

**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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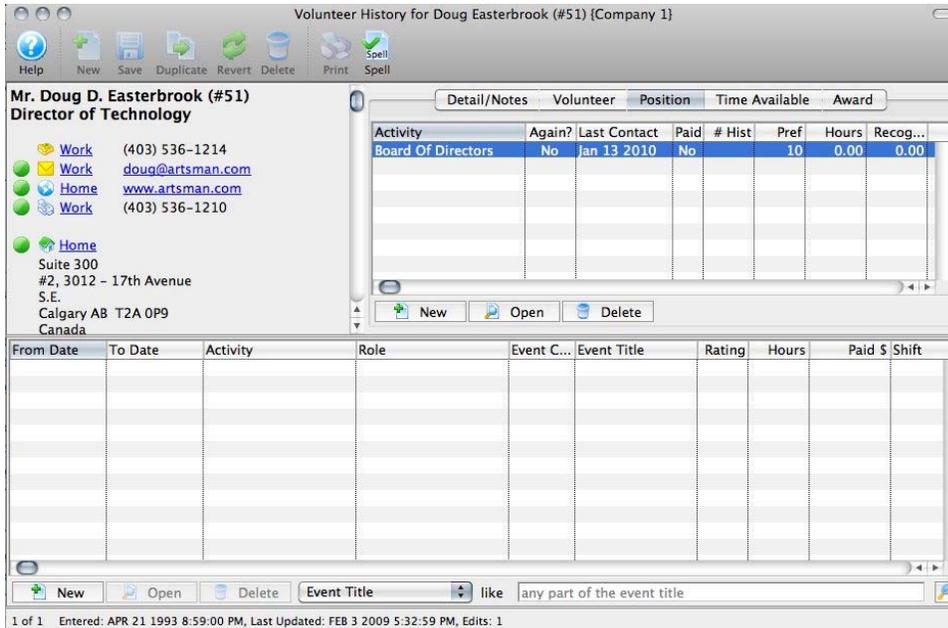
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Volunteers

Opening the Volunteer Window

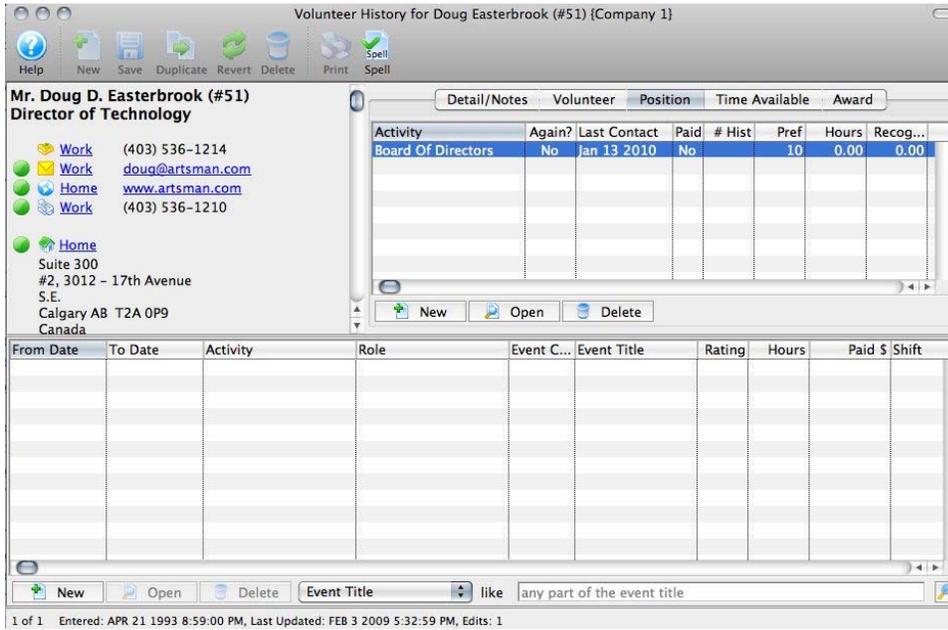
1. Open the Patron List Window.
2. Search for a Patron and click on their name in the list.

3. At the top of the Patron List Window, select the Volunteer  Button. The Volunteer Window will open with the data of the patron.



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.



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
Greeting	Blaine		Height 0.00 ft.	2006-07 0.00
				2005-06 0.00
Birthday	AUG 29 1957		Weight 0.00 lbs.	2004-05 0.00
				2003-04 0.00
Age Code	Adult		SIN #	2002-03 0.00
Status	Status-Active		Gender <input checked="" type="radio"/> Female	Before 2001 10.00
			<input type="radio"/> Male	Total 10.00
General Volunteer Notes				

Parts of the Detail / Notes Tab

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.

The Volunteer Tab

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

Detail/Notes	Volunteer	Position	Time Available	Award
Hair Colour	<input type="text"/>			
Eye Colour	<input type="text"/>			
Vocal Range	<input type="text"/>			
Instrument	<input type="text"/>			
Volunteer Flags				
<input type="checkbox"/> Dance		<input type="checkbox"/> Vol Flag#4		
<input type="checkbox"/> Sing		<input type="checkbox"/> Vol Flag#5		
<input type="checkbox"/> Act				

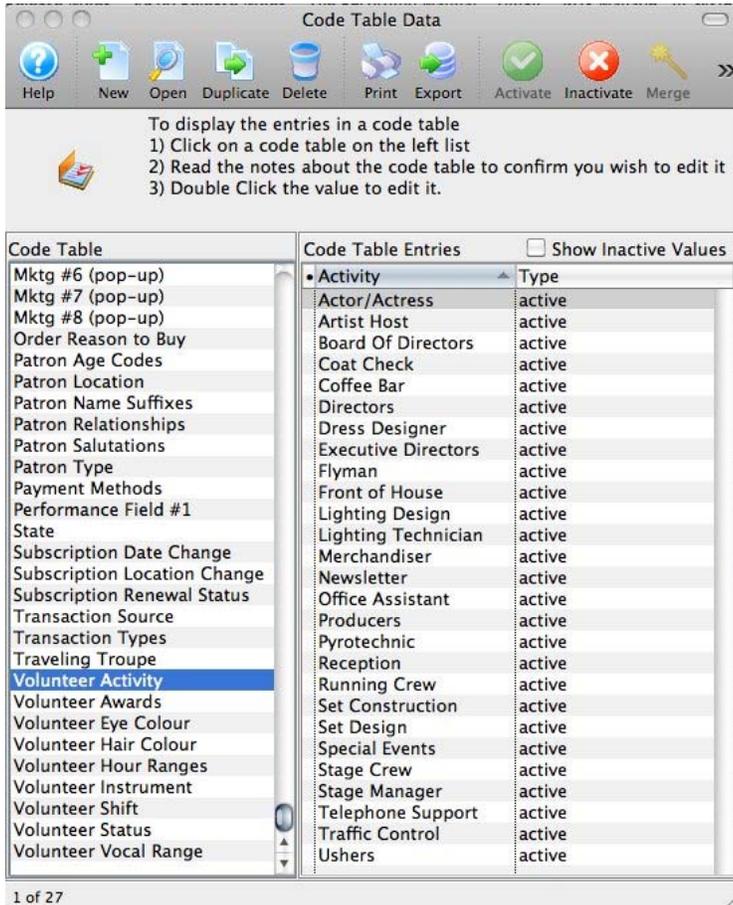
Parts of the Volunteer Tab

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.

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



2. Click the New button  in the toolbar to open the Volunteer Activity Insert window.



- 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.

Code Table Data

Help New Open Duplicate Delete Print Export Activate Inactivate Merge Set

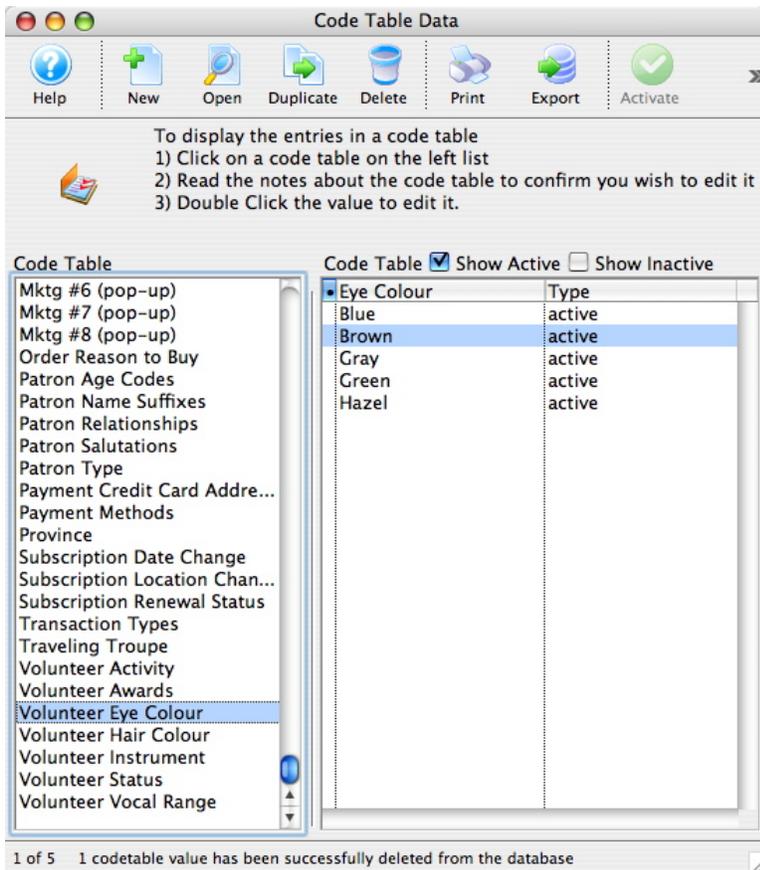
To display the entries in a code table
 1) Click on a code table on the left list
 2) Read the notes about the code table to confirm you wish to edit it
 3) Double Click the value to edit it.

Code Table	Code Table Entries
Misc-Special Letter/Task Ty...	• Activity
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

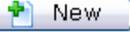
The Custom Volunteer Field 1 field can be customized to suit client needs. The field can be renamed and drop down options edited to reflect client needs. This drop down field is found in Patron Records and Personnel Management.



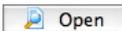
The Positions Tab

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.

Position	A...	Co...	P...	Hist	Pref	Hours	Hour...	Paid Amour
Running Crew	Yes	Ma...	No			0.00	0.00	\$(
Directors	Yes	Ma...	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	\$(

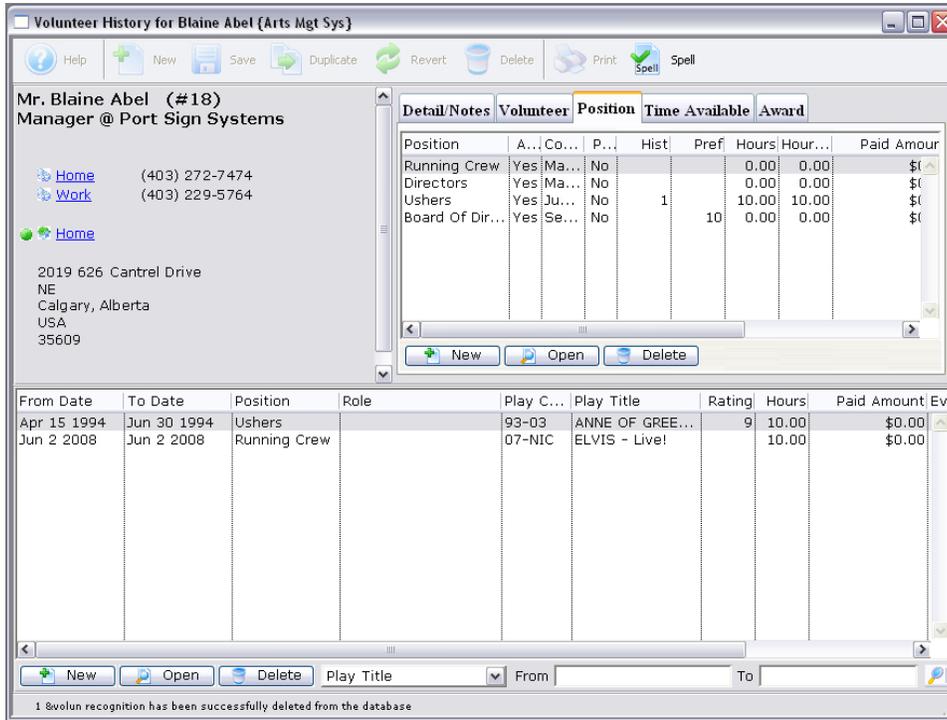
 New
  Open
  Delete

Parts of the Positions Tab

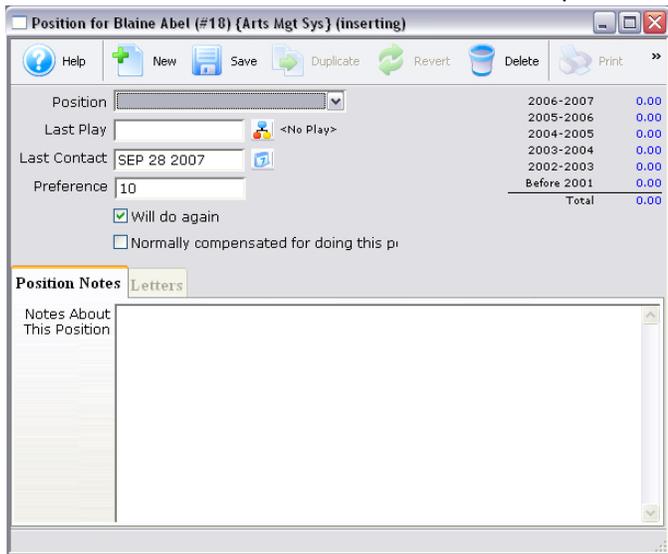
Position	The volunteer code of the position. The codes are setup in Code Tables >> Volunteer Activities.
Again	If the volunteer is still interested in the position.
Contacted	The date last contacted.
Paid	If the activity was paid.
History	If any historical information is available.
Preference	The preference 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.
 Open	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.



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



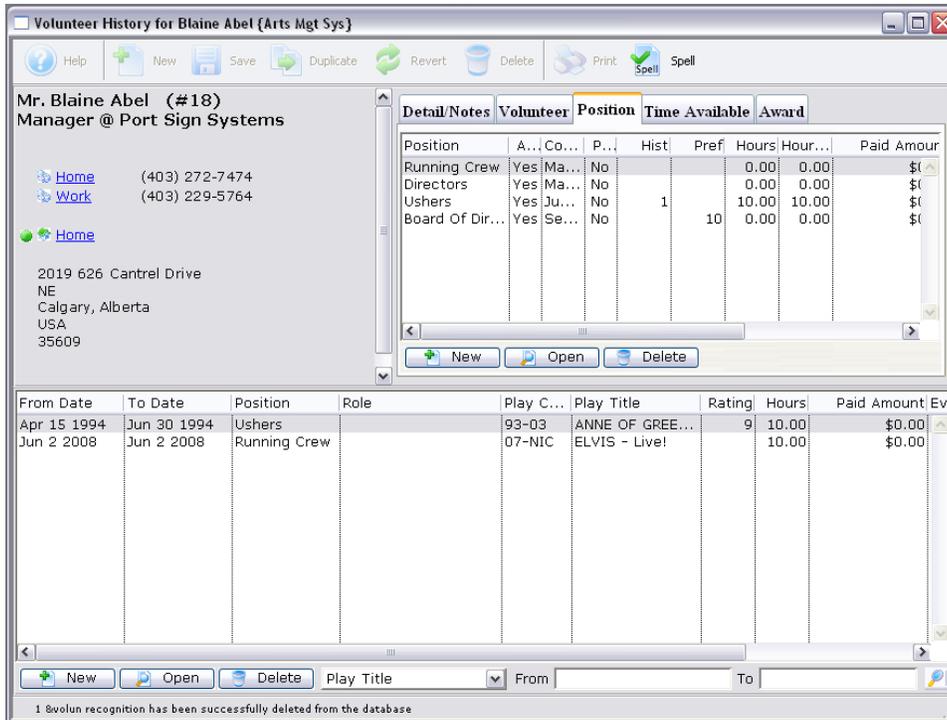
2. Select the position from the list.
The drop-down list is customizable in the Code Tables >> Volunteer Activities.
3. Select a play using the Lookup  button if applicable.
4. This will open the Play List Window allowing you to search for a play. Double click the play to select it.

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.

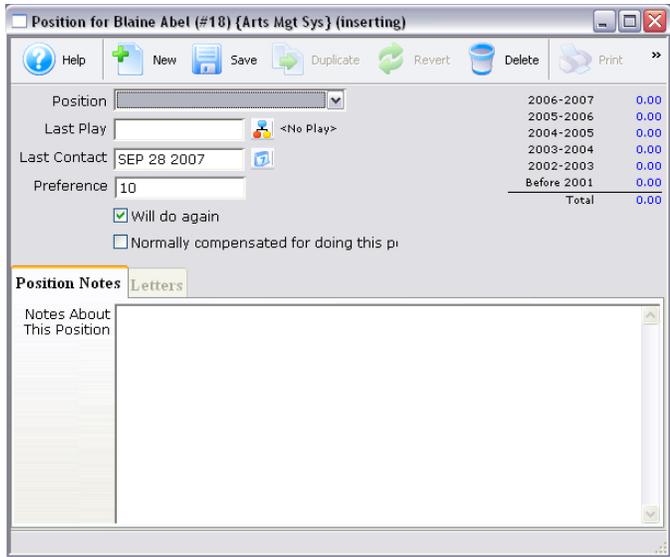
Editing Volunteer Positions

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.



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



5. Change any data as needed.



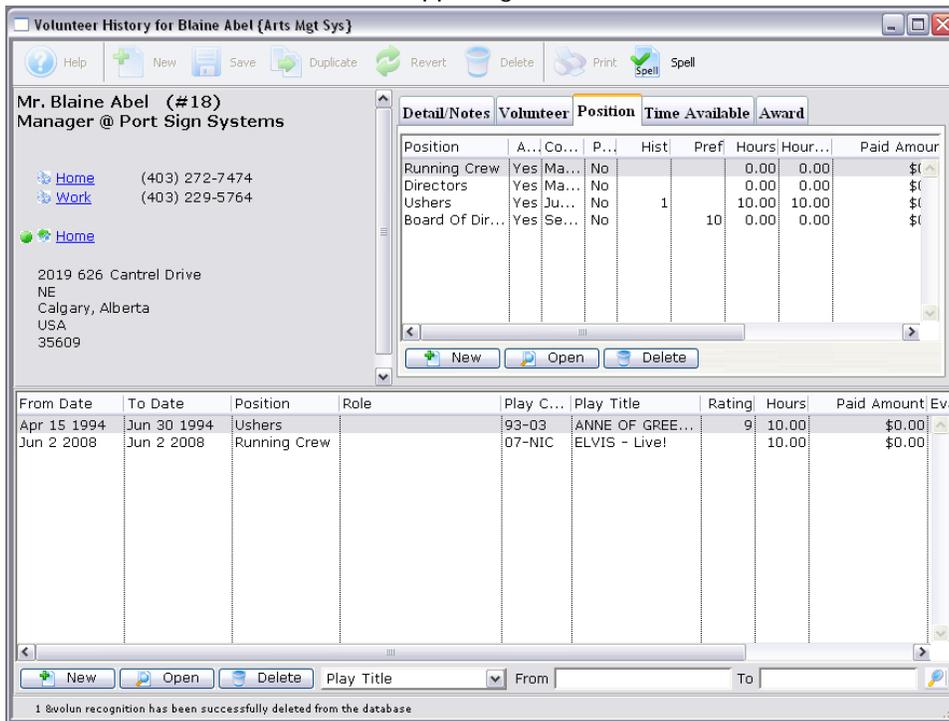
6. Click the Save button.

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.



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:



4. Click Delete  Delete to proceed with the delete.
5. To cancel the position deletion click Cancel .

The Time Available Tab

Month	Day	Start	End	Type	Note
March	Tuesday	02:00 AM	19:00 PM	Available	
March	Wednesday	02:00 AM	19:00 PM	Available	
March	Thursday	02:00 AM	19:00 PM	Available	
March	Friday	02:00 AM	19:00 PM	Available	
April	Tuesday	02:00 AM	19:00 PM	Available	
April	Wednesday	02:00 AM	19:00 PM	Available	

Parts of the Time Available Tab

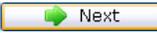
Month	Allows you to specify a particular month to check or set availability
is All Months	Allows you to further refine your search
Month	The Month the Personnel / Volunteer is available
Day	Day of the week the Personnel / Volunteer is available
Start	Start time
End	End Time
Note	Any notes entered on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



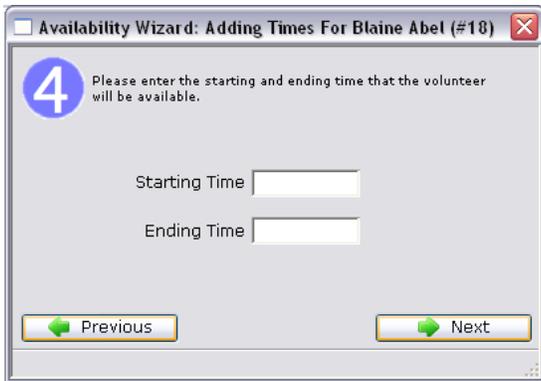
2. Select the availability type.
You can choose whether the time being entered is time that the volunteer is available or whether there is a conflict. If it is a conflict time, then a to and from window will appear next.
3. Click the Next  button to proceed.



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

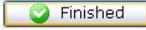


5. Select the days of the week the personnel is available and click the Next  button.



6. Enter the Starting and Ending times and click the  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.



7. Enter any notes associated with the time and click the  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  button on the Times Available Tab.

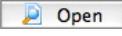
3. Choose whether this is a "Time Available" or a "Time Conflict".
4. Select the month and the day of the week for the time.
5. Enter the start time and the end time of the time.
6. Enter any notes about the time.
7. Click the Save  button to finish creating the new record.

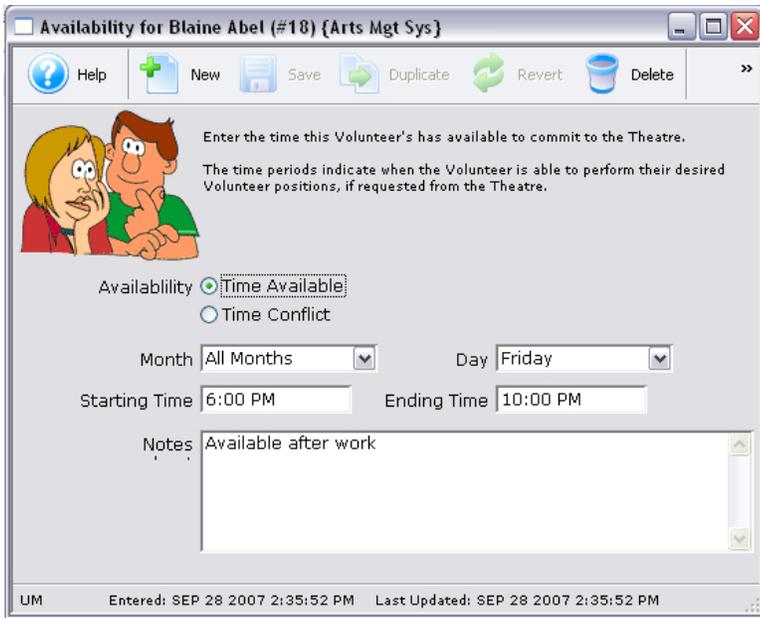
Editing Availability Times

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.

Month	Day	Start	End	Note	Outlet-Ow...	Date Start	Date End
All Months	Monday	18:00 PM	22:00 PM	Av... Available after work	Arts Mgt ...		
All Months	Tuesday	18:00 PM	22:00 PM	Av... Available after work	Arts Mgt ...		
All Months	Wednes...	18:00 PM	22:00 PM	Av... Available after work	Arts Mgt ...		
All Months	Thursday	18:00 PM	22:00 PM	Av... Available after work	Arts Mgt ...		
All Months	Friday	18:00 PM	22:00 PM	Av... Available after work	Arts Mgt ...		

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



5. Make the required changes.



6. Click the Save button.

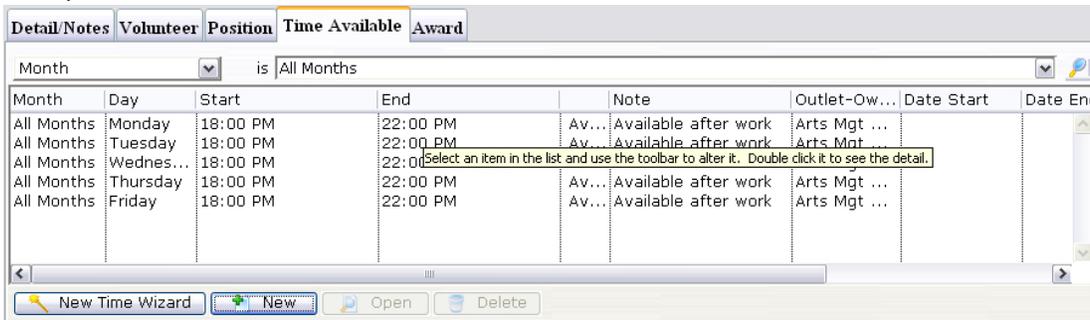
The Time Available Window will close and you will return to the Volunteer Window. The time change will appear in the Time Available Tab.

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.

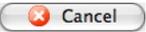
1. Open the Time Available Tab.



2. Select the time you wish to delete.

3. Click the Delete button at the bottom of the tab. The following confirmation window will open.

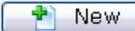


4. Click Delete  to confirm the deletion.
5. Clicking Cancel  will abort the deletion.

The Awards Tab

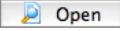
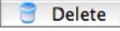
This tab contains award information on the volunteer.

Detail/Notes	Volunteer	Position	Time Available	Award	
Date Awarded	Award	Hour...	Notes	Outlet-Ow...	Outlet
Oct 25 2006	Trop...	25.00		Arts Mgt ...	10
Oct 25 2006	Watch	25.00		Arts Mgt ...	10





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.
	Creates a new award.
	Opens the currently selected award.
	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	Award	Hour...	Notes	Outlet-Ow... Outlet
Oct 25 2006	Pin	10.00		Arts Mgt ... 10.00

Select an item in the list and use the toolbar t

New Open Delete

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

Volunteer Award Detail {Arts Mgt Sys} (inserting)

Help New Save Duplicate Revert Delete Print

 Awards are given to a volunteer after they have given a certain number of hours to the Theatre

Award Type Recognition For Hours Contributed Milestone

Outlet Arts Mgt Sys

Hours Recognized 0.00

Award []

Date Awarded []

Notes Recognized Activities Letters

Notes

2. 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.
3. 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.

Pin - 5 Hours Min. []

Pin - 5 Hours Min.

Trophy - 15 Hours Min.

Watch - 10 Hours Min.

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

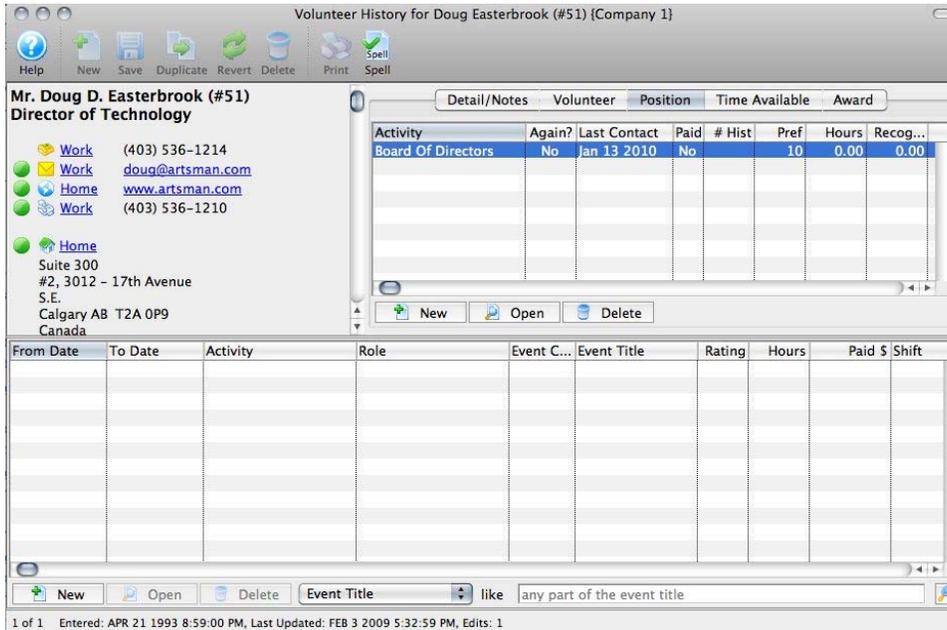
From Date	To Date	Position	Role	Play C...	Play Title	Rating	Hours	Paid Amount	Evaluation	Play #
Apr 15 1994	Jun 30 1994	Ushers		93-03	ANNE OF GREE...	9	10.00	\$0.00	was excellent	67
Jun 2 2008	Jun 2 2008	Running Crew		07-NIC	ELVIS - Live!		10.00	\$0.00		90

Parts of the Activity History / Evaluation Section

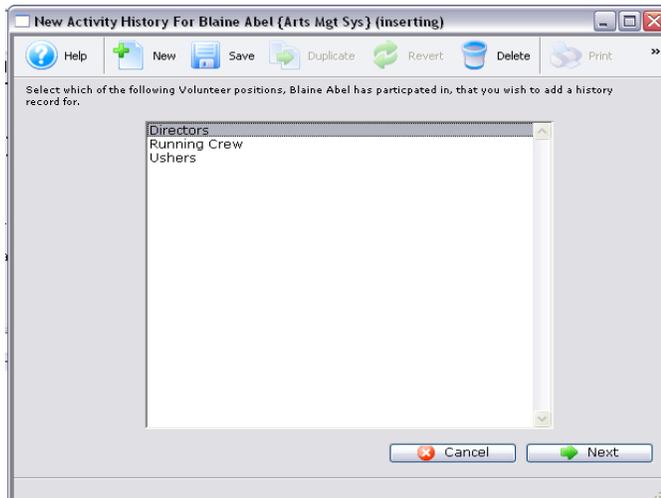
From Date	The date the activity started.
To Date	The date the activity was finished.
Position	The position the activity was performed under.
Role	The role of the volunteer.
Play Code	The play code the activity was performed for.
Play Title	The play name the activity was performed for.
Rating	The rating 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.
 New	Inserts a new activity into the personnel record.
 Open	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

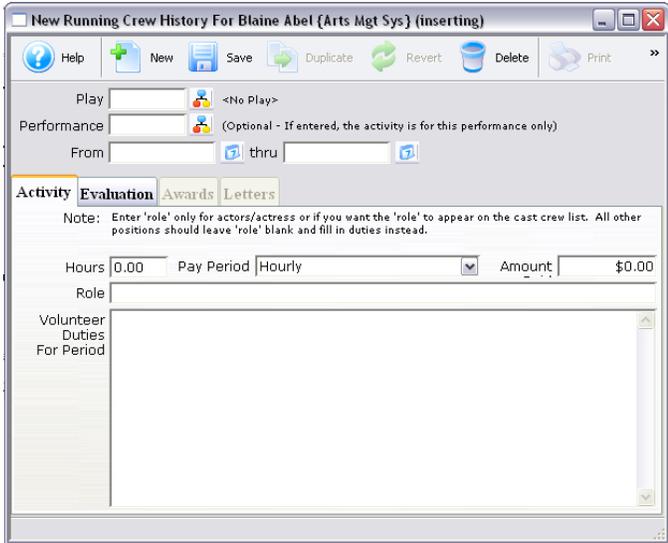
- Once a volunteer has positions setup they can receive historical and evaluation comments. This data is displayed at the bottom of the Volunteer Window. The history and evaluations can help to choose the best personnel for the position you require.
Find the Volunteer for which you wish to add an evaluation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



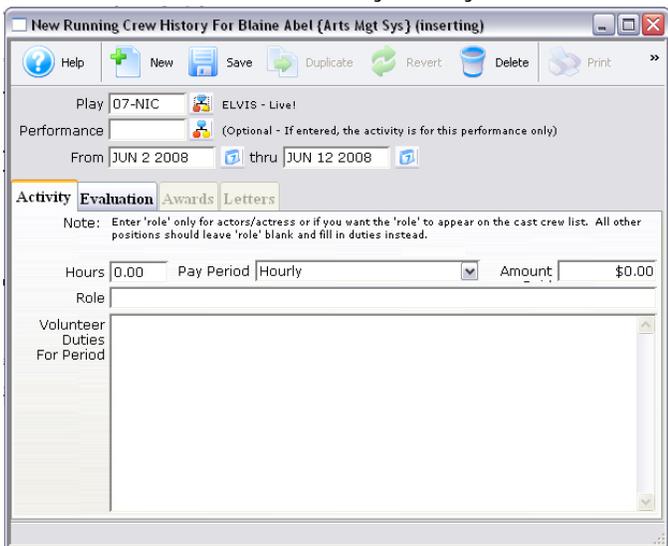
- Click the New  button at the bottom of the window.



- Select the position the activity was performed under.
- Only positions you have setup for the selected volunteer will be displayed. Click Cancel  to return to the Volunteer Window where you can add a new position. [Click here](#) to learn how to setup positions.
- Click OK . The Activity History Window will open.

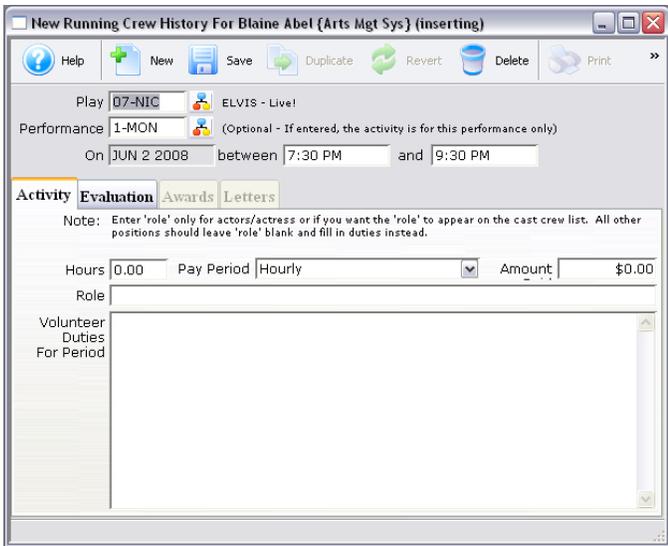


6. Click the Play Lookup  button.
 - This will open the Play List Window allowing you to search for plays.
 - Double click the play for which the activity was performed.
 - You will return to the Activity History Window.

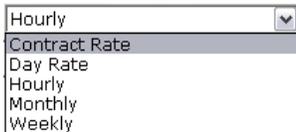


The play code will be displayed in the field along with its title to the right. The From and To fields will be filled with the dates which the play runs.

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.

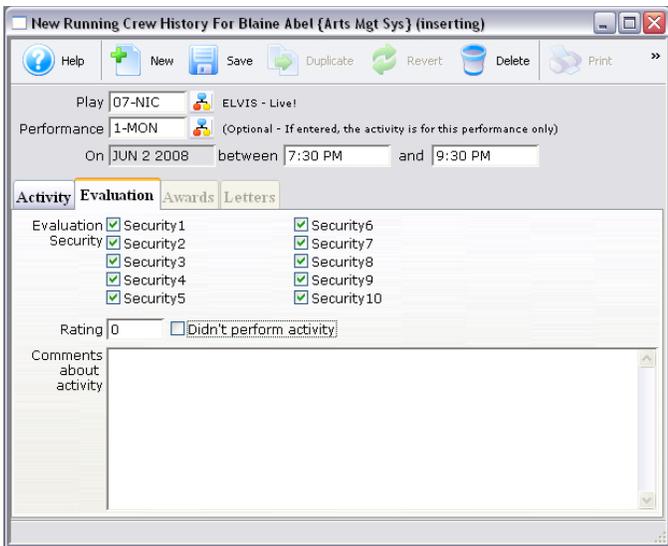


8. Change the times if needed.
9. Enter the number of hours to be credited to the volunteer for working.
10. Select the pay rate and enter the amount if applicable. Leave this field blank if the activity was performed voluntarily. The selections in this drop-down are:



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.



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.

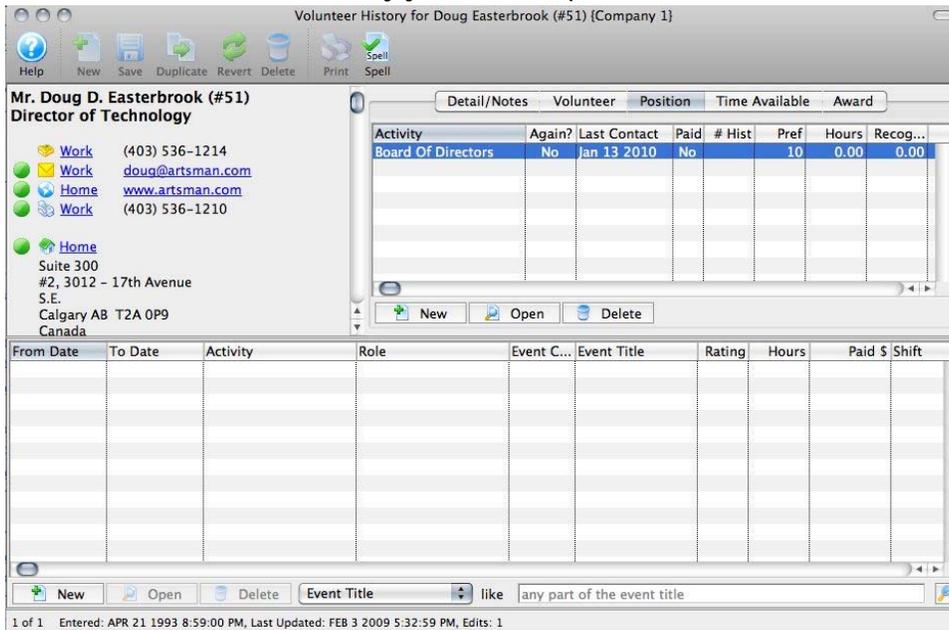


16. Click Save  .

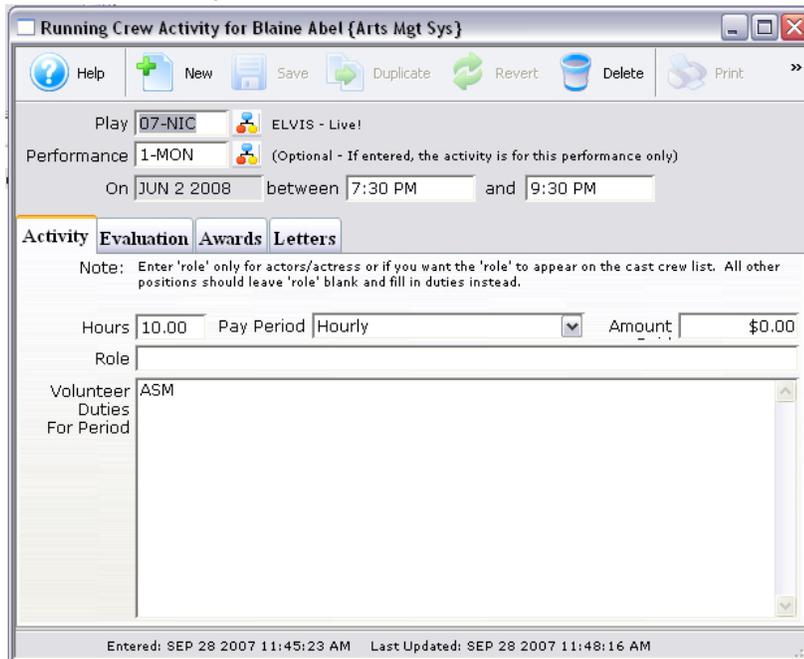
The Awards and Letters Tabs will now become available.

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.



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

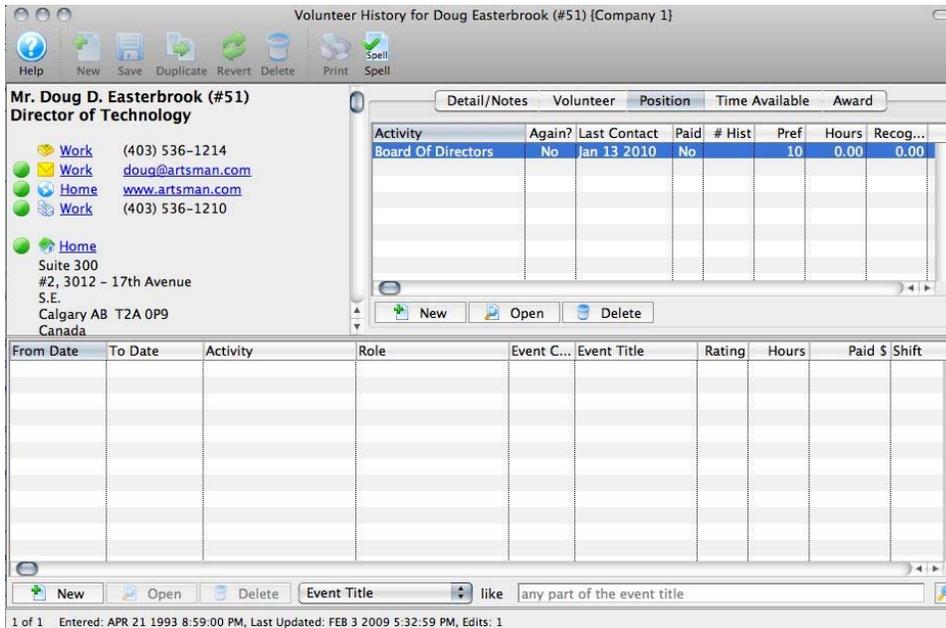


4. Edit the information.
5. Click the Save  button.

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.



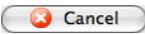
Click on the activity that you wish to delete.

Click the Delete  button.

The following warning window will open.



Click Delete .

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