

# Staff Instruction Manual

## *VMS, Volunteer Management System*

Revised August 15, 2016

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The on-line *Volunteer Management System, VMS*, is user friendly, intuitive and has many useful features allowing the CMG volunteer to:

- Sign-up (unsign-up) for CMG *Project*.
- Volunteer (unvolunteer) for CMG *Events*.
- Sign-up (unsign-up) for CMG Continuing Education *Events*.
- Report/View/Edit hours and contacts.
- Email individual members or groups.
- Change their password, email, and other contact information.
- View current news at the local and state level.
- Share photos, connecting faces with names.
- Link to useful CMG related websites.
- Download linked documents and newsletters.

It was developed specifically for Master Gardener Programs by the University of California Cooperative Extension, and is used in Colorado under license agreement with the University of California.

**Instructions for CMG Volunteers are found in CMG GardenNotes #013, VMS.**

For additional information, contact Mary Small. He is designated as Colorado's contact with the VMS computer programmers at the University of California. The programmers have requested that you work through Mary, rather than contacting them directly.

# Primary Steps in Setting-Up the County VMS Site

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VMS is easy to set-up on the staff side. The basic steps to get it up and going include the following:

- 1. Set-up site administrators** (individuals who will be setting up the county site).  
Administrative access can be granted to anyone on the roster. Site administrators enter the system in the same method as volunteers. They just have additional options when on the system.

To set up site administrators:

- a) Determine who will be helping set up the site.
- b) Add them to the county roster. (see page 8)
- c) Grant them **Full Access Administrator Rights**. (see page 5)

- 2. Set-up County Project.** (see page 11)

- a) Make a project list for the county activities
- b) Add the list to VMS, (see page 12)

In VMS, **Projects** are the base for operations. Projects are major types of activities, such as Office Phones, School Youth Gardens, and Demonstration Gardens.

In VMS, hours are reported back to **Projects** rather than **Events** (specific activities with dates/time). Therefore, the county will need a variety of projects to cover all CMG outreach and continuing education events. Group emails also work at project level.

- 3. Add currently active Calendar Events** (see page 14)

- a) Set-up currently active Calendar Events (see page 14)

In VMS, **Events** are activities that volunteers sign-up for on a specific date and time. **Events** are found on **Calendars**. One of the benefits of VMS is that it allows for multiple Calendars rather than stuffing all the events on a single calendar. For example, one calendar could be set up for office phones, another for the demonstration garden, etc. Each site should have a calendar for continuing education.

- 4. Add Interests,** (see page 9)

- a) Determine your county Interest List
- b) Add the list to VMS

In VMS, one of the volunteer sort and email groups is **Interests**. Interests are topics of expertise that CMG would like to share in CMG outreach. For examples, vegetables, flowers, organic gardening, water wise landscaping and photography.

**5. Add County's Home Page News, (see page 6)**

Home Page News is the news in the center panel of the VMS home page. It is for announcements of CMG interest and should be updated frequently.

**6. Add County Specific Links, (see page 6)**

In VMS, the county has a pod for county specific links.

**7. Localize the New Member Email, (see page 6)**

This is the system's email to volunteers giving them access information. The text shows as one large paragraph, so it does not give us many options in content.

Please localize it by adding your email address rather than Mary's.

**8. Add list of Volunteers, (see page 8)**

First name and last name are required. Email address is required for the volunteers to access the site. The CMG Program has decided to have the staff manually set the password for new volunteers rather than for the system to send them a password.

**9. Communicate to CMG Volunteers how to access the system, (see page 8)**

Send communications to CMGs about how to access the system.

**10. Training of CMG volunteers in VMS**

CMG GardenNotes #013, *VMS: Instructions for Using the CMG On-Line Volunteer Management System*, gives instructions for volunteers.

The system is so intuitive that computer savvy volunteers will need minimal training.

# Manage VMS

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## Managing Administrative Rights

**Administrative Rights can be given to anyone on the roster, including support staff and middle management volunteers.** Login is the same for all individuals. Individuals with management rights will have additional options showing on their pages.

### To Manage Administrative Rights

1. Click on the [**Manage VMS**] link in the left *Administration Navigation Box*.
2. Click on the [**Manage Administrators**] link. The **Manage Administrators** window opens. You will see a list of names that have Administrative Rights and the type.

- **To Add a New Administrator**

1. Select the individual from the [**Select from Roster**] drop down menu. The person must be on the county roster.
2. Click on the [**Make Administrator**] button.
3. Click in the boxes that you want the person to have administrative access to. For example, if you click the Calendar box, they will have access to set-up and edit the calendar features. **Full Access** gives full administrative access to that individual.
4. Click on the [**Update Administrator**] button to save.

- **To Change Administrative Rights for an Individual**

1. Click on the name you want to change.
2. To change rights, place checks in the boxes where you need them
3. Click on the [**Update Administrator**] button to save.

- **To Removed All Administrative Rights for an individual**

1. Click on the name you want to change.
2. Click on the [**Remove Administrator**] button.

## Home Page News

*Home Page News* the center panel in the VMS webpage. This section is for county news and should be updated frequently.

### To Edit Home Page News

1. Click on the **[Manage VMS]** link in the left *Administration Navigation Box*.
2. Click on the **[Home Page News]** link. The **Manage Home Page News** window opens.
3. Edit content and title in the boxes, as desired.
4. Click on the **[Post News]** button.

## New Member Email

This is the system's email to volunteers giving them access information. The text shows as one large paragraph, so it does not give us many options in content. **Please localize it by adding your email address rather than Mary's**

In Colorado, the CMGLC decided to manually set password and to communicate that to volunteers. Thus we will not be using the new member email feature.

## User Options

This feature allows the county to turn off volunteer access to features of the system. By clicking on the links, it toggles the features between **Enabled** and **Disabled**. For example, if **Edit Profile** is disabled, volunteers will not be able to edit their profile. Features should generally remain enabled for the county page.

Calendars are site specific. Where there is a need for a multi-county calendar to handle sign-ups, it would be processed on a different "program" (each county is a program). Where needed, we can add a multi-county program. In this situation, it would be appropriate to turn off most features on the multi-county site, directing the volunteer back to the home county program for reporting.

## Links

This feature allows the county to add county specific web links into a **County Links** pod. **State Links** will change from time to time, as appropriate for CMG activities of the season.

**To Add a Link to the County Links Pod:** (Note: No **County Links** pod will show on the home page if no links have been added.)

1. Click on the **[Manage VMS]** link in the **Administration** pod.
2. Click on the **[Links]** link. It opens the **Link Editor** page.
3. Click on the **[add a new link]** link
4. Enter the **Link Name** and **Link URL** in the boxes.
5. Click on the **[Post Link]** button.

**To Edit or Delete a Link in the County Links Pod:**

1. Click on the [**Manage VMS**] link in the **Administration** pod.
2. Click on the [**Links**] link. It opens the **Link Editor** page. A list of current links shows.
3. Click on the link that you want to edit or remove. The editing page opens for that link.
4. Edit the [**Line Name**] and [**Link URL**], as needed.
5. Click on the [**Post Link**] button to update the link or the [**Delete Link**] button to delete the link.

# Manage Roster

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## Add a New Member

1. Click on the [**Manage Roster**] link in the left *Administration* pod. This opens the *Manage Member Roster* page.
2. Click on [**Add a New Member**] link. The *Add New Volunteer* page opens.
3. From experience, we have learned that it is best to manually set the password and to communicate the password to volunteers via email or mail (rather than to use the system notification). So make sure the second paragraph reads, “**Email notification will NOT be sent...**” If it reads “New members will receive an email with access instructions.,” click on “Turn this feature off.”
4. In the [**Enter Email or Last Name**] box, add the new members last name and click on [**Add/Find Member**]
  - A listing of everyone in the system with that last name comes up.
  - If the person you want to add is on the list, click on the [**Add to Roster**] or [**Reactivate**] link.
  - If the person is not on the roster scroll down to the bottom of the page to **Don’t see the member listed? Click here to add them.** Click on **Click here.**
5. The *Edit Member Profile* page opens. Working down the *Edit Member Profile* page, add data as desired.
  - [**First Name**] and [**Last Name**] are required.
  - **CMG status:** Select the appropriate status from the drop down menu.
  - **Start year:** Add their start year
  - **Change Password:** In the box, enter the password you want to assign.
    - It could a generic password for the county.
    - It could be a specific password for the individual.
    - The password must have at least 7 characters, no spaces and contain a number or special character.
  - **E-Mail Address:** Add their email address. The e-mail address is used for their login. **No two individuals in the system can share the same e-mail address.**
  - Other items may be added by the staff or left for the volunteer to enter.
6. Click on [**Save Information**]

**Note on email address:** The system uses the email address as the primary identifier of the volunteer. It does not allow two volunteers to have the same email. Where a couple share the same email, you may need to help them set-up a second email address, as each must have a different email for system identification. In most emails systems, they can forward a second account to a primary address.

## View and Edit a Member Profile

1. Click on the [**Manage Roster**] link in the left *Administration* Navigation Box. This opens the *Manage Member Roster* window.
2. Click on **member's name** that you want to see/edit. This opens the member's Profile.
3. View and make changes, as desired.
4. Click on the [**Save Information**] at the bottom of the page.

**Note: When a volunteer's profile need corrections, edit the profile, as described above. A common mistake is to delete the profile and then recreate it. This does NOT work.** When a profile is deleted, it is removed from the county's roster, but not removed from the system. When the profile is recreated, the system has duplicate entries. This creates a system crash for the volunteer when they login. If this occurs, contact Mary.

## Remove a Member Profile

There are two options in removing a member's profile.

- **Released** – Stops access to VMS but keep the person's information in the system. Their hours and contacts will show in reports. To "release" a volunteer:
  1. Click on the [**Manage Roster**] link in the left *Administration* Navigation Box. This opens the *Manage Member Roster* window.
  2. Click on **member's name** that you want to see/edit. This opens the member's Profile.
  3. In the *CMG Status* box, select Released from the drop down menu
  4. Click on [**Save Information**] button at the bottom of the page.
- **Deleted** – Removes the person's profile from the county roster. . Access to the system is eliminated. However the name is still in the system.
  1. Click on the [**Manage Roster**] link in the left *Administration* Navigation Box. This opens the *Manage Member Roster* window.
  2. Click on **member's name** that you want to see/edit. This opens the member's Profile.
  3. Click on the [**Delete Volunteer**] at the bottom of the page.

**Note: When a volunteer's profile need corrections, edit the profile, as described above. A common mistake is to delete the profile and then recreate it. This does NOT work.**

## Manage Interests

*Interests* are a feature that allows volunteers to select titles where they have expertise and would like to share it within the program. It includes subject matter items and skills useful in volunteer activities.

It can be use to quickly identify volunteers with special interests and skills. **Email may be sent a group of individuals with a given interest.**

**The list is county specific;** that is each county adds the list to include items of local importance.

### **To Add Interests**

1. Click on the [**Manage Roster**] link in the left *Administration* pod.
2. Click on the [**Manage Interests**] link in the left *Administration* pod. This opens the *Interests* window.
3. Click on **the** [**Add New Interest**] link.
4. Add the name of the new interest in the box.
5. Click on the [**Create Interest**] button.

### **To Change or Delete Interests**

1. Click on the [**Manage Roster**] link in the left *Administration* pod.
2. Click on the [**Manage Interests**] link in the left *Administration* pod. This opens the *Interests* window.
3. From the List of Interests, click on the name to edit or delete.
4. To edit name, make changes in the **Interest Name** box, then click on the [**Update Interest**] button. To delete an interest, click on the [**Delete Interest**] button.

## Email Individuals or Groups

This feature allows you to send email to individuals or to specific groups sorted by interests, projects or CMG Groups.

### To Send an Email to a Select Group of Volunteers

1. Click on the [**Manage Roster**] link in the **Administration** pod OR the [**Member Roster**] in the **General Information** pod.
2. Click on the [**Email Members**] link. This opens the *Email Volunteers* page.
3. Check the boxes in **List of Interests**, **List of Projects**, and **List of MG Groups** that fit your email needs. To mail all volunteers, check the **Email all volunteers** box in the List of MG Groups.
4. Click the [**Email by Interest or Group**] button.
5. On the **Email Volunteers** pages, compose your email.
  - It will show individuals who do not have email.
  - Allow to you deselect individuals, if needed.
  - Compose your subject and title.
  - Attach files.
  - Select to receive a copy of the mail.
6. Click on [**Send Email**] button.

# Manage Projects

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## Projects and Calendar Events

VMS works with two levels of activities, *Projects* and *Calendar Events*. *Projects* are the basis for system operations. Projects are groups of similar outreach activities. For example, answering phones at the Extension office, staffing an informational booth at garden center and working in a school youth garden would be projects. When volunteers sign-up for a project, it does not commit them to any specific event (day and time).

The next level is *Calendar Events*. Calendar Events are tied to specific days and times. For example, answering phone at the Extension office on July 6<sup>th</sup> from 9 to 12 noon is a calendar event. When volunteers sign-up for an event, they are committed to serve at a specific day and time.

## The County's Project List

**The project list is county specific.** Each county sets it up as is appropriate for their outreach and continuing education activities. Example of projects includes the following:

- Community Fairs
- Continuing Education for CMGs
- Demonstration/Research Gardens
- Farmers Market Clinics
- Garden Center Clinics
- Hosting (not teaching) at classes (like ProGreen and local community classes)
- Office Contacts (phone, emails, and walk-in clients)
- Teaching Classes / Speakers Bureau
- Web Development
- Writing for Newspapers
- Youth Gardening Projects

In setting up the list of *Projects*, keep it simple by combining similar types of activities into the same project. In considering projects, give attention to two primary considerations:

1. **Reporting** – All reporting of hours and contacts is tied back to projects, not events or days. The county site must have projects to cover all events.
2. **Email communication** – Project sign-up puts the volunteers on that project's email lists, allowing for directed communications.

For example, if Buffalo County has two demonstration gardens (the Buffalo County Extension Office Water Wise Garden and the Plant Select Garden at Columbine Park) it could be approached in two ways. If it works to have the hours for both sites combined in report summaries, it simplifies things to put the two sites together in one project titled "Demonstration Gardens". Likewise, if there is one primary pool of volunteers working the two sites, it simplifies things to combine them. On the other hand, if there is a need to summarize hours separately or to communicate to the volunteer pool separately, they

should be set up as two separate *projects*. It would be easy to schedule events for both sites on one calendar call “Demonstration Gardens”.

Likewise, in Buffalo County if CMGs staff informational booths at three different garden centers, they could be set up as one project working all three sites off one calendar, OR as three separate projects if report summaries or communications need to be kept separate.

All counties will need project(s) for reporting of continuing education. If all you need is total hours from all events, it would be simple to have one “Continuing Education” project. However, if you have a need to sort out the hours by various activities, multiple projects will be needed.

**Start your set-up of VMS by making a list of Projects for your county.**

## Manage Projects

### To Manage Projects

1. Click on [**Manage Projects**] in left *Administration* Navigation Box. This opens the **Manage Projects** page.

### Data Included in the Project Name Listing

The **Project Name** list shows all data (volunteers, hours, and slots) for each project on the site. If you want to limit the data to a specific time frame (like the CMG year) add **Start Dates** and **End Dates** in the boxes and click on the [**Submit**] button. This will resort the list showing the data for the timeframe indicated. If the boxes are left blank, it will show all data since the CMG started with VMS.

### Active/Inactive Projects

- This feature allows you to hide “inactive” projects, keeping the **Active Projects** list shorter and more current.
- The display toggles between **Active Project** and **Inactive Project** by using the [**View Inactive Projects**]/[**View Active Project**] link.
- To make a project Inactive or Active, click on the [**Inactivate**] or [**Activate**] buttons.

## Add a Project

1. Click on the [**Manage Project**] link. This opens the *Manage Projects* page. A list of Active/Inactive project shows.
2. Click on the [**Add New Project**] link. The *Edit Project Information* page opens.
3. Working down the page, add project information, as needed.
  - a. Add **Project Name**.
  - b. Add **Project Description** (as desired).
  - c. Add **Project Information** (as desired).

- d. Select **Project Category** from the drop down menu that best fits the project. The categories connect the data to the state report.
  - e. Select **Project Contact** from the drop down menu. – This is the person the volunteer would communicate with about the project. It could be a staff member or a middle management volunteer.
  - f. **Email Contact:** Select Yes or No. – If yes, the contact person above will receive an email when a volunteer signs-up or removes their name from the project.
  - g. **Number of Volunteers Needed:** Add number of volunteer needed. In selecting the number, keep in mind that this does not commit volunteers to any specific event (day/time), so keep your number high.
    - If the project has the number of volunteers needed, volunteers will see “*Project is full! Sorry, not accepting more volunteers at this time*” at the bottom of the project details page.
    - Administrators may manually add more volunteers to the list than the number is set for.
4. Click the [**Create Project**] button.

## Edit a Project

1. Click on the [**Manage Project**] link on the *Administration Navigation Box*. This opens the *Manage Project* page.
2. Click on the project’s name in the list to be edited. This opens the *Edit Project Information* page.
3. Edit the information as needed.
4. Click the [**Update Project**] button.

## Delete a Project

1. Click on the [**Manage Project**] link on the *Administration Navigation Box*. This opens the *Manage Project* page.
2. Click on the project’s name in the list to be edited. This opens the *Edit Project Information* page.
3. Click the [**Delete Project**] button.

# Calendar Events

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*Calendar Events* are specific outreach or continuing education activities that volunteer sign-up for **on a specific day and time**. As a side note, reporting of hours is not linked to the **events** but rather **projects**.

## Adding Calendar Events

1. Click on [**Adding Calendar Event**] in the left *Administration* navigation box. The **Calendar Event Editor** page opens.
2. Working down the page, enter information about the project.
  - **Event Name** – Add title of event
  - **Select Calendar OR Create New Calendar** – Select the Calendar you want it to show in OR create a new calendar by entering calendar name in the box below. Note: The system creates a calendar only when it has events listed in the calendar.

**Calendars** – One of the best features of the VMS system is that it has multiple calendars, rather than lumping everything in one. Create calendars that would be most useful for the volunteer to find what they want. However, combine similar types of events so that the list of calendars is not too long. Each county set their OWN list of calendars as appropriate for their outreach.

For example, the county may want a calendar for the office phones. If a county has three demonstration gardens, they could all be put on one Demonstration Garden Calendar. Examples of calendars include the following:

- General Calendar (default is another calendar is not selected)
  - Office Phones
  - Farmer's Market Clinics
  - Garden Store Clinics
  - Youth Gardening Projects
  - Continuing Education
  - Demonstration Gardens
  - Speakers Bureau
  - ProGreen
  - Colorado Garden Show
- 
- Select **Project** (if you want the event to display on the project page).
  - Select **Event Coordinator** – This is the person a volunteer would communicate with about the project. It could be a staff member or a middle management volunteer.

- Select **Email Coordinator: Yes/No** – If yes is checked, the coordinator will receive an email when a volunteer signs-up or removes their name from events.
- Select **Start Date**
- Select **End Date**
- Select **Occurrence Type**
  - **Single Event** – set single date/time for the event.
  - **Occurs Daily** – allows you to set up events that repeat daily.
    - ✓ **Daily Occurrences** – Check days of the week that the event occurs.
  - **Occurs Weekly** – allows you to set-up events that occur weekly.
    - ✓ **Weekly Occurrence** – enter the weekly interval that the event occurs. For example, enter 1 and the event will show up every week from the start date to the end date. Enter 2 and the event will show up every other week from the start date to the end date.
  - **Occurs Monthly** – allows you to set up events that regularly occur once a month on a set day.
    - **Monthly Occurrences** – enter repeat pattern of the event.
- **All Day Event** – Check this box if the event runs all day.
- **Event Times** – Enter start and end time of event.
- **Sign-Ups** – enter the number of people you who can sign-up for this event.
  - Administrators may manually add more volunteers to the list than the number is set for.
- **Display Signups on Calendar: Yes/No** – If yes is checked, the first initial and last name of volunteers who have signed up for this event will be listed on the calendar. CAUTION: do not check “yes” if more than 4-6 volunteers will be participating, otherwise the calendar becomes too cluttered.
- **Block Sign-up** – Select then number of days before the event that you want volunteers to be able to sign-up/remove their name on the list.
- **Location** – add location of event.
- **Event Address** – add address of the event.
- **Event Website Address** – you can add a URL for additional information about the event (if desired).
- **Contact Information** – add contact information (as desired).
- **Event Description** – add a description of the event (as desired).
- **File Attach** – This allows you to attach files about the event.

3. **Update** – To save information click on [**Save Event Information**]

## Adding a Similar Calendar Events

You can add a similar event, with the **Copy Event** feature.

1. Click on calendar with event you want to copy. The calendar opens.
2. Click on the event you want to copy. The event’s page opens.
3. Click on the [**Edit This Event**] link. The event’s page opens in edit mode.
4. Click on [**Copy This Event**] link. A new event’s page opens.
5. Edit the information as needed.

6. Under Update, click the [**Save Event Information**] link.

## Editing Calendar Events

1. Go the calendar with the event to be edited. Click on the event link to be edited. This opens the event's page.
2. Click on the **[Edit This Event]**. This opens event details for editing.
3. Edit content as desired.

- **Change ALL instances? Yes/No** – This allows you to make changes in all recurring events (if yes is checked) or only to a single date (if no is checked).
- **Email Coordinator Yes/No** – Give some thought to whether the coordinator wants an email each time a volunteer signs-up or removes their name. Depending on the situation, it may be desirable so the coordinator can carefully track what is happening. However, in other situations, it could fill the coordinator's mail with hundreds of unneeded emails.

In some situations, the need here could change. For example, in the spring as volunteers are filling the list for the office shifts through the summer, the coordinator does not need an email for each sign-up. However, in midsummer this could change, alerting the coordinator if a volunteer suddenly removed his/her name.

4. Click on the **[Save Event Information]** button to save changes.

## Deleting Calendar Events

1. Go the calendar with the event to be deleted. Click on the event link to be deleted. This opens the event's page.
2. Click on the **[Edit This Event]**. This opens event details for editing.
3. If this is a recurring event, you can delete a single date or all of the dates. If NO is checked in the **Change All Instances**, only the single date will be deleted. If YES is checked in the **Change All Instances**, all of the recurring dates will be deleted.
4. In **Update**, click the **[Delete Event]** button.
5. A verification window opens to confirm that you want to delete the event(s)
6. In deleting the event, if there are no events left in the calendar, the calendar will also be deleted.

# Newsletter/Documents

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VMS allows you to upload newsletters and documents for volunteers to download.

## To Upload a Newsletter or Document

1. Click on the [**Newsletter/Documents**] link in the **Administration** pod.
2. Click on the [**Add New Group**] link. This opens the **Edit Page**.
3. Working down the Edit Page, fill and select details desired.
4. Click on the [**Save Group Information**] button.

## To Edit or Delete a Newsletter or Document

1. Click on the [**Newsletter/Documents**] link in the **Administration** pod.
2. Click on the newsletter group or document group that you want to edit. This opens the Edit Page for that group.
3. Working down the Edit Page, edit information, as desired.
4. Click on the [**Save Group Information**] button to save the information. Click on the [**Delete Group**] to delete the group.

# Hours Reports

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To open the **Hours Report** click on the **[Hour Reports]** link in the **Administration** pod. This opens the **Volunteer Hours Report**.

## Time Frame

- The list shows everything to date from when we started using VMS.
- **To limit the data to a specific time frame** (like the CMG year) add **Start Dates** and **End Dates** in the boxes and click on the **[Submit]** button. This will resort the list showing the data for the timeframe indicated.

## Summary Report View or Expanded Report View

- The view toggles between **[Summary Report]** view and **[Expanded Report]** view, using the link near the top of the report. In the **[Summary Report]** view, it lists totals for each individual. Notice the box for volunteers with no hours recorded. In the **[Expanded Report]** view, each individual is listed, showing each event date that has been entered.

## Create Excel

- VMS readily exports reports into an Excel spreadsheet for additional review and reworking by clicking on the **[Create Excel]** button.

## To Add Hours

1. To add an hours report, click on the name link that you want to edit. This opens the Volunteer Hours History for the volunteer.
2. Click on the **[Add Hours]** link near the top of the page. This opens the **Add Volunteer Hours** page.
3. Working down the page, fill in the details as needed.
4. Click on the **[Save Hours]** button.

## To Edit or Delete a Report

5. To edit a report, click on the name link that you want to edit. Then click on the activity link that you want to edit. This opens the **Edit Volunteer Hours** page.
6. Edit the report, as needed.
7. Click on the **[Save Hours]** button to save the changes or the **[Delete Hours]** button to delete the report.

# Contact Reports

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To open the **Contact Report** click on the [**Contact Reports**] link in the **Administration** pod. This opens the **Contact Reports** page.

## Time Frame

- The list shows everything to date from when we started using VMS.
- **To limit the data to a specific time frame** (like the CMG year) add **Start Dates** and **End Dates** in the boxes and click on the [**Submit**] button. This will resort the list showing the data for the timeframe indicated.

## Show Hours View or Remove Hours View

- The view toggles between [**Show Hours**] view and [**Remove Hours**] view, using the link near the top of the report. In the [**Show Hours**] view are totals. In the [**Show Hours**] view, all events are listed by volunteer and date, including hours.

## Show Projects View or Remove Projects View

- The view toggles between [**Show Projects**] view and [**Remove Projects**] view, using the link near the top of the report. In the [**Show Project**] view, the projects are listed by Project title. In the [**Removed Projects**] view, contacts are listed by volunteer.

## To Edit or Delete a Report

1. To edit a report, click on the project and event link that you want to edit. This opens the **Edit Volunteer Hours** page.
2. Edit the report, as needed.
3. Click on the [**Save Hours**] button to save the changes or the [**Delete Hours**] button to delete the report.

## Create Excel

- VMS readily exports reports into an Excel spreadsheet for additional review and reworking by clicking on the [**Create Excel**] button.

# Managing Volunteer Reappointment

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The reappointment process is currently turned off. We are waiting for an upgrade of the system to make it more functional.

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