

Preface

Those who attended the TLCC 2016 session—“What Do Our Members Want? You Have the Perks, But Do They Work?” on Thursday, August 11th at 10:45AM—know that I very quickly mentioned a barcode “hack” that we’ve put into use at Tulsa Ballet to help easily track our patron attendance at on-site events without having to buy scanners or any extra hardware for the technology.

Since it wasn’t something covered by my PowerPoint presentation slides, I wanted to go into more detail in a document to share this information for anyone who wasn’t able to get all the relevant information down during the session.

Thank you for attending; it was my first full Presenter session, and I was glad to see people after that Tessiturians concert on Wednesday night!



What Do I Need

Here’s a quick list of what’s necessary for this barcode “hack”:

- Tessitura Software
 - Access to system tables
 - Specifically to access and edit:
 - [TR_SPECIAL_ACTIVITY](#)
 - [TR_SPECIAL_ACTIVITY_STATUS](#)
 - Knowledge of List Manager and [how to import a List from a .CSV file](#)
- 3 of 9 Barcode Regular (TrueType Font File)
 - Can be downloaded from http://dl.dafont.com/dl/?f=3of9_barcode
 - Or just do a [quick Google search for 3 of 9 Barcode Regular font](#)
 - Install to your computer’s Fonts folder by opening and clicking Install
 - Computer → OS (C:) → Windows → Fonts
- Any smartphone app which scans barcodes
 - I use [“Bar-Code” by Roberto Sonzogni on iPhone](#) because it’s free (can be upgraded for \$0.99 to remove ads) and allows you to scan multiple bar codes and then email yourself the list
 - If you’re an Android phone user, it looks like [“Bar-Code reader” by Roberto Sonzogni](#) is that device’s app option
- Patrons
- An Event

How It Works

1. The first step, obviously, is to have an event. Once you have that, you’ll want to access system table TR_SPECIAL_ACTIVITY to create a record of your event in the database. This is really straightforward; all you need is a description of the event, a specified control group, and whether or not the event is active or inactive.
 - a. I use a naming convention with the membership name, fiscal year, event type, and date.
 - i. For example: Barre FY17 Open Barre 08022016

2. Next, go to system table TR_SPECIAL_ACTIVITY_STATUS; there are a bunch of status descriptions here which are already set up in the system. It's pretty easy to add new ones here as well, since you just need a description for the status and then to flag it active or inactive. The pre-cooked status lines include:
 - a. Accepted
 - b. Attended
 - c. Cancelled
 - d. Declined
 - e. Invited
 - f. No Show
 - i. Just as a window into what I added for my own sake, I did:
 1. Attended, Guest
 2. Attended, No Dinner
 3. Attended, No RSVP
 4. Did Not Attend, RSVPed
 5. RSVP Received No
 6. RSVP Received Yes
3. Once you have these system tables updated with your event information and preferred status settings, it's time to prepare for your event. We use name tags for all of our members and their guests, and when they're in our Tessitura database we want to associate their constituent ID number to make it easier for us in the post-event breakdown. To help with this, we use the 3 of 9 Barcode Regular font to add a barcode to the name tag representing the constituent ID of the person we've printed a name tag for.
 - a. **Protip:** Remember to use individual constituent ID numbers for each individual person; we have many patrons in households but don't want to track event attendance that way because many times not all members of a household will attend.
 - b. When using the 3 of 9 Barcode Regular font, you need to enter asterisks (*) before and after the value of the constituent ID in order for the barcode to read appropriately on your scanner. Without the asterisks, the barcode doesn't work.
 - c. My individual constituent ID in our database is 167702.
 - i. If I type that in 3 of 9 Barcode regular font without the asterisks, it looks like:
 1. 
 2. 167702
 - ii. If I include the asterisks, it looks like:
 1. 
 2. *167702*
 - iii. If you've installed a barcode scanning app on your phone at this point, you'll be able to see which barcode actually returns a value upon scanning.

- iv. **Protip:** We've experimented and it seems as though font size 36 is about the minimum to be able to easily scan the barcode in, but based on your device, that may vary.
 - d. I like to also include the constituent ID in numerical form under the barcode on the name tag, just so that there's backup when you're scanning so that you know the barcode was set up correctly.
4. Now you have your event, and people show up and it goes great! Based on how specifically you want to track event attendance, you'll want to collect your name tags back from your guests (we have permanent name tags in sleeves with magnets) at the end of the night and organize them into groups. For example, we typically separate into:
 - a. People who attended and had RSVPed prior to the event.
 - b. People who attended but hadn't RSVPed.
 - c. People who had RSVPed but didn't attend.
 - d. People who attended as an established patron's guest.
5. Once you have these piles of name tags separated out, you'll use your barcode scanner to start scanning a list. This is why I really like the "Bar-code" app I mentioned earlier; you can scan multiple barcodes and they aggregate into a single list. Once you've scanned all of the applicable barcodes, you can tap the "Actions with scanned barcodes" button in the app and choose "Send list by Email" to send all of those constituent ID numbers to your email.
 - a. Choose "Reset list and photo" from "Actions with scanned barcodes" in between your piles to keep the lists separate.
6. Once you have that list, copy and paste the numbers into a spreadsheet (like Microsoft Excel) and [save the file as a .CSV](#) (comma-separated value file).
7. Go into Tessitura and go to Tools → List Manager. At the bottom of the screen, push the "Import" button and find your .CSV file to import.
 - a. The Import List box will pop up and you'll want to check next to "Create New List" and enter the List Name, Category, and Control Group.
 - b. Again, naming conventions are important to make your life easier; I like to use List Names like:
 - i. FY17 Open Barre Attendees
 - ii. FY17 Open Barre No Shows
8. Once you have imported the data as new Lists, we'll go to GoTo → Reports & Utilities. Look under the "Data Management" folder for the "[Manage Special Activity](#)" utility and double-click it.
 - a. For Activity Type, you're looking for the description you set in TR_SPECIAL_ACTIVITY for your event. If you don't see it, go back to that system table and confirm that you entered and save it.
 - b. For Activity Date, type in the date of the activity.
 - c. For Status, you're looking for the description from TR_SPECIAL_ACTIVITY_STATUS which matches the List of patrons you've imported. If you're working from a list of people who attended, for example, you'll use "Attended" here.
 - d. For List, select the List you just created via Import in List Manager.

- e. For Mode, select either Insert or Update.
 - i. Insert is when you're adding this activity status to a list of patrons for the first time.
 - ii. Update is when you're going back to update patrons who may already have had a status set for this event.
 - f. I've omitted the Worker, Number of Attendees, Performance, and Notes fields here because they're all optional; they could certainly be useful based on what you want to do with the information, though.
 - g. Click "OK" and the utility will run and show you a report of how many patrons had their Special Activity information updated.
 - h. Repeat for all the Lists you've generated from your event.
9. At this point, all of the event attendance data is now associated with your constituents in Tessitura; congratulations!
10. To get a nice reporting of the data, go back to GoTo → Reports & Utilities. Look under the "Development" folder for the "[Patron Activity Report](#)" report and double-click it.
- a. For Start Activity Date and End Activity Date, you can be as detailed or open as you want regarding your records based on what you want; if you're looking for information on a single event, obviously make the Start and End date the same as the event date.
 - b. Activity Type is where you'll select the description in TR_SPECIAL_ACTIVITY for your specific event.
 - c. Workers, Status, Membership Level, and List are optional again.
 - d. Show notes? is just set to Yes or No depending on how much detail you want to display/whether you're keeping any notes.

Bonus: Note that there are also utilities under the "Data Management" folder called "[Manage Attributes](#)" and "[Manage Constituencies](#)"; you can mass-update these as well using the steps above, so if you wanted to add a Constituency (in System Table [TR_CONSTITUENCY](#)) of "Barre Society Guest", you could import a List of all those constituent IDs and then run the utility to add that information.

Any questions or feedback? Contact me by phone at (918) 392-5915 or by email at brian.parker@tulsaballet.org.