# Theater Manager's Personnel/Volunteer Management Quick Reference Guide



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Released in conjunction with the screen show

We are striving to create documentation that you will find useful in completing your tasks with Theatre Manager.

This is a DRAFT document based on Theatre Manager 8.16. If you have any questions pertaining to the document, find any errors or omissions or any suggestions to enhance your user experience, please email the details to:

#### barb@artsman.com

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# Volunteers

## **Opening the Volunteer Window**

- 1. Open the Patron List Window.
- 2. Search for a Patron and click on their name in the list.
- 3. At the top of the Patron List Window, select the Volunteer Button. The Volunteer Window will open with the data of the patron.

Mr. Doug D	. Easterbroc	ok (#51)	٥		Detail/No	otes Vo	unteer	Posit	ion	Time A	vailable	Award	0
Work	(403) 536-	-1214		Activity Board O	of Directors	Again? No	Last Co Jan 13	ntact 2010	Paid No	# Hist	Pref 10	Hours 0.00	Recog 0.00
Work	<u>www.artsn</u> (403) 536-	<u>man.com</u> -1210											
Home Suite 300 #2, 3012 S.E.	- 17th <mark>Ave</mark> nue	2		•									) + F
Calgary A Canada	B T2A 0P9		×	M 1	New 🔎	Open	🔋 Dele	ete					
Calgary A Canada rom Date	B T2A 0P9	Activity	Re	ole N	New 🔎 🔎	Open	Dele Event T	itle		Rating	Hours	Paic	Shift
Calgary A Canada rom Date	To Date	Activity	R	ole	New 🔎	Open	Dele Event T	itle		Rating	Hours	Paic	IS Shift
Calgary A Canada rom Date	To Date	Activity	R	ole	New Deve	Open	Dele	itle		Rating	Hours	Paic	1 \$ Shift

### **The Volunteer Window**

To access this window you can use the Volunteer Button on the tool bar of the Patron List Window, or the Patron Record Window. The Volunteer Window will open with the data currently residing in memory. As with Media members, the volunteers are entered into the database as patrons. Once entered you can then fill their volunteer information.

Mr. Doug D	Easterbroo	0		Detail/No	tes Vol	unteer Pos	ition	Time A	vailable	Awarc	D	
meetor or	recimology			Activity		Again?	Last Contact	Paid	# Hist	Pref	Hours	Recog
Work	(403) 536-	1214		Board O	f Directors	No	Jan 13 2010	No		10	0.00	0.00
Home	www.artsm	man.com										
Work	(403) 536-	1210										
Suite 300				_								
#2, 3012	- 17th Avenue			0								Dali
CE												
Calgany	P T24 000			-		Open	Coloto					
Calgary / Canada	B T2A 0P9		4		lew 🗾 🔎	Open	🔋 Delete					
Calgary / Canada rom Date	B T2A 0P9	Activity		Role	lew 🔰	Open Event C	Delete Event Title		Rating	Hours	Paid	s Shift
Calgary / Canada rom Date	To Date	Activity		Role	lew 🔎	Open Event C	3 Delete Event Title		Rating	Hours	Paic	Shift
Calgary / Canada rom Date	B T2A 0P9	Activity		Role	lew D	Open	Delete Event Title		Rating	Hours	Paic	s Shift
Calgary / Canada rom Date	To Date	Activity		Role	lew 📔 🔎	Open	Delete		Rating	Hours	Paic	1 \$ Shift
Calgary / Canada rom Date	AB T2A 0P9	Activity	-	Role	lew 🛛 🔎	Open	Delete		Rating	Hours	Paic	3 \$ Shift
Calgary / Canada rom Date	To Date	Activity	2	Role	lew 🎾	Open	Delete		Rating	Hours	Paic	s Shift
Calgary <i>J</i> Canada rom Date	To Date	Activity		Role	lew 🏿 🔎	Open	Delete		Rating	Hours	Paic	3 \$ Shift
Calgary J Canada rom Date	To Date	Activity	•	Role	lew D	Open	Delete		Rating	Hours	Paic	Shift
Calgary A Canada From Date	To Date	Activity	•	Role	iew   🔎	Open	Delete		Rating	Hours	Paic	1 \$ Shift
Calgary / Canada from Date	To Date	Activity		Role	iew   🔎	Open	Delete		Rating	Hours	Paic	1 \$ Shift

### Parts of the Volunteer Window

Volunteer Information	This information is contained in the upper left portion of the window. All the information is taken directly from the patron information you entered.
Detail/Notes	This tab allows you to enter more specific information about the volunteer.
Volunteer	This tab has adjustable menus and fields for additional information on the volunteer.
Position	This tab lists positions that the volunteer can perform are displayed in this section.
Time Available	This tab allows you to set the times that the volunteer is either available or unavailable.
Award	This tab allows you to see any awards that the volunteer has received and add additional awards.
History	The Activity History / Evaluations is the lower section of the window. It contains a list of all the activities that volunteer has participated in.

## The Detail / Notes Tab

This tab contains detailed information on the volunteer.

Detail/Notes	Volunteer	Position	Time Available Award	1			
Greeting Birthday Age Code Status	Blaine AUG 29 195 Adult Status-Activ	57 🗾 Ve	Height 0.00 ft. Weight 0.00 lbs. SIN # Gender • Female Male	2006-07 2005-06 2004-05 2003-04 2002-03 Before 2001 Total	0.00 0.00 0.00 0.00 10.00 10.00		
							X

Greeting	The greeting that the individual prefers.
Birthday	The individual's birthday.
Age Code	The age code of the individual. The selection can be modified in Code Tables.
Status	If the individual is active and if so when the best times for them to work are. This drop down field can also be edited in code tables.
Height	The height of the individual.
Weight	The weight of the individual.
SIN #	The individual's Social Insurance Number.
Gender	The gender of the individual.
Hours Summary	Shows a yearly summary of hours worked for the past five years, and a summary of all years prior.
General Volunteer Notes	General notes about the individual.

#### Parts of the Detail / Notes Tab

### **The Volunteer Tab**

The volunteer tab displays additional criteria that can be tracked about the volunteer.

Detail/Notes	Volunteer	Position Time Availa	ble Award	
Hair Colo	ur 📃		~	
Eye Colo	ur		~	
Vocal Rang	je 🗌		~	
Instrume	nt		~	
Volunteer Fl	ags			
Dance		Vol Flag#4		
Sing		🗌 Vol Flag#5		
LIAU				

### Parts of the Volunteer Tab

Hair Colour	The hair colour of the volunteer. The list is adjustable in Code Tables >> Volunteer Hair Colour.
Eye Colour	The eye colour of the volunteer. The list is adjustable in Code Tables >> Volunteer Eye Colour.
Vocal Range	The vocal range of the volunteer. The list is adjustable in Code Tables >> Volunteer Vocal Range.
Instrument	The instrument the volunteer plays. The list is adjustable in Code Tables >> Volunteer Instrument.
Dance	Check box to denote whether the volunteer dances.
Sing	Check box to denote whether the volunteer sings.
Act	Check box to denote whether the volunteer acts.
Volunteer Flag #4	Additional assignable flag that can be used for tracking volunteers.
Volunteer Flag #5	Additional assignable flag that can be used for tracking volunteers.

#### Volunteer Activity - Code Tables

The types of activities your organization's volunteers engage in can be set up, assigned and tracked inside Theatre Manager. This page shows you how to set up those activity types.

 To set up volunteer activities, go to Setup > System Tables > Code Tables and scroll down to select Volunteer Activity.

0.00	Code Table Data	$\Box$		
Help New Open Duplicate	Delete Print Export Ad	ctivate Inactivate Merge		
To display the e 1) Click on a co 2) Read the not 3) Double Click	entries in a code table de table on the left list es about the code table to o the value to edit it.	confirm you wish to edit it		
Code Table	Code Table Entries	Show Inactive Values		
Mktg #6 (pop-up)	Activity	Type		
Mktg #7 (pop-up)	Actor/Actress	active		
Mktg #8 (pop-up)	Artist Host	active		
Order Reason to Buy	Board Of Directors	active		
Patron Age Codes	Coat Check	active		
Patron Location	Coffee Bar	active		
Patron Name Suffixes	Directors	active		
Patron Relationships	Dress Designer	active		
Patron Salutations	Executive Directors	active		
Patron Type	Flyman	active		
Payment Methods	Front of House	active		
Performance Field #1	Lighting Design	active		
State	Lighting Technician	active		
Subscription Date Change	Merchandiser	active		
Subscription Location Change	Newsletter	active		
Subscription Renewal Status	Office Assistant	active		
Transaction Source	Producers	active		
Transaction Types	Pyrotechnic	active		
Traveling Troupe	Reception	active		
Volunteer Activity	Running Crew	active		
Volunteer Awards	Set Construction	active		
Volunteer Eye Colour	Set Design	active		
Volunteer Hair Colour	Special Events	active		
Volunteer Hour Ranges	Stage Crew	active		
Volunteer Instrument	Stage Manager	active		
Volunteer Shift	Telephone Support	active		
Volunteer Status	Traffic Control	active		
Volunteer Vocal Range	- Ushers	active		

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2. Click the New button

in the toolbar to open the Volunteer Activity Insert window.



4

3. Give the activity a specific name so anyone will be able to decipher its purpose, mark it Active by checking the Active box, and select in which areas you'd like this volunteer activity to be available (Box Office, Development, and/or via the Internet) by checking the appropriate box or boxes. Then click the Save button to add it to the list of Volunteer Activities.

000	Code Ta	ble Data
Help New Open Duplicate D	Image: Selete         Print         Export         ////////////////////////////////////	Activate Inactivate Merge Set
To display the er 1) Click on a cod 2) Read the note 3) Double Click t	ntries in a code table e table on the left list s about the code table to he value to edit it.	confirm you wish to edit it
Code Table	Code Table Entries	
Misc-Special Letter/Task Ty	Activity	<ul> <li>Type</li> </ul>
Misc-Workflow Notification	Actor/Actress	active
Mktg #6 (pop-up)	Artist Host	active
Mktg #7 (pop-up)	Board Of Directors	active
Mktg #8 (pop-up)	Coat Check	active
Order Reason to Buy	Coffee Bar	active
Patron Age Codes	Directors	active
Patron Location	Dress Designer	active
Patron Name Suffixes	Executive Directors	active
Patron Relationships	Flyman	active
Patron Salutations	Front of House	active
Patron Type	Lighting Design	active
Payment Methods	Lighting Technician	active
Performance Field #1	Merchandiser	active
State	Newsletter	active
Subscription Date Change	Office Assistant	active
Subscription Location Change	Producers	active
Subscription Renewal Status	Pyrotechnic	active
Transaction Source	Reception	active
Transaction Types	Running Crew	active
Traveling Troupe	Set Construction	active
Volunteer Activity	Set Design	active
Volunteer Awards	Special Events	active
Volunteer Eye Colour	Stage Crew	active
Volunteer Hair Colour	Stage Manager	active
Volunteer Hour Ranges	Telephone Support	active
Volunteer Instrument	Ticket Seller	active
Volunteer Shift	Traffic Control	active
Volunteer Status	Ushers	active
Volunteer Vocal Range 🔹		

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#### Volunteer Custom Field 1

The Custom Volunteer Field 1 field can be customized to suit client needs. The field can be renamed and drop down options edited to reflect client needs. This drop down field is found in Patron Records and Personnel Management.

00		C	ode Table I	Data			
Help New	) Open	Duplicat	te Delete	S Print	export	Activate	3
T 2 3 Code Table	o display t ) Click on ) Read the ) Double C	the entri a code ta notes a Click the	es in a code able on the bout the co value to ed	e table left list de table t it it.	o confirm y	ou wish to	edit it
Mktg #6 (pop-ur	p)	6.	• Eve Colou	r		iow mactiv	e
Mktg #7 (pop-ut	)		Blue		active		
Mktg #8 (pop-up	) )		Brown		active		
Order Reason to	Buy		Grav		active		
Patron Age Code	s		Green		active		- 1
Patron Name Suf	fixes		Hazel		active		- 1
Patron Relations	hips						- 1
Patron Salutation	IS						- 1
Patron Type							- 1
Payment Credit (	Card Addre	e					- 1
Payment Method	s						- 1
Province							- 1
Subscription Dat	e Change						- 1
Subscription Loc	ation Char	۱					- 1
Subscription Ren	ewal Statu	S					- 1
Transaction Type	25						- 1
Traveling Troupe	2						- 1
Volunteer Activit	Y						- 1
Volunteer Award	S Jour						- 1
Volunteer Eye Co	olour						
Volunteer Instru	ment						- 1
Volunteer Status	nent						
Volunteer Vocal	Range	A I					- 1
Torunceer Yocar	unge		;				_

### **The Positions Tab**

The positions tab is part of the Volunteer Window and displays the positions, which the volunteer can perform. Functions of this tab are add a position, edit a position and delete a position.

Detail/Notes	Volun	teer	Position	Tim	e Availa	ble Av	vard		
Position	A	Со	P	Hist	Pref	Hours	Hour	Paid /	Amour
Running Crev	v Yes	Ма	. No			0.00	0.00	)	\$( ^
Directors	Yes	Ма	. No			0.00	0.00	)	\$(
Ushers	Yes	Ju	No	1		10.00	10.00	)	\$(
Board Of Dir.	Yes	Se	No		10	0.00	0.00	)	\$(
									~
<			1111						>
🎦 New	) 🗾	Ope	n 🥛	Dele	te				

#### Parts of the Positions Tab

Position	The volunteer code of the position. The codes are setup in Code Tables >> Volunteer Activities.
Again	If the volunteer is still interested in the position.
Contacted	The date last contacted.
Paid	If the activity was paid.
History	If any historical information is available.
Preference	The preference rating of the volunteer for the position on a scale of 1-10.
Hours	The total number of hours worked in the position.
Paid \$	The total amount that was paid for the activity.
Last Year	The last year that the volunteer performed the position.
Notes	Any notes associated with the position.
New	Inserts a new position through the Positions For Window.
Den	Shows the details for the selected position as well as allowing editing in the Positions For Window.
😁 Delete	Deletes the selected position.

#### **Adding Volunteer Positions**

Once a volunteer has worked or expressed interested in a position you should add the position to their data. Open the Volunteer Window. You will see the positions section on the upper right of the screen.

🗖 Volunteer His	🗌 Volunteer History for Blaine Abel (Arts Mgt Sys)									
Help 🕇	New 📕	Save 📦 Dupli	iate 🧔	Revert 🍧 🛙	Delete	Print	Spell Spell			
Mr. Blaine A Manager @	.bel (#18) Port Sign Sy	stems	^	Detail/Notes N	/olunteer	Position	Time A	vailable A	ward	
<ul> <li>Home</li> <li>Work</li> <li>Home</li> <li>Home</li> <li>2019 626 C.</li> <li>NE</li> <li>Calgary, Alb</li> <li>USA</li> <li>35609</li> </ul>	(403) 272-7 (403) 229-5 antrel Drive erta	474 764	m	Position Running Crew Directors Ushers Board Of Dir	A Co. Yes Ma. Yes Ju Yes Se.	P No No No No No 	Hist I 1 Delete	Pref Hour 0.0 10.0 10 0.0	5 Hour 0 0.00 0 0.00 0 10.00 0 0.00	Paid Amour \$(^
From Date	To Date	Position	Role		Play C	Play Title	9	Rating H	Inurs	Paid Amount Ev.
Apr 15 1994 Jun 2 2008	Jun 30 1994 Jun 2 2008	Ushers Running Crew			93-03 07-NIC	ANNE OF	GREE	9	10.00	\$0.00
New	Dpen	🕘 Delete 🏻 P	lay Title	×	From			то		
1 &volun recogn	1 8volun recognition has been successfully deleted from the database									

1. Click the New **New** button. This will open the Positions For Window.

Position for Blaine Abel (#18) {Arts Mgt Sys} (inserting)		X
🕜 Help 🛃 New 拱 Save 📭 Duplicate 🞺 Revert 🍧	Delete Print	»
Position 🔽	2006-2007 0.0	00
Last Play	2005-2006 0.0	00
	2003-2004 0.0	00
Last Contact   SEP 28 2007	2002-2003 0.0	00
Preference 10	Before 2001 0.0	00
Vill do again	iotai U.t	10
Normally companyated for daing this p		
Informatly compensated for doing this pr		
Position Notes Letters		
Notes About This Position	2	5
		v

2. Select the position from the list.

The drop-down list is customizable in the Code Tables >> Volunteer Activities.

- 3. Select a play using the Lookup 🕹 button if applicable.
- 4. This will open the Play List Window allowing you to search for a play. Double click the play to select it.

- 5. Change the last contact date if needed.
- 6. Select "Will do again" or "Normally compensated for doing this position" if applicable.
- 7. Enter any notes about the position.
- 8. Click Save if all the information is correct.
- 9. The new position will now be shown under the Positions Tab and can be used to create records. Click here for more information on creating volunteer history.

#### **Editing Volunteer Positions**

You may need to edit a volunteer position to update notes about the position or the last play the volunteer worked. This is performed through the Positions Tab on the Volunteer Window.

- 1. Find the Patron Record and open the Volunteer Window.
- 2. Click on the Positions Tab at the upper left of the window.

📃 Volunteer His	Volunteer History for Blaine Abel (Arts Mgt Sys)										
Help	New 📄	Save 📦 Duplic	ate 🧔	Revert 😁 🛛	Delete	Print	spell Sp	ell			
Mr. Blaine A Manager @ J	bel (#18) Port Sign Sv	stems	^	Detail/Notes V	/oluntee	r Positio	on Time	Availa	ble Aw	ard	
Manager @ 1	i ore orginoy	stems		Position	ACo	)   P	Hist	Pref	Hours	Hour	Paid Amour
© <u>Home</u> © <u>Work</u> ● ● <u>Home</u>	(403) 272-7 (403) 229-5	474 764	Ш	Running Crew Directors Ushers Board Of Dir	Yes Ma Yes Ma Yes Ju Yes Se	a No a No No e No	1	10	0.00 0.00 10.00 0.00	0.00 0.00 10.00 0.00	\$(\$( \$( \$( \$(
2019 626 Ca NE Calgary, Alb USA	antrel Drive erta			¢							
35609			~	New	0 🔍	pen	) Delete	•			
From Date	To Date	Position	Role		Play C	.  Play Ti	tle	Rat	ing Ho	ours	Paid Amount Ev.
Apr 15 1994 Jun 2 2008	Jun 30 1994 Jun 2 2008	Ushers Running Crew			93-03 07-NIC	ANNE ( ELVIS	DF GREE. - Live!	•••	9 10	0.00	\$0.00 \$0.00
											<b>v</b>
New (	New Delete Play Title From To										
1 &volun recogn	ition has been succ	essfully deleted from	the datab	ase							

- 3. Click on the position you wish to edit.
- 4. Click the Open button Point. This will open the Position Window for the position.

Position for Blaine Abel (#18) {Arts Mgt Sys} (inserting)		ĸ
🕜 Help 🕈 New 📄 Save 💿 Duplicate 🤣 Revert 🍧	Delete Print	»
Position	2006-2007 0.0	0
Last Diau	2005-2006 0.0	0
	2004-2005 0.0	0
Last Contact SEP 28 2007 🛛 👩	2003-2004 0.0	0
Preference 10	Before 2001 0.0	10
	Total 0.0	ō
🗹 Will do again		
Normally compensated for doing this p		
Position Notes Letters		
Notes About	1	7
This Position		1
	~	
		킨

- 5. Change any data as needed.
- 6. Click the Save save button.

You will return to the Volunteer Window and any changed data will be saved and displayed under the Position Tab.

#### **Deleting Volunteer Positions**

You may now delete positions that have no activities attached to them. Find the Patron Record and open the Volunteer Window.

1. Select the Positions tab at the upper right of the window.

🔲 Volunteer His	story for Blaine A	Abel {Arts Mgt Sy	rs}							
Help	New 📄	Save 🚺 Dupli	sate 🧳	Revert	Delete	S Prin	t 🍢 Spe	:11		
Mr. Blaine A Manager @	bel (#18) Port Sign Sy	stems	^	Detail/Note	s Volunt	eer Posit	ion Time A	Available	Award	
i Home i Work Mone	(403) 272-7 (403) 229-5	474 764	=	Position Running Cru Directors Ushers Board Of D	A ew Yes Yes Yes ir Yes	Co P Ma No Ma No Ju No Se No	Hist	Pref Hou 0. 10. 10. 0.	urs Hour. .00 0.0 .00 0.0 .00 10.0 .00 0.0	Paid Amour 0 \$(^) 0 \$( 0 \$( 0 \$( 0 \$(
2019 626 C NE Calgary, Alb USA 35609	antrel Drive erta			New		Open )	Telete			
From Date	To Date	Position	Role	,	Play (	Play 1	Title	Rating	Hours	Paid Amount Ev
Apr 15 1994 Jun 2 2008	Jun 30 1994 Jun 2 2008	Ushers Running Crew			93-03 07-NI	ANNE C ELVIS	OF GREE 3 - Live!	. 9	10.00	\$0.00 \$0.00
New 1	Onen C	Celete D	ا مالا Title		Fron				_	<b>&gt;</b>
1 &volun recogn	nition has been succ	essfully deleted from	the datab	, )ase		.1		10	1	
•										

This tab displays all the positions the volunteer has held or expressed an interest in.

- 2. Click on the position you wish to delete.
- 3. Click the Delete **Delete** button at the bottom of the tab. The following confirmation window will open:

🗖 Delete a Record 🛛 🔀					
	Are you sure you want to delete the 1 selected Volunteer history record?				
	Cancel				

- 4. Click Delete <u>Delete</u> to proceed with the delete.
- 5. To cancel the position deletion click Cancel Cancel.

### The Time Available Tab

Detail/	Notes Vol	lunteer	Position	Time Available	Award		
Month	1		▼ is	All Months			- 2
Month	Day	Start		End	Type	Note	
March	Tuesday	02:00	) AM	19:00 PM	Availab	le	
March	Wednesd	ay 02:00	D AM	19:00 PM	Availab	le	
March	Thursday	02:00	MA C	19:00 PM	Availab	le	
March	Friday	02:00	MA (	19:00 PM	Availab	le	
April	Tuesday	02:00	MA (	19:00 PM	Availab	le	
April	Wednesd	ay 02:00	MA (	19:00 PM	Availab	le	-
1			III			•	P.
	New Time V	Wizard	) 🔁 N	ew 🛛 👂 Open	 Delete		A.

#### Parts of the Time Available Tab

Month 💌	Allows you to specify a particular month to check or set availability
is All Months 🔹	Allows you to further refine your search
Month	The Month the Personnel / Volunteer is available
Day	Day of the week the Personnel / Volunteer is available
Start	Start time
End	End Time
Note	Any notes entered on the availability time
🔍 New Time Wizard	Opens the new time wizard
New	Adds a single time
Dpen Dpen	Opens a selected time
📑 Delete	Deletes a selected time

If a volunteer knows what times they will be available. You can set them up under the Time Available Tab.

#### **Creating Times Using the Wizard**

1. Click the New Time Wizard <u>New Time Wizard</u> button.



2. Select the availability type.

You can choose whether the time being entered is time that the volunteer is available or whether there is a conflict. If it is a conflict time, then a to and from window will appear next.

3. Click the Next <u>Next</u> button to proceed.

🗖 Avail	ability Wizard: A	dding Times For B	Blaine Abel (#18) 🛛 🔀
2	Please select the n	nonth(s) the Volunteer	r has time available.
	🗌 All Months		
	🗹 January	🗹 February	🗹 March
	🗹 April	🗹 May	🗹 June
	🗹 July	🗹 August	🗹 September
	🗹 October	🗹 November	🗹 December
	Previous		Next

4. Select the months which the personnel is available and click the Next west button.



5. Select the days of the week the personnel is available and click the Next wext button.



6. Enter the Starting and Ending times and click the Next **Next** button.

For available times these times will be the time of day. Whereas with conflict dates they will be actual dates i.e. month, day, year.

🗖 Availa	ability Wizard: Adding Times For Blaine Abel (#18) 🛛 🔀
6	Please enter the Volunteer specific requirements about this time period. These notes will be placed on all of the created records
•	Previous Finished

7. Enter any notes associated with the time and click the Finished Finished button. The new times will be displayed under the tab.

#### Creating Times by a Single New Entry

- 1. This will allow you to enter a single record of either available or conflicting time.
- 2. Start by clicking the New <u>New</u> button on the Times Available Tab.

🗖 Availability for Blaine Abel (#18) {Ar	ts Mgt Sys} (inserting)
🕜 Help 🚹 New 📄 Save 🗌	Duplicate 🤣 Revert 🍧 Delete 🏻 🏾
Enter the time this V The time periods indi Volunteer positions, i	olunteer's has available to commit to the Theatre. cate when the Volunteer is able to perform their desired f requested from the Theatre.
Availablility ⓒ Time Available ◯ Time Conflict	
Month All Months	Day All Days
Starting Time	Ending Time
Notes	×

- 3. Choose whether this is a "Time Available" or a "Time Conflict".
- 4. Select the month and the day of the week for the time.
- 5. Enter the start time and the end time of the time.
- 6. Enter any notes about the time.
- Click the Save save button to finish creating the new record.

#### **Editing Availability Times**

If a personnel member has availability or conflict times setup they may eventually need to be updated.

- 1. Find the Patron Record and open the Volunteer Window.
- 2. Open the Times Available Tab.

Detail/Note:	Volunteer	Position Time A	vailable Award			
Month		✓ is All Mont	hs			<b>v</b> <i>P</i>
Month	Day	Start	End	Note	Outlet-Ow Date Start	Date End
All Months All Months All Months All Months All Months	Monday Tuesday Wednes Thursday Friday	18:00 PM 18:00 PM 18:00 PM 18:00 PM 18:00 PM	22:00 PM 22:00 <u>PM</u> 22:00 <mark>5elect an item in the</mark> 22:00 PM 22:00 PM	Av Available after work Av Available after work list and use the toolbar to alter it. Dou Av Available after work Av Available after work	Arts Mgt Arts Mnt Arts Mgt Arts Mgt Arts Mgt	<
New T	ime Wizard	New	III Delete			>

- 3. Select the time you wish to edit.
- 4. Click the Open Determined button. The Time Available Window will open with the data of the selected time.

🔲 Availability for Bla	ine Abel (#18) {Arts Mgt Sys} 📃 🗖 🔀
🕜 Help  🚹 M	Jew 📄 Save 🔖 Duplicate 🤣 Revert 🍧 Delete 🛛 »
	Enter the time this Volunteer's has available to commit to the Theatre. The time periods indicate when the Volunteer is able to perform their desired Volunteer positions, if requested from the Theatre.
Availablility	<ul> <li>● Time Available</li> <li>○ Time Conflict</li> </ul>
Month	All Months 💌 Day Friday 💌
Starting Time	6:00 PM Ending Time 10:00 PM
Notes.	Available after work
UM Entered: SEF	28 2007 2:35:52 PM Last Updated: SEP 28 2007 2:35:52 PM

5. Make the required changes.



6. Click the Save Save button.

The Time Available Window will close and you will return to the Volunteer Window. The time change will appear in the Time Available Tab.

#### **Deleting Available Times**

If a volunteer has availability or conflict times setup they may eventually need to be updated.

Find the Patron Record and open the Volunteer Window.

Detail/Note	s Voluntee	r Position Time A	vailable Award		
Month		is All Mont	hs		v 🄎
Month	Day	Start	End	Note Outlet-Ow Date Sta	rt Date Er
All Months All Months All Months All Months All Months	Monday Tuesday Wednes Thursday Friday	18:00 PM 18:00 PM 18:00 PM 18:00 PM 18:00 PM 18:00 PM	22:00 PM 22:00 PM 22:00 <mark>5elect an item in th</mark> 22:00 PM 22:00 PM	Av     Available after work     Arts Mgt       Available after work     Arts Mgt       elst and use the toolbar to alter it. Double dick it to see the detail.       Av     Available after work       Arts.     Mgt       Av     Available after work       Arts.     Mgt       Av     Available after work       Arts.     Mgt	
K New	Time Wizard	New	📖 🔁 Open		>

1. Open the Time Available Tab.

- 2. Select the time you wish to delete.
- 3. Click the Delete **Delete** button at the bottom of the tab. The following confirmation window will open.



- 4. Click Delete <u>Delete</u> to confirm the deletion.
- 5. Clicking Cancel Cancel will abort the deletion.

### The Awards Tab

This tab contains award information on the volunteer.

Detail/Notes	Volunteer	Position	Time Available	Award					
Date Awarde	d Award	Hour N	otes	Out	et-Ow	Outlet			
Oct 25 2006	Trop	25.00		Arts	Mqt	10 🔥			
Oct 25 2006	Watch	25.00		Arts	Mgt	10.			
New Delete									

### Parts of the Awards Tab

Date Awarded	The date the award was given.
Award	The award that was given.
Hours Recognized	The number of hours that were recognized with the award.
Notes	Any notes that were entered with the award.
Outlet Owner	The main organization name.
Outlet	The specific outlet that this volunteer was awarded for working at.
* New	Creates a new award.
Dpen	Opens the currently selected award.
😁 Delete	Deletes the currently selected award.

#### **Adding Awards**

If you wish to add an award to a volunteer, you can set them up under the Awards Tab.

Detail/Notes	Volunteer	Position	Time Available	Award		
Date Awarded	d Award H	lour No	tes	Out	let-Ow	Outlet
Oct 25 2006	Pin	10.00		Arts	: Mgt	10 🔼
			Select a	an item in th	e list and use	e the toolbar t
						~
<			1111			>
🕈 New	Dpe 🤌	en 📑	Delete			

1. Click the New **New** button. The Volunteer Award Detail Window will open.

🔲 Volunteer Award Detail {Arts Mgt Sys} (inserting)	. 🗆 🔀
🕜 Help 🕈 New 📄 Save 📭 Duplicate 🥏 Revert 🍧 Delete 📎 P	'rint »
Awards are given to a volunteer after they have given a certain number of hours to the Theatre	
Award Type 💿 Recognition For Hours Contributed 🔋 Outlet Arts Mgt Sys	~
O Milestone Hours Recognized 0.00	
Award	
Date Awarded	
Notes Recognized Activities Letters	
Notes	
	~

- Select the type of award that you wish to assign.
   For a "Recognition For Hours Contributed" type the volunteer must have records of working that number of hours. For a "Milestone" type hours are not required.
- Select the Outlet at which the volunteer worked.
   The award that matches the number of hours will automatically select.
- 4. If you wish to assign a different award, select it from the drop down list.



- 5. The Date Awarded will default to the current date.
- 6. Alter the date as needed.
- 7. Enter any notes about this award.

E

8. Click Save Save. The new awards will be displayed under the tab.

Volunteer Activity History / Evaluations Section This section is located at the bottom of the Volunteer Window. It contains the activity history for a volunteer. Each history has an evaluation of their performance included with it. These evaluations and comments can be used in your future selections of volunteers.

From Date	To Date	Position	Role	Play C	Play Title	Rating	Hours	Paid Amount	Evaluation	Play #	
Apr 15 1994	Jun 30 1994	Ushers		93-03	ANNE OF GREE	9	10.00	\$0.00	was excellent	67	~
Jun 2 2008	Jun 2 2008	Running Crew		07-NIC	ELVIS - Live!		10.00	\$0.00		90	
											~
<										>	
New	Dpen	📄 Delete 📄 P	lay Title	~	From		Тс				2

### Parts of the Activity History / Evaluation Section

From Date	The date the activity started.
To Date	The date the activity was finished.
Position	The position the activity was preformed under.
Role	The role of the volunteer.
Play Code	The play code the activity was performed for.
Play Title	The play name the activity was performed for.
Rating	The rating the volunteer received.
Hours	The number of hours the volunteer worked.
Paid Amount	The amount the volunteer was paid for the activity.
Evaluation	The comments associated with the activity.
Play Number	The number of the play.
1 New	Inserts a new activity into the personnel record.
Dpen	Opens the currently selected record and allows the record to be edited
😁 Delete	Deletes the currently selected activity(s)
Search Function	Allows you to search the volunteer activity history based on a number of different categories.

### **Adding Activity History and Evaluations**

1. Once a volunteer has positions setup they can receive historical and evaluation comments. This data is displayed at the bottom of the Volunteer Window. The history and evaluations can help to choose the best personnel for the position you require.

Find the Volunteer for which you wish to add an evaluation and history.

000		0 9	Volunteer History	for Doug Easter	prook (#5	1) (Company	1}				C
Help New Mr. Doug D. Director of Work	Save Duplicat Easterbrool Technology (403) 536-:	te Revert Delete (#51) 1214	Print Spell	Detail/Not ity I Of Directors	es Vo Again? No	unteer Pos Last Contact Jan 13 2010	ition Paid No	Time / # Hist	Available Pref 10	Aware Hours 0.00	Recog
<ul> <li>Work</li> <li>Home</li> <li>Work</li> <li>Home</li> <li>Work</li> <li>Home</li> <li>Suite 300</li> <li>42, 3012</li> <li>S.E.</li> <li>Caloary A</li> </ul>	<u>doug@artsn</u> <u>www.artsma</u> (403) 536-1 - 17th Avenue B T2A 0P9	nan.com an.com 1210		New	Open	🕄 Delete					) + +
Canada From Date	To Date	Activity	Role		Event C	Event Title		Rating	Hours	Pai	d \$ Shift
Θ											
New	Open	Delete	Event Title	ike	any par	t of the event	title				

2. Click the New <u>New</u> button at the bottom of the window.



- 3. Select the position the activity was performed under.
- 4. Only positions you have setup for the selected volunteer will be displayed. Click Cancel Cancel to return to the Volunteer Window where you can add a new position. Click here to learn how to setup positions.
- 5. Click OK **CONT**. The Activity History Widow will open.

🔲 New Runnin	g Crew Hist	ory For Bla	ine Abel {Arts M	lgt Sys} (inser	ting)		. 🗆 🗙
🕜 Help	New	肩 Save	Duplicate	Revert	🔵 Delete	S Pri	nt »
Play		💦 <no pi<="" td=""><td>ay≻</td><td></td><td></td><td></td><td></td></no>	ay≻				
Performance		离 (Option	nal - If entered, the	activity is for thi	s performance	only)	
From		🗾 🗊 tł	nru 📃	5			
Activity Eval	uation Aw	ards Lette	TS				
Note:	Enter 'role' on positions sho	ly for actors/a uld leave 'role	ctress or if you wa blank and fill in du	nt the 'role' to ap ties instead.	pear on the cas	t crew list. A	ll other
Hours	0.00 P	ay Period	Hourly		Amo	unt	\$0.00
Role							
Volunteer							~
For Period							
							~
· · · · · ·	l						

- 6. Click the Play Lookup 🛃 button.
- This will open the Play List Window allowing you to search for plays.
- Double click the play for which the activity was performed.
- You will return to the Activity History Window.

🗖 New Runnin	ng Crew History For Blaine Abel {Arts Mgt Sys} (inserting)	_ 🗆 🗙
Help	🚹 New 📄 Save 💿 Duplicate 🤣 Revert 🍧 Delete 📎	Print »
Play	07-NIC 🔀 ELVIS - Live!	
Performance	(Optional - If entered, the activity is for this performance only)	
From	JUN 2 2008 🗾 🔂 thru JUN 12 2008 🔂	
Activity Eval	Juation Awards Letters	
Note:	Enter 'role' only for actors/actress or if you want the 'role' to appear on the cast crew list positions should leave 'role' blank and fill in duties instead.	t. All other
Hours	0.00 Pay Period Hourly 💽 Amount	\$0.00
Role		
Volunteer Duties For Period		~
Torrenou		
		V

The play code will be displayed in the field along with its title to the right. The From and To fields will be filled with the dates which the play runs.

7. Click the Performance Lookup button to specify if this activity is only for one performance. If a performance code is entered, the date will be set, and times will be available to be entered.

🗖 New Running Crew History For Blaine Abel {Arts Mgt Sys} (inserting)
🕜 Help 🍸 New 拱 Save 🕼 Duplicate 🤣 Revert 🍧 Delete 🔊 Print. »
Play D7-NIC 💦 ELVIS - Live!
Performance 1-MON 💦 (Optional - If entered, the activity is for this performance only)
On JUN 2 2008 between 7:30 PM and 9:30 PM
Activity Evaluation Awards Letters
NGTE: Enter 'role' only for actors/actress or if you want the 'role' to appear on the cast crew list. All other positions should leave 'role' blank and fill in duties instead.
Hours 0.00 Pay Period [Houriy Amount ] \$0.00
Role
Volunteer
For Period

- 8. Change the times if needed.
- 9. Enter the number of hours to be credited to the volunteer for working.
- 10. Select the pay rate and enter the amount if applicable. Leave this field blank if the activity was performed voluntarily. The selections in this drop-down are:

Hourly	~
Contract Rate	
Day Rate	
Hourly	
Monthly	
Weekly	

11. Enter a role and/or a description of the volunteer duties. At least one of these fields must be filled to insert the data.

#### 12. Click on the Evaluation Tab.

🔲 New Running Crew History For Blaine Abel {Arts Mgt Sys} (inserting)	X
🕜 Help 🕈 New 📄 Save 💿 Duplicate 🤣 Revert 🍧 Delete 📎 Print	»
Play 07-NIC & ELVIS - Live! Performance 1-MON & (Optional - If entered, the activity is for this performance only)	
Activity Evaluation Awards Letters	
Evaluation     Security1     Image: Security6       Security/     Security7     Image: Security7       Image: Security3     Security8       Image: Security4     Security9       Image: Security5     Image: Security10	
Rating 0 Didn't perform activity	

- 13. Set the security level allowing who can view the evaluation of the volunteer.
- 14. Rate the volunteer.

This rating is based on a scale of 0-10. If any data is entered which does not fall into this range you will receive a warning message Rating must be between 1 and 10 and not be able to enter the data.

15. Enter any comments about the activity.

These comments are to be used to critique the performance of the individual. This can then be used for finding the best volunteer for a particular position in the future.



The Awards and Letters Tabs will now become available.

### **Editing Personnel Activity History**

- 1. Find the Patron Record and open the Volunteer Window.
- 2. Click on the Volunteer activity you want to update in the bottom section of the window.

Help New	Save Duplica	te Revert Delet	e Print Spel		2)						
Mr. Doug D	. Easterbroo	k (#51)	0 -	Detail/I	Notes Vo	lunteer Po	osition	Time A	Available	Awar	±t
Work Work Home Work Work	(403) 536- doug@artsn www.artsm (403) 536-	1214 <u>man.com</u> <u>an.com</u> 1210	Ad	tivity ard Of Directors	Again? No	Last Contac Jan 13 201	t Paid	# Hist	Pref 10	Hours 0.00	Recog 0.00
S.E. Calgary A Canada	B T2A 0P9		Į	ి New 🍃	Open	🔋 Delete	]				
From Date	To Date	Activity	Role		Event C	Event Title		Rating	Hours	Pai	d \$ Shift

3. Click on the Open Determination. A detail window for the activity will open.

🗖 Running Crev	w Activity for Blaine Abel {Arts Mgt Sys}
Help	🎦 New 📄 Save 🔖 Duplicate 🤣 Revert 🍧 Delete 📎 Print 💙
Play (	J7-NIC 💦 ELVIS - Live!
Performance	1-MON 💦 💦 (Optional - If entered, the activity is for this performance only)
On 🛛	IUN 2 2008 between 7:30 PM and 9:30 PM
Activity Evalu	ation Awards Letters
Note: E	Inter 'role' only for actors/actress or if you want the 'role' to appear on the cast crew list. All other positions should leave 'role' blank and fill in duties instead.
Hours	10.00 Pay Period Hourly Amount \$0.00
Role	
Volunteer /	ASM 🔊
For Period	
	<u>v</u>
Enter	ed: SEP 28 2007 11:45:23 AM Last Updated: SEP 28 2007 11:48:16 AM

- 4. Edit the information.
- 5. Click the Save Save button.

#### **Deleting an Activity**

If an activity has been entered improperly you may delete it using the steps outlined below. This procedure only deletes an activity associated with the volunteer.

Find the Patron Record and open the Volunteer Window.

000			Volunteer History fo	or Doug Easterbr	ook (#5	1) {Com	pany 1)	ł				C
Help New	Save Duplica	te Revert Delet	e Print Spell									
Mr. Doug D.	Easterbroo	k (#51)	0	Detail/Note	s Vo	unteer	Posit	ion	Time A	vailable	Awarc	D
Director of	rechnology		Activity	1	Again?	Last Co	ntact	Paid	# Hist	Pref	Hours	Recog
<u>Work</u>	(403) 536-	1214	Board	Of Directors	No	Jan 13 2	2010	No		10	0.00	0.00
Work	doug@artsr	man.com										
Work	(403) 536-	1210										
WOIK	(+05) 550-	1210										
Home												
Suite 300												
#2, 3012	- 17th Avenue		0			12				13		) + +
Calgary A	B T2A 0P9		× •	New 👂 O	ben	🕘 Dele	te					
Canada			Y									
From Date	To Date	Activity	Role	EV	ent C	Event Ti	tle		Rating	Hours	Paid	\$ Shift
0									10			) 4 1
🕈 New	Onon	Delate	Event Title	A like		- Cale -	upont tit	the state				
	Den Open	Delete	Event fille	• like	any pari	or the e	vent th	ue				

Click on the activity that you wish to delete.

Click the Delete **Delete** button.

The following warning window will open.

🗖 Delet	e a Record 🛛 🔀
	Are you sure you want to delete the 1 selected Volunteer history record?
	.4

Click Delete Oelete.

If you do not wish to continue with the deletion click Cancel Cancel. You will return to the Personnel History Window and the activity will have been removed.