Houston Grand Opera Guild

Track It Forward
Administration Guide

Version 0.9

Written by:

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Houston Grand Opera Guild Vision

Engage, involve, and retain a larger, more diverse membership in order to increase volunteer participation.

Houston Grand Opera Guild Mission

The mission of the Houston Grand Opera Guild is to support HGO in its endeavor to bring together larger and more diverse audiences to experience grand opera. This will be accomplished by:

- Educating the opera and music theater audiences of tomorrow,
- Promoting active participants through service and events,
- Contributing financially to the opera where consistent with its education and service objectives.

Table of Contents

Message from the Co-Presidents

We would like to thank all of the Board members, event chairmen and team leaders who give so much time and effort make the Guild programs as successful as they are.

Among many other things, leaders are responsible for seeing that volunteer hours, miles driven and other expenses are collected for themselves and their volunteers. Previously this has been done inconsistently both as to format and completeness. Track It Forward can make this process easier by allowing hours and expenses to be captured as they happened. By capturing data as you go, it simplifies or eliminates the need to compile final reports.

The Events function provides a uniform way to sign people up for meetings, parties and other activities that occur at definite times and places. It also provides a greater visibility of who is volunteering for what events. Please use it where possible.

Please set a good example for your team members by recording your hours and expenses in a timely manor and encourage them to do the same.

Fred & Imelda Gott
Guild Co-Presidents

Administration

All of the Houston Grand Opera Guild (HGOG) specific configurations in Track It Forward (TIF) have been created and are maintained by the administrators. Collectively administrators are TIF users have been given special privileges to perform certain functions.

This document assumes knowledge of the contents of the HGOG *Track It Forward User Guide* for basic functionality as the regular volunteers experience the results of these administrative functions.

TIF Help Pages

The Track It Forward web site has several very useful help pages that cover administrative functions http://help.trackitforward.com/help_center

The contents of this document are a distillation of those pages with a focus on the tasks that chairmen and team leaders may be requested to perform. The contents are HGOG TIF specific and have screen-shots added for clarity.

Administrative Privileges

There is a hierarchy of administrative privileges. Privileges are granted on an as needed basis to provide for efficient use of volunteer time while protecting the TIF database from inadvertent corruption. The following table summarizes the privileges each administrator has:

	Owner	Manager	Coordinator	Reporter	Approver	Field Approver
Delete Site	x					
Edit Settings	x	x				
Invite Volunteers	x	x	x			
User Approval Notification	if no coordinator	if no coordinator	x			
Milestone Award Notification			x			
Edit Hours / Volunteers	x	x	x		x	specific
View Hours / Volunteers	x	x	x	x	x	specific
Approve Hours	x	x	x		x	specific
Hour Notification					x	specific

Administrative privileges for Owner, Manager, Coordinator, Reporter and Approver are site wide grants that apply to everything within their scopes of authority. Field Approver has limited authority over designated activities.

If you have problems getting started or with any of the tasks in this document, contact the Guild at guild@hgo.org where someone will be glad to help you.

Connecting to TIF

To perform TIF administrative functions, it is necessary to connect to TIF using a web browser. Connecting to TIF is covered in the HGOG *Track It Forward User Guide*.

TIF Users that have been granted site wide administrative privileges will find they have additional menu choices once they have connected to TIF.

Site wide administrative functions are accessed from the Organizer Dashboard. The link to the Organizer Dashboard can be found here
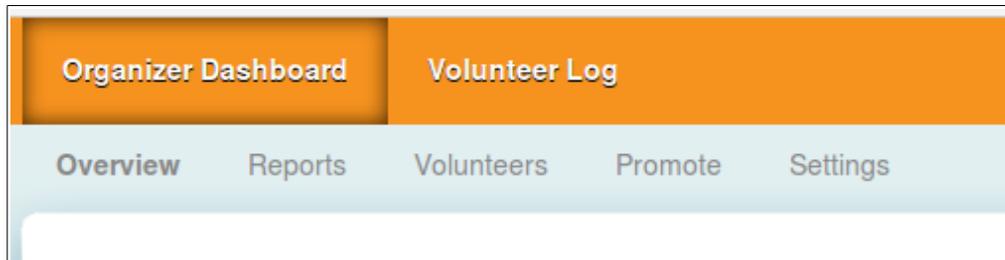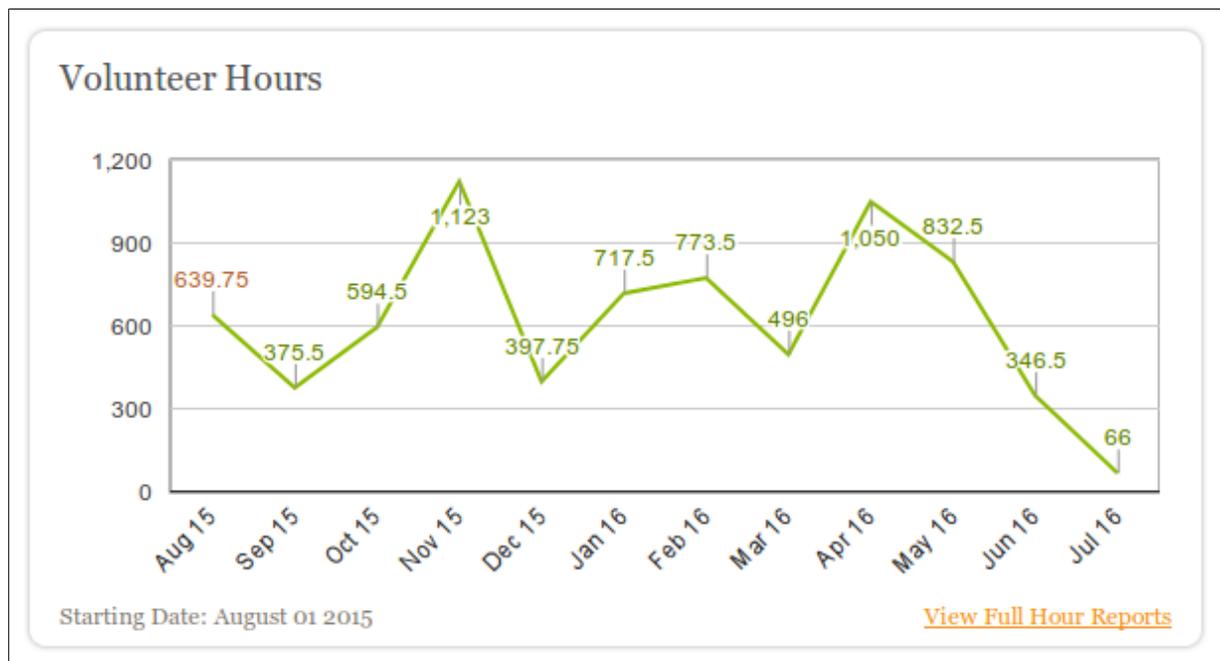

or here

Organizer Dashboard

The complete Organizer Dashboard has several components. Depending on the level of privilege granted, the dashboard may be missing some components or a component may be present but without the ability to make changes.
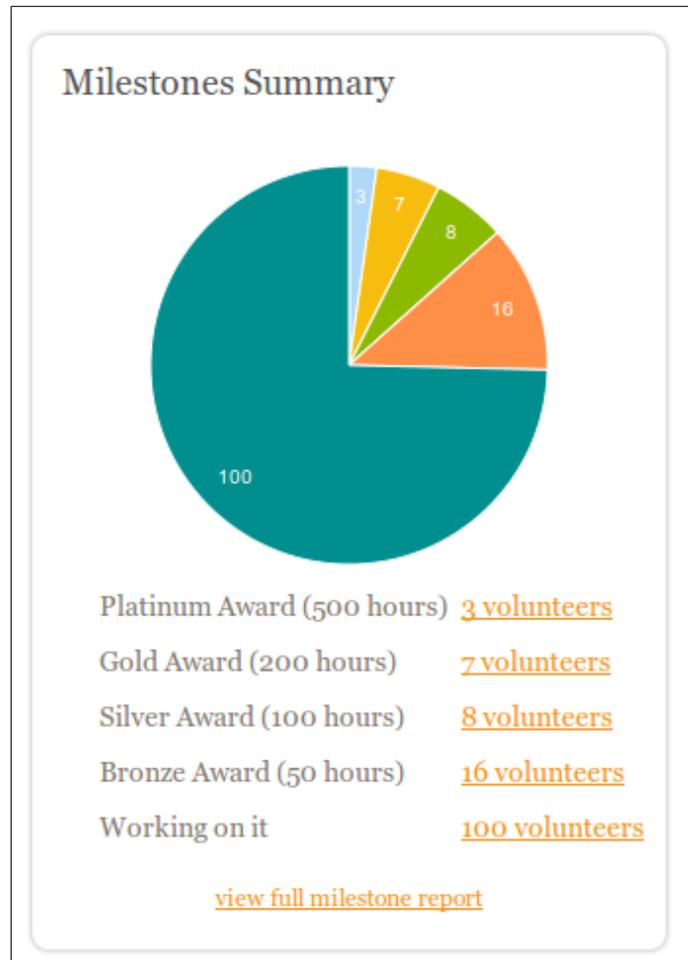
The complete Organizer Dashboard menu looks like this:

When going to the dashboard, the Overview is the first view shown. At the top there is a pane showing the hours logged by month:

There is pane showing the progress towards the different milestone levels:

Milestones Summary

Platinum Award (500 hours)   3 volunteers

Gold Award (200 hours)   7 volunteers

Silver Award (100 hours)   8 volunteers

Bronze Award (50 hours)   16 volunteers

Working on it   100 volunteers

view full milestone report

The links in the page go to a page the lists the individual users with their total hours.

The Report Summary pane is where most administrative work is done:

Report Summary

| Hour Submissions | Approve Hours (1) | Approve Users (4) | Award Milestones |

⊕ 4 days ago   Guild Office volunteered for 0.5 hours   edit | approve ☐

Expand All   Select All ☐

Approve Logs

If there are hours to be approved, the Approve Hours tab will present first. Otherwise the Hour Submissions will present.

The Award Milestones tab will have entries when a volunteer passes one of the hours milestones. The administrator confirms award which causes email notifications to be sent.

Normally, request for adding volunteers to TIF come from a committee chairman after which an administrator will create an account and email an invitation to activate the account. The volunteer part of this process is described in the HGOG TIF User Guide.

In some cases, potential volunteers will find one of the links in the TIF interface where a request to join TIF can be made. In these cases the administrators will confirm that the request is legitimate and not a duplicate of an existing user before approving the request.

The Submit Hours pane allows an administrator to submit hours for other users. This function is discussed below.

Approving Submissions

The administration privilege given to committee chairmen, team leaders and event chairmen is the Approve Hours function. A user is granted Approve Hours for one or more Activities.

When a user submits a new entry an email is sent to the Approvers let them know that there are new submissions to be approved:

Guild Office has volunteered hours at your site.
Volunteer: Guild Office
Email: guild@houstongrandopera.org
Date: 07-12-2016
Hours: 0.5
Activity: Guild Board
Notes:
Approve all recent submissions at your site page Houston Grand Opera Guild.
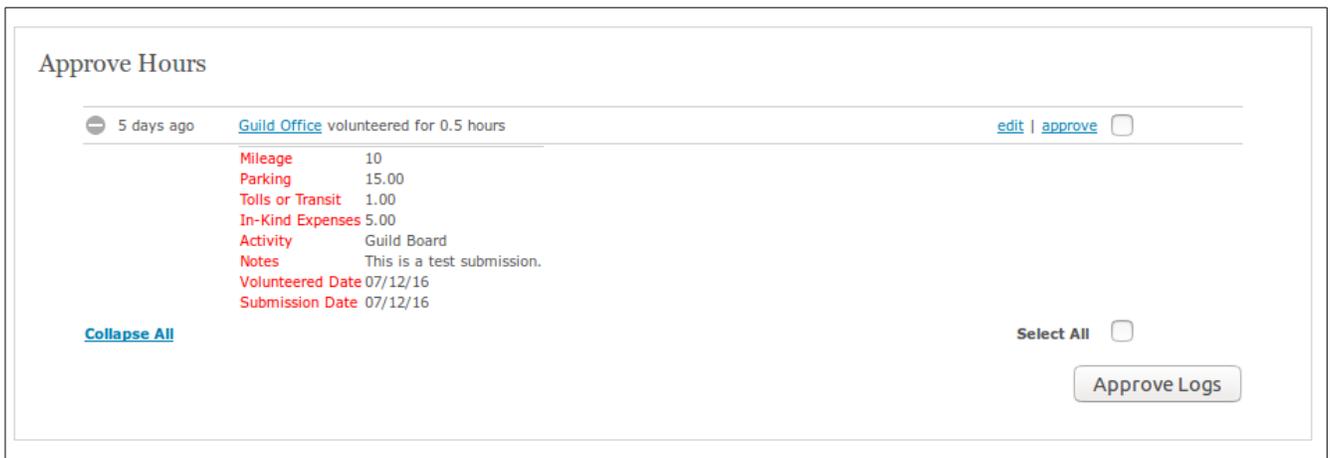-- The Track it Forward Team

You can get to the TIF Approve Hours page by following the link in the email or from either of the next two TIF pages:

Either of these links will take you to the Overview Approve Hours page:
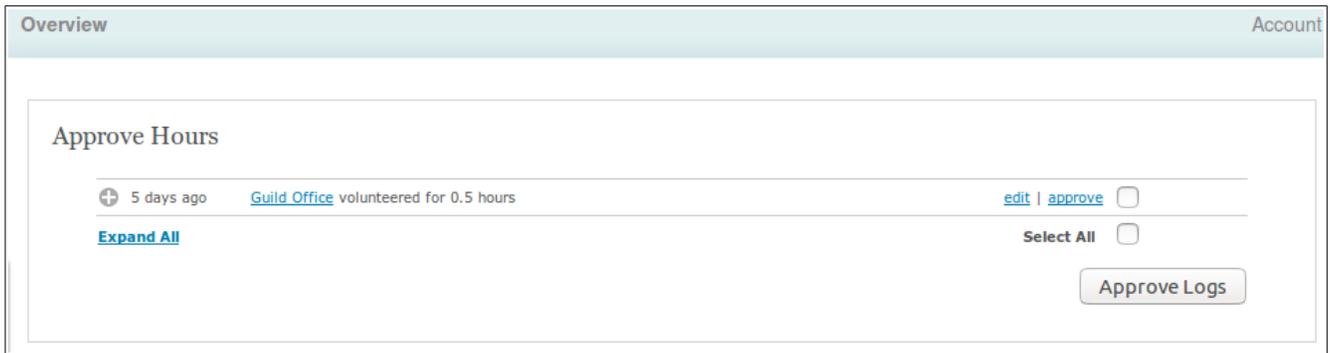
Click on the "+" symbol for an individual submission or click "Expand All" to see the details for all submissions.

Some common mistakes to look for are
- Wrong volunteer
- Wrong Activity
- Wrong Volunteer Date
- Duplicate submissions
- Obviously bad or misplaced numeric values

The smart phone apps are especially prone to errors if the person doing the entries is not very careful.

Wrong volunteers can be fixed only by TIF administrators who can edit volunteer submissions. When you find such errors, please send an email to the TIF managers.

The other errors can be fixed by following the "edit" link for the submission. Edit takes you to this window. If you suspect a bad value but do not know the correct one, you can ask the volunteer to edit their own submission. Volunteers and Approvers can edit submissions as long as they have not been approved.

Overview

Name:
Guild Office

Site:
Houston Grand Opera Guild

Hours
0.5

Date Volunteered
Jul   12
2016

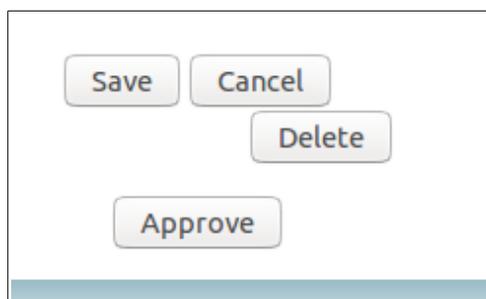**Activity**
Guild Board

Mileage:
10

Parking:
15.00

Tolls or Transit:
1.00

In-Kind Expenses:
5.00

Classification:

After changes have been made press Save or Approve. Duplicate entries can be removed by pressing Delete.

Editing Approved Submissions

Once a submission has been approved only the TIF administrators can edit it. Send an email to the TIF administrators with as much detail possible to aid in the identification an correction. There are many submissions in TIF. Depending on the age of the submission, various search methods may be needed to find the correct submission.

Submitting hours for others

Some event organizers may wish to enter hours at the event for each of the participating volunteers. This ensures the prompt recording of all hours. In some cases where participation goes to earning benefits, it makes sure that everyone is properly recognized.

In other cases, a volunteer may have accumulated hours in a spreadsheet or other format rather than entering them in TIF. An administrator can enter these hours individually or in bulk using one of the methods below.

Kiosk method

The permission that allow submissions to be made for other users carries with it other permissions that as a best practice is not granted widely. To allow group submissions to be made at events, a special TIF user (hgoguildkiosk) has been created. The password for this user can be given to the event organizer for the duration of the event. The password will be changed after the event is complete.

The hgoguildkiosk userid can be used from the TIF web site by going to the Organizer Dashboard or by one of the smart phone apps. In the case of the smart phone app, the normal display will will have an additional drop down menu for selecting the volunteer the submission is for.

The Submit Hours pane on the Organizer Dashboard is used create submissions for any user:
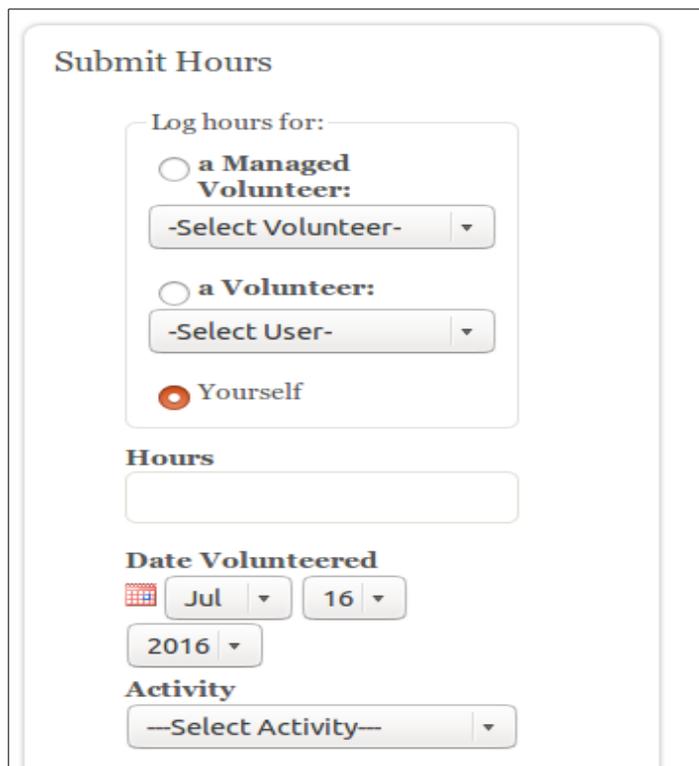
The kiosk user selects the volunteer for the submission and then fills in the rest of the information as is done for any other volunteer submission. The only difference is to select the correct volunteer from either the Managed Volunteer list or the Volunteer list.

- A "Volunteer" is someone who has a TIF login account. Most volunteers will be in this category.

- A "Managed Volunteer" is a volunteer in the system without an email address.

Managed Volunteers are created by an administrator. Only administrators or the kiosk user can log efforts for Managed Volunteers. Long term use of Manged Volunteers should be used only for those rare volunteers that do not do email. Short term use is OK until an email address is provided. An administrator can covert an Managed Volunteer to a Volunteer once an email address is provided.

Spreadsheet method

If a user or a committee has accumulated hours and expenses in a spreadsheet it possible to import them in bulk rather than transcribe each entry individually. To do this contact a TIF administrator. The import function is on the Volunteers page:

Create an Excel document with the following columns: Email, Date, Hours, Activity, Notes , Mileage, Parking, Tolls or Transit, In-Kind Expenses, Classification
- Email must be from an already existing user that is part of your site
- Date must be in the format YYYY-MM-DD, i.e. 2013-01-02
- Hours must be a number reflected in your hour drop-down if it's enabled
- Activity must be an activity reflect in your activity drop-down
- Notes can be whatever you want
- Mileage, Parking, Tolls or Transit and In-Kind Expenses must be numeric values (no text or $ signs)

Creating Events

After Approve Hours, the most common enhanced administration function is managing events. Events are used for signing up volunteers for meetings and other volunteer opportunities or providing a way for the public to RVSP for events.

To ensure that events are created in a uniform manor, the HGOG TIF has been configured so that only the administrators can create events. Once an event has been created, the designated Organizer can perform all functions necessary to administer the event.

Events management is accessed by following the "Event Sign-ups" link:
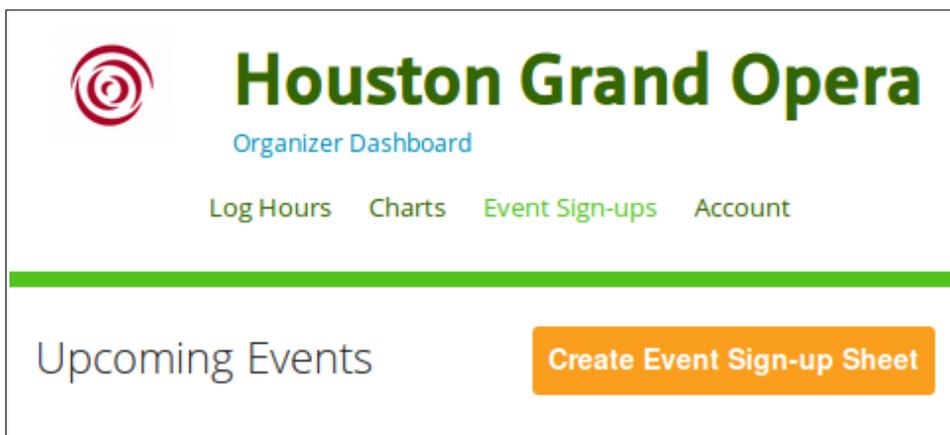
Press "Create Event Sign-up Sheet" to begin the process.
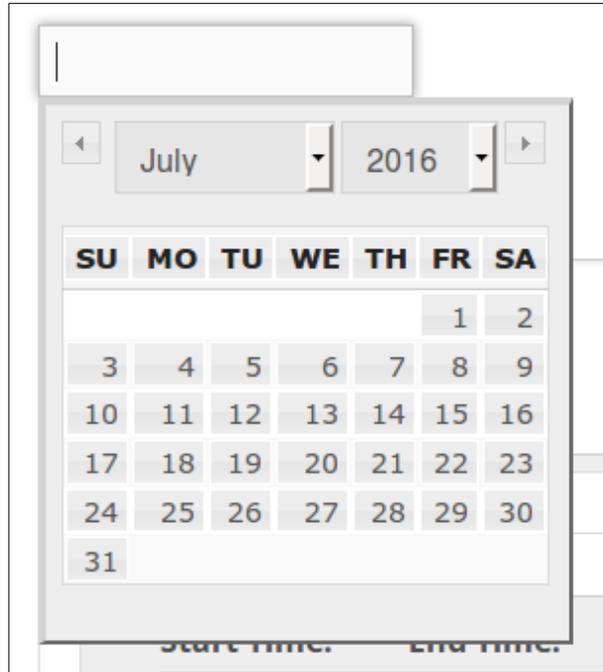
Describe the Event

First it necessary to describe by giving it a title.

Next right click on the Event Date field to select the Event Date from the calendar widget.

Next enter an Event Description. A description might include the location for the event or information about the nature of the event.

Add shifts

An event needs at least one Shift.

"Shift" is TIF terminology for a time period and a role at an event. Additional shifts can be added with the "Add more values" button.

The circle icon with the diagonal bar (on the right side) can be used to delete a Shift.

Start Time and End Time are specified by right click on the time fields and picking the times from the pop-up menus.

Shift Title can be something generic like "Guest" or "Attendee" when there is only one shift. If there are multiple roles to be filled, the different roles should be reflected in the shift title: e.g. for a Boutique Performance, two of the Shifts are "Cashier" and "Sales Assistant".

Description can be used to indicate any special requirements for the shift; e.g. "Requires standing for long periods."
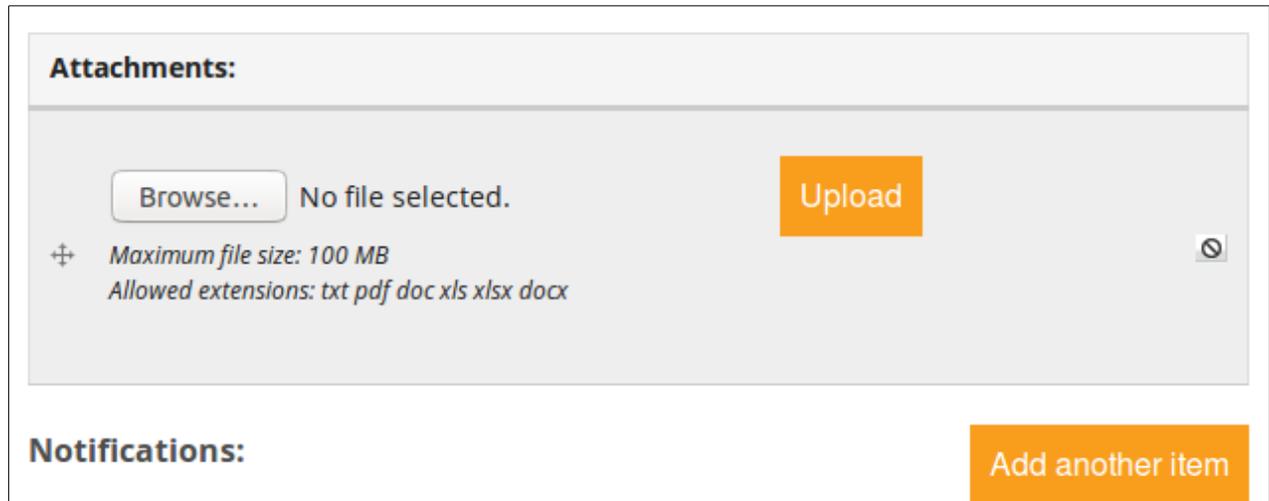
Volunteers Needed specifies the maximum number of volunteers will be accepted for the role. Unlimited can be use for general attendance for something like Opera Night Live or a team meeting. For something like "Boutique Performance", only three cashiers are needed. The number volunteers is specified by clicking the bar on the right side of the field. Pick the number of volunteers from the pop-up list. When sign-up of the shift reach the maximum number, the shift shows as "FULL" on the sign-up page.

Add attachments

If there are documents that need to given to those who sign-up, they can be added here. Use the Browse button to find the file on your computer and then press Upload.

The circle icon with the diagonal bard (on the right side) can be used to delete an attachment.

Select notifications

TIF has the ability to send notifications when various things happen in the life of an event. The check boxes on the left side are used to turn the notifications on and off.

Notifications:

☑ Email volunteer upon sign up

☑ Email organizer upon sign up

☑ Email organizer when volunteer cancels

☑ Email volunteer 2 days before event

☑ Email volunteer after event to log hours

☑ Email signed-up volunteers if event is deleted

Email volunteer upon sign up

When someone signs-up a confirmation email is sent:

> You just signed up for a shift for Guild Board Meeting on Tuesday, August 9th 2016.
> 6:30pm – 8:00pm Monthly Meeting
> You can view this event on Track it Forward here:
> http://www.trackitforward.com/site/70567/event/84752

Email organizer upon sign up

When someone signs-up an email is sent to the organizer.

> Guild Office (guild@houstongrandopera.org) just signed up for a shift for Demo Event on Monday,
> August 1st 2016:
> 8:00pm - 9:00pm
> Attendee
> Reply directly to this email to message them.
> You can view this event on Track it Forward here:
> http://www.trackitforward.com/site/70567/event/85494

When there are many events or volunteer slots, this can produce a lot of emails.

Email organizer when volunteer cancels

When a volunteer cancels an RSVP, the organizer is informed so that a replacement can be secured if necessary. Do not rely on this for last minute cancellations. Last minute cancellations should be made by phone or text.

Guide Office just canceled their shift for Demo Event on Monday, August 1st 2016:
8:00pm - 9:00pm
Attendee
You can view this event on Track it Forward here:
http://www.trackitforward.com/site/70567/event/85494

Email volunteer 2 days before event

An email is sent to the each person who signed up two days before the event as a reminder.

```
From: Guild Office [reminders@trackitforward.com]
Sent: Friday, July 29, 2016 10:33 PM
To: Guild Office
Subject: Reminder for Demo Event
Just a reminder that you RSVP'ed for these shifts in 2 days for Demo Event on
Monday, August 1st 2016.
8:00pm - 9:00pm    Attendee
You can view this event on Track it Forward here:
http://www.trackitforward.com/site/70567/event/84522
```

Email volunteer after event to log hours

After the event a reminder is sent to remind the volunteer to log hours and expenses. This is not used for public events or when hours are captured at the event.

```
From: Guild Office [reminders@trackitforward.com]
Sent: Monday, August 01, 2016 7:37 PM
To: Guild Office
Subject: Log your hours for Demo Event
Don't forget to log your hours on Track it Forward for the time you spent at Demo
Event on Monday, August 1st 2016.
```

Email signed up volunteer if event is deleted

Should an event be canceled, those who have signed up are notified by email.

From: Track it Forward [noreply@trackitforward.com]
Sent: Friday, July 29, 2016 9:17 PM
To: Guild Office
Subject: Organizer canceled event Demo Event on Saturday, July 30th 2016
Jerry Bohannon canceled event "Demo Event" on Saturday, July 30th 2016.

Set Permissions

Is the event for the general public or just volunteers? Most event are for volunteers who are expected to log hours and expenses. For these events, the setting should be Yes. For events, for the general pubic guest attendance; e.g. Opera Night Live and Volunteer Gathering, the setting should be No.

Require Track it Forward account in order to RSVP?:

◉ Yes
◯ No

If you require Track it Forward accounts, we will prompt the user to login / create an account before RSVP'ing. If you do not require Track it Forward we will prompt them to log in / create an account as give them the option of just leaving their name, phone number, and email.

Who can see who has signed up? Normally this is Logged in Volunteers.

▾ Permissions

Show RSVP List to:

◯ Anyone

◉ Logged-in Volunteers

◯ Managers Only

Password:

[   ]

If you set a password, volunteers will need to enter a password to access this event signup sheet. The event signup sheets will still be listed in the calendar.

Organizer:

Guild Office ▾

[Save]

Setting a Password makes the event private. The event appears on the calendar, but the sign up page can only be accessed after the password is entered.

The Organizer drop down menu allows the person creating the event to turn management of the event over to someone else. The Organizer will be the one receiving the notifications.

Event Management

Once an event has been created, several tasks are available to the Organizer on the bottom of the sign-up page.

Guild Board Meeting

Tuesday, August 09 2016

University of St Thomas
West Alabama @ Montrose
Parking garage on Graustark

| 6:30pm - 8:00pm | Monthly Meeting | ⊕ 1 | CONFIRMED |

Edit Event | Duplicate Event | Invite Volunteers | Email Attendees | Roster | Sign In Sheet

Edit Event

The Edit Event link makes the functions described in the preceding section available for modifying the settings for the event.

Create a duplicate event

To create a similar event from the current event definition, use Duplicate Event. The default event name is "Clone of …." . The event date is the same as the current event. Use the Edit Event function to change the Event Title, Event Date and make any other necessary changes.

Invite Volunteers

After an event is created, how do people know to sign-up? Outside of TIF, a direct link to the sign-up page can be included in an email or a web page. Alternately there is a private Guild sign-up page:

http://www.hgoguild.org/SignUp.htm

TIF users can be invited from within TIF via email.

The default choice on the TIF invitation page, is to invite all volunteers. Due to the large number of volunteers in TIF, this is not a good idea.

The Select Volunteers method is usually the best choice. When Select Volunteers is checked the menu expands to show all Volunteers in TIF. There is a check box by each volunteer's name. Select the people on the invitation list. The invitations will go the email addresses registered in TIF.
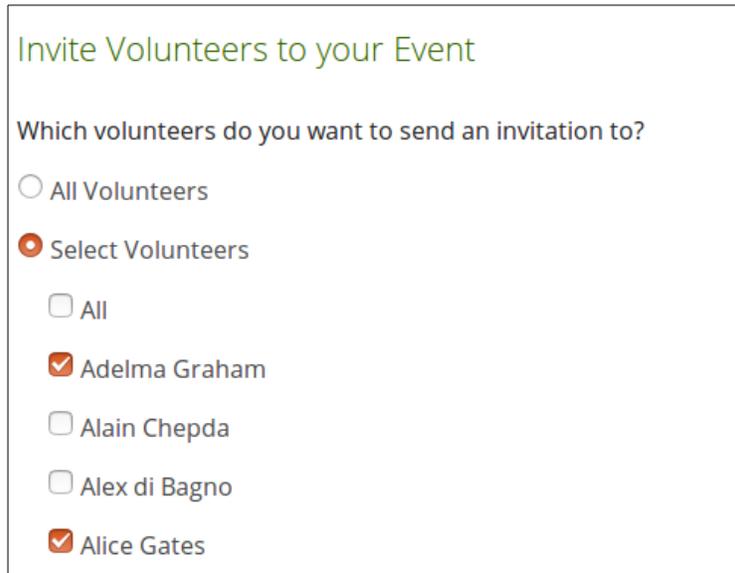
If you have the email addresses for the invitation list in a separate file, Email List may be selected and the email address copied from the file and pasted the box.
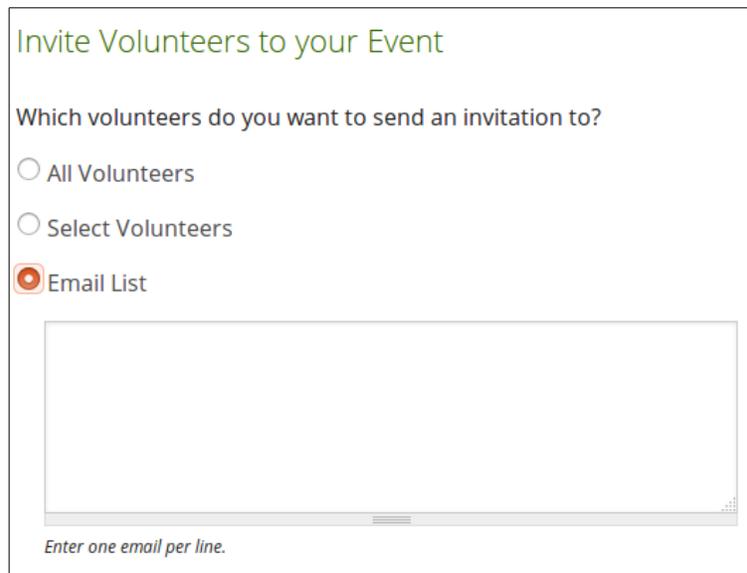
The next task is to compose the invitation email. Give the email a descriptive subject line and fill in the message body.

Email List

Email subject line:

Volunteer at Guild Board Meeting on Tuesday, August 9th 2016

Write a message to your volunteers:

Send Preview Email   Send   Skip and go to event

The "Send Preview Email" button will send a test email to the organizer for proofreading. When the email looks correct, the "Send" button will send the email to the invitation list. A direct link to the event sign-up page will appended to the bottom of the email.

Email Attendees

The Email Attendees link can be used communicate with those who have signed up for the event.

Email Attendees to your Event

Email subject line:

Guild Board Meeting on Tuesday, August 9th 2016

Write a message to your attendees:

Send Preview Email   Send

It functions the same way the email invitation works.

View the roster

Roster of Volunteers

Guild Board Meeting

Tuesday, August 09 2016

Time	Shift	Sign Ups	Name
6:30pm - 8:00pm	Monthly Meeting	3	Jerry Bohannon
" "			Janis Doty
" "			Joseph Sims

As the sign-up period progresses, the organizer may want view a list of who as signed-up. The "Roster" link show he complete list of RSVPs including the shifts they have volunteered for.

Print a sign in sheet

Then "Sign In Sheet" button creates a printable form that is suitable for use as sign-in sheet at the event. This can be used if it is not convenient to use the kiosk user account to enter hours, miles and expenses directly into TIF.

Sign In Sheet

Guild Board Meeting

Tuesday, August 09 2016

Time	Shift	Name	Time In	Time Out
6:30pm - 8:00pm	Monthly Meeting	Jerry Bohannon		
" "		Janis Doty		
" "		Joseph Sims		

University of St Thomas
West Alabama @ Montrose
Parking garage on Graustark

Given the prevalence of smart phones, tablets and laptops, direct entry with the kiosk user is strongly recommended.
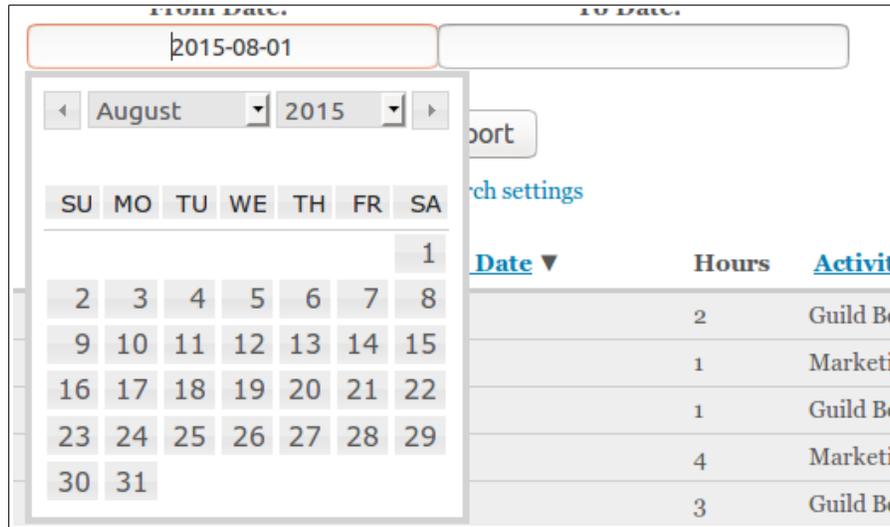
Reporting

The Reporting function is accessed from the Organizer Dashboard by users that have been granted reporting privileges. Reporting is used for QC of individual records and creating summaries of Guild, committee or individual submissions.
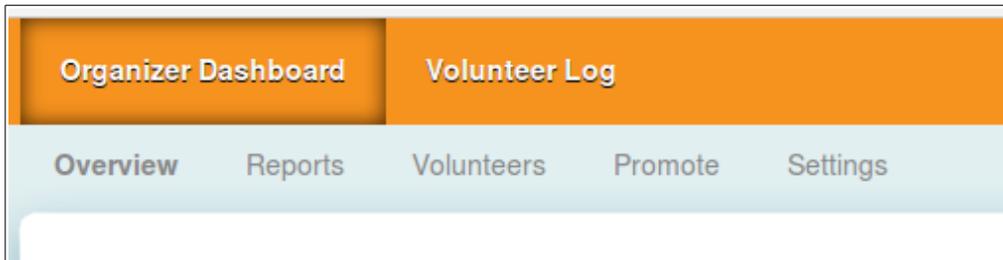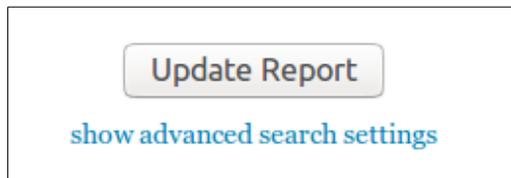

The default report is an listing of individual hour submissions in descending time sequence. The default From Date is the beginning of the Guild fiscal year. The default To Date is the current date.
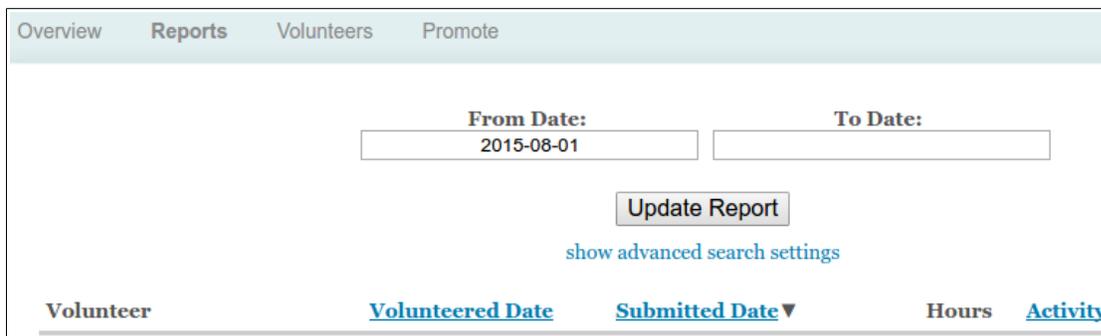
Reports can be restricted to a specific time period by right clicking on the From Date and To Date fields and selecting the date with the calendar pop-up menu:

The "show advanced search settings" link takes you to the page where custom reports are generated.

The advanced search page is used to define the type of report to be generated.

The Show Fields section defines the fields to be included in the report. For some aggregation reports, all fields are selected by default and cannot be unselected.

The Group By section controls what if any aggregation is done. The Nothing selection returns individual submissions. The other selections roll-up the individual submissions into aggregated numbers.

The Date Filter section allows selection on the different types of time stamps.

The Filter By section allows the report to be limited to certain Activities or Volunteers. Selection of multiple items is done by Shift-click on the desired items.

When all of the search parameters have been selected press Update Report to create the report.

	Update Report	Reset			
Activity	**Hours**	**Mileage**	**Parking**	**Tolls or Transit**	**In-Kind Expenses**
Artist in Residence	47.5	315	6	5	
Boutique Management	451.5	3302	361	71.75	2909.89
Boutique Performance	1929	7370.8	12.6	91.4	15

Numeric fields are summed at the bottom of the page.

Young Artists Vocal Academy	105	1127	30	52	1169.21
TOTAL	7453	35217.9	1748.1	651.5	17206.42
TOTAL OVERALL PAGES	7453				

Export

Print

The Print button will send the report to your printer.

The Export button will create a comma separated file (.csv) that can be save to a folder on your computer. The .csv file can be imported into Excel or other spreadsheet program for editing. In the spreadsheet program, unwanted fields can be deleted and formats applied to make the report better looking.

Advanced Administrative Functions

There are several functions that only are done by the TIF manager. These are mentioned here for completeness. If you think one of these need to be done, contact the TIF manager.

- Add/Delete/Modify users
- Transfer hours between users
- Modify site settings
- Modify Activities list
- Add new attributes