pacific Islander Male Adult**
    - **Hawaiian & Pacific Islander Male Youth**
    - **Hawaiian & Pacific Islander Female Adult**
    - **Hawaiian & Pacific Islander Female Youth**

- o   Unknown Male Adult
- o   Unknown Male Youth
- o   Unknown Female Adult
- o   Unknown Female Youth
- o   Total Contacts
  - ▪   the report will display below the search criteria
    - •   for a basic search of the report use the search bar provided
    - •   select the gold **Export Data** button to create an Excel

3.7.3 Expanded Hours Report

The **Expanded Hours Report** displays a list of all hour's entries per volunteer, and can be customized for time period, project and more. To run an **Expanded Hours** report:

- •   Log into VMS
- •   Select **Reports** from left navigation bar
- •   Using the **Choose Report** dropdown select **Expanded Hours Report**
  - o   report options include:
    - ▪   **Program**
    - ▪   **Achievement Level**
    - ▪   **Status**
    - ▪   **Project**
    - ▪   **Event Keywords**
    - ▪   **Location**
    - ▪   **Contact Category**
    - ▪   **Start Date**
    - ▪   **End Date**
    - ▪   **Show Volunteers with hours?**
      - •   **Yes / No**
  - o   enter desired criteria and select the blue **Run Report** button
- •   The report is generated with the following information:
  - o   **Last Name**
  - o   **First Name**
  - o   **Program**
  - o   **Achievement Level**
  - o   **Status**
  - o   **Volunteer Hours**
  - o   **Continuing Education Hours**
  - o   **Total Hours**
  - o   **Activity**
  - o   **Event Date**
  - o   **Miles Traveled**
  - o   **Category**
  - o   **County**
  - o   **Location**
  - o   **Address**
  - o   **Address 2**
  - o   **City**
  - o   **State**
  - o   **Zip**
  - o   **Country**

- o Comments
- o White Male Adult
- o White Male Youth
- o White Female Adult
- o White Female Youth
- o Black Male Adult
- o Black Male Youth
- o Black Female Adult
- o Black Female Youth
- o American Indian Male Adult
- o American Indian Male Youth
- o American Indian Female Adult
- o American Indian Female Youth
- o Hispanic Male Adult
- o Hispanic Male Youth
- o Hispanic Female Adult
- o Hispanic Female Youth
- o Asian Male Adult
- o Asian Male Youth
- o Asian Female Adult
- o Asian Female Youth
- o Hawaiian & Pacific Islander Male Adult
- o Hawaiian & Pacific Islander Male Youth
- o Hawaiian & Pacific Islander Female Adult
- o Hawaiian & Pacific Islander Female Youth
- o Unknown Male Adult
- o Unknown Male Youth
- o Unknown Female Adult
- o Unknown Female Youth
    - ▪ the report will display below the search criteria
        - • for a basic search of the report use the search bar provided
        - • select the gold **Export Data** button to create an Excel report

3.7.4 Retention (duration) Report

The **Retention (duration)** report displays the number of years a volunteer has been in the program using the start / end years recorded in VMS. The report will also show volunteer and continuing education hours. To run a **Retention (duration)** report:

- • Log into VMS
- • Select **Reports** from left navigation bar
- • Using the **Choose Report** dropdown select **Retention (duration)**
    - o report options include:
        - ▪ **Program**
        - ▪ **Achievement Level**
        - ▪ **Status**
        - ▪ **Retention Years**
    - o enter desired criteria and select the blue **Run Report** button
- • The report is generated with the following information:
    - o **Last Name**
    - o **First Name**
    - o **E-mail**

- o   **Achievment Level**
- o   **Status**
- o   **# of Years**
- o   **Start Year***
- o   **End Year**
- o   **Volunteer Hours**
- o   **Continuting Education Hours**
    - ▪   the report will display below the search criteria
        - •   for a basic search of the report use the search bar provided
        - •   select the gold **Export Data** button to create an Excel

*Start year is pulled from the volunteer profile, if left blank this report will display 1900. (*See Section 3.6.5 Edit Volunteer Profile*)

3.7.5 Roster Report

The **Roster Report** will use the current county roster and return the information requested. To run a **Roster** report:
- •   Log into VMS
- •   Select **Reports** from left navigation bar
- •   Using the **Choose Report** dropdown select **Roster**
    - o   report options include:
        - ▪   **Program**
        - ▪   **Achievement Level**
        - ▪   **Status**
        - ▪   **Age**
        - ▪   **Gender**
        - ▪   **Race/Ethnicity**
        - ▪   **Education**
        - ▪   **County**
        - ▪   **Interests**
        - ▪   **Start Date**
        - ▪   **End Date**
        - ▪   **Include Interests in results?** (Yes / No)
    - o   enter desired criteria and select the blue **Run Report** button
- •   The report is generated with the following information:
    - o   **Edit** (edit volunteers volunteer profile directly from here if needed)
    - o   **Last Name**
    - o   **First Name**
    - o   **E-mail**
    - o   **Mailing Address**
    - o   **Mailing City**
    - o   **Mailing State**
    - o   **Mailing Zip**
    - o   **Physical Address**
    - o   **Physical City**
    - o   **Physical Zip**
    - o   **Home Phone**
    - o   **Work Phone**
    - o   **Mobile Phone**
    - o   **Phone Preference**

- o **Last updated** (profile)
- o **Private** (contact information, false = public, true = private)
- o **Achievement Level**
- o **Status**
- o **Start Date**
- o **Volunteer Hours**
- o **Continuing Education Hours**
- o **Race / Ethnicity**
- o **Education**
- o **Age**
- o **Comments**
- o **Emergency Contact(s) / Relationship**
  - ▪ the report will display below the search criteria
    - • for a basic search of the report use the search bar provided
    - • select the gold **Export Data** button to create an Excel report

3.7.6 Volunteer Commitment Report

The **Volunteer Commitment** report says whether or not a volunteer met the reappointment requirements for a specific time period. Run this report for the reappointment time period (7/1/##- 6/30/##) to see who has met reappointment requirements and if not what hours they are in need of. To run a **Volunteer Commitment** report:

- • Log into VMS
- • Select **Reports** from left navigation bar
- • Using the **Choose Report** dropdown select **Volunteer Commitment**
  - o report options include:
    - ▪ **Program**
    - ▪ **Achievement Level**
    - ▪ **Status**
    - ▪ **Start Date**
    - ▪ **End Date**
  - o enter desired criteria and selects the blue **Run Report** button
- • The report is generated with the following information:
  - o **Last Name**
  - o **First Name**
  - o **Achievement Level**
  - o **Status**
  - o **Email**
  - o **Home Phone**
  - o **Work Phone**
  - o **Mobile Phone**
  - o **Phone Preference**
  - o **Program**
  - o **Volunteer Hours**
  - o **Continuing Education Hours**
  - o **Achieved Requirements?** (meet the reappointment requirements)
    - ▪ **True / False**
  - o **Disqualification Reason**
    - ▪ **Both / Volunteer Hours / Continuing Educaiton**
    - ▪ the report will display below the search criteria
      - • for a basice search of the report us the search bar provided

- select the gold **Export Data** button to create and Excel report

3.7.7 Volunteer Hours Report

The **Volunteer Hour** report display all Volunteer Hours for all time or a time frame you designate. Use this report throughout the year to check on the status of volunteer hours and continuing education credit. This is also a good indicator on whether or not volunteers are entering their hours into VMS. To run a **Volunteer Hours** report:

- Log into VMS
- Select **Reports** from left navigation bar
- Using the **Choose Report** dropdown select **Volunteer Hours**
  - o report options include:
    - ▪ **Program**
    - ▪ **Achievement Status**
    - ▪ **Status**
    - ▪ **Hours Category**
    - ▪ **Project**
    - ▪ **Start Date**
    - ▪ **End Date**
    - ▪ **Show Vols. with hours?**
      - • **Yes / No**
- The report is generated with the following information:
  - o **Last Name**
  - o **First Name**
  - o **E-Mail**
  - o **Home Phone**
  - o **Work Phone**
  - o **Mobile**
  - o **Phone Preference**
  - o **Volunteer Hours**
  - o **Continuing Education Hours**
  - o **Mailing Address**
  - o **Mailing City**
  - o **Mailing Zip**
    - ▪ the report will display below the search criteria
      - • for a basic search of the report use the search bar provided
      - • select the gold **Export Data** button to create an Excel

3.7.8 Save a Report

Reports has the ability to save a report for future running so as not to have to customize a report that is run often. To save a report:

- Log into VMS
- Select **Reports** from left navigation bar
- Using the **Choose Report** dropdown select report you want to run and save
- In the **Report Name** box type the name you would like the report to have (i.e. Reappointment Year 17/18 All Roster)
  - o click the **Save Report** check box
  - o enter desired criteria and select the blue **Run Report** button
- The report is now listed in the **Choose your saved report section** of the reports page

To access the report in the future:
- Log into VMS
- Select **Reports** from left navigation bar
- Using the **Choose Report** dropdown select report you to run / view
  - using the **Choose Saved Report** dropdown select the saved report
  - select the blue **Run Report** button
    - the report will display below the search criteria

3.7.9 Make a Favorite Report

Reports has the ability to make a report a favorite for future running so as not to have to customize a report that is run often. The favorite report will appear as its own button (only one favorite will be displayed at a time). To make a report a favorite:
- Log into VMS
- Select **Reports** from left navigation bar
- Using the **Choose Report** dropdown select report you want to run and save
- In the **Report Name** box type the name you would like the report to have (i.e. Reappointment Year 17/18 All Roster)
  - click the **Save Report** and **Make Favorite Report** check boxes
  - enter desired criteria and select the blue **Run Report** button
- The report is now displayed as a button in **Favorite Saved Reports** section at the top the **Reports** page

3.7.10 Delete a Saved or Favorite Report

If a saved or favorite report is no longer needed they can be deleted. To delete a report:
- Log into VMS
- Select **Reports** from left navigation bar
- Using the **Choose Report** dropdown select report you want to delete
  - select the red 🗑**Delete Saved Report** button
    - select **OK** from the pop up window to confirm deletion
    - select **Cancel** to not delete

Note: Deleting a saved / favorite report is not reversible

3.7.11 Legacy Category Reports

The category report enables you to view hours by project category. To view the **Legacy Category Reports**:
- Log into VMS
- Select **Reports** from left navigation bar
- Select the blue **View Legacy Reports** button
- Select **Category Reports**
  - report options include:
    - **Start Date**
    - **End Date**
    - select the blue 🔍**Submit** button to run the report
  - the report will display below the search criteria
    - for a basice search of the report us the search bar provided

- - - select the blue **Create Excel** button to create an Excel report
- The report is generated with the following information:
  - o **Category Name** (See Section 2.4.1 Project Categories for definitions)
  - o **Category Volunteer Hours**
  - o **Category Continuing Education Hours**
  - o **Project Name**
  - o **Project Volunteer Hours**
  - o **Project Continuing Education Hours**
  - o **County Name**

3.7.12 Legacy Contact Reports

The contact report shows contacts, hours, and projects by demographics. To view the **Legacy Contact Reports**:

- Log into VMS
- Select **Reports** from left navigation bar
- Select the blue **View Legacy Reports** button
- Select **Contact Reports**
  - o report options include:
    - Start Date
    - End Date
    - select the blue 🔍 **Submit** button to run the report
  - o the report will display below the search criteria
    - for a basice search of the report us the search bar provided
    - select the blue **Create Excel** button to create an Excel report
    - select the blue **Show Hours** button to show the hours the contacts are associated with
      - select the blue **Show Hours** button to go back
    - select the blue **Show Projects** button to show the contacts per project category
      - select the blue **Remove Projects** button to go back
    - select the blue **Show Removed Volunteers** button to show the contacts inactive resigned / removed volunteers
      - select the blue **Hide Removed Volunteers** button to go back
- The report is generated with the different information depending on what is selected:
  - o **Project**
  - o **First Name**
  - o **Last Name**
  - o **Date**
  - o **White Male Adult**
  - o **White Male Youth**
  - o **White Female Adult**
  - o **White Female Youth**
  - o **Black Male Adult**
  - o **Black Male Youth**
  - o **Black Female Adult**
  - o **Black Female Youth**
  - o **American Indian Male Adult**
  - o **American Indian Male Youth**
  - o **American Indian Female Adult**
  - o **American Indian Female Youth**
  - o **Hispanic Male Adult**
  - o **Hispanic Male Youth**

- o Hispanic Female Adult
- o Hispanic Female Youth
- o Asian Male Adult
- o Asian Male Youth
- o Asian Female Adult
- o Asian Female Youth
- o Hawaiian & Pacific Islander Male Adult
- o Hawaiian & Pacific Islander Male Youth
- o Hawaiian & Pacific Islander Female Adult
- o Hawaiian & Pacific Islander Female Youth
- o Unknown Male Adult
- o Unknown Male Youth
- o Unknown Female Adult
- o Unknown Female Youth
- o Volunteer Hours
- o Hours

3.7.13 Legacy Hour Reports

The hours report shows the hours per volunteer. To view the **Legacy Hour Reports**:
- Log into VMS
- Select **Reports** from left navigation bar
- Select the blue **View Legacy Reports** button
- Select **Hour Reports**
  - o report options include:
    - ▪ **Start Date**
    - ▪ **End Date**
    - ▪ select the blue Q **Submit** button to run the report
  - o the report will display below the search criteria
    - ▪ for a basice search of the report us the search bar provided
    - ▪ select the blue **Create Excel** button to create an Excel report
- The report is generated with the following information:
  - o **Last Name**
  - o **First Name**
  - o **Phone**
  - o **City**
  - o **Continuing Education Hours**
  - o **Volunteer Hours**
  - o **Start Date**
  - o **Status**
  - o **Achievement**

3.7.14 Legacy Retention Report

The **Legacy Retention Report** calculates the duration of an inactive volunteer's service by subtracting the "Start Year" field from the date the volunteer was made inactive. For active volunteers, the "Start Year" is subtracted from the current year. If the "Start Year" field was incorrectly completed or a volunteer was deleted rather than made inactive, the volunteer may not appear in the report. Also, volunteers with under one year of service will not appear on this report. To view the **Legacy Retention Report:**

- Log into VMS
- Select **Reports** from left navigation bar
- Select the blue **View Legacy Reports** button
- Select **Retention Report**
  - o the report will display below
  - o for a basic search of the report us the search bar provided
  - o select the blue **Show Volunteers** button to show details
  - o select the blue **Create Excel** button to create an Excel report
- The report is generated with the different information depending on what is selected:
  - o **Duration Active**
  - o **Inactive Volunteers**
  - o **Active Volunteers**
  - o **Volunteer Name**
  - o **Start Year**
  - o **End Date**
  - o **Years**
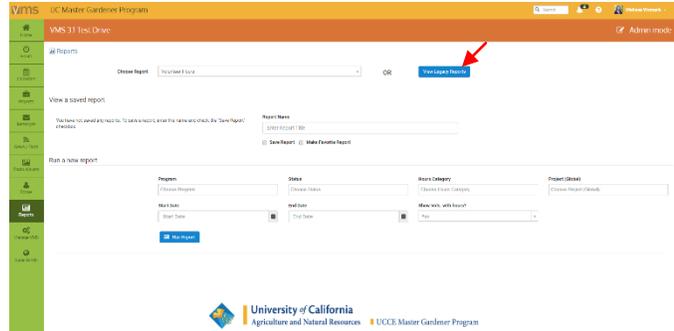
3.8 Manage VMS

In this section you will learn how to:
3.8.1 Manage Access to VMS
3.8.2 Manage Administrators
3.8.3 Manage Home Page News
3.8.4 Manage Volunteer Options
3.8.5 Manage Home Page Links
3.8.6 Manage New Member Email
3.8.7 Manage Program Contact Information
3.8.8 Manage Reappointment
3.8.9 Manage Interests
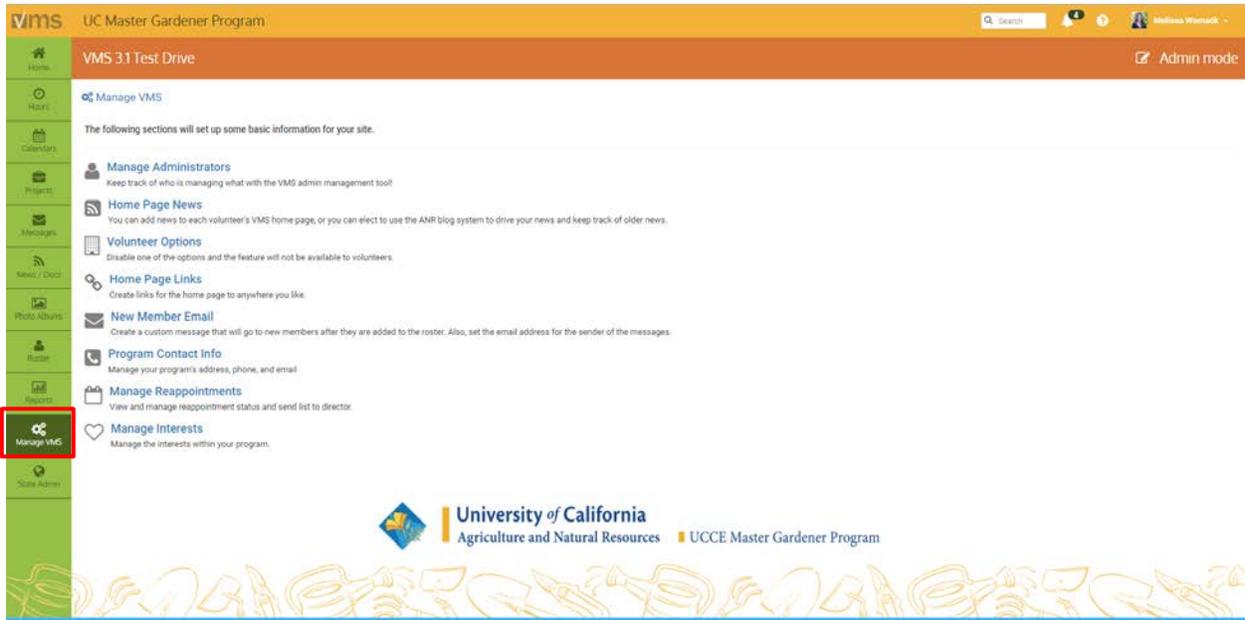
3.8.1 Manage Access to VMS

The statewide office designates the **Owner** of VMS, who then can add volunteers to VMS and designate **Administrative Rights** to VMS as required or needed.

Note: The **Owner** of VMS in each county is typically the Advisor, County Director or Program Coordinator.

3.8.2 Manage Administrators

The designated **Owner** of VMS has **Full Access** and can **Manage Administrators** through the **Manage VMS** tab.

To **Manage Administrators**:
- Log into VMS
- Select **Manage VMS** from the left navigation bar
- Select the volunteers name from the **Select from Roster** dropdown menu
- Select the blue **+ Make Administrator** button to add a new person
- Select the level or levels of Admin Access you would like to give the user:
  - Roster
  - Projects
  - Calendar
  - Newsletter / Documents
  - Volunteer Hours
  - Photo Albums
  - Full Access (includes all admin functions)
- Select the blue ✓**Update Administrator** button.

To edit / remove administrator access:

- Log into VMS
- Select **Manage VMS** from the left navigation bar
- Select **Manage Administrators**
- Select the user you would like to edit and unclick the Admin Access you would like to remove and select the blue ✓**Update Administrator** button or:
- Select the red 🗑**Delete Administrator** button to remove all admin access
  - select **OK** from the pop up window to confirm deletion
  - select **Cancel** to not delete

3.8.3 Manage Home Page News

Customize VMS's home page and add timely program related news, updates, reappointment information, or upcoming events. To customize **Home Page News**:

- Log into VMS
- Select **Manage VMS** from the left navigation bar
- Select **Home Page News**
- Populate the **Front Page News Title** and **Front Page News** boxes
- Select the blue **Post News** button

To leave **Home Page News** blank, delete all content in the **Front Page News Title** and **Front Page News** box, choose *Not Using ANR blog* in the **Use ANR Blog** box, and select the blue **Post News** button.

Note: You can put news about your group here, or use the UC ANR blog system, you can have one or the other, not both.

3.8.4 Manage Volunteer Options

Volunteer Options customizes what is displayed in VMS and available to all volunteers. To manage volunteer options:

- Log into VMS
- Select **Manage VMS** from the left navigation bar
- Select **Volunteer Options**
- Select the option to **Enable** or **Disable** options that volunteers will have access.
  - enabled options will appear in the **Enabled** list;
  - disabled options will appear in the **Disabled** list
    - the two lists complement each other; selecting an item will move that item from one side (enabled or disabled) to the other side
    - changes are automatically saved

Note: If suddenly your VMS instance is missing features be sure to check the **Volunteer Options** settings, this features is controlled at the county level.

3.8.5 Manage Home Page Links

Mange what links are displayed on the county's VMS home page, use this to connect volunteers with online trainings and resources. To manage links:
- Log into VMS
- Select **Manage VMS** from the left navigation bar
- Select **Home Page Links**
- Select the green **✚ Add New Link** button
- Type in the name you want displayed for the link in the **Link Name** box
- Type the web address in the **Link URL** box
- Select the **Publish Location** from the drop down box to determine where the link is displayed on the VMS homepage: **Header**, **Footer**
- Select the blue ✓**Post Link** button
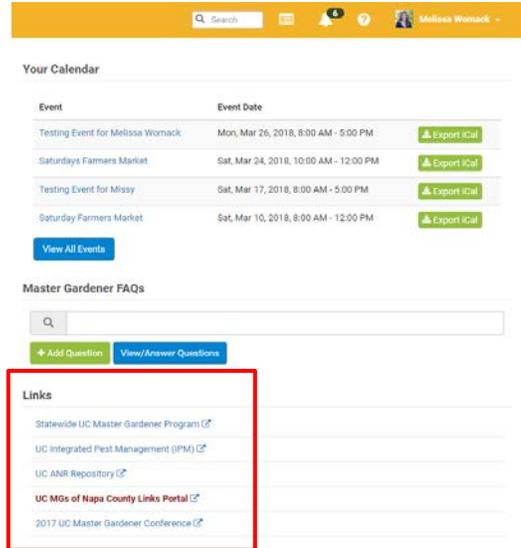
To edit / delete a home page link:
- Log into VMS
- Select **Manage VMS** from the left navigation bar
- Select **Home Page Links**
- Click the name of the link to edit or delete
  - edit link as needed
    - select the blue ✓**Save Link** button, or
  - select the red 🗑**Delete Link** button
    - select **OK** from the pop up window to confirm deletion
    - select **Cancel** to not delete

Note: Check that the link works by going to the VMS home page and testing it.

3.8.6 Manage New Member Email

Create a custom message that is prepended to the standard 'To login to the ANR Portal click on the link...' message for new members after they are added to the roster. To update/ edit / change the new member email message:
- Log into VMS
- Select **Manage VMS** from the left navigation bar
- Select **New Member Email**
  - designate sender email address
  - type customized message in the text box
- Select the blue ✓**Save Email Message** button

Anyone added to the roster or resent the Welcome Email will receive that message. There is no requirement for what should be in the email, customize as needed to welcome the new members to VMS.

Example of language automatically included in welcome email:

How to Logon to the Portal

To log into the portal for the first time:

1. Go to: https://ucanr.edu/portal
2. Click on the 'New user? Forgot your password? Click here' button.
3. Enter your e-mail address and click the button.
4. If your e-mail address is in our system, an e-mail will be sent which contains a link to access the portal.
5. Click on this link to enter the system.

The link will only work one time. If you forget your password again, you will need to re-submit the access request.

Once you are in the system, you can change your password.

If you are NOT in the system, please contact your office manager or MSO.

3.8.7 Manage Program Contact Information

Mange the program's address, phone and email displayed on the county's VMS home page in the footer. To manage program contact information:

- Log into VMS
- Select **Manage VMS** from the left navigation bar
- Select **Program Contact Info**
  - o enter information:
    - ▪ **Contact Phone**
    - ▪ **Contact Email**
    - ▪ **Contact Address**
- Select the blue ✓**Save Information** button

To leave **Program Contact Info** blank and not display anything:

- Log into VMS
- Select **Manage VMS** from the left navigation bar
- Select **Program Contact Info**
  - o delete all content in:
    - ▪ **Contact Phone**
    - ▪ **Contact Email**
    - ▪ **Contact Address**
- Select the blue ✓**Save Information** button

3.8.8 Manage Reappointment

Reappointment is turned on by the statewide office (June 1), at this time VMS prompts users to electronically complete the volunteer agreement and releases required to complete reappointment. **Full Access** administrators through the **Manage VMS / Manage Reappointments** function can:

- Manage / Track volunteer progress
- ✓**Submit Paper**
- 🗑**Reset Terms**
- ✉**Send List to Director**
- ✉**Email Unappointed Volunteers**
- **Create Excel Report**

To access reappointment:

- Log into VMS
- Select **Manage VMS** from the left navigation bar

For full reappointment instructions *see Section 4.0 Reappointment*.

3.8.9 Manage Interests

The **List of Interests** is displayed in the profile of volunteers to identify / click what their areas of interest are when creating / editing their VMS profile. When looking for interested volunteers utilize this list to engage those who have listed interest in that particular topic.

To add interests to the list:
- Log into VMS
- Select **Manage VMS** from the left navigation bar
- Select **Manage Interests**
- Select the green **＋Add New Interest** button
- Type in the name of the **Interest** you want to add in the **Interest Name** box
- Select the green **＋Add Interest** button

To delete / edit interests from the list:
- Log into VMS
- Select **Manage VMS** from the left navigation bar
- Select **Manage Interests**
- Select the **Interest Name** to be deleted or edited from the list
- Edit **Interest Name**
  o Select the blue ✓**Update Interest** button to save, or;
  o Select the red 🗑**Delete Interest** button to delete

To view report of volunteer interests:
- Log into VMS
- Select **Manage VMS** from the left navigation bar
- Select **Manage Interests**
- Select the report icon from the Report column
  o a **Roster Report** is generated for that specific interest
    ▪ if needed you can add additional interest and customize the report further if needed
  o select the gold **Export Data** button to create an Excel report

Section 4 Reappointment

4.0 Reappointment

In this section you will learn about:

4.1.1 Reappointment

4.1.2 Reappointment Communications

4.1.3 Collect Digital Recertification or Resignation Documents from Volunteers

4.1.4 How to Submit Paper for a Volunteer

4.1.5 Resigning or Inactive Volunteers

4.1.6 Roster Clean-Up, Final Numbers and Insurance Invoicing

4.1.1 Reappointment

1. Annual reappointment is a requirement for all UCCE Master Gardeners / Food Preservers to remain active in the program including:
   - Active - Limited Active
     - o First Year Master Gardener
     - o Master Gardener
     - o Gold Badge
     - o Platinum

2. The minimum hours required to remain a certified UCCE Master Gardener / Food Preservers are:
   - 25 hours - Volunteer
   - 12 hours - Continuing education

   Note: First year UCCE Master Gardeners / Food Preservers are required to complete a minimum of **50 volunteer hours** (no continuing education requirement) before the next certification cycle.

3. Reappointment consists of volunteers paying any fees associated with their UC Master Gardner / Food Preservers Program (i.e. program fee, insurance fee) and electronically signing the following documents:
    - *Annual Agreement*
    - *Code of Conduct / Responsibilities and Rights*
    - *Proof of Insurance*

    Additional Master Food Preserver requirements:

    - *Waiver of Liability, Assumption of Risk, and Indemnity Agreement*
    - *Preparing/Serving Food Release Statement*
    - Passing score on *Reappointment Quiz*

    Note: Reappointment must be done digitally, only paper copies should be used as an accommodation under special circumstances.

4. All volunteer questions regarding the appointment process go through the Program Coordinator, Advisor or County Director.

5. The reappointment year runs on the state fiscal year July 1, 20## through June 30, 20##. Reappointment officially begins and is turned on in VMS by the statewide office on June 1.
    - Reappointment policy as outlined in the UC Master Gardener Handbook states: "In order to retain active status as a MG volunteer, MG volunteers must apply for reappointment within a specific sixty (60) day period as follows: Thirty (30) days before the end date of the current program year June 30, through thirty (30) days after the end date of the current program year, July 1."

6. Coordinators are responsible for:
    - Communication with volunteers about completing reappointment
    - Assisting volunteers in completing the reappointment process
    - "Send List to Director" for appointment
    - Verifying all volunteers have been reappointed by the Director
    - Resigning and changing the status of volunteers who do not wish to reappoint to "Inactive/Resigned"
    - Sending letters to all newly "Inactive/Resigned" volunteers
    - Collect fees (if applicable)
    - Cleaning roster and verifying insurance charges from the Statewide Office

    See the UCCE Master Gardener Program Administrative Handbook for Program Staff, Section VI. Reappointment (Second and Subsequent Years of UCCE MP Service)

4.1.2 Reappointment Communications

The UC Master Gardener statewide office will provide guidance to the coordinators throughout the reappointment process as well as post to the Statewide UC Master Gardener Statewide Blog and Coordinators Collaborative Tools to share the reappointment process.

The UC Master Food Preserver statewide office will provide guidance to the coordinators through the reappointment process as well as post to Coordinators Collaborative Tools to share the reappointment process.

Coordinators are responsible for communicating directly with their volunteers about reappointment. The statewide office has resources available to share with volunteers to assist in walking volunteers through the reappointment process on VMS.
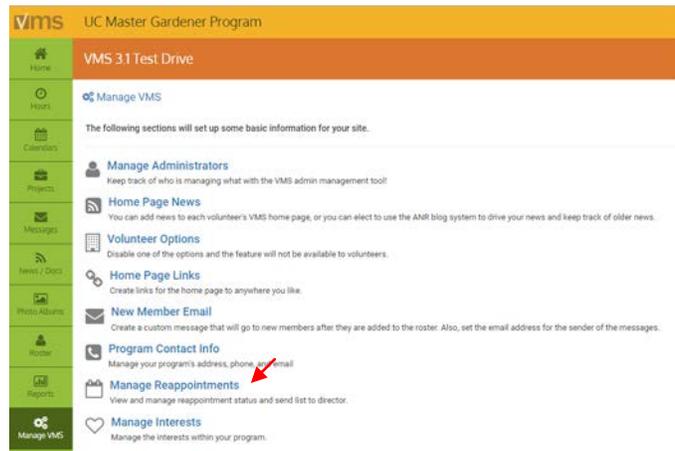
4.1.3 Collect Digital Reappointment or Resignation Documents from Volunteers

1. The statewide office will "turn on reappointment" for all counties on June 1. When logging into VMS volunteers will see the call to action box titled Volunteer Agreement and Releases. Coordinators can manage reappointment and check on the status of their volunteer's reappointment process through VMS.
   - Log into VMS
   - Select **Manage VMS** from the left navigation bar
   - Select **Manage Reappointments**

2. By the second week of July every person on the roster should have a green "**Renewing**" or a black "**Resigning**" in the **Terms Status** column. If they don't, make contact with volunteers who have not completed reappointed and ask if they plan on reappointing. If they *do not plan* to reappoint the coordinator must change their status to **Inactive Resigned** in VMS and complete the Annual Agreement for them by selecting **Do Not Wish to be Reappointed** from the drop down menu.

   Note: If you send the list to the County Director prior to having all volunteers with a **Renewing** or **Resigning Terms Status**, the County Director must complete the following step multiple times.

3. To Send list to directors:
   - Log into VMS
   - Select **Manage VMS** from the left navigation bar
   - Select **Manage Reappointments**
   - Select the green ✉**Send List to Director** from top of Manage Reappointment page.
     - o Once you instruct VMS to send list to director, provide county director with the following instructions:
       1. Log into ANR Portal, find **MG Reviews / MG Reviews** on the right sidebar.
       2. Click link- which takes you to a list of volunteers and term statuses.

3. Select **View only 3 of 3** (Master Gardener), **View only 5 of 5** (Master Food Preserver) to avoid appointing someone who has not completed the terms.
4. Select volunteer's names for reappointment by clicking on check box on the left-hand side.
5. Click submit reappointment information, via button at top of page
- Coordinators must verify all volunteers have been reappointed.
- Verify every volunteer has a green **Yes** in the **Appointed** column and bold green **Renewed** or black **Resigned** under term status.
- *Email the statewide office when the reappointment process is complete.*

Note: If someone was missed, notify the County Director to log-in and appoint that person.

4.1.4 How to Submit Paper for a Volunteer

If a volunteer cannot recertify online the coordinator can submit recertification papers on their behalf. When a coordinator digitally submits papers for a volunteer, the county must retain hard copies signed by the volunteer on file. Submitting digital files for a volunteer should happen on a case-by-case basis, and only as a special accommodation. To submit papers for a volunteer:

- Log into VMS
- Select **Manage VMS** from the left navigation bar
- Select **Manage Reappointments**
  - ○ select the blue ✓**Submit Paper** button in the **Action** column of the volunteer to submit paper for
  - ○ using the drop down menu select the appropriate agreement
    - ▪ Completed Hours and Seeking Reappointment
    - ▪ Not Completed Hours and Seeking Reappointment
    - ▪ Seeking Limited Active Status
    - ▪ Do Not Wish to be Reappointed
    - ▪ Trainee
    - ▪ First-Year Volunteer
  - ○ different prompts will appear based on what agreement is chosen, follow the prompts as they appear
    - ▪ when all prompts are completed select the blue **Volunteer Name Agrees to the Information Above**

Note: When a coordinator digitally submits papers for a volunteer, the county must retain hard copies signed by the volunteer on file.

4.1.5 Resigning or Inactive Volunteers

Once Reappointment is complete the coordinator will provide written notice to all Inactive / Resigning volunteers informing them of their new status and the procedure to be reinstated. There is a template form letter for Inactive / Resigning Volunteers located with the reappointment resources available through the Coordinator Website.

For instructions on how change the status of a volunteer *see Section 3.6.6 Change Volunteer Status and or/Achievement,* to reinstate a volunteer *see Section 3.6.7 Reinstate a Volunteer*. *See the UCCE Master Gardener Program Administrative Handbook* for Program Staff, Section VII. Inactive Status, Section VIII. Reinstatement

4.1.6 Roster Cleanup, Final Numbers and Insurance Invoicing

The UC Master Gardener / Food Preserve Program will be charged an insurance fee based on the number of Active Master Gardener / Food Preserver volunteers listed in their roster. The term "Active Master Gardeners / Food Preserver" includes VMS classifications: "Master Gardener," "Master Food Preserver," "First

Year Master Gardener," "First Year Master Food Preserver," "Gold Badge," "Platinum Badge" and "Limited Active" as listed on roster as of July 1, 20##. This designation excludes "Trainees," "Inactive Resigned" and "Honorary" members.

To ensure accurate billing program coordinators should implement "Roster Cleanup" after reappointment is completed. *See Section* 3.6.6 *Change Volunteer Status and /or Achievement*. The statewide office will send invoices out to each county, confirm that the quantity being billed matches the number of "Active Volunteers" and confirm the account number to be recharged. If either the number of volunteers or the account number is wrong respond to the invoice with the correct information.

4.1.7 Annual Reappointment Quiz for Master Food Preservers

In conjunction with reappointment UCCE Master Food Preserver volunteers must also pass the annual reappointment quiz. The reappointment quiz is created by the statewide office and is managed at the county level. Volunteers are directed to contact the county coordinator with questions and assistance with their quiz. Information regarding the annual reappointment quiz along with a study guide will be posted to the Coordinator Reappointment webpage before Reappointment begins on June 1.

The quiz ranges from 10 to 15 questions and is administered online, paper copies may also be given if needed. Volunteers are allowed two attempts to pass with a score of 85% or better. If volunteers are unsuccessful in passing the quiz within two attempts, it is at the discretion of the county Coordinator/Director to allow for a third attempt.

Appendix 1 – Volunteer Frequently Asked Questions

Q1: How do I access VMS?

A1: *See Section 1.2. Accessing VMS* for directions on accessing VMS.

Q2: I can't access VMS? I know I have the right password.

A2: If you are not able to login to VMS or your UCANR portal you may need to clear your cookies and/or update your internet browser.

Clear your browser's cookies, this usually resolves the access problem without the need to download a new browser. Here is info on that: http://www.wikihow.com/Clear-Your-Browser%27s-Cookies.

Internet security is always changing requiring that we use a browser that supports modern standards. Mozilla, Firefox and Google Chrome work well (as does any browser that supports modern standards). Browsers can be downloaded for free. Adding Mozilla Firefox or Google Chrome does not require that you delete your existing browser.

Q3: How do I reset my password?

A3: *See Section* 1.2.4 *Accessing VMS when you've lost or forgotten your password* for directions on how to reset your password. If after following the directions you are still unable to access VMS due to a forgotten password contact your coordinator or another **Full Access** VMS Administrator to reset your password.

Q4: How do I find an event?

A4: *See Section 2.3.2 View all Events* for directions on how to see all the events taking place in your county program.

Q5: How do I unvolunteer myself for an event?

A5: *See Section 2.3.5 Unvolunteer for an Event* for directions on unvolunteering for an event.

Q6: How do I enter my hours and/or contacts?

A6: *See Section 2.2.1 Add Volunteer and/or Continuing Education Hours with or without Contacts* for directions on how to enter hours and contacts.

Q7: Do I have to report contact when I report my hours or can I do them separately?

A7: Hours and contacts related to those hours need to be recorded together. You enter hours without contacts but not contacts without hours. If you have already entered hours and need to enter contacts related to those hours *see Section 2.2.2 Edit Volunteer and/or Continuing Education Hours with or without Contacts*.

Q8: How do I edit my hours? How do I delete my hours?

A8: *See Section 2.2.2 Edit Volunteer and/or Continuing Education Hours with or without Contacts* for directions on editing hours. *See Section 2.2.3 Delete Volunteer and/or Continuing Education Hours with or without Contacts* for directions on deleting hours.

Q9: I keep entering hours and they disappear, why?

Q9: In order to save your hours you must click the blue ✓**Save Hours** button, if you don't your entry is not saved. After clicking the blue ✓**Save Hours** button a green bar will appear at the top of the screes stating "Hours have been added!"

Q10: Do I list my travel time separate from my volunteer hours?

A10: Travel time does not count as volunteer hours unless you are conducting volunteer activities. If you are unsure of what hours qualify discuss it with your coordinator. The **Miles Driven** is for your personal records and not used by in an official capacity.

Q11: How do I see how many hours I have?

A11: *See section 2.2.5 View Volunteer and Continuing Education Hours* for directions on how to view your hours.

Q12: How many hours do I need to reappoint?

A12: *See section 2.8.1What is Reappointment?* for detailed information on reappointment requirements. The minimum hours required to remain a certified volunteer are:
• 25 hours - Volunteer
• 12 hours - Continuing education

Note: First years are required to complete a minimum of 50 volunteer hours (no continuing education requirement) before the next certification cycle.

Q13: How do I verify my reappointment went through?

A13: After you electronically complete each agreement a green bar will appear at the top of the screen stating:

- **"Reappointment request saved"**
- **"Code of Conduct Agreement saved"**
- **"Proof of California's Driver License and Automotive Liability Insurance saved"**

A chart will display listing the completed date next to each releases name. Select the blue words View / Print Agreement to display the next page where you can select the blue words Print Complete Release.

View/Print Agreement

Thank you for considering reappointment into the Master Gardener Program. We value your service and thank you for sharing your valuable time as a volunteer for the Master Gardener Program. We hope you will consider joining as an agent of UC for another program year.

Complete the following three sections to fulfill the county requirements for participation in the Master Gardener program. If you are not seeking reappointment, or you are seeking limited/active status, please complete section one only.

Release Name	Date Completed
Annual Volunteer Agreement and Request for Reappointment	3/14/2018
Code of Conduct/Responsibilities and Rights	3/14/2018
Proof of California Driver's License and Automotive Liability Insurance	3/14/2018

If you can't determine if you have completed reappointment contact your county coordinator or someone who is a **Full Access** VMS administrator and asked them to check for you.

Q14: Can everyone see my emergency contact information I listed in my profile?

A14: No, only State VMS Admin, **Full Access** VMS administrators and roster administrators in your county can view emergency contact information.

Q15: I enter my hours and they show up in VMS twice, what is happening?

A15: You may be using an outdated browser such as Internet Explorer browser. Either change to an updated browser like Chrome or Firefox or you can continue to use Internet Explorer and delete the duplicate entry.

Appendix 2 – Administrator Frequently Asked Questions

Q1: Who do I contact if I have a problem with VMS?

A1: VMS is a computer program designed, updated and maintained by UCANR Communications Services and Information Technology and their team of programmers. During the first few months of the VMS 3.1 submit questions and fix it tickets through this link:

Normally: Report programming errors to UCANR Communications Services and Information Technology through the **IT Help** button located on UCCE staff portal accounts. If you are a VMS administrator and are a volunteer contact your coordinator or office manager and have them submit the issue through the **IT Help** button.

Q2: How does a program coordinator send an email to new trainees to alert them of their new VMS accounts and/or to create a new password in VMS?

A2: Once the trainee is added to the roster an automatic email will alert the trainee that they have an account and that they need to set-up a password. Content can be added to the "New MemberEmail" which will be sent out to new volunteers only. Program coordinators can send a reset/set-up password link to new and active volunteers by using the link below to gain access to the portal:
https://ucanr.edu/portal/login/UniversalForgotPass.cfm

How to Logon to the Portal

To log into the portal for the first time:

1. Go to: https://ucanr.edu/portal
2. Click on the 'New user? Forgot your password? Click here' button.
3. Enter your e-mail address and click the button.
4. If your e-mail address is in our system, an e-mail will be sent which contains a link to access the portal.
5. Click on this link to enter the system.

The link will only work one time. If you forget your password again, you will need to re-submit the access request.

Once you are in the system, you can change your password.

If you are NOT in the system, please contact your office manager or MSO.

Q3: Is there information to give to new MG trainees on what to do when they receive the "Accessing Master Gardener System" / "Accessing Master Food Preserver System" email?

A3: Volunteers receive an email generated from VMS no-reply@ucdavis.edu which provides a link to their portal account and includes login procedure info. The coordinator should go into "Manage VMS" and then "Manage email message" first, however, to edit the information. *See Section 1.2.2 Accessing VMS for the first time* for directions.

Q4: Is there any training for new users to VMS?

A4: There is a VMS help website – with very basic intro materials, here: vmshelp.ucanr.edu this is meant for volunteers who are new at logging into VMS, etc. Unfortunately there is no advanced training for VMS admins at this time. The statewide office will be developing more VMS help and admin resources in the future

Q5: How can I reset a volunteer's password in VMS?

A5: *See Section 3.6.11 Reset a Volunteer's Password* for directions on resetting passwords.

Q6: How can I (coordinator) give a new supervisor access to my county VMS?

A6: The coordinator can add the new supervisor to the VMS roster and designate them in their profile as "UC Staff." If the supervisor will need access for recertification review this has to be done at the statewide level by adding the person to the recertification reviewers/program admin.

Q7: Coordinator has a new training class that ends on Feb 20. They want the new volunteers to sign all the appropriate forms electronically at this time. Can VMS be set up to "Manage Reappointments" so the "Sign Your Forms" flag goes only to the new class and not whole roster?

A7: Yes. Change the status of the volunteers in VMS from Trainee to First-Year Master Gardener /Food Preserver *See Section 3.6.6 Change Volunteer Status and/or Achievement* for directions on changing volunteer status.

Q8: What forms are required to give trainees to sign?

A8: Assuming the trainees are past the application period and are ready to begin classes, many counties print out the Adult Volunteer Code of Conduct/Rights and Responsibilities form and ask trainees to sign so that they know the behavior that is expected of them while completing training and as a volunteer.

Some counties also choose to have trainees sign the UCANR Photo Release Agreement, as they want to document the training with photographs. Other paperwork such as the volunteer agreements, and driving document are electronically signed at reappointment and/or when they graduate / change status from Trainee to First-Year Master Gardeners / Food Preservers in VMS.

Q9: Does a volunteer have to have an email address to access VMS?

A9: Yes

Q10: When a volunteers transfers from one county UC MG /MFP Program to another and they are added to the roster their hours previously logged do not come over with them on VMS. Do I need to manually add those hours and activities?

A10: Volunteer and continuing education hours don't transfer with a volunteer from one county to another – for federal reporting purposes hours are 'owned' by the county in which they were given. To get a MG transfer volunteer up-to-date in a new county enter their current fiscal year (FY) volunteer and continuing education hours, their past FY's volunteer and continuing education hours (as one big lump sum), and then their total for all time of volunteer and continuing education hours as an entry in the comments section (99 character limit) of their volunteer profile (not assigned to a generic "transfer" project). The volunteer should be responsible for tracking when they hit their program milestones.

Q11: How can MGs store photos that allows other MGs to be privately and securely stored and have access those photos for appropriate use?

A11: Through VMS volunteers can upload and store images. *See Section 2.7 Photo Albums* for more information)

UCANR has an internal system for storing images, called the ANR Repository that only staff can upload images into (ie: program coordinator / advisor) but volunteers can download from.

Q12: When a volunteer resigns and their status is changed to Inactive Resigned can they be deleted from the roster?

A12: Yes, although a resigned volunteer has thirteen months to seek reinstatement they can be deleted from the roster without their volunteer or continuing education hours being lost. *See Section 5.4 Reinstate a Volunteer* for direction on how to reinstate a volunteer.

Q13: Can I enter volunteer, continuing education hours under my staff profile?

A13: No, if you have a staff profile (ANR Directory) and need to record hours you should have a volunteer account that uses a personal email address. Once employment is severed or you no longer has access to the staff profile email you will no longer have access or ability to edit the information you recorded in VMS. Maintain a staff email profile in VMS for business and a personal profile in VMS for your volunteer work.

Q14: What does the email to resigning volunteers say?

A14: Below is a screenshot of what VMS sends to volunteers and the owner of VMS when a volunteer's status is changed to Inactive Resigned. The close of the email includes the VMS owner's name and email address. A postal letter should be mailed as follow up to let them know how to re-enter the program, template letter is located on coordinator site and can be customized as needed.
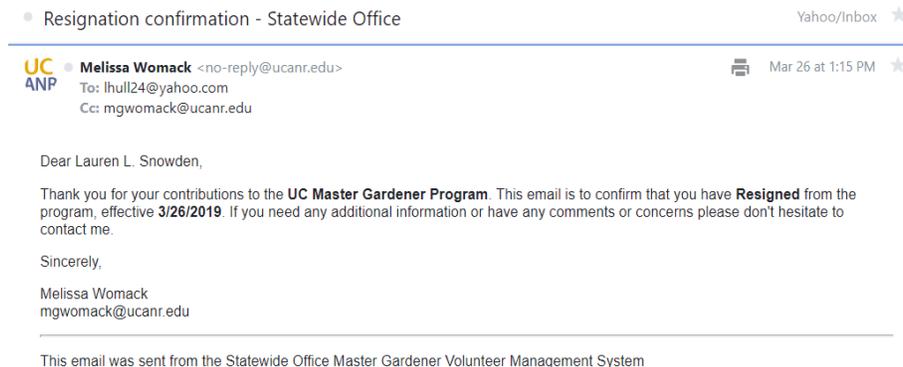
Appendix 3 – Administrator Reappointment Quick Tips and Frequently Asked Questions

Q1: What if my volunteer doesn't have internet access / wants a paper copy / or will be on vacation?

A1: If a volunteer cannot recertify online the coordinator can submit recertification papers on their behalf. When a coordinator digitally submits papers for a volunteer, the county must retain hard copies signed by the volunteer on file. Submitting digital files for a volunteer should happen on a case-by-case basis, and only as a special accommodation. The coordinator is not signing for them - but rather telling VMS there is a hard copy

version on file for these agreements. Click "Submit Papers" button on the left of volunteer's name. This takes you to a page that asks the specifics about the type of agreement you are submitting on their behalf and whether they agree to the Code of Conduct and Driving Agreement.

Q2: What if my volunteer does not reappoint?

A2: If a volunteer cannot be contacted or upon contact says they no longer wish to continue in the program their status must be changed to "Resigning" to not be billed an insurance fee. To select a volunteer as resigned - select "Submit Papers" and "Wish not to be reappointed."

Note: Although the above action signifies a volunteer as resigning on the reappointment roster, you must also go to their profile and change status to "Inactive/Resigned" in order to remove their access to VMS, and ensure they are not counted on your roster for insurance billing. *See Section 11.4 Resigning or Inactive Volunteers* and *Section 5.5 Change Volunteer Status* for more information.

Q3: Can I delete a volunteer From VMS?

A3: Yes! A volunteer can be deleted from a program's roster without losing any of the data associated with the profile. In the past it was communicated to not delete volunteers in fear of losing data, this issue has been addressed by IT and is no longer an issue.

Q4: What if my County Director can't find the MG Reviews link for approving Reappointment?

A4: If there has been a change in leadership in the past year, the new County Director may need to be added as a review-level administrator. Please contact the statewide office to have your County Director added as a review-level admin.

Q5: I need more help with reappointment, where do I get it?

A5: Check out the coordinator website for updates on reappointment, useful forms, recorded trainings and assistance, mgcoord.ucanr.edu.

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