

Houston Grand Opera Guild

Track It Forward User Guide

Version 0.9

Written by:

Jerry Bohannon

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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.

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Message from the Co-Presidents

We would like to take this opportunity to introduce our volunteers to the user-friendly tracking system the Houston Grand Opera Guild has installed.

As you know, the Guild is a volunteer organization, and as such we want to account for all our volunteer hours, expenses, and mileage driven for Opera projects. All our volunteer efforts are collated at the end of the year and included the Opera's year-end reporting as a tax-exempt organization. HGO also uses our record of accumulated volunteer efforts when applying for grants.

To make it easier for volunteers to record their contributions of time, expenses and mileage, we are using a system called Track It Forward (TIF). Jerry Bohannon has written this simple, helpful TIF User's Guide. We urge all volunteers to read the User's Guide and use TIF starting today!

Fred & Imelda Gott Guild Co-Presidents

Message from the VP Membership

Kudos to all of the wonderful volunteers who make the Houston Grand Opera Guild tick. Without you, we wouldn't be able to maintain our programs, or support HGO's education and outreach programs. It's important that we capture all volunteer hours, related mileage and expenses. In addition to recognizing our top volunteers, we want to be able to report complete and accurate totals to HGO. All volunteer activities, no matter how small or how large, are important. **The official way to report your activities is through the Track It Forward system**. The system is very simple to use once you get started. You can report your activities from your computer or smart phone.

Patricia Carnes Guild VP Membership

What to record

- Travel time to and from volunteer activities
- Time performing volunteer activities
- Mileage to and from volunteer activities
- Board meetings and committee meetings
- Time spent on the telephone and/or computer associated with Guild activities
- Time spent shopping for supplies, food, etc. for Guild activities
- Expenses for refreshments, parking, etc. related to Guild activities, for which you were not reimbursed

What not to record

- Attendance at the opera or at HGO associated activities unless you are actually working there as a representative of the Guild (e.g. Opera Unwrapped, Subscriber Events, recitals, etc.)
- AMICI events, unless you helped organize them
- Attendance at non-HGO activities where a studio member or former member may be performing. (This is not a Guild activity.)
- Expenses that are reimbursed by the Guild

What is Track It Forward?

Track It Forward (TIF) is the Internet based volunteer tracking tool to which Houston Grand Opera Guild (HGOG) subscribes. Volunteer hours and expenses can be captured using a web browser or a smart phone app. Information is captured in a consistent way across committees and volunteers. By recording efforts as they happen (daily!), volunteers no longer have to keep track and submit reports which committee chairmen have to collate and forward to the VP Membership. Reports can be generated anytime to track progress and detect errors while there is still time to correct them.

In addition to tracking volunteer efforts retrospectively, TIF has a web based sign-up feature that allows committees to solicit volunteers for specific events. Volunteer openings can be listed by time and/or by role to be performed. Event organizers and other volunteers can see what slots are available and who else has signed up.

The information in this document is accurate as of the time of its original writing. Some things may change as the TIF organization release updated versions or the HGOG TIF administrators implement new features.

If you have problems getting started or entering your data, contact the Guild at <u>guild@hgo.org</u> where someone will be glad to help you.

Activities

For HGOG, TIF has been configured to track volunteer efforts by Activity. An Activity is a committee (e.g. Marketing), an event (e.g. Theater District Open House) or a sub-activity (e.g. Boutique Work Day) that needs to be tracked. As of this writing, the 2016-2017 activities are:

- Artist in Residence
- Boutique Management
- Boutique Performance
- Boutique Work Day
- Concert of Arias
- Education Docents
- Fall Brunch
- Guild Board
- HGO Special Projects
- Hospitality
- Hospitality: Abduction from the Seraglio
- Hospitality: Elixir of Love

- Hospitality: Faust
- Hospitality: Götterdämmerung
- Hospitality: Nixon In China
- Hospitality: Its a Wonderful Life
- Marketing
- Membership
- Miller Event
- Neighborhood Talks
- Opera Night Live
- Spring Event
- Student Performance Guide
- Studio Buddies
- Theater District Open House
- Volunteer Gathering
- Website Activity
- Young Artists Vocal Academy

Additions may be made to this list as the season progresses. Activities are deleted only at the start a new season.

Recordable Data Items

When a volunteer does something for one of the above Activities, the following data items can be recorded. Only the hours and date volunteered are required. Mileage and expenses are entered only when they are incurred as part of the activity. Notes can be used to describe any further information you want to supply or your committee requires.

The Classification field has been created for Hospitality and other committees that need to capture additional information. Unless your committee gives specific instructions this field may be left blank.

- Hours
- Mileage
- Parking
- Tolls or Transit
- In-Kind Expenses
- Notes
 - Free form comments
- Classification (committee specific usage)
 - <blank>
 - Airport Trip
 - Artist Gift: Welcome
 - Artist Gift: Other
 - Excluding team gifts

- Artist Meal
- Excluding cast party
- Artist: Other Activity
 - Describe in Notes
- Cast Party
 - Indicates attendance

Volunteer Recognition

HGOG is volunteering. In order to identify our most dedicated volunteers, TIF has been configured to track when volunteers complete certain numbers of hours.

- Platinum Award: > 500 hrs
- Gold Award: 200 hrs to 499 hrs
- Silver Award: 100 hrs to 199 hrs
- Bronze Award: 50 hrs to 99 hrs

Volunteers reaching the Bronze level and above are recognized each year at the Volunteer Gathering.

Privacy

Although HGOG is all about volunteering, we recognize that volunteers drive many miles and incur significant expenses. The benefits these expenses provide to HGOG are greatly valued and appreciated. However, each person's circumstances and resources are different. There is not a competition to see who can drive the most miles or incur the greatest expenses.

HGOG only reports miles and expenses in summary form by Activity or by the entire Guild. Individual's numbers are kept confidential but are available to the administrators for quality control purposes. Your expense contributions are between you and the Internal Revenue Service. The HGOG TIF administrators can generate individual reports that show what expenses were incurred, when they were incurred and when they were posted to TIF.

Common User Tasks

The most common tasks for users are

- Record efforts
- Review and edit your submissions
- RSVP for Events (as a Volunteer or a Guest)

The account maintenance functions rarely are required once your account is activated.

Record Efforts

Volunteer efforts should be recorded the same day as the activity or shortly thereafter. By doing this, there is no need to try to recreate efforts weeks or months later or to keep separate records.

A separate entry should be made for each Activity volunteered. If an activity was volunteered for more than one time in a day, one submission with the totals for the day may be submitted or submissions may be made for each period.

Self-recording

Many volunteer activities are performed independently at a time and place of the volunteer's choosing. In these cases, the volunteer should self record using the smart phone app or following a "Log Hours" link on any of the web pages discussed in the section on connecting to TIF.

Log Hours				
Hours:				
Select Hour				-
Date Volunteered: 🏢				
Jul -	12	•	2016	•
Activity:				
Select Activity				•
Mileage:				
Parking:				
Tolls or Transit:				
In-Kind Expenses:				
Notes:				
	Subm	nit Time		//

To complete your submission:

- Select the hours from the pick list (required)
- Select the Date Volunteered if it is not the current date
- Select Activity from the pick list (required)
- Enter as numbers any values for Mileage, Parking, Tolls or Transit or In-Kind Expenses
- Select a Classification (if appropriate)
- Add any Notes
- Press Submit Time

Your submission will appear in the "Timesheet" section.

Group-recording

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 toward earning benefits, this makes sure that everyone is properly recognized.

When an event uses group-recording (also known as kiosk mode), please have ready the information necessary to complete your submission. The organizer may complete the submission for you or have you use a tablet or smart phone.

N.B. TIF can manage efforts for volunteers that do not have email addresses. In this case, an administrator or the organizer will have a login that can enter data for these volunteers.

Committee specific instructions

Individual committees may adopt policies and procedures to make sure that their volunteers are accurately recorded and to capture any additional information required for reports.

Theater District Open House

The Theater District Open House uses a large number of volunteers in a short time. Many of these volunteers volunteer only once a year. Volunteer submissions will be made with kiosk mode as part of the check-in process at the event.

Boutique

Boutique Performances and Boutique Work Days earn volunteers dress rehearsal tickets. To make sure each volunteer's efforts are accurately recorded, a boutique manager submits the entries for each volunteer at the performance or work day.

Boutique Management covers the activities of mangers and buyers outside of performances and work days. These are logged individually.

Hospitality

There is an Activity for each host team and a general Activity for efforts not associated with a specific host team. When a person serves on more than one host committee at the same time, the Chief Hosts will provide instructions on how to apportion hours, mileage and contributions between the teams.

Hospitality makes extensive use of the Classification attribute in order to collect more detailed statistical information for its after-action reports. Team members will be given specific instructions during team meetings.

Review submissions

You can review your submissions in the Timesheet section of the Log Hours page:

Submit Time			
Timoshoot			
IIIIesneet			
	<< - >>		
	Bronze Award: 0/50 hours		
	see all milestones		
Date	Activity	Hours	
07/12/16	Guild Board	0.5	
		pending	
	Total	0.5	

Date	Activity	Hours
07/12/16	Guild Board	0.5
		pending
Tuesday	Mileage: 10	pending
07/12/16	Parking: 15.00	hour
	Tolls or Transit: 1.00	approval
	In-Kind Expenses: 5.00	edit
	This is a test submission.	
	Submitted on 2016-07-12 21:08:29	
	Total	0.5

Your can view the details of a submission by clicking on it:

Editing hours

As long as the submission is in "pending", you can edit or delete it by clicking on the "edit" link:

Hours:			
0.5			-
Date Volunteered:			
Jul	12	2016	
		2010	
Activity:			
Guild Board			-
Mileage:			
10			
Parking:			
15.00			
Tolls or Transit:			
1.00			
In-Kind Expenses:			
5.00			
Notes:			
This is a test submission.			
Cancel			Delete

A submission that has been approved can only be edited by an administrator.

Exporting hours

If you need an export of your submissions, please contact an administrator who has access to the Reports function. The Reports function can export all of the data fields in a submission. Individual submission lists or summary reports can be created.

The "export all hours logged" on this pages does just that:



This export does not include any of the expense fields.

RSVP for Events

Events are the way people sign-up for forthcoming Guild activities. Events can have different degrees of openness:

- Open to any Guild member with a TIF account
- Open to team members only
- Open to the general public

To RSVP for an event, go to the TIF page for that event and enter your information. There are several way to get to that page:

- Via a direct link in a marketing email from the Guild
- Via a direct link in an invitation email send from TIF by the event organizer
- Via a direct link on a web page
- By following the "Event Sign-ups" link on a Log Hours page to get to the Upcoming Events page
- By using the embedded Guild Events sign-up page
 - <u>http://www.hgoguild.org/SignUp.htm</u>

Event RSVPs are available only from a web browser. Depending on the width of the browser window, the Upcoming Events page will look like one of these two displays:

0	Houston Grand Opera Guild Organizer Dashboard						
		Log Hou	rs Charts	Event Sign-	ups Account		
Upcomir	ig Events					Create Ever	nt Sign-up Sheet
						Legend Ava	ilable RSVP'ed Full
Mond	ay Tu	iesday W	/ednesday	Thursday	Friday	Saturday	Sunday
August	08	09	10	1	12	ß	14
	Gui	ld Board leeting					
August	6	16	Ø	18	19	20	2)

Image: Weight of the second	on Grand Opera	
Log Hours Cha	narts Event Sign-ups Account	
Upcoming Events	Create Event Sign-up Shee	et
August 09 2016 Guild Board Meeting	RSVP'ed	
September 13 2016		
Guild Board Meeting	Available	
October 04 2016		
Opera Night Live Guest RSVF	P Available	

Find the desired event and click on it to go to the sign-up page:

Houston Grand Opera Guild					
Lo	g Hours	Charts	Event Sign-ups	Account	
Opera Nigh	t Live V	oluntee	r		
Tuesday, Octob	oer 04 201	6			
Rehearsal Room Wortham Center 510 Preston St 77002					
6:00pm - 8:30pm	Bar Sta	ff		0/3	SIGN UP
6:30pm - 7:30pm	Gree	eter		0/4	SIGN UP
	Guil	d Table		0/4	SIGN UP

You will see one or more "shifts". A shift represents a unit of volunteer work or event attendance.

Shifts can be distinguished by the duty to be performed and or the time it is to be performed.

The number of volunteers needed can be "Unlimited" or shown as <#signed up>/<# max number needed>.

If there are available slots available for the desired shift, the "SIGN UP" will be live.

If there are no slots available, the button will show as FULL and be inactive.

The "+" symbol next to the shift name indicates that there is additional information available about the shift. Press the symbol to see that information.



Press SIGN UP button to sign-up for a shift. The next dialog will appear:



You if you wish you can enter short message that will go to the event organizer. Press Sign Up to complete your RSVP.

Once you have signed up, the SIGN UP button changes to CONFIRMED.

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

Click on the "+" sign next to the number to the left of the SIGN UP/ CONFRIMED button for the shift to see who has RVSP:

6:30pm - 8:00pm	Monthly Meeting	⊜ 1	CONFIRMED
		Jerry Bohannon	*

Your RSVP can be canceled by clicking on the red "X".

Event Notifications

Once you have entered your RSVP, you will receive email communications about the event depending on how the organizer has configured the event:

- Confirmation on sign-up
- Reminder two days before the event
- Notification if the event is canceled
- Reminder after the event to log hours for the event

Confirmation Email

The confirmation email will look something like this:

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: <u>http://www.trackitforward.com/site/70567/event/84522</u>

The email will have an attached .ics file. This file may be imported into your calendar program or phone calendar app to put the event name, date and time on your calendar.

Volunteer Reminder Email

The volunteer reminder email will look something like this:

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

Cancellation Email

The cancellation email will look something like this:

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

Log Hours Reminder Email

The log hours reminder email will look like something like this:

```
From: Guild Office [<u>reminders@trackitforward.com</u>]
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.
```

Events open to Guild members only

Most events are pure volunteer activities and are in principle open to any Guild member. To volunteer you must have a TIF account. TIF accounts are available to any Guild member who volunteers. If a potential volunteer does not have an account, the committee chairman or team leader can request the TIF administrators to create one.

If you are using a direct link to the event page but are not logged into TIF, you will be prompted to login when the SIGN UP button is pressed:

	×
Em	ail / Username
Pas	ssword
Me	ssage to Organizer
	Log In & Sign Up
	register

Events for team members only

Some teams may use TIF for sign-ups, but wish the details of the event to be invisible to the public or the full set of TIF users. In this case the Event is configured with a password. The Event will appear on the calendar, but details on the sign-up sheet are visible only after the password is entered.

Guild Board Meeting				
	Enter password to	access this ev	vent sign up sheet:	
		Submit		

The organizer of the Event will supply the password to the team members when the sign-up period opens.

Events open to the public

Some events are open to the general public. Opera Night Live is such a public event. In these cases, RSVP for attendance is allowed without requiring a TIF account. In most cases, there will be a companion "members-only" event for those volunteers who will be putting on the event.



TIF users who wish to RSVP as a Guest can use the regular sign-up method for a logged-in user.

Non-TIF users will normally use a direct link in an email or from a web page to get to the event sign-up page.

×	
Email / Username	
Password	
Message to Organizer	
Log In & Sign Up	
register sign up without an account	

Non-TIF users should follow the "sign up without an account" link.

Name, Email and Phone are required fields.

sign up w	rithout an account	×
Name		_
Email		
Phone		
Message	to Organizer	
	Sign Up	
	login register	

Press Sign Up to submit the RSVP.

In order to know how many guests will be attending, we need an RSVP from each guest. It is preferred that each person attending has their own RSVP. If that is not possible, the "Message to Organizer" box can be used to list by name any guests. Guest names are necessary for the attendee lists given to building security.

RSVP for others

Not everyone will use one of the above TIF methods to enter their own RSVP. The organizer may receive direct emails, phone calls or personal communications. In these cases, the organizer can add those responses by going to the event sign-up page and pressing the SIGN UP button:



Then follow the "choose an existing volunteer" link.

choose an existing volunteer	
Select Volunteer	
Fred Gott	•
Message to Organizer	
Sign Up	
sign up yourself	

Next use the "Select Volunteer" pick list to select the volunteer for the RSVP. Press Sign Up to complete the RSVP.

Connecting to TIF

To record volunteer activities or RSVP for Events, you must have an Internet connection and a TIF account.

Connection via web browser

From a computer's web browser there are multiple ways to connect to TIF to log hours. The web browser method is also used for RSVPs and account maintenance.

To make it easy to log your efforts, you should bookmark one or more of the following web pages.

Track It Forward website

Using your favorite web browser connect to the TIF web site with this link:

http://www.trackitforward.com/



Follow the "Sign In" link and enter your Username or Email address and your password:

← → C C https://www.trackitforward.com/user/login ★
FORMERLY OURVOLTS
Username or Email:
Enter your Track it Forward username or email address.
Enter the password that accompanies your username.
Don't have an account yet? Register at your volunteer site page or create a new site. Can't remember your username or password? Find it here!

To make subsequent connections to TIF easier, you can let your web browser cache your TIF userid and password for any of the web-based connection methods.

From this point you log hours, edit your profile data, change your password, view the hours you have logged or Sign Out.



Alternately you can use the link to the TIF login page for HGOG.

http://www.trackitforward.com/site/houston-grand-opera-guild

to go directly to the TIF HGOG login page:

\leftarrow \rightarrow C \square www.trackitforward.com/site/houston-gran \bigstar :
louston Grand
Log Hours Charts Event Sign-ups
Sign In to Log Hours
Email or Username:
Password:
Sign in
Need an account? Sign up
Forgot Password?

Enter your Email or Username and your Pasword.

Guild website

Another way to log hours is to use the Guild embedded web page at this link

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



Enter your Username or Email and your Password which will take you here:

Volunteer Hours Tracking
Volunteer Hours Reports Page
Log Your Hours
Hours: Select Hour
Date Volunteered Jul ▼ 11 ▼ 2016 ▼
Activity: Select Activity
Mileage:
Parking:
Tolls or Transit:
In-Kind Expenses:
Notes:
Submit Time
AVAILABLE ON THE App Store Google play
OURVOLTS Logged Hours Manage Account Edit Profile
Logout

If you are using a browser on a smart phone, you can follow one of the icons to install the phone app.

Smart phone apps

The smart phone apps can be used to log hours and expenses while you are away from a computer.

N.B. #1: When you login to TIF from a smart phone, the app caches certain configuration information such as the Activity list. If the TIF configuration is changed while you are logged in, you will need to log out and back in to pickup the changes. The apps do not cache the userid and password.

N.B #2: If you are logging data for multiple Activities or multiple volunteers in kiosk mode, the Activity pick lists reset to the default values after each submission. Be sure you have selected the correct Activity before submitting the next record.

Android

Follow the link below from an Android device to install the Android version of the app.



iOS

Follow the link below from an iOS device to install the iOS version of the app.



Account Setup & Access

A valid login account is required to use TIF. Normally this is an email address. A non-email address usererid can be created, but it must have an associated email address. (Only one TIF account per email address is allowed.)

TIF for HGOG is configured so that TIF accounts must be created by an administrator. The TIF subscription is based on the number of volunteer accounts. Therefore accounts are given only to active volunteers. The list is purged once a year.

When an administrator creates an account for a new volunteer, TIF will send an invitation email like this:

From: Houston Grand Opera Guild [do-not-respond@trackitforward.com] Sent: Saturday, July 09, 2016 7:01 PM To: Guild Office Subject: Your Track It Forward login for Houston Grand Opera Guild

Dear volunteer,

Houston Grand Opera Guild is now using Track It Forward for recording volunteer hours and for volunteer event sign-ups. A login has been created for you. All you need to do is follow the link below.

Keeping records of volunteer efforts is important to the Guild and to Houston Grand Opera. The Guild wants to recognize those who give of their time. Houston Grand Opera uses volunteer efforts as evidence of community support when submitting grant requests. Please help us by recording your hours, miles and expenses.

Track It Forward will allow you to record your volunteer efforts as you do them. The system captures your entries so that you do not have to keep track and submit reports later. The system can also generate reports of your miles driven and out-of-pocket expenses when tax time comes around. There are mobile apps for Android and iOS that you can use to enter your data while on-the-go.

Track It Forward will also allow you to sign-up as a volunteer for Guild Activities. The system will remind you that you have volunteer activity approaching.

To activate your login, do the following:

1) Click on this link to automatically login

2) Change your password

3) Start logging hours or sign-up as a volunteer at an event

Follow "Click on this link" to create your password and activate your account.

Alternately, the administrator can create a password for you.

Change Password

If you need to change your password at anytime, you can follow the Account link on any of the several pages shown above to navigate to this page on the TIF website:

How it Works Pricing Blog Account Sign Out
Houston Grand Opera Guild
Log Hours
Edit Profile
Change Password
all hours logged export all hours logged

Click the "Change Password" button to get the account maintenance page:

GuildOffice
Account information
Username:
GuildOffice
Spaces are allowed; punctuation is not allowed except for periods, hyphens, and underscores.
E-mail address:
guild@houstongrandopera.org
A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e- mail.
Password:
Confirm password:
To change the current user password, enter the new password in both fields.
- Email settings
Plaintext email only Check this option If you do not wish to receive email messages with graphics and twies

Here you can create a new Password or change your Username.

Forgot Password

If you have forgotten your password and need to create a new one, navigate to one of these pages:

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

Volunteer Hours Tracking	
Volunteer Hours Reports Page	
Login to track your volunteer hours.	
Email or Username: *	
Password: *	
Sign in	
Need an account? Sign up	
Forgot Password?	
OURVOLTS	

http://www.trackitforward.com/site/houston-grand-opera-guild

\leftarrow \rightarrow C \square www.trackitforward.com/site/houston-gran $云$:
Houston Grand
Log Hours Charts Event Sign-ups
Sign In to Log Hours
Email or Username:
Password:
Sign in
Need an account? Sign up
Forgot Password?

Follow the "Forgot Password?" link to this page:

Enter the email address associated with your TIF account and press "Reset Password".

An email will be sent with a link that will allow you reset your password.