2025 Volunteers Dashboard - How-To Guide

After a decade of using forms to collect the certification visit data, we're finally at a point where entering the data directly into the database would streamline and improve the process. The database is desktop and mobile-compatible. Please don't hesitate to contact me with any questions or feedback about this guide or the process in general.

For a video version of this written guide, please visit this link.

Login

- 1. Website: https://backyardhabitats.org/wp-login.php
- 2. Enter the username and password we provided each volunteer individually via email.
- 3. Once logged in, please change your password to something safer by clicking the 'Account' button in the top right corner.

First Screen

Once logged in, you will see your dashboard with your assignments and their progress.

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	Certification Visit		Upgrade Visit		Renewal	Hold		
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		0 Completed Tasks		2 Pending Tasks				
				0 Completed Tasks				

Tasks

The dashboard is organized by tasks:

- Initial Site Visit
- Follow-Up Phone Call
- Consultation
- Follow-Up Email
- Certification Visit
- Upgrade Visit
- Renewal
- Hold

	Upgrade Visit	
1 Assigned Tasks		1 Scheduled Tasks
1 Scheduled Tasks		2 Pending Tasks
1 Pending Tasks		0 Completed Tasks
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* Volunteers only see Certification Visit and Upgrade Visit tasks on your dashboards.

Each task is broken down into three steps and one substep.

- Assigned: New tasks assigned to you.
 - **Scheduled**: Tasks for which you scheduled visits.
- Pending: Tasks that you completed and are waiting for administrators' approval.

• Completed: Tasks that were approved by administrators.

* The ring charts visually represent the tasks and the step count for the assignments within each task.

Process

Scheduling

The initial part of the process stays the same until the part when I connect you and the participant via email. Instead of sending you the property information in a Site Report file attached to the email, the email is your cue to log into the database to see the assignment in your dashboard.

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	Portland, OR 97215		Certific	ation Visit <mark>signed</mark> (Assigned: May 30, 2024)
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	@gmail.com		🙎 Cei	rtified
	Frank (Secondary)		Ø Site	e Report (System)
	213 16264110651157624711403@norepiy.ii	Valid	Ø Site	e Report (Malcolm McDowell)
	Portland OR 97239		Certific	ation Visit <mark>signed</mark> (Assigned: February 5, 2025)
	John Brian (Primary), He / him Engl	sh	🔗 In I	Progress
	@gmail.com		Ø Site	e Report (Catherine Trzybinski)
	Maryanna (Secondary), Dgmail.com			

- 1. The properties I assign to you will show in the 'Assigned Tasks' list (orange line).
 - a. Click the orange line to open a slide-up window.
 - i. This window displays all the necessary information (contact information, pronouns, preferred language, address, site report, etc.).

- b. Review the information on the **Site Report** by clicking on the hyperlink (blue words).
 - i. The Site Report document will open in a new window. After you review it, you can close it.
- c. Contact the participant via email to schedule a visit (same as always).

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Hello, Jane Cedar				Certification Visit (#119597)				
Initial Site Assessment		Follow up Phone Call		Draft				
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	1 Assigned Tasks		1 Scheduled Tasks	Instructions To be completed for: 🚱	•			
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- 2. When you have a date scheduled for the visit
 - a. Click that property's 'Certification Visit' hyperlink (horizontal red arrow).
 - b. On the slide-left window, enter the visit date (red circle).
 - c. Click the 'Save Draft' button (vertical red arrow). The window will say 'updated,' and you can close it.

IMPORTANT: Clicking the 'Submit' button prematurely finishes the task. Only click the 'Submit' button when ready to send the task for the administrators' review.

d. **Refresh** your browser (F5 key) to see the updated dashboard.

NOTE: Under the instructions (highlighted yellow), we'll add any special considerations the participant included when filling out the visit request form. In other words, I'll transpose the content of cells in column D of the self-assignment spreadsheet.

Post Site Visit

After the site visit, return to your dashboard and find the property you just visited.

Dashboard v4.0.15				× CLOSE	SAVE DRAFT SUBMIT	
Hello, Jane Ceda	r			Certification Visit (#119597)		
Initial Site Assessment		Follow up Phone Call		Draft		
Certification Visit		Upgrade Visit		Task Certification Visit	To be completed by: 🚱 Jane Cedar	
	1 Assigned Tasks		1 Scheduled Tasks	Instructions	To be completed for:	
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- 1. Click on the "**Scheduled Tasks**" (brown) line.
- 2. Click on the Certification Visit task in the slide-up's middle column.
- 3. Click on the **Action selector** (red circle) and select the form you want to create.
 - If the visit resulted in a certification, choose Certification
 - \circ If the visit turned out to be a consultation, choose Non-Certification.
- 4. Click the **New Action** button (red down arrow). The form type you selected opens.

Submitting Certification and Non-Certification Forms

Dashboard v4.0.15			← BACK	SAVE DRAFT. SUBMIT
Hello, Jane Cedar Initial Site Assessment Certification Visit	Follow up Phone Upgrade Visit 1 Assigned Tasks 1 Scheduled Tasks 1 Pending Tasks	s Call Scheduled Tasks 2 Pending Tasks 0 Completed Tasks	Certification Date Certification Date Jane Cedar ~ Certification Level	SQ FT Naturescaped Percentage Naturescaped (SQ FT Naturescaped)/(SQ FT plantable area) Native Trees Planted All Other Native Plants Planted
Action		Actions	Site Data at Certification Cats Indoor/Endosure Only Indoor/Outdoor None	Outstanding Example - Garden or Yard Tour Worthy? Oakscaping Wildlife Stewardship I. Bird/Bat Nest Boxes
ha Ter 17239 il.com s (Secondary), imail.com		Certification Visit	Canopy Layers 1. Ground Cover/Grass/Bulb 2. Small - Meddum Shrub 3. Large Shrub 4. Small - Medum Tree 5. Large Tree	2. Keeps Cats Indoors 3. Native Pollinator Meadow 4. Pollinator & Beneficial Insect Nesting Habitat 5. Reduced Bird/Window Collisions 6. Reduced Outdoor Lighting 7. Snag or Decomposing Nurse Log 8. Wolfield Muste Enstree
Thank you for creating with Woodbree			Invasive Trees Present 2 6 - Black Locust funder 20th) 2 6 - English Hawthorn (under 20th) 2 6 - English Hawthorn (under 20th) 2 6 - Norway Maple (under 20th) 2 6 - Tree-of-Heaven (under 20th) 2 0 - Theode Heaven (under 20th) 2 7 - Theode Heaven (under 20th) 2 0 - Theode Heaven (under 20th)	

- 5. Enter the data you collected during the site visit in the opened form.
 - The form is similar to the one we've been using.
- 6. Upload the picture(s) you took of the participant toward the bottom of the form.
- 7. Write the Facebook post following the example provided toward the bottom of the form.

NOTE: If the participant refuses to be included in our social media, check the checkbox and skip steps 6 and 7 above.

8. Click the Submit (the form is finished) or the Save Draft (the form is partially filled) button.

NOTE: Drafts will be saved indefinitely, but you will receive automatic reminders about unfinished forms after 14 days.

9. Back out of the acknowledgment window (top left corner).

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Hello, Jane Cedar				Certification Visit (#119597)	7	
Initial Site Assessment		Follow up Phone	Call	Draft		
Certification Visit		Upgrade Visit		Task To be completed by: Certification Visit Jane Cedar		
	1 Assigned Tasks		1 Scheduled Tasks	Instructions To be completed for: @		
	1 Scheduled Tasks		2 Pending Tasks	Date Created: February 6, 2025		
	1 Pending Tasks		0 Completed Tasks	JP Marchetti-Mendez		
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n condary), .com			 In Progress Site Report (Catherine Trzybinski) 	Praft February 6, 2025 5:10 pm Certification		

10. Click the **Save Draft** button if you saved a draft of the form (example above), or click the **Submit** button if you submitted a complete form (example below).

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Hello, Jane Cedar			Certification Visit (#119597)			1	
Initial Site Assessment		Follow up Phone O	Call	Draft			
Certification Visit		Upgrade Visit		Task Certification Visit	To be completed by: 🚱 Jane Cedar		/
	1 Assigned Tasks		1 Scheduled Tasks	Instructions	To be completed for: @ 5356 SW Martha Ter		
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- 11. Close the acknowledgment window.
- 12. Refresh the window (F5 key) to see the updated dashboard.
- 13. The task now shows as Pending, which means an administrator will review and approve it.



NOTE: While the task is pending, you can still visit and make changes to the form you submitted.