

## Phila Docent Website That does It All-

Presentation (more or less) goes with PPT slides

Welcome to the website of the Park House Guides from the Phila Museum of Art

I am Maryl Hitchings and I am a docent in 1 of 3 docent groups at our Museum. Massimo Bocunni, of Mastix.com, who is our web designer, joins me.

The impetus for creating this website was primarily statistics. The Museum was changing and they requested our statistics monthly. This was quite an increase from twice a year, when we might record our hours every couple of months. Suddenly the Statistics job became very cumbersome. Docents would email in their hours, then the Statistician not only had to record these hours, for them, in the "Book" but also to do the tallies for the group of 80, every month. This became a hard job to fill.

The good news is, WE NO LONGER NEED A STATISTICIAN!

The other job, no one wants, is the scheduler, well that is so easy now that it takes about an hour instead of all day for 2 people!

So let's get started, when we created this website, we wanted it to do EVERYTHING and it does.

My plan is to go thru the website tabs first, so you have an idea of all of the things the website does and then at the end, we will spend more time with statistics and scheduling.

### 1<sup>st</sup> Slide- Public Home Page

Welcome to the website of the Phila. Art Museum's Park House Guides.

You sign in here with your ID and password and if the public stumbles upon our page they can click on two places, to find out about our Houses, Tours at the museum or Volunteer opportunities.

### 2-Sign in

-We used everyone's email address as their member ID and gave everyone the same password. Everyone signs in, as an individual, to his or her own pages.

-We gave everyone the same password, like docent, so everyone would remember it and he or she could change it if they wish, few did.

-We made it so that when you signed into your home computer, it would remember your email and all you needed to do was to push login, the next time and you were on the site. This was very helpful for some of our members.

### 3- Guides Home page and it truly is their office

You can see from the tabs that you can ck the schedule, sign up for a lecture, enter your hours, look up study materials, lots of info under the PHG Info tab, read our newsletter, sign up for a trip, ck the latest info, link to resources.

I'd like to go through all of the tabs on the website and then return to scheduling at the end since that was the most complicated.

**(LOISE NEVELSON- Atmosphere and Environment)**

4- Go to duty Calendar and select the month

5- Duty Calendar

This is our calendar for Oct

You can see that I am signed in and so the tours that I have been assigned are highlighted for me.

Our monthly calendar lists the tours we are giving, that month and who is giving them.

We will be returning to this and will discuss it more in depth.

6-The next tab in line is the Events calendar, this is almost as important as our schedule.

-You choose the month using the month, year, view selections; we do list things that may be 6mos to a year out

7- here is a sample of a study trip we are running and you see "Sign up" or "view sign up sheet"

8-I hit sign up and immediately I receive a confirmation that I have signed up

9- We were also holding a few study days that you see highlighted here.

And I tried to sign up but

10- If you you are already signed up, you will get this message- 'You are already signed up'

11- of course you then go immediately to 'view sign up sheet', because you don't remember you did that and sure enough there is your name on the list and the date you signed up

If you can no longer attend, you see the click here to cancel. In some cases we are limited to a number because of logistics and it's appreciated if you cancel, if you can no longer attend.

12-Another plus to our Events Calendar is, we have been using it for the training of a new class

-As you see, Sat the 27<sup>th</sup>, the heading 2013 training, if you hit that title, a drop down box lists all of the study materials that have been assigned to that day.

Several pluses have come from this- the trainees are responsible for printing or downloading their own study materials, so The Museum has not had to print hundreds of pages, to hand out to 20+ trainees and

Secondly, because different classes do learn different things, no one can complain, 'they didn't know about that'. All materials are available to everyone as are the lectures that the new class is attending.

13 Let's move on to Manage Hours

You see in the top band, you can choose, Credit Hours, Non Credit Hours or Full Chart.

14- Let's start with credit hours- We are responsible to work 60 hours/year; we used to enter this into a book. It is now done automatically.

You choose the date from the drop down calendar or you can write it into the date box, then you put a dot in the tour that you gave, you fill in the # of visitors and the # of credit hours that apply and you push 'save'

You see the hours, so far accumulated at the bottom

15- and now the new hours are added

The delete button is there if you made a mistake, you delete it and just re-enter

16-next we report Non-Credit Hours

I've entered the date by hand as you see,

We have 2 types of non credit hours- Continuing Ed, which we are required to attend 5 lectures a year and other hours we spend, for the Museum, at meetings or other Volunteer hours, such as this.

17- you see they accumulate separately.

18-Next is Full Chart

This is the very favorite page of our Museum Administrator

It accumulates all of the hours, credit and non credit and all visitors for all Guides on a monthly basis.

It is up to date and also does year to date.

Our Admin gets on line at 8a.m. the first day of every month!

The other statistics this allows is looking at a particular tour, the number of visitors, when is our busiest season, etc

That is on the Admin side of the website. I should tell you there are 2 sides to the website, what the Guide sees and what our Webmaster sees.

The Webmaster is in charge of adding the files, such as we saw for the new class.

We'll be looking at that when we talk about scheduling.

19-Continuing Ed is our next tab and you can see from the drop down box there are many topics here.

Information from existing tours we give, will be here; if we are starting a new tour, we add that to the list and upload the information everyone needs. If we have new information being presented for an existing tour we add it here.

20- we saw earlier that we were doing study days about the workers at our houses, these are the new files added to Cedar Grove, one of our Historic Houses

21- This photograph is our other Historic house, Mt Pleasant and the tabs you see under PHG Info are about our daily duties.

We have attendance sheets that anyone, who needs one, can print out

We have our Book club--- let's take a look

22-Our book Club started in Jan 2007 and all of the books they have read are listed

23-to the current next meeting, which is in Jan 2014

24 PHG Evaluations- A museum requirement is that we are evaluated every two years, this was never formalized very well, so now it is.

25- this chart lists all of the Guides and all of the tours that we give, so it serves 2 purposes- you can see when the last time someone was Evaluated and who needs to be and also who is eligible to give certain tours. Not all of our guides do all things.

26-Directory, I skipped over our Handbook, our rules and regulations, which is now easy to edit or change because it is on line and we do not hand them out anymore which we did when it was updated every 2 years.

We also have a History, because we are 50 years old and that we continue to add to also.

We list our Active Guides, our Emeritus group, Staff and we have a photo page, so when new people are added if you don't them you can look them up.

27-Let's take a look at the Directory

Everyone's current information is here. If someone moves or has a new phone no. or email address, they update their profile, you get an advisory about and you just look them up rather than getting a 5 page print out every year.

28-We list our treasurer's reports on line, everyone can see it and we don't need to explain it at the Board Meeting

29- We have just recently added the Dues page because people couldn't remember if they paid their dues or not and they were constantly asking the Treasurer, also some paid 2-3times or didn't pay and needed to be reminded. This page eliminates all of the angst for everyone. You can just look it up and see if you have paid and the treasurer doesn't have to keep hounding people, One email takes care of it all, 'please ck, if you have not paid you will be assessed another \$5 after Oct 1'.

30-Villa Voice-Our bi-monthly newsletter is published here. It is usually 8-12 pages, so it is very nice not to print that

31- Study Days and Excursions- When we run our yearly 4 day trip we publish all the information here

32- Hitchings' Post-This is a tab for new info we want everyone to be aware of; we also add it to Cont Ed

33-Useful Links- Links that we use for research and our City

34-Now, an in depth look at scheduling-, What we call our Duty Calendar

- 1<sup>st</sup> tab is 'Create a new month'

-We are going to create Dec

35- here is the month of Dec

-at the bottom, click on create Dec calendar

36-This is a list of all of the tours that we give, we can add or subtract from this list at any time

37- the Scheduler checks off the tours that will be given that month and which days

38- The tours she has selected look like this.

If changes need to be made you can do this here. Notice on wed the 25<sup>th</sup>, I've taken away the tours and put in closed, since it is Christmas and on Mon the 30<sup>th</sup>, I have added them back in. We will be open, that Mon, as it is a holiday week. We are usually open on the Holiday Mon's

39-The schedule is published and this is what the Guide receives  
You see I am signed in and I check the tours I'm available for.

40-After I ck these off, I hit the submit button at the bottom and receive the message you see here

41-What the Scheduler receives is all requests from all Guides

You can see that the 1<sup>st</sup> wed was very popular

She also reviews the notes at the bottom, like the one from Marie Judge, who only wants 2 of the tours.

Same with Marybeth Smith

The scheduler reviews who wants what and makes her determinations, eliminating all names but one.

42- The scheduler publishes the calendar and you can see, when I sign on, my name is highlighted

Where no one has signed up, we use the word Help and people wait for the Helps, check the list and sign up then.

The Scheduler decides who is given these tours, you cannot just sign yourself up.

**43- THE END- log in and get started**