

Day 2 - Morning

Employee Management

- Create new employees for new users
- Providing the basic required access (an in-depth review of the access requirements will be done in a separate session)

Theatre Manager Introduction

- Logging into the database
- Toolbar Functionality and Menu Introduction
- Accessing the Calendar

Terminology

- What does Calendar mean?
- What does Event mean?
- What does Task mean?
- What does Project mean?
- What does Participant mean?
- What does Employee/Staff mean?
- What does Volunteer mean?
- What does Resource mean?
- What does Inventory mean?

Mechanics of Using the Calendar

- Accessing the Calendar
- Changing the views using Filters to display calendars with people, tasks, and projects
- Navigation via the date toolbar
- Changing the default calendar preferences for setting colors
- Using quick buttons for hiding/showing information on the calendar
- Saving your display preferences

Calendar Filters

- Calendar management to isolate the view to a single venue or event; or a group of events; or to a related set of tasks
- Creating Custom Views
- Saving calendar filters
- Filters can be Universal and Shared or kept Private

Break Time

Where to Start? (Project or Task... Chicken or Egg)

- Start with the Task or Project first?
- Updating Code Tables - Task Types
- Updating Global Colors settings in the Calendar
- Assigning Delegate Employees to Employees

Tasks

- Making new tasks private
- Adding attachments to tasks

Check List

Day 2 - Afternoon

Setting up Venues and Calendar Types

- Setting up new venues, meeting rooms, dressing rooms, rehearsal halls
- Updating Code Tables - Calendar Types
- Updating Global Colors settings in the Calendar
- Assigning Delegate Employees to Employees

Tasks (Continued)

- Using your real life facility management cases, start adding tasks
- Adding attachments to tasks

Resources & Inventory Management

- Creating Resources
- Defining Resource classifications
- Creating Inventory
- Determining profit versus non-profit costing
- Setup of G/L Accounts for Cost of Goods Sold versus Income Accounts

Tasks (Continued)

- Adding Resources/Inventory to tasks

Break Time

Project Management

- Creating a New Project
- Dragging existing tasks from the calendar into a Project
- Adding new tasks to the project, then showing them on the calendar
- Assigning Participants to the task, making them apart of the Project

Gantt Chart for Viewing and Project Management

- Turning the Project into a Gantt Chart view

Project Management (Continued)

- Use an Existing Project as a template and Duplicate it for 'next time' (very powerful)

Tasks (Continued)

- Assigning Venues to tasks
- Adding Resources/Inventory (billable and non-billable) to tasks
- Adding Participants to tasks

Data Exporting/Importing

- Review if there is any data to be imported (volunteers, positions, resources, projects, tasks, etc.)

Practice/Workshop Time

- Go play with what you have learned and keep updating your projects

Check List

Meeting with Executive Director - Review of Onsite Training

- Status update of where we are in the training process
- Outstanding tasks that need to be completed
- Missed topics that were part of the base curriculum and reasons why they were missed
- Possible options (cancel future topics, shortened time allocation to future topics, postpone a future topic for another onsite training session in the future) to catch up on any missed topics

Data Exporting (IT Department)

Based on the existing scheduling software, export data that could potentially be imported into Theatre Manager (Projects, Volunteers, Positions, Resources, Inventory, Personnel Activities, Billing Rates, etc.)

Day 2 - Homework

Data Exporting (IT Department)

- Based on the existing scheduling software, export data that could potentially be imported into Theatre Manager (Projects, Volunteers, Positions, Resources, Inventory, Personnel Activities, Billing Rates, etc.)

Data Importing (Arts Management)

If data has been provided to import:

- Review the exported data to see if it could be imported
- Import Resources, Inventory, Personnel Activities, Billing Rates, etc.

Facility Manager

If no data is going to be imported tonight:

- Continue to setup Resources and Inventory used within the facility.
- Continue to setup code table values associated with the Facility Management module.

Software Installation (IT Department)

If your organization requires Theatre Manager to be installed on additional workstations for any new users that require access, the Theatre Manager installation files will be provided.

- Installation and configuration of Theatre Manager on each of the workstations
- Connectivity testing from workstations to server