Volunteer Management Information System

AVCC User Guide | Version 1

Contents

1.0 - Welcome to VMIS

Welcome to the **Volunteer Management Information System**, or **VMIS**. VMIS is a web application that allows volunteers within the military community to find and apply for volunteer opportunities, record and track their volunteer hours, and manage their volunteer service record. VMIS also assists the **Army Volunteer Corps (AVC)** in managing these dedicated volunteers.

This guide is written specifically for **AVC Coordinators**, or **AVCCs**, and describes the functionalities relevant to their role. For information on using VMIS as a volunteer or Organization Point of Contact (OPOC), refer to the **VMIS User Guide for Volunteers** and **VMIS User Guide for OPOCs**, respectively.

For information about **AVCC Assistants** and functionality specific to that role, refer to **AVCC Assistants** within this guide.

To access VMIS, visit the following website: https://vmis.armyfamilywebportal.com

VMIS Home Page

Supported browsers for AFWP Applications are Internet Explorer 11, Chrome, and Firefox. You may experience functionality and appearance differences when using the application depending on your browser version.

> ***Note:*** *Beware of system timeouts. Be sure to save your progress frequently, especially while filling in long forms.*

1.1 - Glossary

The following abbreviations are helpful to know as you are going through this guide:

- **OPOC: Organization Point of Contact** – Person in charge of a particular volunteer organization who typically approves volunteer applications and certifies or rejects volunteer hours.
- **AVC: Army Volunteer Corps** – Army Community Service (ACS) program that organizes and assists Army volunteers.
- **AVCC: Army Volunteer Corps Coordinator** – Person who runs a volunteer program at a garrison and manages one or more OPOCs.
- **AVC PM: Army Volunteer Corps Program Manager** – Person who manages administrative users, standard groups, standard organizations, and standard positions. This is the functional position of the Headquarters ACS Staff member (the AVC PM at IMCOM).
- **RM: Region Manager** – Person who acts as a liaison between AVCCs in their region and the AVC PM at Headquarters. This is the functional position of the IMCOM Directorate (ID) Army Community Service (ACS) Point of Contact (POC).
- **VMIS: Volunteer Management Information System** – Web application that allows volunteers within the military community to find and apply for volunteer opportunities, record and track their volunteer hours, and manage their volunteer service record.
- **AFWP: Army Family Web Portal** – Online hub for Army Community Service (ACS), providing access to systems and services for military families, soldiers, and sponsors.
- **ACS: Army Community Service** – Collection of programs to assist commanders in maintaining readiness of individuals, families, and communities within America's Army by developing, coordinating, and delivering services which promote self-reliance, resiliency, and stability during war and peace.
- **ARC: AFWP Resource Center** – Repository where important information for both family members and Army Community Service (ACS) staff is maintained.
- **SSO: Single Sign-On** – Feature that allows users to log in to any AFWP systems with the same email and password as their AFWP Account, reducing the number of usernames and passwords between systems without any compromises of security.
- **Non-user** – Volunteer who is not directly using VMIS to log their volunteer hours.

1.2 - VMIS Registration

Users who register for VMIS are also required to have an account for the Army Family Web Portal, or AFWP. This account, also known as an **AFWP Account**, is used to **log in to VMIS** or any other permitted **Army Community Service (ACS)** system. An AFWP Account can be created directly through the VMIS website, or through the **AFWP Resource Center (ARC)**.

The following sections contain more information about AFWP and the features of having an AFWP Account.

1.2.1 - Army Family Web Portal (AFWP) & AFWP Accounts

The **Army Family Web Portal (AFWP)** is an online hub for ACS, providing access to VMIS and Issue Management systems and services to sponsors and family members. VMIS users can visit AFWP to create an **AFWP Account**, which can be used to **log in to VMIS** and other permitted ACS systems.

Registering directly through the VMIS website will **automatically create an AFWP Account**, using the same email address and password provided during registration.

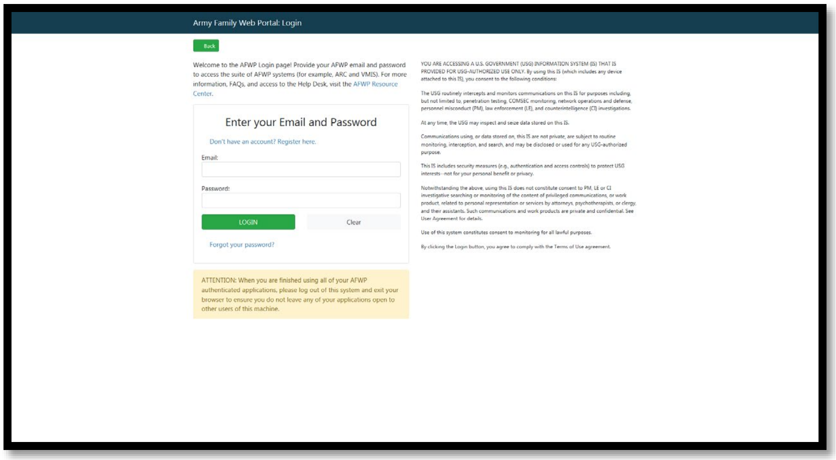
Refer to **Create an AFWP Account** to complete the registration process directly on VMIS**,** or visit the following page on the AFWP Resource Center: https://www.armyfamilywebportal.com/

1.2.2 - Single Sign-On (SSO)

An **AFWP Account** is used to log in to VMIS, through the **Single Sign-On (SSO)** feature. This feature allows users to provide the same email and password as their AFWP Account when logging in to VMIS, reducing the number of usernames and passwords to remember between systems without any compromises of security.

Refer to **Army Family Web Portal (AFWP) &** AFWP Accounts for more information on creating an AFWP Account to log in to VMIS.

> ***Tip:*** *If you have ever created an AFWP Account for a different ACS system, you can log in to VMIS using the same credentials as those systems. See* ***Log In to VMIS****.*



Single Sign-On Login Page

1.2.3 - Create an AFWP Account

1. Select **Register** on the **VMIS Home Page**, or select Log In from the **VMIS Home Page** and then select **Register**.
2. Enter the required information into the **following data fields**:
   - *Email, Password,* and *Confirm Password.*

> ***Note:*** *SSO passwords are* ***case-sensitive*** *and require a minimum of* ***15 characters*** *that include the following:*
>
> *2 uppercase letters, 2 lowercase letters, 2 numbers, and 2 special characters (!#$%^@).*

3. Select Register.
4. An **automated email** will be sent to the email that was entered in step 2 with a link and a token number.
5. Select the link in the email to verify the account.
6. On the page that appears, enter the **email address and the token number** provided in the automated email.
7. Select Verify Email.

1.3 - Log In to VMIS

1. Select Log In from the **VMIS Home Page**.
2. Enter the **Email** and **Password** you used to create your AFWP Account into the respective fields on the page that appears.

3. Select Log In.
4. When logging in for the first time, you will need to create your **AFWP Profile** (if you don't already have one) and your **Volunteer Profile**. Enter the required information into the following data fields:
   - *First Name, Middle Initial (optional), Last Name, Date of Birth, Military Community, Branch, Component, Disposition(s), Preferred Contact Method, Volunteer Email, Primary Phone, Secondary Phone (optional), Work Experience (optional), Volunteer Experience (optional),* and *Special Skills, Interests, and Hobbies (optional).*
5. Select Save.

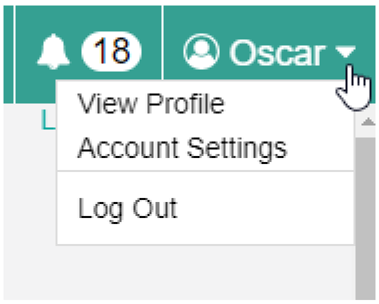
1.4 - Become an AVCC

To be assigned as an AVCC, an **AVC Program Manager** at headquarters or **AVC Region Manager** must assign the user as an AVCC for a particular community within VMIS. Once this is complete, the assigned AVCC will have access to AVCC functionality while logged in to VMIS.

After being assigned as a community's AVCC, that user will be required to complete their **Administrator Profile** after logging in to VMIS.

1.5 - AFWP Account Management

The **user account menu** provides options to update a user's personal, demographic, and volunteer information. All user types can access this page via the upper-right corner of any AFWP System or directly to the URL (https://account.armyfamilywebportal.com/).
It also provides a way to customize **account settings**, such as email notification preferences, and it is used to **log out** of a current VMIS session.



User Account menu

1.5.1 - View and Update Profile

1. Select your **user name** on the right side of the toolbar at the top of any VMIS page.

2. Select **View Profile** from the drop-down menu to update your **AFWP Profile**, **Administrator Profile**, or **Volunteer Profile**.
3. **Add** or **modify** the information in the following data fields:
   - *First Name, Middle Initial (optional), Last Name, Date of Birth, Military Community, Branch, Component, Disposition(s), AVCC Communities Note (optional), Work Email, Commercial Work Phone, DSN Phone (optional), Country, Work Address, City, State, ZIP/Postal Code, Preferred Contact Method, Volunteer Email, Primary Phone, Secondary Phone (optional), Work Experience (optional), Volunteer Experience (optional),* and *Special Skills, Interests, and Hobbies (optional).*
   - *Check the box next to "Receive email notifications" if you wish to receive them.*

   > ***Note:*** *If you opt in to receive email notifications, you will receive one email for every notification you receive in VMIS. You must input a work email and/or a volunteer email on your profile in order to receive email notifications.*

4. Select Save.

1.5.2 - View and Update Account Settings

1. Select your **user name** on the right side of the toolbar at the top of any VMIS page.
2. Select **Account Management**.
3. Select the **pencil icon** next to *Email and Password.*
4. **Add** or **modify** the selected information.
5. Select Save to apply the changes.

   > ***Warning:*** *Updating an email address or password on this page will* ***also change the email or password of the logged in AFWP Account****.*
   >
   > *To change only an administrator or volunteer email address instead, refer to* ***View and Update Profile****.*

1.5.3 - Connect a CAC

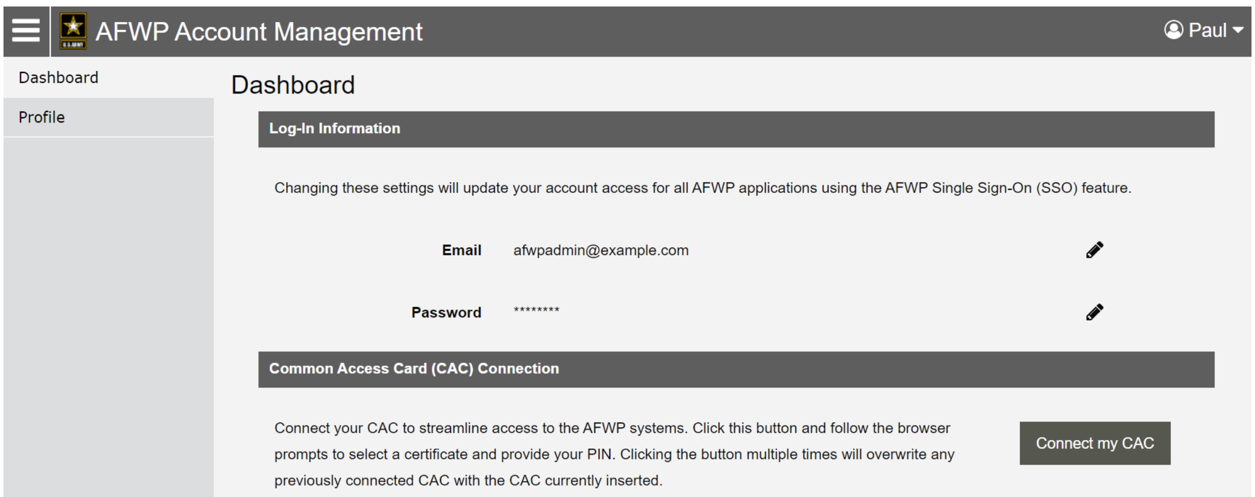
Users can connect their own **Common Access Card (CAC)** with their AFWP Account, making it possible to **log in using their CAC** instead of an email address and password. The CAC must be inserted into the CAC reader **before** beginning the CAC connection process.

To **connect a CAC**:

1. Once you login, select "Account Management" from the drop down in the upper right corner.

2. Select Connect my CAC on the AFWP Account Management page to begin the CAC connection process, and keep the following in mind as you read the instructions on the site carefully:

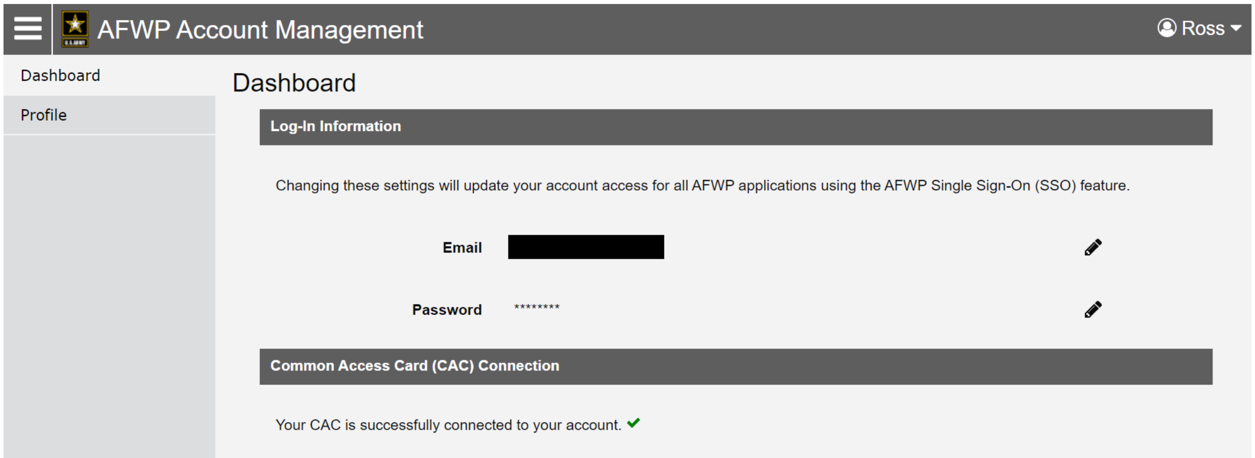
- The connection process will require the CAC's **associated pin** to be entered correctly **each time** the CAC is used to log in.
- You **can't connect an expired CAC**, your browser will not allow you to authenticate your CAC.
- Using a CAC may require you to download specific CAC certificates for specific browsers. Make sure to do this before attempting to connect a CAC to your AFWP Account.



3. Follow the prompts that appear.

1.5.4 - Check if a CAC is connected to your account

- An AFWP account can only have one CAC connected at a time
- To see if you have a CAC connected to your AFWP account, go to Account Management. You should see a confirmation there whether you login with your CAC or with your username/password.



This screenshot shows what should appear when a CAC is successfully added.

1.5.5 - Replace your CAC

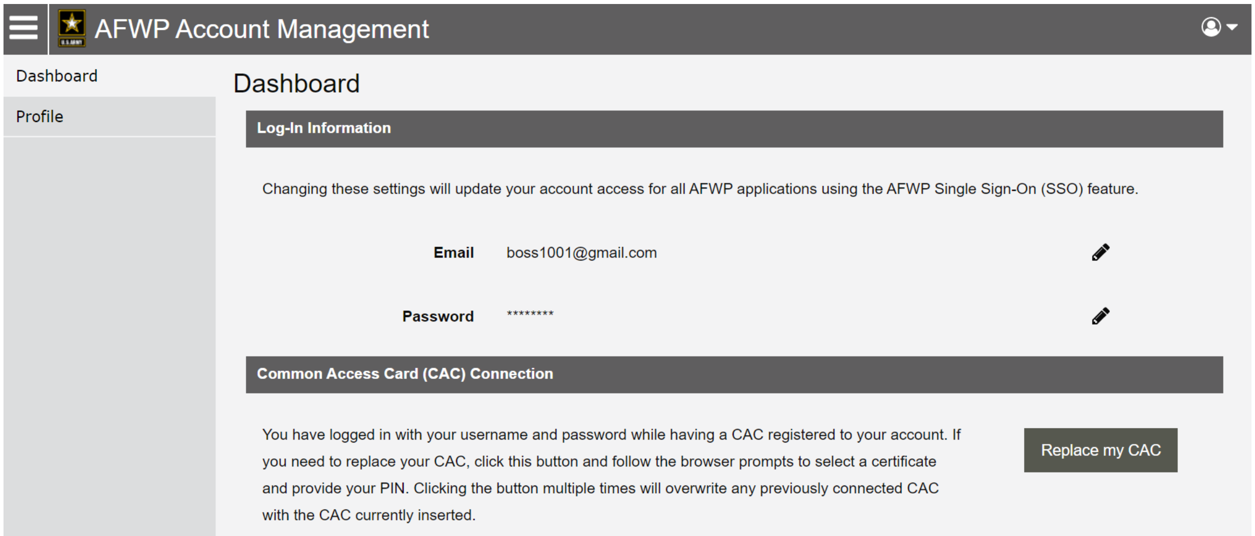
Only one CAC can be connected to an account at a time, therefore if you have a new CAC or your CAC needs to be updated, you will need to replace the old CAC with a new one. Keep in mind that a CAC can only be replaced, not removed.

To **replace a CAC**:

1. To replace your CAC - you have to login with your username and password and then connect your replacement CAC
2. Once you login, select "Account Management" from the drop down in the upper right corner.

3. Select Replace my CAC on the AFWP Account Management page to begin the CAC connection process, and refer to section 1.1.1 for things to keep in mind.

4. Follow the prompts that appear.



This screenshot shows what should appear when attempting to replace a CAC.

1.5.6 - Recover Forgotten Password

1. Select **Login** in the upper-right corner of the **ARC Home Page** while logged out.
2. Select **Need to reset your password?** at the bottom of the login page that appears.
3. Enter the **email address** of the AFWP Account that needs to be reset.
4. Select Reset Your Password and a **confirmation email** will be sent to the provided email address.
5. There will be two links in the email, be sure to select the URL for **changing your password**.
6. Navigate to the **unique URL** in the confirmation email to log in to VMIS.
7. Follow the prompts to **create a new password** and complete the recovery.

> ***Note:*** *If you change your password for any reason, you will be logged out of any previously open sessions. You will then have to log back in using your new password.*

1.5.7 - Log Out

1. Select your **user name** on the right side of the toolbar at the top of any VMIS page.
2. Select **Log Out** to log out of VMIS and return to the Log In page.

1.6 - Contact the Help Desk

1. Select **FAQ/Help** in the left corner of the footer at the bottom of any page on VMIS.
2. A new tab will open that will direct you to the Army Family Web Portal Resource Center (ARC)
3. Select **Contact the Help Desk** at the bottom of any ARC page.
4. Provide the necessary information in the **following data fields**:
   - *Your Name, Your Email Address, Subject, Category, Message,* and *Attachment.*
5. Select Send Message to complete the submission for review.

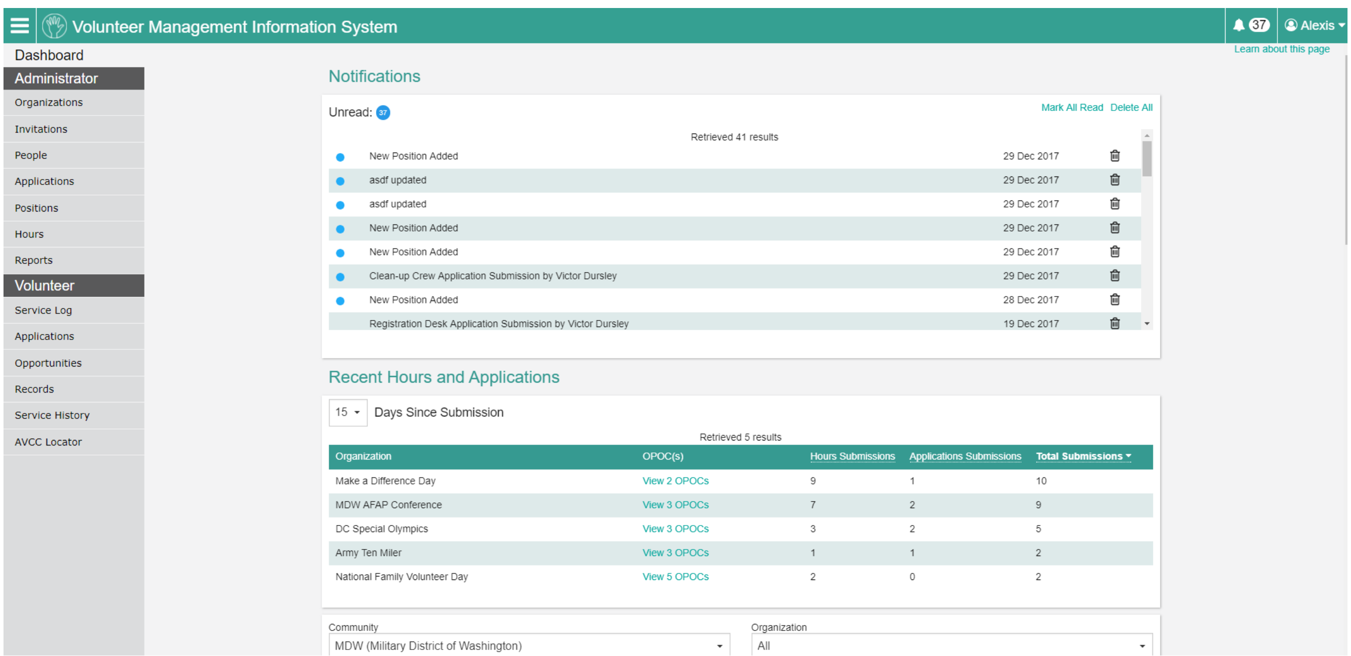
> ***Note:*** *Your message will be processed as soon as possible. You may receive direct follow up communication from the help desk via email.*

2.0 - Administrator Dashboard

The **Administrator Dashboard** provides several resources to assist you with your routine AVCC responsibilities. These resources include a **Notifications** area related to the volunteers in your organization and to your own volunteering activity, a **Recent Hours and Applications** area to quickly review the status of outstanding tasks within a community, a **Log Hours** area, and an **hour chart** of your own volunteer hours.

The Administrator Dashboard can be accessed from any page on VMIS while logged in as an AVCC – simply select **Dashboard** from the left-hand navigation menu.

> ***Note:*** *For information on how the Administrator Dashboard appears for* ***AVCC Assistants****, refer to* ***Administrator Dashboard*** *in the AVCC Assistants section at the end of this guide.*



Administrator Dashboard

2.1 - Notifications Area

Here are some important things to know when checking the Notifications area:

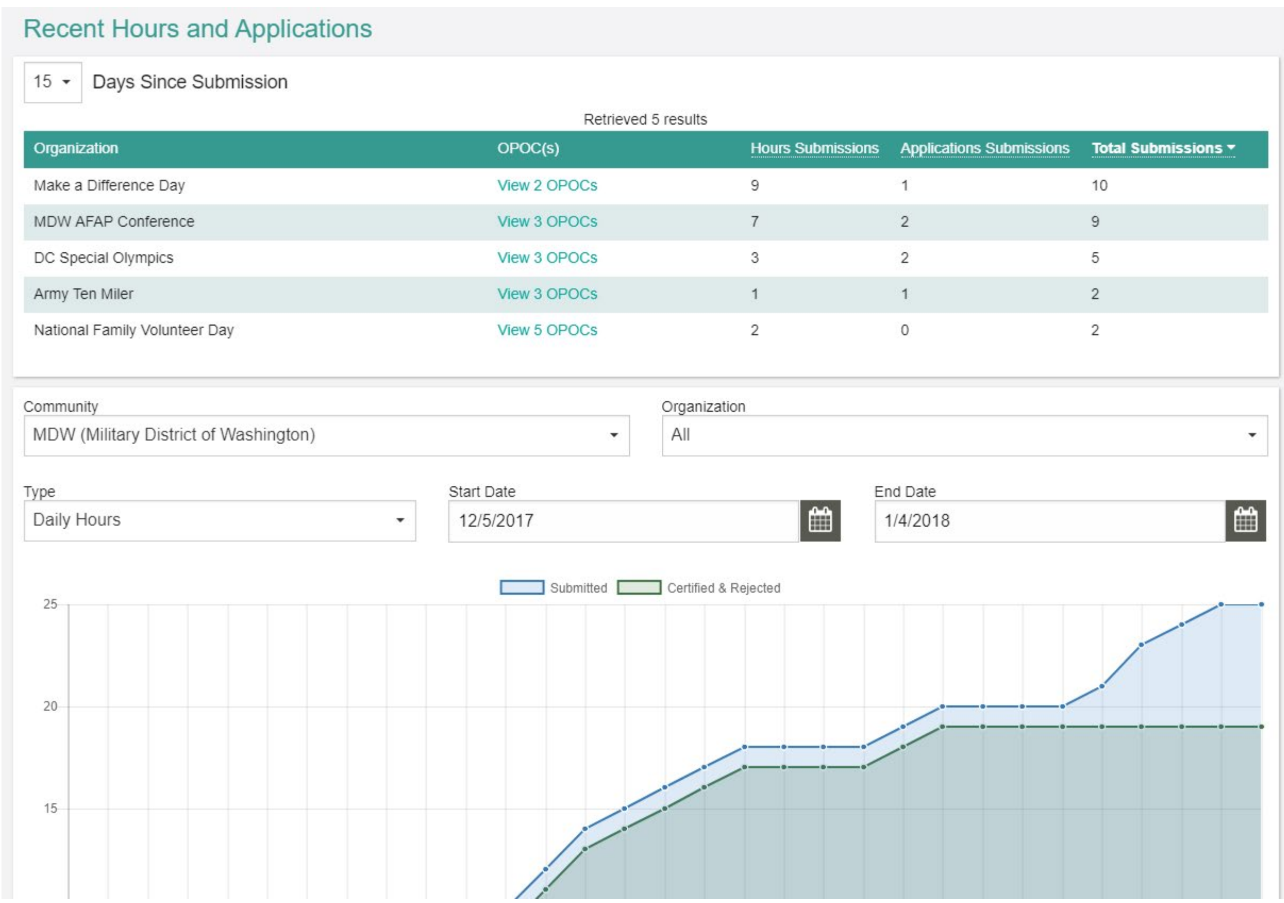
- There are two ways to view your **Notifications** at any time:
  1) Navigate to the **Administrator Dashboard** from the left-hand navigation menu, or
  2) Select the **Notifications bell icon** on the toolbar at the top of any page.
- The **Notifications area** displays all of your current notifications, such as changes to submitted applications, hours that have been approved, or hours that have been rejected.

- The number of **unread notifications** appears at the top of the section in a blue circle, and notifications that are unread will have a blue dot next to them.
- Selecting a notification will display **additional information** about it, **marking it as read** and removing the blue dot.
- Select **Mark All Read** to mark all notifications as read and remove their blue dots.
- Select **Delete All** to delete all notifications from the Dashboard, or select the **trash can icon** to the right of any notification to delete it individually.

> ***Warning:*** *Once a notification is deleted, it **cannot** be retrieved.*

2.2 - Recent Hours and Applications

The **Recent Hours and Applications** area provides an overview of submitted hours. This overview of hours and applications includes both a table view and graph view, which you can configure to display the time range and type of information you want to see.



Recent Hours and Applications area

2.2.1 - Table View

- Organizations will be shown in this table only if they have applications or hours that have not been reviewed within the selected **Days Since Submission**, which defaults to 15 days. For each organization in the table, the **total number of submissions** for both hours and applications can be seen, as well as the total number of all submission types combined (hours and applications). This table can help you understand if there are certain organizations that have many outstanding applications and/or hours, and it provides a way to contact the relevant OPOCs.
- Use the **Days Since Submission** drop-down to filter the table to show organizations with outstanding applications and hours within a different timespan.
- Select **View # OPOCs** to see the following information about the OPOCs for a particular organization:
  - *Name, Phone, DSN Phone,* and *Email*.
- Select a column header to **sort the table** by that column. The only column that cannot be sorted is the OPOC(s) column.

2.2.2 - Graph View

- The trend line is **blue for submitted** hours or applications within the specified time period, whereas the trend line is **green for certified and rejected** hours and applications.

> ***Note:*** *The graph displays information cumulatively, which means that the total represents total hours or applications since the Start Date selected, NOT the total for all time. To see the total for all time, set the Start Date to a date earlier than the community's earliest volunteering activity.*

- Use the **following filters** to change which hours or applications you view:
  - *Use the **Community** drop-down to filter results to a specific community.*
  - *Use the **Organization** drop-down to filter results to a specific organization, or select **All** (the default selection) to view information for all your organizations.*
  - *Use the **Type** drop-down to specify whether to show information for daily hours, period hours, or applications. Daily hours (the default selection) are hours a volunteer submitted for a particular day, whereas period hours are hours a volunteer submitted for a particular month.*
  - *The **Start Date** field specifies the earliest submission date to display, with a default selection of one month ago.*

- *The **End Date** field specifies the latest submission date to display, with a default selection of the current date.*

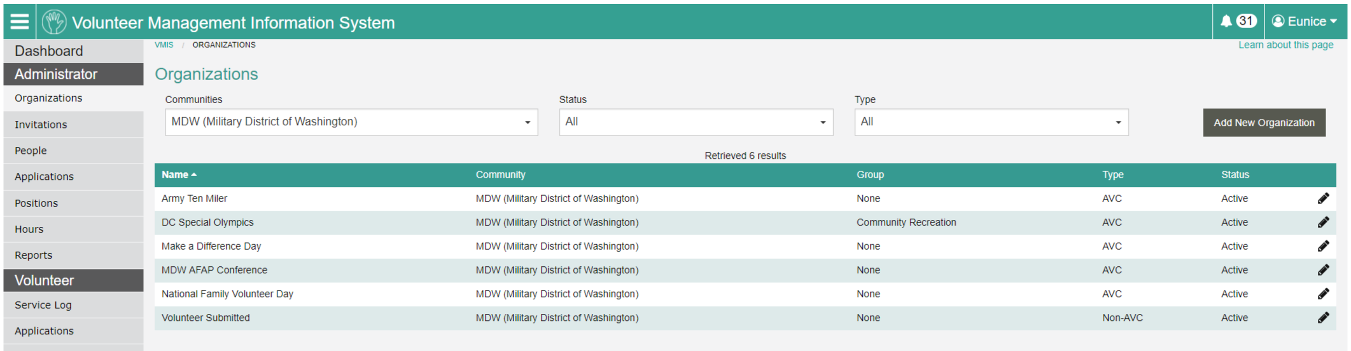
- **Hover over** any point on the graph to see hours or applications submitted, certified, and rejected on that specific date, as well as those submitted, certified, and rejected cumulatively since the specified start date.

2.3 - My Volunteering

For information on this section of the dashboard, refer to **My Volunteering** in the **VMIS User Guide for Volunteers**.

3.0 - Organizations

The **Organizations** page provides information about a community's organizations. Limited information about these organizations can be edited from this page, and new organizations can also be added.



Organizations page

3.1 - Filter Organizations

- Use the **Communities** drop-down to view organizations within a specific community.
- Use the **Status** drop-down to filter between active and inactive organizations, or select **All** to view organizations with either status.
  - ***Active*** *organizations have open positions and are still recruiting volunteers.*
  - ***Inactive*** *organizations no longer operate on the installation.*
- Use the **Type** drop-down to filter on AVC organizations, private organizations, or Non-AVC organizations, or select **All** to view all types of organizations.
  - ***AVC*** *organizations are all statutory organizations on the installation.*
  - ***Private*** *organizations have permission to operate on the installation.*
  - ***Non-AVC*** *organizations exist outside of the installation.*

> ***Tip:*** *The list of organizations can be sorted by selecting any of the column headings in the table.*

3.2 - Edit an Organization

8. Select **Organization** on the left-hand navigation menu.
9. Select the **pencil icon** ✎ for the organization you want to edit.
10. **Add** or **modify** information in the following data fields:

- *Group, Status, Name,* and *Description*.

> ***Note:*** *You will not be able to edit the name if the organization has at least one associated position with at least one volunteer who has logged hours to that position.*

> ***Warning:*** *Changing an Active organization to Inactive will close all positions within that organization and prevent volunteers from logging any more hours to those positions.*

11. Select Save.

3.3 - Add a New Organization

12. Select **Organization** on the left-hand navigation menu.
13. Select Add New Organization.
14. Enter the **required information** in the following data fields:

- *Community, Type, Group, Name,* and *Description*.

15. Select Save.

When creating a new organization, an AVCC can either create an **original organization** OR a **standard organization**.

- Notes About Original Organizations
  - *An original organization is one that is unique to a single garrison. Even if organizations may be similar across garrisons, this organization has details and positions that are specific and customized to the garrison.*
  - *An AVCC creates an original organization by making sure that* ***None*** *is selected for the* ***Standard Organization*** *field. When this organization is created, it will NOT include an initial set of positions. Positions need to be created one by one.*
- Notes About Standard Organizations
  - *A standard organization is one that is common across garrisons in terms of name and structure (e.g., position names, details, etc). Using the standard organization process to*

create organizations can be helpful to AVCCs since they will use a template with standard details and positions.

- *An AVCC creates a standard organization by selecting the name of the desired standard organization from the Standard Organization field. At the start, a standard set of positions will accompany the creation of this organization. Those positions will start in a closed state and the AVCC can select which positions they want to include by changing the status of the position or by deleting the unwanted positions. If an AVCC desires to change details to the Standard Organization once created, they are fully capable of doing so. Note that changed those details will not update the original Standard Organization or Standard Position templates in any way.*

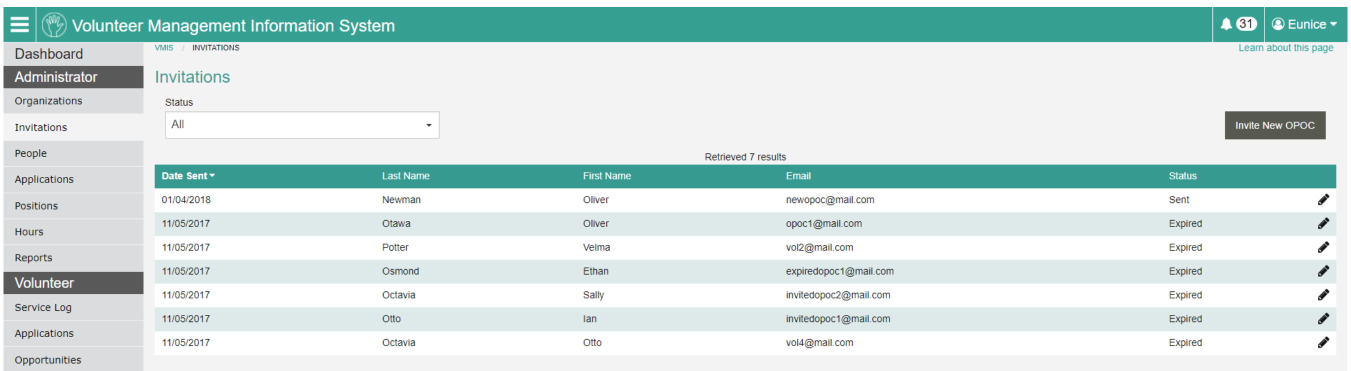
> ***Note:*** *For both original organizations and standard organizations,* **Organization Group** *is a required field. This field does not include any additional information such as template positions, etc. In the previous version of VMIS, Organization Groups also had similar functionality to Standard Organizations. This has been streamlined to only apply to Standard Organization.*

4.0 - Invitations

The **Invitations** page is where invitations are sent to individuals who have been designated as OPOCs. Invitations can be resent or deleted from this page, and detailed information about new OPOCs invitations is also available.

When an individual is invited to become an OPOC, they are expected to assume **all OPOC responsibilities** of one or more organizations. The invited person will receive an email with instructions on how to accept the invitation and proceed to the system, but an **invitation will expire** if the recipient does not accept it within 30 days.

> ***Tip:*** *Use the **Status** drop-down to filter by sent, accepted, or expired invitations, or select All to view all invitations. The Invitations table can also be **sorted** by selecting any of the column headings, such as Date Sent or Last Name.*



Invitations page

4.1 - Invite New OPOC

Individuals who are invited to become OPOCs will receive an **invitation email** for this request. This email will provide instructions to create or complete the registration of their VMIS account and log into the system. To send this invitation email to a new OPOC:

1. Select **Invitations** on the left-hand navigation menu.
2. Select Invite New OPOC.
3. Enter the **required information** in the following data fields:
   - *Community, Organizations, Email, First Name,* and *Last Name*.

> ***Tip:*** *Choose one or more organizations by clicking in the Organizations input and selecting one or more Organizations. You can also start typing to filter the Organizations in the dropdown.*

4. Choose whether to **attach a guide**, **request a read receipt**, or **BCC another recipient** by selecting the checkboxes next to the corresponding options.

> ***Note:*** *Only one additional recipient can receive a BCC for each invitation. To BCC the same invitation to multiple people, multiple invitations must be created.*

5. Select Invite New OPOC to complete the invitation.
6. The **invitation email** will be sent to the email address provided for the OPOC. If the individual already has a VMIS account, they will also receive an invitation notification on their Dashboard.

4.2 - Resend Invitation

1. Select **Invitations** on the left-hand navigation menu.
2. Select the **pencil icon** for the invitation to be resent.

> ***Note:*** *Invitations can only be resent if they have a status of Sent or Expired.*

3. Select Resend.

4.3 - Delete Invitation

1. Select **Invitations** on the left-hand navigation menu.
2. Select the **pencil icon** for the invitation you want to delete.

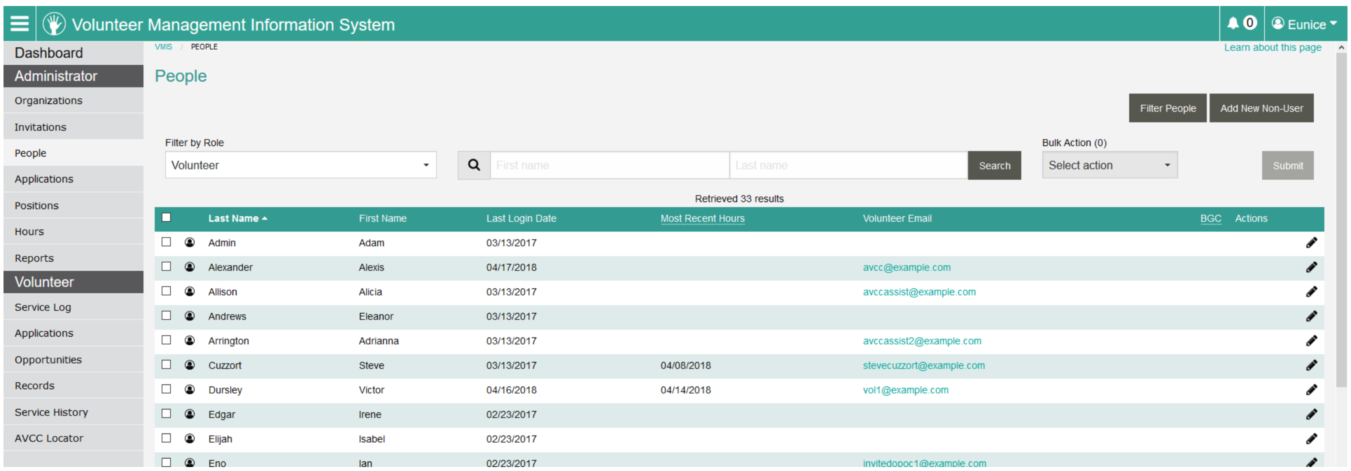
> ***Note:*** *Invitations can only be deleted if they have a status of Sent or Expired.*

3. Select Delete.
4. Select Yes to confirm the deletion.

5.0 - People

The **People** page allows you to view AVCC assistants, OPOCs, and volunteers, along with relevant information for those people. From this page, you can export a list of people, email users, edit user information, and add new users.

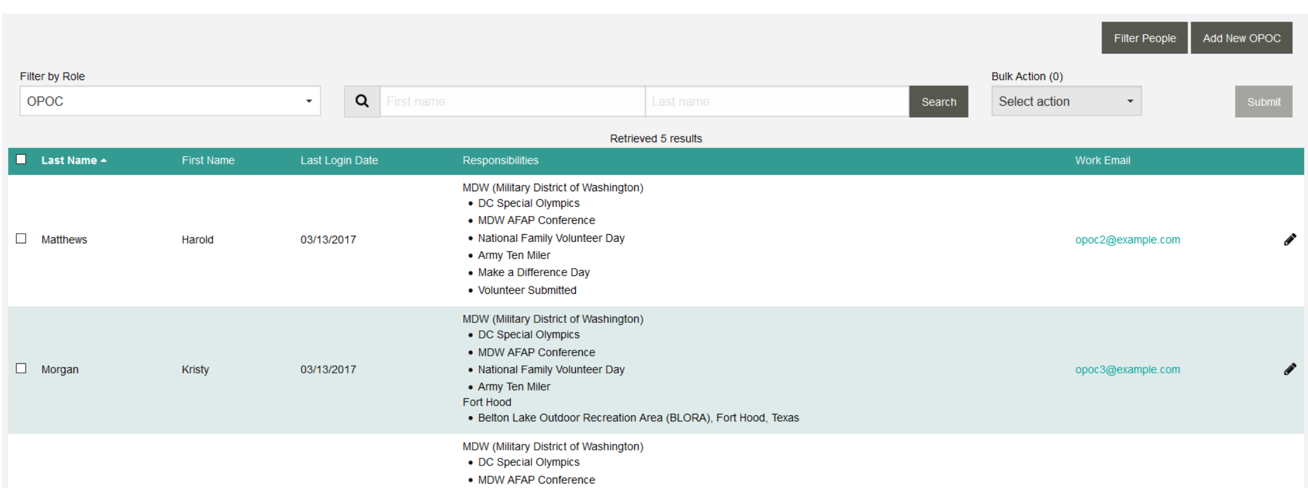
***Note:** For information on how the People page appears for **AVCC Assistants**, refer to **People** in the AVCC Assistants section at the end of this guide.*



People page

5.1 - People Table

The **People** table shows a list of AVCC assistants, OPOCs, or volunteers based on your selected filter. The table will show different information depending on which type of user you have selected. You can also filter the list, search for a user by name, and perform other actions on an individual user.



People table

> ***Tip:*** *Each volunteer has a silhouette icon to the left of their name. A black silhouette icon indicates the volunteer is a normal user. A white silhouette icon indicates the volunteer is a non-user. You can also hover over the silhouette icon to view this information for each volunteer.*

5.1.1 - Filter and Search for Users

You can manage the People list more easily by using the **Filter** and **Search** tools. Use the following information to learn more about these tools and helpful features:

- **Search** for a user by name by typing the first name, last name, or both into the appropriate search boxes, and then selecting Search.
- To return to the list of all users after performing a search, clear both the *First name* and *Last name* search boxes, then select Search.
- You can sort the list of users by clicking any of the **column headings** in the table.
- Select the **Filter by Role** drop-down to show only people who have the selected role.
- To filter even further, select Filter People. Enter any known data into the following fields and then select Filter:
    - *Community, Organization of Activity, Activity, Have Logged in Since,* and *Have Not Logged in Since*.

> ***Note:*** *You cannot filter by Organization of Activity for AVCC assistants.*

> ***Tip:*** *You can use the* ***Have logged in since date*** *and* ***Have not logged in since date*** *fields to filter volunteers according to their VMIS activity. This can help identify volunteers who may need to be contacted to confirm their participation in the AVC program.*

- To **clear** your filters, select Filter People. Then select Clear.

> ***Note:*** *On top of the Volunteer table you will see a checkbox that is selected by default that reads* ***"Show only volunteers who have submitted an application." DO NOT unselect this checkbox.*** *Leave it selected. This will ensure that VMIS will only show you users who have ever submitted an application in VMIS (regardless of what community or organization for which the application was submitted). This checkbox will not apply to Non-Users as they will always be shown in this view. This checkbox will only show when you are searching for volunteers.*

5.1.2 - Edit an AVCC Assistant

1. Select *AVCC Assistant* from the **Filter by Role** drop-down.
2. Select the **pencil icon** for the AVCC assistant you want to edit.
3. Add or remove a **community** using the Communities field. You can add any community you are responsible for, and you can add multiple communities.
4. Select Save.

5.1.3 - Edit an OPOC

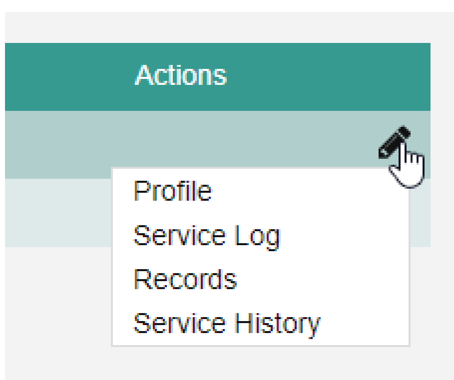
1. Select *OPOC* from the **Filter by Role** drop-down.
2. Select the **pencil icon** for the OPOC you want to edit.
3. Select a **community** using the Community drop-down.
4. Add or remove an **organization** using the Organizations field. You may add more than one organization.

   > ***Note:*** *If you remove all of an OPOC's organizations, they will no longer appear in the table.*

5. Select Save.

5.1.4 - Actions Menu for Volunteers

The **Actions Menu** allows you to view various information about a volunteer as well as take direct action on a volunteer's account. To access it, select *Volunteer* from the **Filter by Role** drop-down. Then select the **pencil icon** to the right of any volunteer.



Actions menu

> ***Note:*** *The information in the Profile, Service Log, Records, and Service History sections focuses on AVCC-specific tasks. For detailed information about the functionality in each of these sections, refer to the VMIS User Guide for Volunteers.*

Profile

The **Profile** section of the Actions Menu refers to the **AFWP Profile** of the selected Volunteer.

Make any desired modifications to the profile's following fields and then select Save:

- *Name, Date of Birth, Military Community, Branch, Component, Disposition(s), Preferred Contact Method, Volunteer Email, Primary Phone, Secondary Phone (optional), Work Experience (optional), Volunteer Experience (optional),* and *Special Skills, Interests, and Hobbies (optional).*

Service Log

The **Service Log** is a calendar view of the volunteer's hours. AVCCs can use this view to submit and certify hours on the volunteer's behalf, as well as reject or certify hours that were previously submitted by the AVCC or volunteer.

- Entries will appear according to the **selected month**, **Service Status**, and **Position**.
- Hours can be logged for individual days, and **period hours** can be logged for a selected month. It is strongly recommended that all volunteers log hours on a **daily basis**.
- Up to three **attachments** can be included with a daily hour entry.
- **Notes** are required for any hours that are rejected by the AVCC, and can also be added optionally to any certified or submitted hours.
- AVCCs can **add a position** to any volunteer by selecting Add to Position. Select a *Community, Organization,* and *Position* from the drop-downs, and select Add to Position.
- Once a position is added to a volunteer's profile, hours for that position can be logged.

Records

1. Select **Records** from the Actions Menu.
2. Select Add Award to add an award for the selected volunteer.
3. Select Add Training to add training for the selected volunteer.
4. Select Add Orientation to add an orientation for the selected volunteer.
5. Select Add Note to add a note for the selected volunteer. Fill out the **Note** text field, and then select Save.

> ***Note:*** *Volunteers will* ***not*** *be able to see this note. It will only be viewable by an OPOC or AVCC with access to the volunteer's information.*

6. Select Add Background Check to add a background check for the selected volunteer. Fill out information in the *Date Checked, Valid Until,* and *Comment (optional)* data fields. Then select Save.

> ***Note:*** *A background check should only be added once a volunteer has completed it. For this reason, the Date Checked cannot be set to a future date.*

7. Select Add Documents to add a document for the selected volunteer.
8. To edit or certify any record, select the **pencil icon** to the right of that record. You can edit the information for that record, including whether or not it is certified, and select Save. You can select Delete to delete that record.

Service History

1. Select **Service History** from the Actions Menu.
2. Select the **pencil icon** to the right of any position to edit the status of that individual position for the selected volunteer. Select a status from the **Service Status** drop-down, then select Save.
3. Select Download DA 4713 and select a year to download a PDF of the volunteer's **Volunteer Daily Time Record**, which shows their volunteering hours for each day that calendar year.
4. Select Download DA 4162 to download a PDF of the volunteer's **Volunteer Service Record**. This record contains information about their qualifications, volunteer positions, trainings, and awards. Specifically, this form contains the volunteer's 7 most recent:
   - *Certified awards*
   - *Certified trainings*
   - *Positions, determined by the most recent date of certified hours.*

Convert to Normal User

> ***Note:*** *You can perform this action only on non-users.*

1. Select **Convert to Normal User** from the Actions Menu.
2. Update the **Email** of the non-user if necessary.

> ***Note:*** *You cannot use an email address that already exists within AFWP.*

3. Select OK on the **Confirm Conversion to Normal User** window.
4. The non-user will receive an **email** with a temporary password and instructions for logging in to VMIS. The non-user will now appear as a **normal user** in the People table.

5.2 - Export a List of Users

Lists of users can be **exported** from the People table into a **CSV file** containing information about the exported profiles. To export a list of volunteers:

1. Select **People** on the left-hand navigation menu of any VMIS page.

2. **Search** or **filter** the list to find the users being exported.
3. Select the **checkbox** to the left of each user being exported.

> ***Tip:*** *The checkbox in the top left corner of the table will select or unselect* ***all*** *users currently listed on the table.*

4. Using the **Bulk Action** dropdown, select **Export** and then select Submit.
5. Open the **CSV file** once it finishes downloading using Excel or another spreadsheet editor. It will contain the following information:
   - *First Name, Last Name, Last Login Date, Most Recent Hours,* and *Email.*

5.3 - Email Users

1. Select **People** on the left-hand navigation menu of any VMIS page.
2. Select the **checkbox** to the left of each user to include in the email.

> ***Tip:*** *The checkbox in the top left corner of the table will select or unselect* ***all*** *users currently listed on the table.*

3. Using the **Bulk Action** dropdown, select **Mass Email** and then select Submit.
4. Enter the necessary information into the **Subject** and **Message** data fields.
5. Select Send when the email is complete.

5.4 - Add a New AVCC Assistant

An AVCC assistant is an individual who supports the AVCC in managing VMIS volunteering in a particular community.

1. Select *AVCC Assistant* from the **Filter by Role** drop-down.
2. Select Add New AVCC Assistant.
3. Select a **community** using the Communities field.
4. Enter a **login email address** in the Log In Email field.
5. Select Save.

5.5 - Add a New OPOC

Adding a new OPOC will bypass the invitation process and directly assign the individual as an OPOC for the selected organization(s). Usually this should be done only if the AVCC has discussed this already with the individual so they are aware of the new role.

> ***Note:*** *In order to add a new OPOC, the person you are adding must already have an AFWP account. To add a new OPOC who* doesn't *have an AFWP account, refer to Invite New OPOC.*

1. Select *OPOC* from the **Filter by Role** drop-down.
2. Select Add New OPOC.
3. Select a **community** from the Community drop-down.
4. Select one or more **organizations** using the Organizations field.
5. Enter a **login email address** in the Log In Email field.
6. Select Save.

5.6 - Add a New Non-User

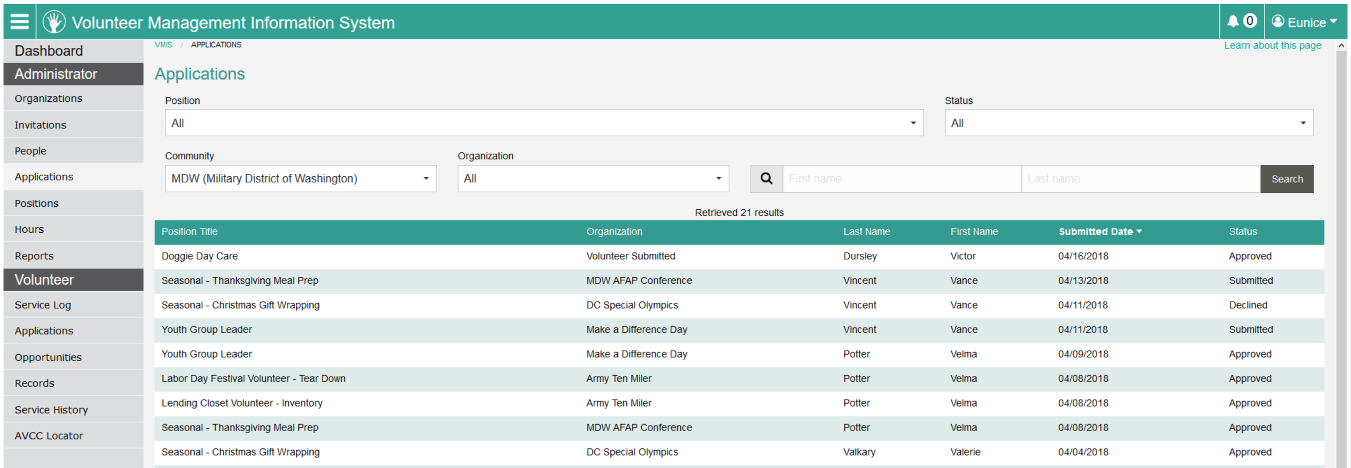
A **Non-User** is a volunteer who is not directly using VMIS to log their volunteer hours. AVCCs may wish to track the volunteer's hours anyway, either for that volunteer's benefit or for the benefit of the organization.

Once added, Non-Users can be interacted with in the same way as normal users. For instance, AVCCs can add a Non-User to a position or log their volunteer hours on their behalf.

1. Select **People** on the left-hand navigation menu of any VMIS page.
2. Select *Volunteer* from the **Filter by Role** drop-down.
3. Select Add New Non-User and the **Add New Non-User** window will appear.
4. Enter the user's **email address**, then select Continue.
5. Enter the **personal information** in the following data fields and then select Continue:
   - *First Name, Middle Initial (optional), Last Name, Date of Birth,* and *Military Community.*
6. Enter the **demographic information** in the following data fields and then select Continue:
   - *Branch, Component,* and *Disposition(s).*
7. Enter the **contact information** in the following data fields and then select Continue:
   - *Preferred Contact Method, Volunteer Email, Primary Phone,* and *Secondary Phone (optional).*
8. Fill out the **background information** in the following data fields and then select Continue:
   - *Work Experience (optional), Volunteer Experience (optional),* and *Special Skills, Interests, and Hobbies (optional).*
9. Select Save.

6.0 - Applications

The **Applications** page displays the applications that are managed by the AVCC. Applications can be **approved** or **declined** from this view. Specific Volunteers and applications can be managed using the Applications page's **filter** and **search** tools.



Applications page

> ***Note:*** *AVCCs are the only individuals who can see applications for non-AVC Positions that have been submitted by volunteers. No OPOC will be able to see these applications. To filter for these specifically, change the Organization drop-down to "Volunteer Submitted".*

6.1 - Filter Applications and Search for Volunteers

1. Select **Applications** on the left-hand navigation menu of any VMIS page.
2. Select a **position** from the Position drop-down, or select **All** to view applications for all managed positions.
3. Select a **status** from the Status drop-down, or select **All** to view all applications regardless of status.
4. To look at applications submitted by a specific volunteer, enter the volunteer's **first name**, **last name**, or **both** into the appropriate search boxes, then select Search.

> ***Tip:*** *To return to the list of all applications after searching by name, clear both the* First name *and* Last name *search boxes, then select* Search.

5. Select a **community** from the Community drop-down.
6. Select an **organization** from the Organization drop-down, or select **All** to view applications across all organizations.

Tip: *You can sort the list of applications by clicking any of the column headings in the table.*

6.2 - Approve Applications

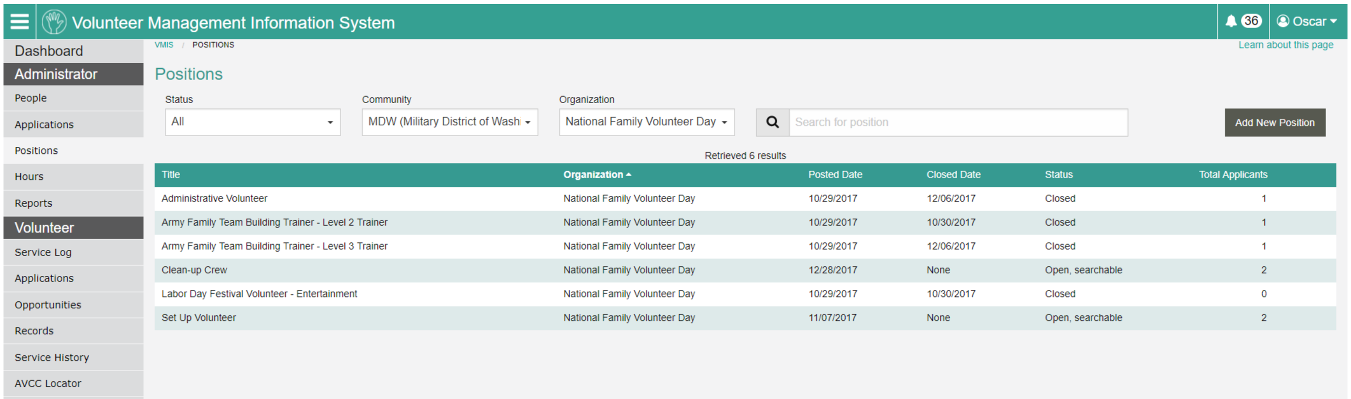
1. Select **Applications** on the left-hand navigation menu of any VMIS page.
2. Select the **row** of the application to be approved.
3. Select Approve and a **confirmation window** will appear.
4. Select Approve again to finalize the approved application.

6.3 - Decline Applications

1. Select **Applications** on the left-hand navigation menu of any VMIS page.
2. Select the **row** of the application to be declined.
3. Select Decline and a **confirmation window** will appear.
4. Enter a **Reason** for declining the application. Providing a reason is **required** and will be **visible to the Volunteer**.
5. Select Decline again to finalize the declined application.

7.0 - Positions

The **Positions** page provides details about each of the positions managed by the AVCC. From this page, managed positions can be created, edited, filtered, and deleted.



Positions page

7.1 - Filter and Search for Positions

1. Select **Positions** on the left-hand navigation menu of any VMIS page.
2. Select a **status** from the Status drop-down, or select **All** to view all positions regardless of status.

> ***Note:*** *Each of the following statuses can be selected from the Status drop-down:*
>
> ***Open, searchable*** *denotes positions that are accepting volunteers and that will appear in search results on a volunteer's Opportunities page.*
>
> ***Open, not searchable*** *denotes positions that have active volunteers, but that will not appear in search results on a volunteer's Opportunities page. For example, a position that has reached the maximum number of volunteers and should be unavailable to new volunteers.*
>
> ***Closed*** *denotes positions that do not have active volunteers and will not appear in search results on a volunteer's Opportunities page.*

3. Select a **community** from the Community drop-down.
4. Select an **organization** from the Organization drop-down.

5. Type any part of a **position title** in the search field to find a specific position.

> ***Note:*** *The table will only filter on the data already loaded into it. To search in all Positions, select "Load All Results" at the bottom of the page before searching by title.*

> ***Tip:*** *Select any column header in the table to sort the table on that column.*

7.2 - Add a New Position

1. Select **Positions** on the left-hand navigation menu of any VMIS page.
2. Select Add New Position.
3. Enter the required information in the following **data fields**:
   - *Community, Organization, Title, Closed Date (optional), Keywords (optional), Position Type, Opportunity Type, Status, Background Check Required, Supervision Required, Summary (optional), Duties, Qualifications, Training, Orientation, Time Required, Evaluation (optional), Benefits (optional), Country, Street Address, City, State, Zip/Postal Code, Supervisor 1 Name (optional), Supervisor 1 Email (optional), Supervisor 1 Phone (optional), Supervisor 2 Name (optional), Supervisor 2 Email (optional),* and *Supervisor 2 Phone (optional).*

> ***Note:*** *If you specify a Closed Date, the position will be closed at 12:00 am on the morning of that date. If you choose today as the Closed Date, the position will be automatically closed once it is created. Once the closed date has passed, the service status for volunteers in this position will be set to* Finished, *and the volunteers will no longer be able to log hours to it. You may update the Closed Date for a position at any time.*

4. Select Save to create the position.

> ***Tip:*** *To create multiple positions with similar information (for example, if you are creating multiple positions for the same event), refer to* ***Clone a Position*** *for information on duplicating existing positions.*

7.3 - Edit a Position

1. Select **Positions** on the left-hand navigation menu of any VMIS page.
2. Select the desired **position** from the list.

> ***Note:*** *You can only edit* ***open positions****.*

3. Edit the desired information in the following **data fields**:
   - *Community, Organization, Title, Closed Date (optional), Keywords (optional), Position Type, Opportunity Type, Status, Background Check Required, Supervision Required,*

Summary (optional), Duties, Qualifications, Training, Orientation, Time Required, Evaluation (optional), Benefits (optional), Country, Street Address, City, State, Zip/Postal Code, Supervisor 1 Name (optional), Supervisor 1 Email (optional), Supervisor 1 Phone (optional), Supervisor 2 Name (optional), Supervisor 2 Email (optional), and *Supervisor 2 Phone (optional).*

> ***Note:*** *You will not be able to edit certain fields if hours are associated with the position. Additionally, if you specify a Closed Date, the position will be closed at 12:00 am on the morning of that date. If you choose today as the Closed Date, the position will be automatically closed once you save and confirm your edits. Once the closed date has passed, the service status for volunteers in this position will be set to* Finished, *and the volunteers will no longer be able to log hours to it. You may update the Closed Date for a position at any time.*

4. Select Save and a confirmation window will appear.
5. Select Confirm to confirm the edits.

7.4 - Delete a Position

1. Select **Positions** on the left-hand navigation menu of any VMIS page.
2. Select the desired **position** from the list.

> ***Note:*** *You can only delete positions that have no hours associated with the position.*

3. Select Delete and a confirmation window will appear.
4. Select Confirm to confirm the deletion.

7.5 - Clone a Position

1. Select **Positions** on the left-hand navigation menu of any VMIS page.
2. Select the desired **position** from the list.
3. Select **Clone**.
4. Add or modify the desired information in the following **data fields**:

- *Community, Organization, Title, Closed Date (optional), Keywords (optional), Position Type, Opportunity Type, Status, Background Check Required, Supervision Required, Summary (optional), Duties, Qualifications, Training, Orientation, Time Required, Evaluation (optional), Benefits (optional), Country, Street Address, City, State, Zip/Postal Code, Supervisor 1 Name (optional), Supervisor 1 Email (optional), Supervisor 1 Phone (optional), Supervisor 2 Name (optional), Supervisor 2 Email (optional),* and *Supervisor 2 Phone (optional).*

> ***Note:*** *If you specify a Closed Date, the position will be closed at 12:00 am on the morning of that date. If you choose today as the Closed Date, the position will be automatically closed once it is created. Once the closed date has passed, the service status for volunteers in this position will be set to* Finished*, and the volunteers will no longer be able to log hours to it. You may update the Closed Date for a position at any time.*

5. Select Save to save the cloned position.

7.6 - Print a Position

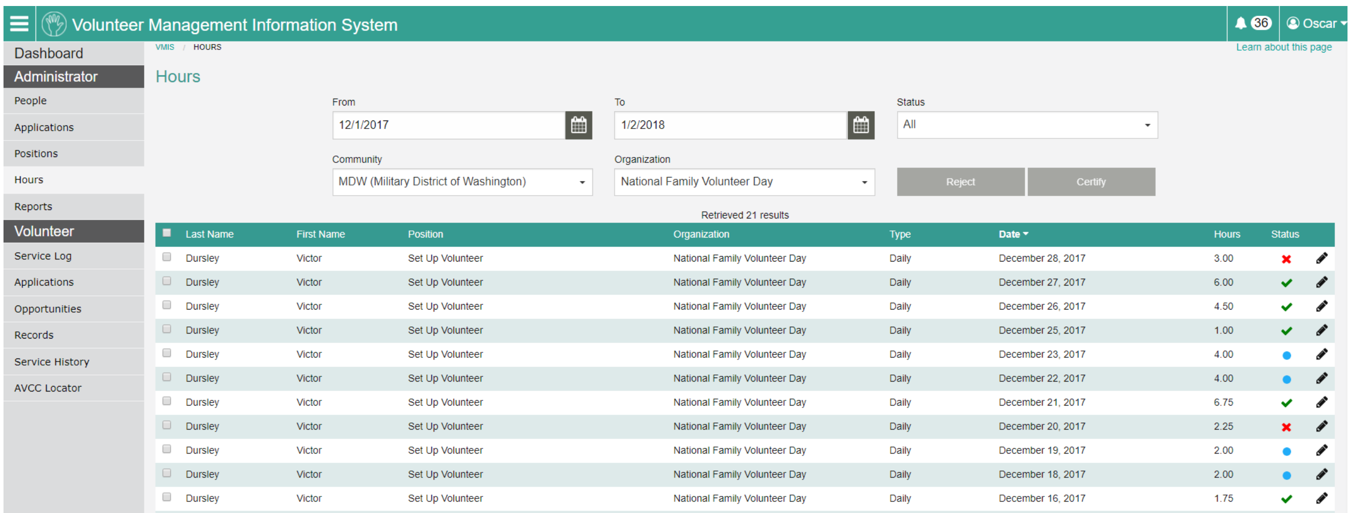
1. Select **Positions** on the left-hand navigation menu of any VMIS page.
2. Select a **position** from the list of positions.
3. Select **Print**.
4. A browser window will appear with the position details. **Right-click** anywhere inside the browser window.
5. Select **Print**.

8.0 - Hours

The **Hours** page displays all of the hours recorded by volunteers within a particular community and organization. Volunteer hours can be **rejected** or **certified** on this page, either individually or in bulk, as well as **edited** or **deleted**.

Additionally, more information related to hour entries can be viewed here, such as **submitter notes** and any **attached documentation**.

> ***Note:*** *The Hours page for* ***AVCC Assistants*** *is identical to the Hours page for AVCCs.*



Hours page

> ***Note:*** *AVCCs are the only individuals who can see hours for Non-AVC Positions that have been submitted by volunteers. No OPOC will be able to see these hours. To filter for these specifically, change the Organization drop-down to "Volunteer Submitted".*

8.1 - Filter Hours

1. Select **Hours** on the left-hand navigation menu of any VMIS page.
2. Select the **calendar icon** in the **From** field to choose a from date to define the beginning of the desired date range.
3. Select the **calendar icon** in the **To** field to choose a to date to define the end of the date range of hours to display.

> ***Note:*** *The date range will default to the past month. If today is before or on the 15th of the month, the* From *date will default to the 1st of the previous month; if today is after the 15th of the month, the* From *date will default to the 1st of the current month. The* To *date will always default to today's date.*

4. Select a **status** from the Status drop-down, or select **All** to view all hours regardless of status.

> ***Note:*** *A status of Submitted is selected by default.*

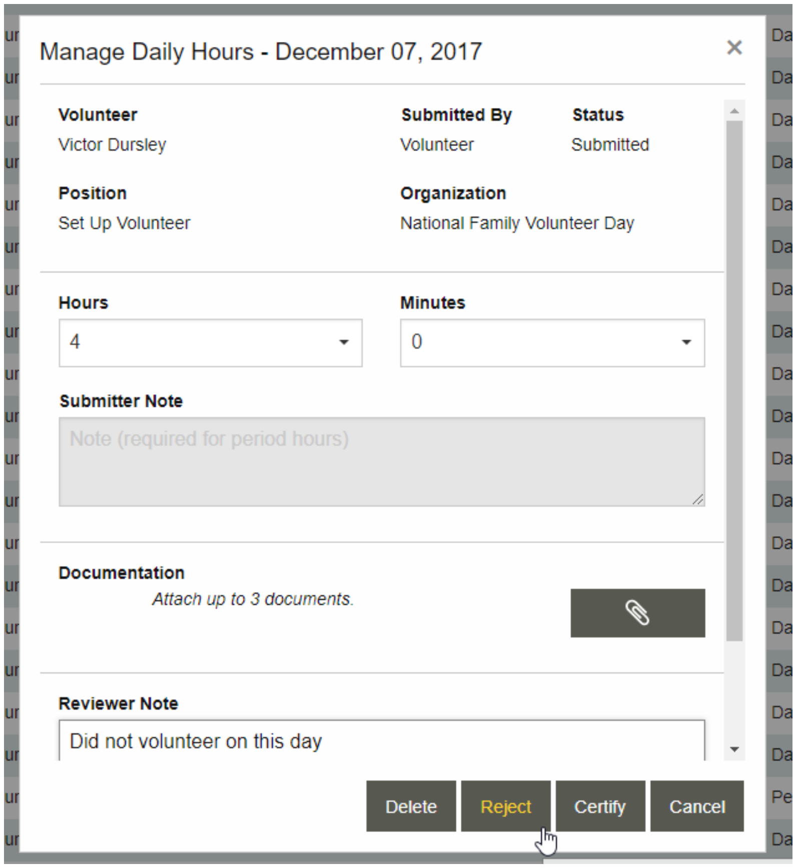
5. Select a **community** from the Community drop-down.
6. Select an **organization** from the Organization drop-down, or select **All** to view volunteers across all organizations.

8.2 - Certify, Reject, and Delete Hours

Hours can be **rejected individually or in bulk** after they are submitted by a Volunteer. Rejected hours appear on the Volunteer's service log but will not count towards the total certified hours. Similarly, hours can be **certified individually or in bulk** after they are submitted by a Volunteer and will count towards the total of certified hours.

Submitted hours can also be deleted by an AVCC, but **hours cannot be deleted in bulk** and will not appear on the Volunteer's service log after deletion.

> ***Note:*** *When rejecting or deleting hours, it is* ***required to include a review note*** *detailing why the selected hours were rejected or deleted. These notes are optional when certifying hours, and* ***Volunteers will be able to see any of these included notes****.*



Dialog box to delete, reject, or certify hours

8.2.1 - Reject Individual Hours

1. Select **Hours** on the left-hand navigation menu of any VMIS page.
2. Select the **pencil icon** next to the hours to be rejected.
3. Attach **documentation** if needed by selecting the paperclip button .

> ***Note:*** *Up to* ***three documents*** *can be attached to a single instance of hours. Once the hours are certified, these documents will automatically be removed. They are intended as a reference during review but will not be retained once that review is complete.*

4. Add a **reviewer note** in the Reviewer Note field.
5. Select Reject.

8.2.2 - Reject Hours in Bulk

1. Select **Hours** on the left-hand navigation menu of any VMIS page.
2. Select the checkbox next to each row corresponding to the hours to be rejected.

3. Select Reject.
4. Add a **reviewer note** in the Reviewer Note field.
5. Select Reject.

> ***Note:*** *You can only reject hours with a status of* ***Submitted*** *or* ***Certified****.*

8.2.3 - Certify Individual Hours

1. Select **Hours** on the left-hand navigation menu of any VMIS page.
2. Select the **pencil icon** next to the hours to be certified.
3. **Edit** the hours if needed using the Hours and Minutes drop-downs.
4. Add a **reviewer note** in the Reviewer Note field if needed.
5. Select Certify.

8.2.4 - Certify Hours in Bulk

1. Select **Hours** on the left-hand navigation menu of any VMIS page.
2. Select the checkbox next to each row corresponding to the hours to be certified.
3. Select Certify.
4. Add a **reviewer note** in the Reviewer Note field if needed.
5. Select Certify.

> ***Note:*** *You can only certify hours with a status of* ***Submitted*** *or* ***Rejected****.*

8.2.5 - Delete Hours

1. Select **Hours** on the left-hand navigation menu of any VMIS page.
2. Select the **pencil icon** next to the hours to be deleted.
3. Add a **reviewer note** in the Reviewer Note field.
4. Select Delete.
5. Select Delete in the dialog box that pops up.

> ***Note:*** *You can delete hours with a status of* ***Submitted****,* ***Rejected****, or* ***Certified****. Once you delete hours, this action* ***cannot be undone****.*

9.0 - AVCC Assistants

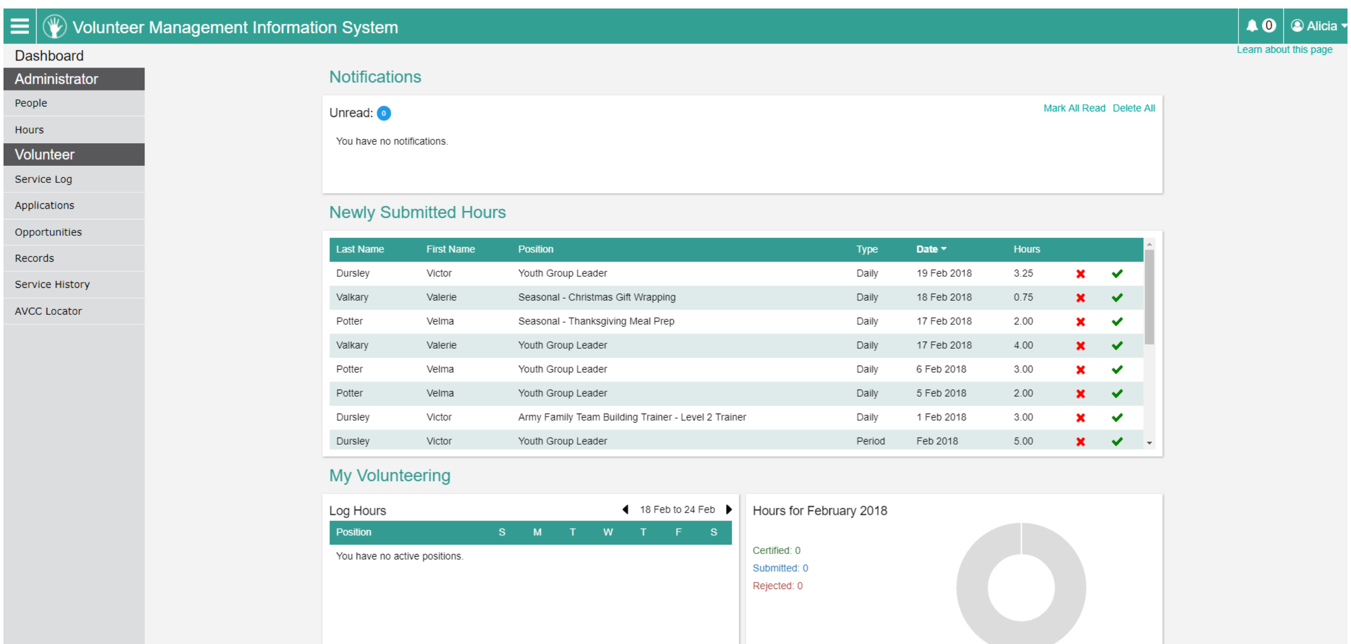
AVCC Assistants are users who are largely responsible for **certifying and rejecting hours**, and for **entering hours** on behalf of volunteers. Within VMIS, they have some – but not all – of the capabilities provided to AVCCs.

The following sections contain information about the specific functionalities of the AVCC Assistant role.

9.1 - Administrator Dashboard

The **Administrator Dashboard** for AVCC Assistants provides the same Notifications and My Volunteering areas that are provided to AVCCs. AVCC Assistants are also able to **certify and reject hours** directly from the Administrator Dashboard.

> ***Note:*** *For more information on the Notifications and My Volunteering areas, please refer to* ***Notifications Area*** *in this user guide and* ***Section 2.2 – My Volunteering*** *in the* ***VMIS User Guide for Volunteers****, respectively.*



Administrator Dashboard for AVCC Assistants

9.1.1 - Newly Submitted Hours

The **Newly Submitted Hours** table displays data when a volunteer within the AVCC Assistant's organization(s) has submitted hours. These hours can be quickly certified or rejected using the same table; however, this table is not provided to AVCCs.

> ***Note:*** *For information on how to view details about submitted hours, such as notes or documentation, refer to* ***Hours****.*

Newly Submitted Hours

Last Name	First Name	Position	Type	Date	Hours
Dursley	Victor	Youth Group Leader	Daily	19 Feb 2018	3.25
Valkary	Valerie	Seasonal - Christmas Gift Wrapping	Daily	18 Feb 2018	0.75
Potter	Velma	Seasonal - Thanksgiving Meal Prep	Daily	17 Feb 2018	2.00
Valkary	Valerie	Youth Group Leader	Daily	17 Feb 2018	4.00
Potter	Velma	Youth Group Leader	Daily	6 Feb 2018	3.00
Potter	Velma	Youth Group Leader	Daily	5 Feb 2018	2.00
Dursley	Victor	Army Family Team Building Trainer - Level 2 Trainer	Daily	1 Feb 2018	3.00
Dursley	Victor	Youth Group Leader	Period	Feb 2018	5.00

Newly Submitted Hours table

> ***Tip:*** *You can sort the list of volunteer hours by clicking any of the column headings in the table.*

9.1.2 - Certify Submitted Hours

1. Select **Dashboard** on the left-hand navigation menu and locate the **Newly Submitted Hours** area.
2. Locate the **row of submitted hours** to be certified.
3. Select the **green check** ✔ to the right of the hours.
4. The hours will be **certified** and removed from the table.

> ***Note:*** *Rejecting or certifying hours on the Administrator Dashboard does* ***not*** *allow you to edit the hours, add a reviewer note, or attach documentation. For information on how to do this, refer to* ***Hours****.*

9.1.3 - Reject Submitted Hours

1. Select **Dashboard** on the left-hand navigation menu and locate the **Newly Submitted Hours** area.
2. Locate the **row of submitted hours** to be rejected.
3. Select the **red X** ✖ to the right of the hours. A window with more details will appear.
4. Enter a **Reviewer Note**, which is required when rejecting hours and **will be visible** to the volunteer who submitted the hours.
5. Select Reject at the bottom of the details window.
6. The hours will be **rejected** and removed from the table.

9.2 - People

The **People** page for AVCC Assistants is similar to the same page for AVCCs, except AVCC Assistants can only **view and edit volunteers** – they cannot view or edit OPOCs or other AVCC Assistants.

Additionally, AVCC Assistants have access to the **Service Log** and **Records** sections of the volunteer action menu, but they cannot access the Service History or Profile sections. They also cannot convert a Non-User to a normal user.

For more information about this page, refer to the parts of **People** related to volunteers.

Note: *On top of the Volunteer table you will see a checkbox that is selected by default that reads **"Show only volunteers who have submitted an application." DO NOT unselect this checkbox.** Leave it selected. This will ensure that VMIS will only show you users who have ever submitted an application in VMIS (regardless of what community or organization for which the application was submitted). This checkbox will not apply to Non-Users as they will always be shown in this view. This checkbox will only show when you are searching for volunteers.*

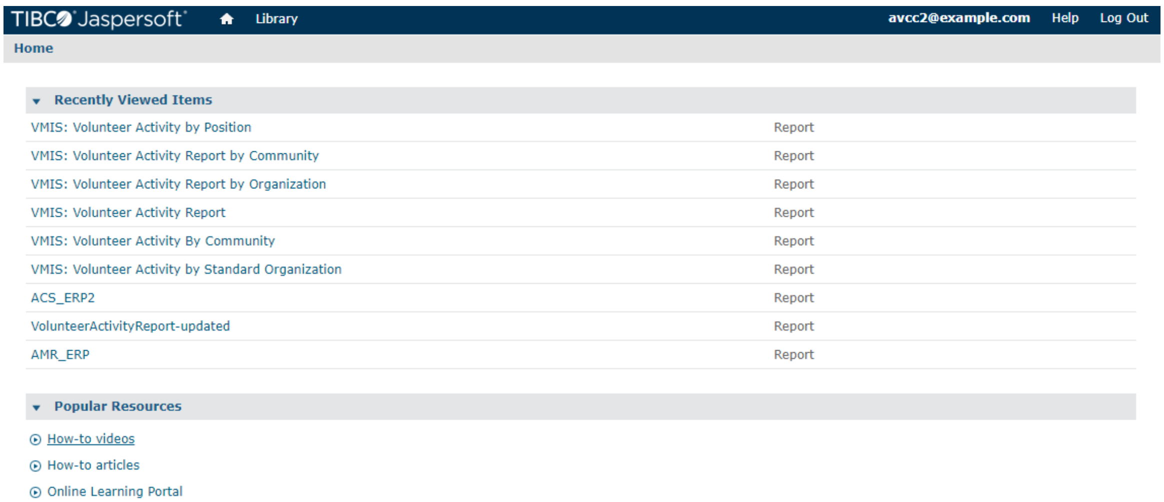
9.3 - Hours

The **Hours** page for AVCC Assistants is identical to the Hours page for AVCCs in both appearance and functionality. Refer to **Hours** for more detailed information.

10.0 - Reports

The **Reports module** of VMIS allows users to run reports about volunteers, organizations, and other related information stored in VMIS. It can be accessed by AVCCs and OPOCs at any time by selecting **Reports** from the left-hand navigation menu on any VMIS page.

Note: *Users must be* ***logged in to VMIS*** *to access the Reports module.*



Reports Home Page

10.1 - Reports Home Page

The **Reports Home Page** features several useful resources:

- The **Recently Viewed Items** area displays the most recently accessed reports by the logged-in user.
- **Popular Resources** provides quick access to frequently requested resources related to reports.
- The **home icon** in the top banner of Reports will direct the user back to the Reports Home Page.
- The **Library tab** in the top banner of Reports will direct to a list of all Reports that can be accessed by the logged-in user.
- The **Help tab** in the top banner of Reports will direct to site documentation and troubleshooting resources specifically for the Reports module.
- The **Log Out** option in the top banner of Reports will log the current user out of their current session, which will **also log out any other AFWP web applications**.

10.2 - Library Tab

The **Library tab** is available in the Reporting module and provides a list of reports created with specific filters and saved for repeated use. Other functions of the Library tab include the ability to **sort reports by Name or Modified Date**, **filter reports by name**, and **view saved report filters**.

10.2.1 - Types of Reports

Within the Library tab, there are several **pre-configured reports** available that provide specific filters for VMIS reporting purposes. These report types include:

- *VMIS: Volunteer Award Report by Community*
- *VMIS: Volunteer Award Report by Organization*
- *VMIS: Volunteer Activity by Standard Organization*
- *VMIS: Volunteer Activity by Position*

> ***Note:*** *To locate or run any of these listed reports, select the* ***Library*** *tab in the top banner of the Reporting module, and then select the correct report from the list that appears.*

10.2.2 - Run a Report

1. Select **Reports** from the left-hand navigation menu on any VMIS page.
2. Select **Library** from the top of the **Reports Home Page**.
3. Select the **name of the report** to run from the list that appears.
4. **Enter or modify** the necessary information in the left-hand Options column.

   > ***Tip:*** *Use the* ***Select All***, ***Deselect All***, *and* ***Invert*** *options to easily select large lists of communities or other filters that require multiple entries.* ***Optional data fields left blank*** *will be treated as if all options for that data field are selected.*
   >
   > *Currently selected items can be viewed separately by selecting the* ***Selected tab*** *above the list of entries.*

5. Select Apply to run the report after the correct criteria is selected.
6. To **save the report as a file**, select the **Export icon** above the report results and select the **desired file type** from the drop-down list that appears.

   > ***Note:*** *Reports can be saved to the* ***following file types****: PDF, Excel (Paginated), Excel, CSV, DOCX, RTF, ODT, ODS, XLSX (Paginated), XLSX, and PPTX.*

10.2.3 - Save a Report Filter

Users can **save and name custom report filters** that will appear within the Library tab. These customized reports are displayed by selecting the **arrow icon** ► to the left of the parent report's name.

To save a custom filter as a new report:

1. Select **Reports** from the left-hand navigation menu on any VMIS page.
2. Select **Library** from the top of the **Reports Home Page**.
3. Select an **existing report** from the list that appears that is **most similar** to the new report.

> ***Note:*** *The filters available in the Options column will* ***vary by the report selected****. For this reason, it is necessary to select and modify a report containing the same filters as the new report being created.*

4. **Add or modify** the required criteria for the new report in the left-hand **Options** column.
5. Select **Save** at the bottom of the left-hand Options column to save the current report criteria as a new report.
6. Enter a **name** for the report being created.
7. The **new report** will now appear beneath whichever report was selected in Step 3.

> ***Note:*** *Select the* ***arrow icon*** ► *to the left of the parent report to display all nested reports.*

10.2.4 - Search a Report

To search the contents of any report for particular keywords or other information:

1. **Select and run** the desired report (see **Section 10.2.2 – Run a Report**).
2. Select the **report search box** [search report] at the top of the report results area.
3. Enter the **keywords to search** and any instances of that keyword will become highlighted in the report results.
4. Select the **left and right arrow icons** ◄ ► next to the search box to navigate the results if more than one instance of the keyword is found.