






Facility Management

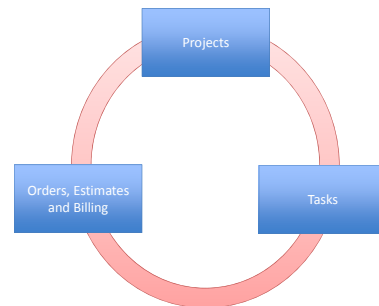
This document contains the slides in the Facility Management slide show, and associated notes.
(12/21/10)

Slide 1 Facility Management	<div data-bbox="489 142 1062 175">  Theatre Manager Facility Management Overview </div> <div data-bbox="625 284 926 321"> <p>Facility Management</p> </div>	Notes: What does it mean to you
Slide 2	<div data-bbox="489 573 1062 605">  Theatre Manager Facility Management Overview </div> <div data-bbox="548 714 1001 831"> <p>Allows venues to manage, track and bill for their people, rooms and resources</p> </div>	Notes: Allows venues to manage, track and bill for their people, rooms and resources across your organization's available venues. With this module, the data coordination is presented in multiple visual ways allowing you to easily view and understand the relationships among all those variables.
Slide 3 Features and Benefits	<div data-bbox="489 1003 1062 1036">  Theatre Manager Facility Management Overview </div> <div data-bbox="520 1068 594 1088"> Features </div> <ul data-bbox="520 1092 749 1398" style="list-style-type: none"> • Calendaring • Project/Event Planning • Estimates & Invoicing • Meeting invitations • To-do's, Tasks • Reminders • Background Events & Vacations • Attachments and Doc Storage • Cal Sync via email • Staff Notification • Resource Tracking • Inventory Management • Room Booking • Volunteer Management • G/L for income, some expenses • Task Lists <div data-bbox="783 1068 940 1088"> Benefits to a Venue </div> <ul data-bbox="783 1092 1035 1377" style="list-style-type: none"> • Single Calendar for the Enterprise • Single source of entry • Integration • Calendar sync with patrons • Internal communication • More complete CRM • Eliminate other applications and save money • Additional revenue sources • Safe doc. storage w/ context • Future: web calendar for patron • Future: concession option • Future: more reports 	Notes:

Slide 4



Theatre Manager Facility Management Overview



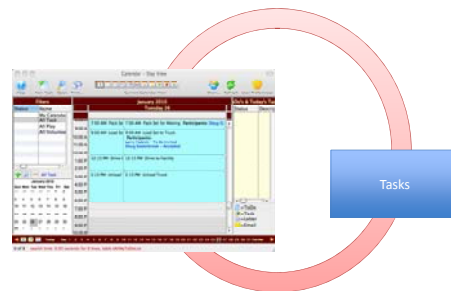
Notes:

Tasks
Projects
Orders & Billing

Slide 5 Tasks



Theatre Manager Facility Management Overview



Notes:

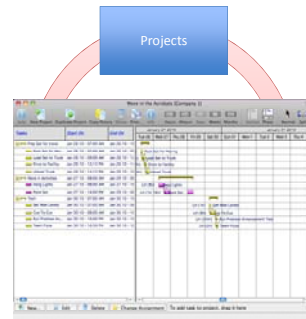
A task can represent anything you want to have show up on a calendar or appear in an invoice for a client. Because of its flexibility, it is important to understand all the different kinds of information that can be stored in a task so that you can determine which options to use for your particular situation. For example:

- Tasks can be associated with plays or events; a particular show or performance; patrons or employees; a group of people
- Tasks can be grouped together in an order
- Groups of tasks can be used as a template for creating similar groups in the future
- A person can be assigned as the "owner" of a task
- Individuals can set alarms on tasks for themselves
- Tasks can have date and time ranges, such as meeting start and end times
- Tasks can be indicated as ToDo-type tasks that have only a necessary completion date
- Tasks can have resources assigned to them, such as the number of chairs needing to be set up in a venue, equipment being rented, or the actual rental of a room

When you ask the question "Can I use a task for" the answer is probably **Yes**.

Slide 6 Projects

MS Theatre Manager Facility Management Overview



Notes:

A project is a way to group tasks together and create relationships between the various tasks that make up that project.
A project may be as simple as someone booking a conference room at your facility or as complicated as bringing in a Broadway show like Wicked, with all the builds and move-ins and resources associated with it.
A project can be billed to a particular client and an invoice created.

Slide 7 Orders, Estimates & Billing

MS Theatre Manager Facility Management Overview

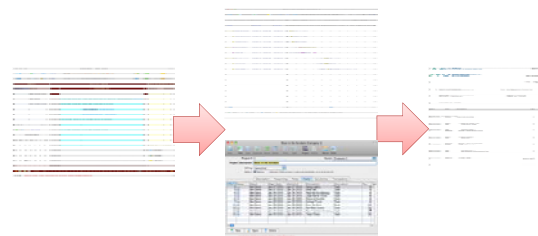


Notes:

When you use projects, you can create estimates, orders and bill for the tasks grouped in the project all under one order.

Slide 8

MS Theatre Manager Facility Management Overview



Notes:

Calendar
To the Project Views
To the final Billing

Slide 9 Tasks & Calendars

Tasks

- Calendar is the essential nugget
- Calendar data can consist of
 - Tasks
 - Volunteer/personnel information
 - Performance data (from event setup)
- Each is treated similarly, yet slightly differently

Notes:

Tasks are the core of Facility Management. They represent something that needs to be accomplished.

The core of assigning tasks is the calendar.

The Calendar data can be viewed by: Tasks, Volunteers, Personal Appointments, Performance Data.

Slide 10 Calendar Data

Calendar Data

Notes:

Trick is to get it to display in many ways – like a Rubik's cube with the sides being date, people, resources, venues

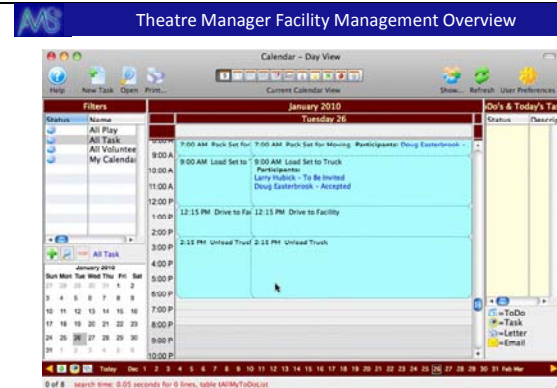
Slide 11 Calendar Example: Month

Calendar Example: Month

Notes:

Example – start at a typical calendar for a month

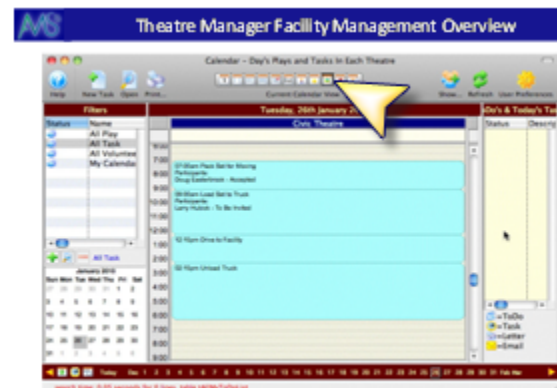
Slide 12 Calendar View - Day



Notes:

Flip to a day
Click the Day button in the top bar

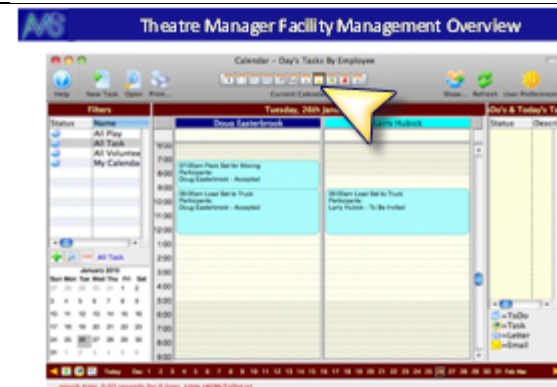
Slide 13 Calendar View – Day Plays and Venues



Notes:

Flip to what's going on in the venue(s)
Click the Plays and Tasks in each Venue button in the top bar

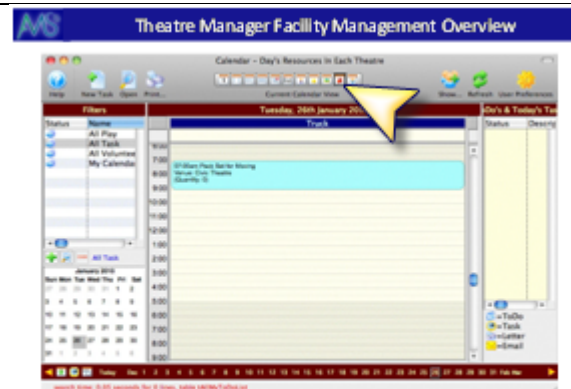
Slide 14 Calendar View – Day Tasks By Employee



Notes:

Change over to see who is doing the work.
Click the Tasks by employee button in the top bar

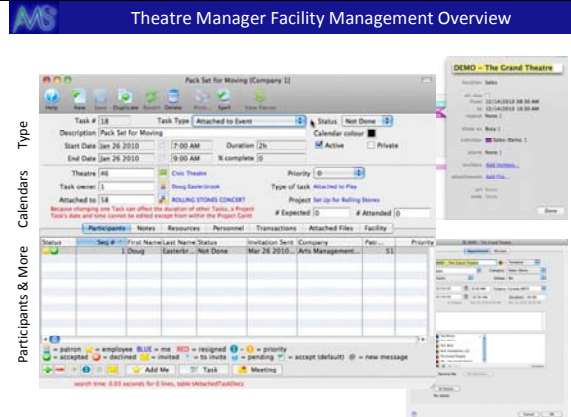
Slide 15 Calendar View – Day Resources in Each Theatre



Notes:

Then see what resources are being used that day

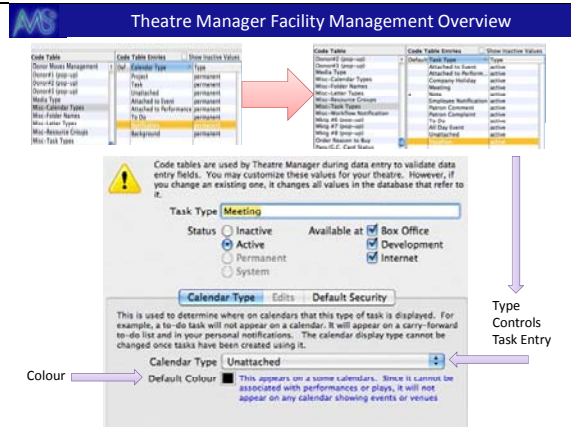
Slide 16 All the different things contained in Tasks



Notes:

The key is the task – everything centers around what you do on this window. Its much like Daylite, outlook or iCal – except it does much more and spreads the integration outside the organization

Slide 17 Tasks



Notes:

Tasks have types that control the display – these are set in code tables and are a two step process. You can also set types of calendars and colors

Slide 18 Task Entry

Theatre Manager Facility Management Overview

What: Description Where: Task Type Status

Task # 1 Task Type Attached to Event Status Not Done

Description Pack Set for Moving

Start Date Jan 26 2010 7:00 AM Duration 12h Calendar colour [X] Active Private

End Date Jan 26 2010 9:00 AM % complete 0

When

Start Date Jan 8 2010 9:00 AM Duration 4h 10m

End Date Jan 8 2010 12:00 PM % complete 0

Privacy

07:00am Pack Set for Moving
Participants
08:00am Pack Set for Moving
Participants
09:00am Pack Set for Moving
Participants
10:00am Pack Set for Moving
Participants
11:00am Pack Set for Moving
Participants
12:00pm Pack Set for Moving
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25:00pm Pack Set for Moving
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26:00pm Pack Set for Moving
Participants
27:00pm Pack Set for Moving
Participants
28:00pm Pack Set for Moving
Participants

Notes:

Entry is date/time OR duration. Privacy shows the events differently, depending who you are.

Slide 19 Task Entry

Theatre Manager Facility Management Overview

Where: the influence of Task Type

Appears on venue calendar and venue map

Theatre 46 Civic Theatre Priority 0

Task owner 1 Doug Easterbrook Type of task Attached to Play

Attached to 58 Because changing one Task can affect the duration of other Tasks, a Project Task's date and time cannot be edited except from within the Project Gantt

Appears on event calendar and event list on 'Tasks'

Project Set Up for Building Research

Expected 0 # Attended 0

Notes:

Depending on the task type, some or all of the fields will appear on the middle section. This defines which calendars the task is eligible to appear on, if it is allowed to appear on a calendar at all.

Slide 20 Task List for an Event

Theatre Manager Facility Management Overview

The task list for an event lets you see what tasks are, along with the various resources

Play 09-02 "ROLLING STONES CONCERT" (DB) (Company 1)

Task #	Description	Begin On	End On	Internal Description	Quantity	Code	Notes
15	Hang Lights	Jan 21					
17	Paint Set	Jan 21					
18	Lead Set to Truck	Jan 21					
20	Drive to Facility	Jan 21					
21	Unload Truck	Jan 21					
22	Prep Set for Travel	Jan 21					
23	Move in Activities	Jan 21					
24	Truck	Jan 21					
25	Cable-Tie-Cut	Jan 21					
26	Set Mute Levels	Jan 21					
27	Run Prophone Assessment	Jan 21					
28	Team Pizza	Jan 21					

This is the list of each Resource assigned to the selected tasks

Add Detail Remove Add All

Notes:

The task list for an event lets you see what tasks are, along with the various resources

Example of attaching something to an event lets you see what you need to do for the events.

Slide 21 Participants Tab

Theatre Manager Facility Management Overview

Participants

- Employees or patrons
- Volunteers dragged here automatically create volunteer history record
- Can add all people from a mail list (e.g. board or staff list)
- Can set priorities
- Can set alarms
- Can accept meetings and set status
- Can invite external people and place on their iCal/Outlook calendar

Notes:

Participants can be:

- Employees or patrons
- Volunteers dragged here automatically create volunteer history record
- Can add all people from a mail list (e.g. board or staff list)
- Can set priorities
- Can set alarms
- Can accept meetings and set status
- Can invite external people and place on their iCal/Outlook calendar

Slide 22 Notes Tab

Theatre Manager Facility Management Overview

Notes

- Are an extended text description for some task types
- Are sent with meeting invitations a agenda style plain text email
- Can be included on invoices if desired.
- Have security associated with it

Notes:

Notes attached to tasks are:

- Are an extended text description for some task types
- Are sent with meeting invitations a agenda style plain text email
- Can be included on invoices if desired.
- Have security associated with it

Slide 23 Resources Tab

Theatre Manager Facility Management Overview

Resources

- Indicate the internal resources that will be needed to accomplish the task
- Resources can be consumable (eg coffee)
- Resources can be rentable (eg stage components)
- Resources can be part of the venue (eg light boards)
- Prices can be set
- Discounts are allowed

Notes:

Resources tab allows you to:

- Indicate the internal resources that will be needed to accomplish the task
- Resources can be consumable (eg coffee)
- Resources can be rentable (eg stage components)
- Resources can be part of the venue (eg light boards)
- Prices can be set
- Discounts are allowed

Slide 24 Personnel Tab

AMS Theatre Manager Facility Management Overview

Personnel

- Lets you add a volunteer to the record and aggregate hours.
- Dragging a volunteer here creates a participant record automatically

Notes:

The Personnel Tab allows you to:

- Lets you add a volunteer to the record and aggregate hours.
- Dragging a volunteer here creates a participant record automatically

Slide 25 Attachments Tab

AMS Theatre Manager Facility Management Overview

Attachments

- Drag and drop documents
- Documents saved in the database
- Safer than storing on file server (permanence)
- Eg: grants, directions, budgets, docs
- Can be opened right out of TM

Notes:

The Attachment Tab allows you to:

- Drag and drop documents
- Documents saved in the database
- Safer than storing on file server (permanence)
- Eg: grants, directions, budgets, docs
- Can be opened right out of TM

Slide 26 Facility Tab

AMS Theatre Manager Facility Management Overview

Facility

- Estimates for preliminary planning (people and money)
- Totals for invoicing
- The order that the task belongs to
- Other financial posting info

Notes:

The Facility Tab allows you to:

- Estimates for preliminary planning (people and money)
- Totals for invoicing
- The order that the task belongs to
- Other financial posting info

Slide 27 Manipulating Tasks

AMS Theatre Manager Facility Management Overview

Manipulating Tasks

- Mostly from calendar
- Can be changed on:
 - Venue window
 - Event window
 - Donation window
 - Project window
 - Volunteer window
 - Patron window
 - Order window
 - (probably more in future)



Notes:

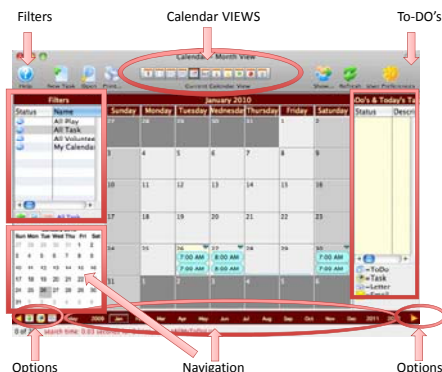
You manipulate tasks mostly from calendar.

Currently tasks can be changed on:

- Venue window
- Event window
- Donation window
- Project window
- Volunteer window
- Patron window
- Order window

Slide 28 Navigation

AMS Theatre Manager Facility Management Overview



Notes:

Parts of the Calendar Window

- Filters
- Calendar Views
- To-Dos
- Navigation

Slide 29 Views

AMS Theatre Manager Facility Management Overview

Views

- 3 Standard views (Day, Month Week)
- 2 Non-standard (2 week and 4 week)
- List View of tasks
- Click on button to change
- Data carries across calendars
- Displays if calendar type supports data on task type
- Use for staff planning
- Use for Volunteer allocation

+ Facility

- Venues across top
- Resources across top
- Employees across top
- Volunteers across top



Notes:

There are 5 standard views of the data.

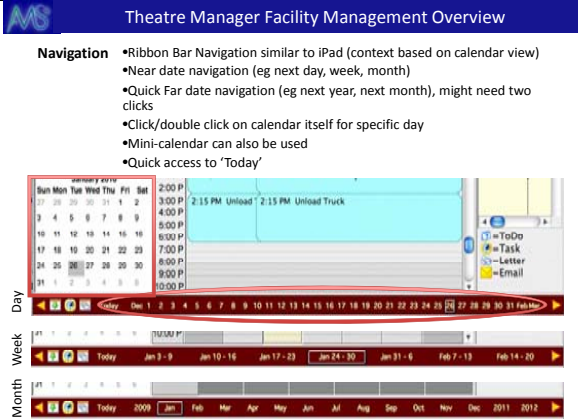
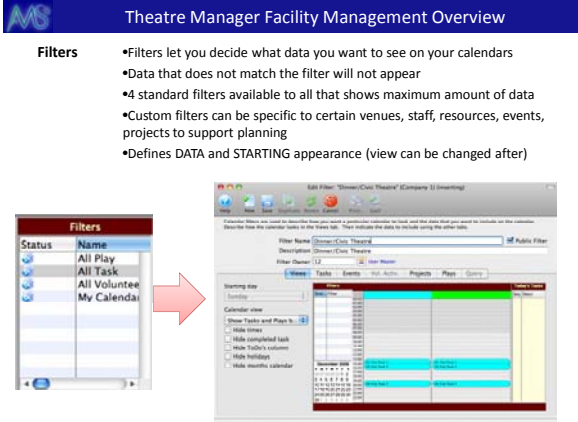
Views:

- 3 Standard views (Day, Month Week)
- 2 Non-standard (2 week and 4 week)
- List View of tasks

Facility

- Venues across top
- Resources across top
- Employees across top
- Volunteers across top

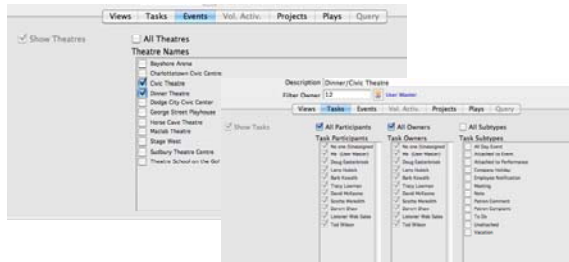
Facility Management adds 4 more for scheduling, planning. Task data will appear on facility calendars if supported. Eg, task must have a venue associated with it to appear on venue

calendar		
Slide 30 Navigation	<div data-bbox="489 467 1062 883">  <p>Navigation</p> <ul style="list-style-type: none"> • Ribbon Bar Navigation similar to iPad (context based on calendar view) • Near date navigation (eg next day, week, month) • Quick Far date navigation (eg next year, next month), might need two clicks • Click/double click on calendar itself for specific day • Mini-calendar can also be used • Quick access to 'Today' </div>	<p>Notes:</p> <ul style="list-style-type: none"> • Ribbon Bar Navigation similar to iPad (context based on calendar view) • Near date navigation (eg next day, week, month) • Quick Far date navigation (eg next year, next month), might need two clicks • Click/double click on calendar itself for specific day • Mini-calendar can also be used • Quick access to 'Today'
Slide 31 Filters	<div data-bbox="489 899 1062 1318">  <p>Filters</p> <ul style="list-style-type: none"> • Filters let you decide what data you want to see on your calendars • Data that does not match the filter will not appear • 4 standard filters available to all that shows maximum amount of data • Custom filters can be specific to certain venues, staff, resources, events, projects to support planning • Defines DATA and STARTING appearance (view can be changed after) </div>	<p>Notes:</p> <ul style="list-style-type: none"> • Filters let you decide what data you want to see on your calendars • Data that does not match the filter will not appear • 4 standard filters available to all that shows maximum amount of data • Custom filters can be specific to certain venues, staff, resources, events, projects to support planning • Defines DATA and STARTING appearance (view can be changed after)

Slide 32 Filters

Filters

- In the detail windows, pick what you want to see
- Uses iTunes style settings for 'all' or 'specific'
- Assumes limited number of venues, calendar types, employees, etc.
- Future: will be consolidating venues into multiple maps to make easier




Notes:

- In the detail windows, pick what you want to see
- Uses iTunes style settings for 'all' or 'specific'
- Assumes limited number of venues, calendar types, employees, etc.
- Future: will be consolidating venues into multiple maps to make easier

Slide 33 Options

Options

- Show or hide filters
- Show or hide mini-calendar
- Show or hide times in the calendar item
- Set overlap for simultaneous events
- Show or hide to-do window




Notes:

- Show or hide filters
- Show or hide mini-calendar
- Show or hide times in the calendar item
- Set overlap for simultaneous events
- Show or hide to-do window

Slide 34 Other Features

Other Features

- User Preferences let you pick calendar colours
- Show... lets you pop up a list of volunteer, employees or patrons
- Refresh gets any data matching the filters in case others have updated calendar (will automatically do this on open or navigation)



Notes:

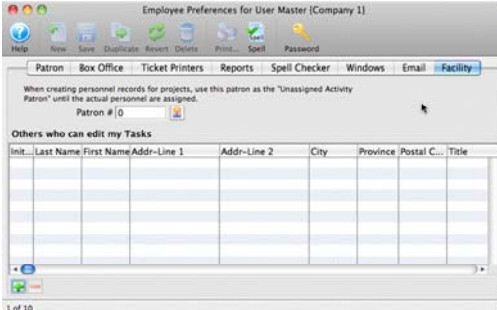
- User Preferences let you pick calendar colours
- Show... lets you pop up a list of volunteer, employees or patrons
- Refresh gets any data matching the filters in case others have updated calendar (will automatically do this on open or navigation)

Slide 35 Employee Preserences

Theatre Manager Facility Management Overview

Employee Pref

- Assign delegates for your calendar (other who can edit info)
- Define a 'house' patron who can be assigned to tasks without sending out email confirmations (a placeholder)



Notes:

- Assign delegates for your calendar (other who can edit info)
- Define a 'house' patron who can be assigned to tasks without sending out email confirmations (a placeholder)

Slide 36 So, we've made a task, now what? How about Notifications!!

Theatre Manager Facility Management Overview

So, we've made a task, now
what?

How about Notifications!!


Notes:

Slide 37 Task Display

Theatre Manager Facility Management Overview

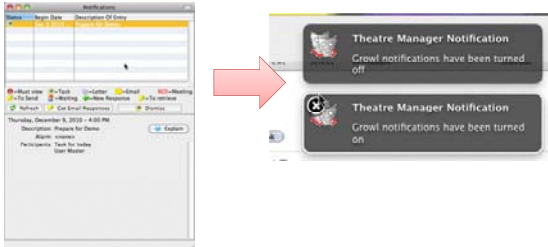
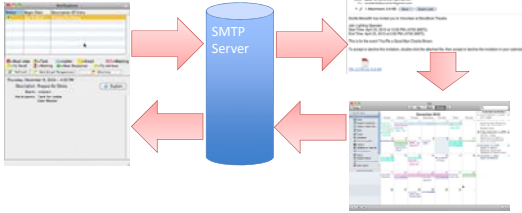
Task Display


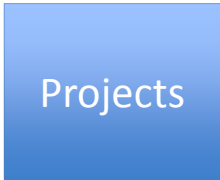
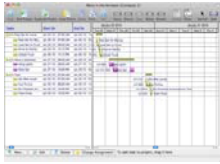


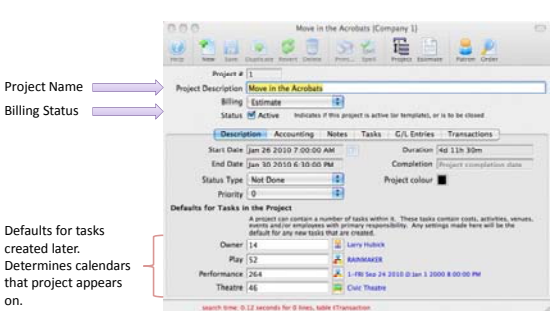
- Calendars shows the time, title and participants.
- It also shows participant STATUS
- Status can be set by user (eg talking to patron who confirms)
- Tasks can be sent to the patron/volunteer via email
- Theatre Manager will collect those responses and update the calendar



Notes:

- Calendars shows the time, title and participants.
- It also shows participant STATUS
- Status can be set by user (eg talking to patron who confirms)
- Tasks can be sent to the patron/volunteer via email
- Theatre Manager will collect those responses and update the calendar

<p>Slide 38 Notifications</p>	<p>Theatre Manager Facility Management Overview</p> <p>Notifications•At startup, the notification window will open automatically</p> <ul style="list-style-type: none"> •Show today's tasks and alarms for you •Show notifications that need to get sent to patrons <p>Grab pending responses from an email server and update TM</p> <ul style="list-style-type: none"> •If open, may show growl messages as well if set in employee preferences and growl set to auto start up (side note: works for mail). 	<p>Notes:</p> <ul style="list-style-type: none"> • At startup, the notification window (in TM) opens automatically <p>It displays:</p> <ul style="list-style-type: none"> • Today's tasks and alarms • Show notifications that need to get sent to patrons • Grab pending responses from an email server and update TM <p>If open, may show growl messages as well if set in employee preferences and growl set to auto start up (side note: works for mail).</p>
<p>Slide 39 Flow</p>	<p>Theatre Manager Facility Management Overview</p> <p>Flow</p> <ul style="list-style-type: none"> •Notifications go from TM to the SMTP server set up specifically for this in company preferences (scheduling@...') •Forwarded to patron with '.ics' attachment •Patron double clicks to add to calendar (ical and outlook tested) •That responds to the SMTP server •TM will get a notice in the 'scheduling' inbox and will update the right meeting (if not deleted) with attend/decline status. 	<p>Notes:</p> <ul style="list-style-type: none"> • Notifications go from TM to the SMTP server set up specifically for this in company preferences (scheduling@...') • Forwarded to patron with '.ics' attachment • Patron double clicks to add to calendar (ical and outlook tested) • That responds to the SMTP server • TM will get a notice in the 'scheduling' inbox and will update the right meeting (if not deleted) with attend/decline status.
<p>Slide 40 If those are tasks, what is a project and why do we need it?</p>	<p>Theatre Manager Facility Management Overview</p> <p>If those are tasks, what is a project and why do we need it?</p>	<p>Notes:</p>

<p>Slide 41 A Project is:</p>	<div data-bbox="489 142 1062 175">  Theatre Manager Facility Management Overview </div> <div data-bbox="506 186 724 365">  </div> <div data-bbox="506 381 724 544">  </div> <div data-bbox="724 186 1062 511"> <ul style="list-style-type: none"> • A collection of tasks • Has an overall owner • Can be in a venue • Can be for an event • Can have time sequence order • Can have resources • Can be duplicated • Can be billed </div>	<p>Notes: Projects are:</p> <ul style="list-style-type: none"> • A collection of tasks • Have an overall owner • Can be in a venue • Can be for an event • Can have time sequence order • Can have resources • Can be duplicated • Can be billed
<p>Slide 42 Creation</p>	<div data-bbox="489 574 1062 607">  Theatre Manager Facility Management Overview </div> <div data-bbox="506 617 1062 698"> <p>Creation</p> <ul style="list-style-type: none"> • Projects can be made by creating a new one from the project list • They can be made by duplicating an existing project (ie. templating) • They can be created by combining a number of tasks on a calendar into a project </div>	<p>Notes: How do you create a Project</p> <ul style="list-style-type: none"> • Projects can be made by creating a new one from the project list • They can be made by duplicating an existing project (ie. templating) • They can be created by combining a number of tasks on a calendar into a project
<p>Slide 43 Billing Status</p>	<div data-bbox="489 1003 1062 1036">  Theatre Manager Facility Management Overview </div> <div data-bbox="506 1045 1062 1088"> <p>Billing Status</p> <ul style="list-style-type: none"> • Estimate acts like reservation only (no G/L), but invoice can be printed. • Invoice means any income and expenses for reservations go to the G/L. </div> <div data-bbox="506 1104 1062 1412">  </div>	<p>Notes:</p> <ul style="list-style-type: none"> • Estimate acts like reservation only (no G/L), but invoice can be printed. • Invoice means any income and expenses for reservations go to the G/L. <p>Defaults for Tasks created later. Determines calendars that project appears on.</p>

Slide 44 Accounting

Theatre Manager Facility Management Overview

Accounting

- An order number is required for billing.
- Printing 'estimate' will cause one to be added
- You can associate to an existing order (order can have multiple projects)

Order # →

Fiscal Year →

Invoice Options →

Notes:

Accounting:

- An order number is required for billing.
- Printing 'estimate' will cause one to be added
- You can associate to an existing order (order can have multiple projects)

For invoice options: Estimated amount will print while the billing setting is 'estimate'. Otherwise actuals will print.

Include in invoice means that the line item will print on the invoice
Incl. estimates from subtasks means that subtasks will print on the invoice.

Slide 45 Tasks

Theatre Manager Facility Management Overview

Tasks

- Initial tasks in a project can be entered similar to an outline style
- Tasks are associated with default values
- Tasks can have estimates, resources, and people associated with them
- Tasks times can be changed until the task is linked with another via gantt

Task outline →

Notes:

Entering Tasks:

- Initial tasks in a project can be entered similar to an outline style
- Tasks are associated with default values
- Tasks can have estimates, resources, and people associated with them
- Tasks times can be changed until the task is linked with another via Gantt (chart)

Slide 46 Gantt Charts

Theatre Manager Facility Management Overview

Gantt

- The tasks in a project can be viewed and edited in a timeline

Notes:

A **Gantt chart** is a type of bar chart that illustrates a project schedule. Gantt charts illustrate the start and finish dates of the terminal elements and summary elements of a project. Terminal elements and summary elements comprise the work breakdown structure of the project

Using Gantt:

- The tasks in a project can be viewed and edited in a timeline

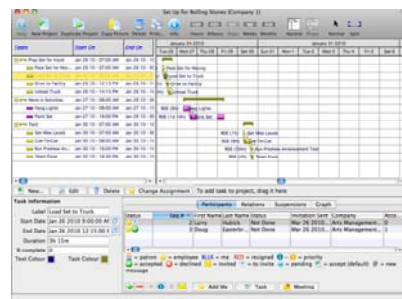
Slide 47 Gantt Charts



Theatre Manager Facility Management Overview

Gantt

- Showing 'Phases' allows you to see the participants in the task below
- You can edit start, end, duration, colour on Gantt chart
- You can break relations and suspensions.



Notes:

- Showing 'Phases' allows you to see the participants in the task below
- You can edit start, end, duration, colour on Gantt chart
- You can break relations and suspensions.

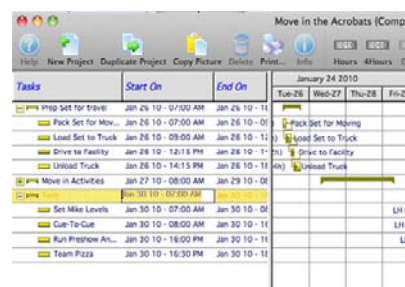
Slide 48 Gantt Charts



Theatre Manager Facility Management Overview

Gantt

- You can hide/show groups (special tasks that are 'headers')
- You can move task or group order around
- You can edit start date/time and end date/time in this area



Notes:

- You can hide/show groups (special tasks that are 'headers')
- You can move task or group order around
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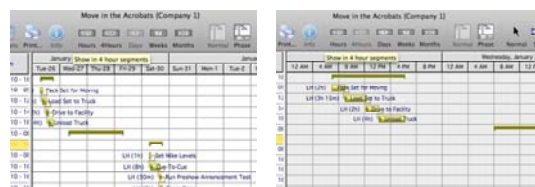
Slide 49 Gantt Charts



Theatre Manager Facility Management Overview

Gantt

- The toolbar can be used to alter the timeline settings for the chart
- Choices are hours, 4 hours, days, weeks and months.
- Granularity depends on type of chart.
 - Move in might be best at 4 hours
 - Annual business plan might be best set at weeks or months



Notes:

- The toolbar can be used to alter the timeline settings for the chart
- Choices are hours, 4 hours, days, weeks and months.
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Slide 50 Gantt Charts

Theatre Manager Facility Management Overview

Gantt

- Change time of task by dragging the item on the Gantt chart
- Drag to another date and time (snaps to grid, change manually)
- You cannot drag to an earlier time than any dependencies.

Notes:

- Change time of task by dragging the item on the Gantt chart
- Drag to another date and time (snaps to grid, change manually)
- You cannot drag to an earlier time than any dependencies.

Slide 51 Suspensions

Theatre Manager Facility Management Overview

Suspensions

- Splitting a task in two so it is done in stages
- Use 'Split' and then click on task. Defaults to a day, drag to fine tune
- Only one suspension per task
- Looks continuous on the actual calendar (split in gantt)
- Remove in 'Suspensions' tab in task view at bottom

Notes:

- Splitting a task in two so it is done in stages
- Use 'Split' and then click on task. Defaults to a day, drag to fine tune
- Only one suspension per task
- Looks continuous on the actual calendar (split in gantt)
- Remove in 'Suspensions' tab in task view at bottom

Slide 52 Relations

Theatre Manager Facility Management Overview

Relations

- Used for tasks that have a relationship with other tasks
- Drag between tasks to create a relationship and then specify
 - Start to Start -> both tasks must start at the same time
 - Finish to Finish -> both tasks must end at the same time
 - Finish to Start -> next task starts when one ends
- Break relations in relation tab in task detail at bottom

Notes:

- Used for tasks that have a relationship with other tasks
- Drag between tasks to create a relationship and then specify
 - Start to Start -> both tasks must start at the same time
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- Break relations in relation tab in task detail at bottom

Slide 53 Duplicating – Step 1

Theatre Manager Facility Management Overview

Duplicating

- Duplicate projects using a wizard to assign new owners and workers
- Available from project detail or list.
- Enter new name for project (useful for move in, special events, etc).

Notes:

- Duplicate projects using a wizard to assign new owners and workers
- Available from project detail or list.
- Enter new name for project (useful for move in, special events, etc).

Slide 54 Duplicating – Step 2

Theatre Manager Facility Management Overview

Duplicating

- Enter new owner of project
- Venue (optional) and event (optional). This determines calendars that the tasks will appear on.

Notes:

- Enter new owner of project
- Venue (optional) and event (optional). This determines calendars that the tasks will appear on.

Slide 55 Duplicating- Step 3

Theatre Manager Facility Management Overview

Duplicating

- Since tasks in project can be related to each other, indicate if you want to retain relationships (finish-to-start), suspensions (breaks in tasks)
- You can also force all task to start at one date and rearrange manually (overrides relationships)

Notes:


- Since tasks in project can be related to each other, indicate if you want to retain relationships (finish-to-start), suspensions (breaks in tasks)
- You can also force all task to start at one date and rearrange manually (overrides relationships)

Slide 56 Duplicating – Step 4

Theatre Manager Facility Management Overview

Duplicating

- People change roles, so duplicating an old project might mean re-assigning substitute workers.
- Changes to indicate staff (non billable) and personnel data (billable)



Notes:

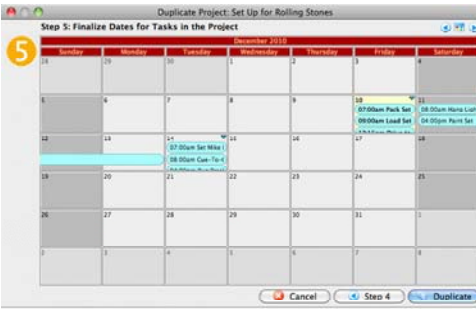
- People change roles, so duplicating an old project might mean re-assigning substitute workers.
- Changes to indicate staff (non billable) and personnel data (billable)

Slide 57 Duplicating – Step 5

Theatre Manager Facility Management Overview

Duplicating

- There is a final opportunity to re-arrange some of the tasks.
- This should only be available if the 'project relationships' are not required to be maintained in step 3.



Notes:

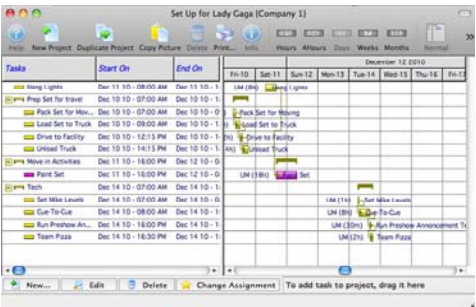
- There is a final opportunity to re-arrange some of the tasks.
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Slide 58 Duplicating

Theatre Manager Facility Management Overview

Duplicating

- When done, the project is created with same resources, pricing, estimates, etc as the original.



Notes:

- When done, the project is created with same resources, pricing, estimates, etc as the original.

Slide 59 Billing



Theatre Manager Facility Management Overview



- Tasks can be estimated
- Estimates can be printed
- Only projects can be billed
- Projects must be attached to an order for estimates to be printed
- Multiple project per order – one recommended for now
- Billing state can be changed from estimate to bill in order to create G/L entries.

Notes:

- Tasks can be estimated
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Slide 60 Estimate & Actual Invoices



Theatre Manager Facility Management Overview

Estimate Invoices

- Do not post to G/L (like reservation only)
- No transactions/daily sales
- Only prints 'Estimates' on the task window, regardless if resources or personnel are attached
- Any data in resources are ignored

Actual Invoices

- Post to G/L
- Transactions and daily sales
- Only prints 'Actuals' calculated from **resources** and **personnel** used to perform each task.
- Any dollar values in estimates are ignored

- Both types require a patron (and order) to print the invoice
- You can switch between estimate and actual if no transactions

Notes:

Estimate

- Do not post to G/L (like reservation only)
- No transactions/daily sales
- Only prints 'Estimates' on the task window, regardless if resources or personnel are attached
- Any data in resources are ignored

Actual

- Post to G/L
- Transactions and daily sales
- Only prints 'Actuals' calculated from resources and personnel used to perform each task.
- Any dollar values in estimates are ignored

Both types require a patron (and order) to print the invoice

You can switch between estimate and actual if no transactions

Slide 61 Resources & Personnel



Theatre Manager Facility Management Overview

Resources

- Resources are physical things used in performing a task.
- Normally considered to inventory items

Personnel

- Use the volunteer module
- Far more tightly integrated
- Staff and Patrons can be associated with a task but cannot be billed.
- Staff must be set up as capable of performing 'personnel' activities and associated with a task to cause billing – because we bill based on activity.

Notes:

Resources

- Resources are physical things used in performing a task.
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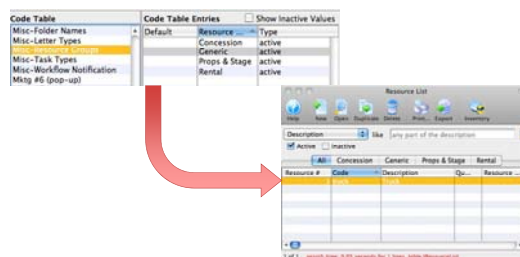
Slide 62 Resources



Theatre Manager Facility Management Overview

Resources

- Items that we can sell (or rent) along with a task.
- Some are tracked for inventory purposes (eg buy, then resell choc. Bars)
- Some are tracked for rental purposes (rent stage equipment by the hour)
- Some are fabrications (popcorn might have a recipe to make before sale)
- Categorized for convenience of searching in Code Tables



Notes:

- Items that we can sell (or rent) along with a task.
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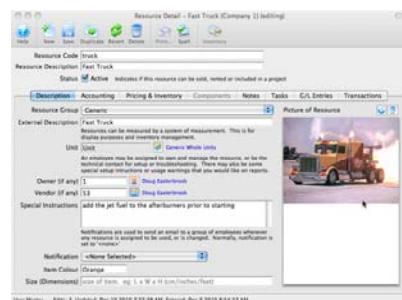
Slide 63 Resources



Theatre Manager Facility Management Overview

Resources

- Resource code, internal and external name (for invoices, etc).
- Units of measurement (always 'unit', concession expands for fabrication)
- Owner looks after the resource and can be notified of changes
- Default vendor is who sells it to us.



Notes:

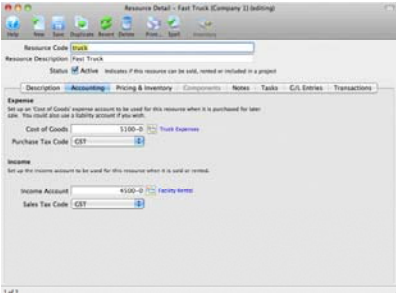
- Resource code, internal and external name (for invoices, etc).
- Units of measurement (always 'unit', concession expands for fabrication)
- Owner looks after the resource and can be notified of changes
- Default vendor is who sells it to us.

Units are important. For FM, you can only sell 'each' or single 'unit'. In other words, you can sell usage of 150 units of chairs, you cannot sell half units. In concession, you can sell half a litre of pop, or use 1/ 4 cup of ketchup in your hamburger fabrication.

Slide 64 Resources

Resources

- Tracks the expense for 'buying' the item when we want to resell it
- Tracks the income account for 'selling' the item to a patron
- Transactions only created when the project that the resource is attached to is changed from 'estimate' to 'bill'.



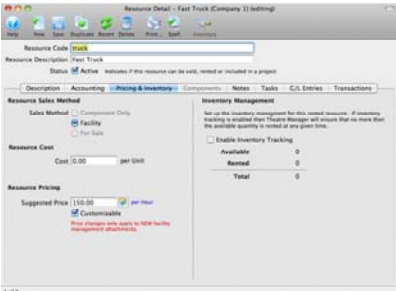
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- Transactions only created when the project that the resource is attached to is changed from 'estimate' to 'bill'.

Slide 65 Resources

Resources

- Pricing can be set for the 'cost' of the item if we need to buy it to satisfy a rental request (eg donuts and coffee)
- Standard sales price can be set when adding to a task
- Use 'Customizable' if you want to change the price when adding to a task



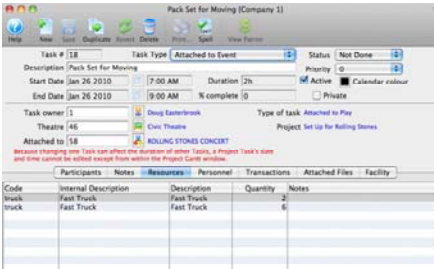
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- Standard sales price can be set when adding to a task
- Use 'Customizable' if you want to change the price when adding to a task

Slide 66 Resource Tasks

Res. Tasks

- Resources can be added to a task on any task window.
- Use the lower buttons, or drag resources onto this list



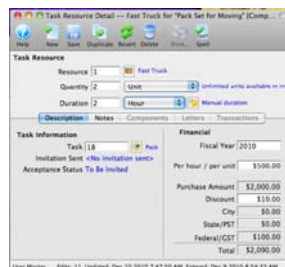
Notes:

- Resources can be added to a task on any task window.
- Use the lower buttons, or drag resources onto this list

Slide 67 Resource Tasks

AMS Theatre Manager Facility Management Overview

- Res. Tasks**
- Set quantities of the resources needed for the task
 - Set the duration of rental (can follow the task, or be fixed such as day)
 - Price comes from resource default, can be changed if 'customizable'
 - Discounts can be applied to get final price (for invoice, not estimates)
 - Notes can be added to print on actual invoice (not for estimates?)



Notes:

- Set quantities of the resources needed for the task
- Set the duration of rental (can follow the task, or be fixed such as day)
- Price comes from resource default, can be changed if 'customizable'
- Discounts can be applied to get final price (for invoice, not estimates)
- Notes can be added to print on actual invoice (not for estimates?)

Durations that follow tasks will change in price if task is changed.

Durations that are fixed – are like doing a fixed price day cost

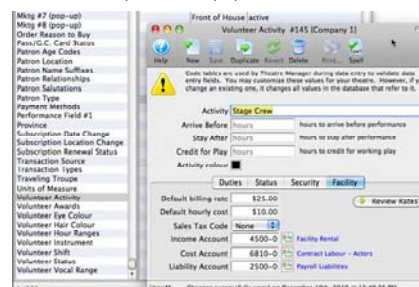
Estimate invoices print the estimate for the item from the calendar.

Real invoices print the actuals

Slide 68 Personnel

AMS Theatre Manager Facility Management Overview

- Personnel**
- The 'volunteer' module now has pricing associated with using the resource.
 - Only personnel can be billed, not staff or patrons associated with a task.
 - Income account (all stage crew bill to same account, not per project)
 - Cost account an liability for items not yet performed.



Notes:

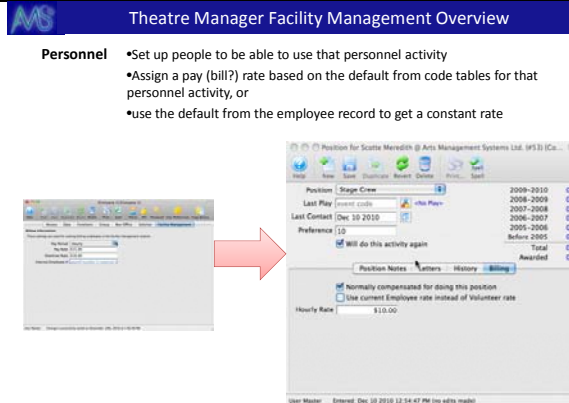
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Slide 69 Personnel

Theatre Manager Facility Management Overview

Personnel

- Set up people to be able to use that personnel activity
- Assign a pay (bill?) rate based on the default from code tables for that personnel activity, or
- Use the default from the employee record to get a constant rate



Notes:

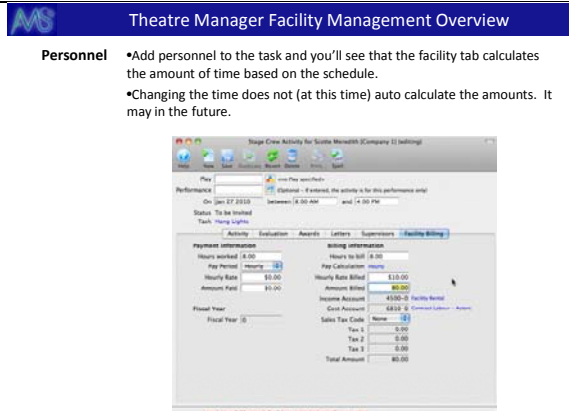
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Slide 70 Personnel

Theatre Manager Facility Management Overview

Personnel

- Add personnel to the task and you'll see that the facility tab calculates the amount of time based on the schedule.
- Changing the time does not (at this time) auto calculate the amounts. It may in the future.



Notes:

- Add personnel to the task and you'll see that the facility tab calculates the amount of time based on the schedule.
- Changing the time does not (at this time) auto calculate the amounts. It may in the future.

Slide 71 Lets print the dang thing

Theatre Manager Facility Management Overview

Lets print the dang thing



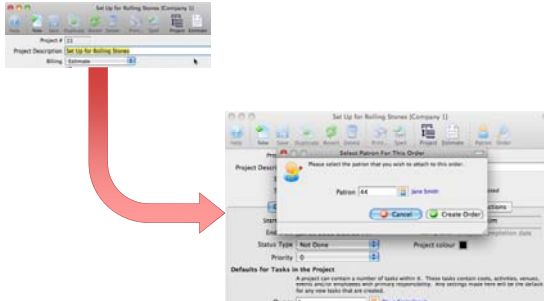
Notes:

Slide 72 Billing

Theatre Manager Facility Management Overview

Billing

- Just click the 'Estimate' or 'Invoice' button on the project detail
- If not associated with a patron/order, you will be asked to provide



Notes:


- Just click the 'Estimate' or 'Invoice' button on the project detail
- If not associated with a patron/order, you will be asked to provide

Slide 73 Billing

Theatre Manager Facility Management Overview

Billing

- Invoice options window is similar to other options
- The most detail is 'also include task details'
- Show comments adds the 'notes' tab to the invoice.
- If Estimate, prints estimate; if invoice, prints actual amounts.



Notes:

- Invoice options window is similar to other options
- The most detail is 'also include task details'
- Show comments adds the 'notes' tab to the invoice.
- If Estimate, prints estimate; if invoice, prints actual amounts.

Slide 74 Billing

Theatre Manager Facility Management Overview

Billing

AMS ARTS MANAGEMENT SYSTEMS

Invoice - Estimate

UNIC: December 9, 2010
Phone: (403) 536-1214
Fax: (403) 536-1210
Account #51

To: DOUG EASTERBROOK
ARTS MANAGEMENT SYSTEMS LTD
SUITE 300
NO 23012 - 17TH AVE SE
CALGARY AB T2A 0P9

From: Arts Management Systems Ltd.
Suite 300
2, 3012 - 17 Avenue SE
Calgary AB T2A 0P9

Date	Item	Description	Qty	Total
Order # 63 December 9, 2010				
Jan 29 2010	Project	Move in the Auditorium	1	0.00
Jan 29 2010	Group	Prep Set for event	1	0.00
Jan 29 2010	Task	Pack Set for Moving	1	0.00
Jan 29 2010	Task	Load Set for Truck	1	0.00
Jan 29 2010	Task	Drive to Facility	1	0.00
Jan 29 2010	Task	Unload Truck	1	0.00
Jan 29 2010	Subtotal	Group - Prep Set for event	1	60.00
Jan 27 2010	Group	Move in Activities	1	0.00
Jan 27 2010	Task	Hang Lights	1	0.00
Jan 27 2010	Task	Paint Set	1	0.00
Jan 27 2010	Subtotal	Group - Move in Activities	1	60.00
Jan 30 2010	Group	Task	1	0.00
Jan 30 2010	Task	Set Mike Levels	1	0.00
Jan 30 2010	Task	Close Back Cur	1	300.00
Jan 30 2010	Task	Ran Procedure Announcement Test	1	0.00
Jan 30 2010	Task	Turns Power	1	0.00
Jan 30 2010	Subtotal	Group - Task	1	300.00
Balance Due:				\$300.00

Notes:

Actual printof bill

Slide 75 End of Day



Theatre Manager Facility Management Overview

End of Day

- Should post the actual amounts from invoices
- End of day has an extra checkbox on create sales entries
- Not fully tested yet.. but soon.



Notes:

- Should post the actual amounts from invoices
- End of day has an extra checkbox on create sales entries
- Not fully tested yet.. but soon.