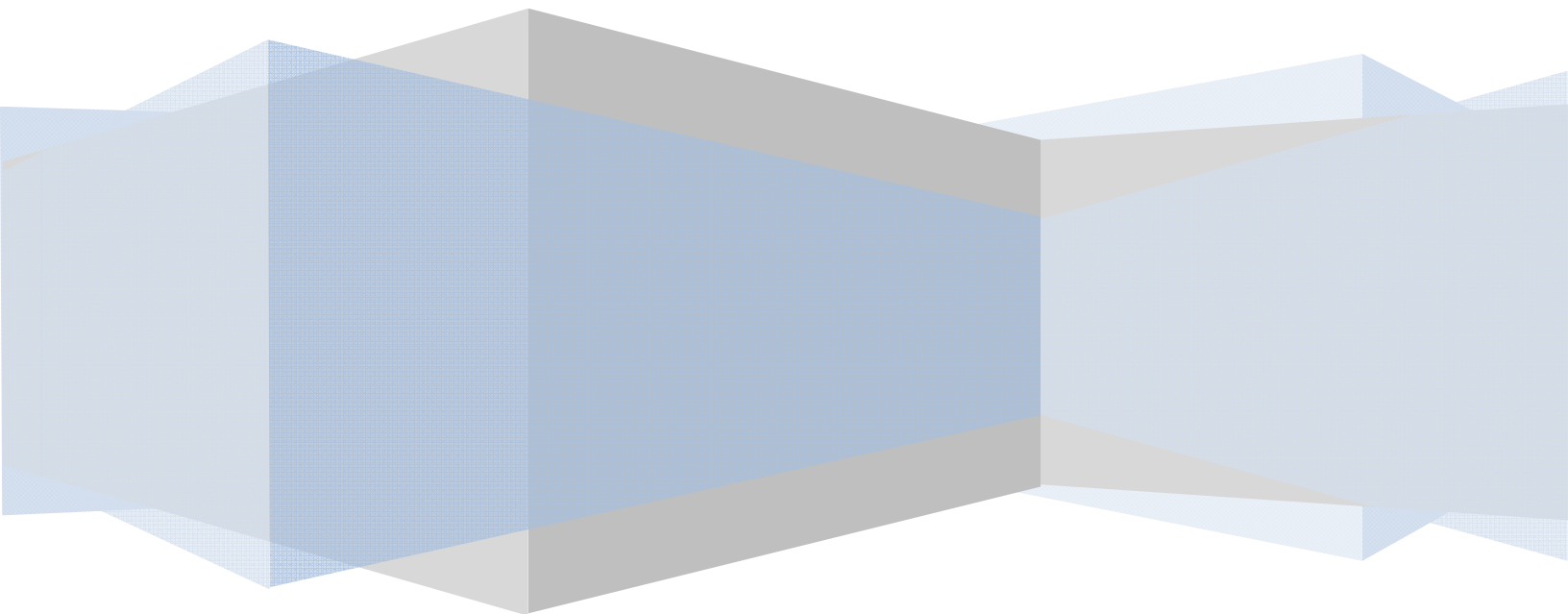


Arts Management Systems

Facility Management Training

Check lists



Preparation	3
Day 2 - Morning	4
Day 2 - Afternoon	5
Day 2 – Homework	6
Day 3 - Morning	7
Day 3 - Afternoon	8
Day 3 – Homework	9
Day 4 - Morning	10
Day 4 – Afternoon	11
Day 4 - Homework.....	12



Preparation

Preparation for our onsite arrival will ensure a more successful implementation of Theatre Manager's Facility Management module.

1 Week Prior

INFORMATION TO PREPARE FOR DAY 1

- The "Local" Administrator password for the database server. This may be a different password than the "Domain" Administrator account. This account is required for the database server only.

Local Administrator Password _____

- If you have a Network Domain setup, the "Domain" Administrator user ID and password for the server and workstation(s)

ID for Server and Workstations Plus Passwords _____

- If you are not using a Network Domain setup, the "Local" Administrator user ID and password for workstation(s)

ID for Local Administrator Plus Passwords _____

ID for Workstations Plus Passwords _____

- If you are using a Wireless Network that will be used by the Onsite Trainer, the Wireless Network password

Wireless Network ID and Passwords _____

- Actual examples of items/events/schedules in your upcoming (or existing) calendar
- Arrange for a projector and backdrop screen. The projector is best for a computer hookup with a fairly high degree of resolution

1 Day Prior

Creating a Training Area

- Prepare the training area for ample room for workstations
- Prepare the training area for and required Ethernet Hubs, Wireless network access
- Have in place additional power bars and/or extension cords
- Setup the projector and backdrop screen

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

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

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

Day 3 - Morning

Install Updated Database (if required)

- Install updated/data imported database
- Review any imported data for verification of accuracy

Review of Prior Topics

- Calendar Views
- Creating a Calendar Filter

Vacation/Holidays and Background Tasks

- Adding Statutory holidays to the calendar
- Items going on all day long, that you want people just to know about
- Employee Vacation days

Moving the Start Date of a Project

- Project dependent tasks
- Gantt dependent tasks
- Manually moving tasks

Calendar Views

- Multiple Calendar Views at one time
- Variations of the calendar default views

Task Management

- General Overview
- Attaching Events to a task
 - Searching for Events & Performances
- Attaching Resources to the task
 - Creating Resources as required
- Review the Calendar display - Show by Resource, from the Resource Point-Of-View
- Review the Calendar display - Show by Venue, from the Venue Point-Of-View
- Review the Calendar display - Show by Employee, from the Employee Point-Of-View
- Setting Alarms for reminder of important tasks

Break Time

Personnel/Staff/Employees/Volunteers/Participants

- Personnel versus Participants
- Complete entering Participants/Staff
- Add Volunteers

Patron Management

- Finding Existing Patrons
- Tricks for searching different ways for patrons
- Different Patron Icons
- Changing displayed columns, re-ordering the displayed columns
- Editing Existing Patrons
- Creating New Patrons (multiple address and contact numbers)

Personnel Management

- Adding a desired position to personnel

Day 3 - Afternoon

Personnel Management (Continued)

- Setting up new positions/job functions that are allowed to be assigned to personnel
- Defining duration hours (before, after, during) for those positions
- Defining billing rates/costs and G/L accounts for those positions
- Return back and assign the new positions/job functions to personnel

Task Management (Continued)

- Return to the previously created tasks and assign personnel positions

Personnel Management (Continued)

- Return to the Personnel Window and see the history list being updated
- Edit tasks assigned to the Personnel via the Tasks tab

Practice/Workshop Time

- Practice locating patrons
- Update the skill sets for your own personnel record and then other employees
- Start updating your tasks with Resources and personnel assignment

Employee Management

- Limiting the access to the new employees only to Facility Management & Personnel Windows
- Update security to only include personnel management, versus marketing information
- Excluding box office module, donation module, and other non-required modules
- Providing view only access versus insert, edit, or delete privileges
- Providing access to personnel to only print reports

Break Time

Project & Task (Continued)

- Create 2 new tasks in the future, not assigned to a project or personnel
- Create a new project
- Click on the tasks tab
- Take the tasks and drag it onto the list to associate it with a Project
- Back to the question: Project or Task; Chicken or Egg
- Adding new tasks within the Projects task list

Gantt Chart

Sounds really technical doesn't it?

- Review the Gantt Chart window
- Changing of views
- Moving tasks within the Gantt Chart view
- Editing tasks via the Gantt Chart view
- Adding tasks via the Gantt Chart view
- Linking Tasks with dependencies/relationships
- Adding Suspensions to tasks
- Adding Split-Times to tasks

Data Exporting/Importing

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

Data Exporting (IT Department)

- Finalize export for Projects, Volunteers, Positions, Resources, Inventory, Personnel Activities, Billing Rates, etc.

Practice/Workshop Time

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

Day 3 – Homework

Data Importing (Arts Management)

If data has been provided to import:

- Finalize import for Resources, Inventory, Personnel Activities, Billing Rates, etc.

Facility Manager

If no data is going to be imported tonight:

- Complete the setup of Employees to access Theatre Manager and assigning the required security access privileges.
- Continue to setup Resources and Inventory used within the facility.
- Continue to setup Personnel and assigning Personnel Positions/Job Functions.
- Continue to setup code table values associated with the Facility Management module.

Day 4 - Morning

Install Updated Database (if required)

- Install updated/data imported database
- Review any imported data for verification of accuracy

Review of Prior Topics

- Calendar Views
- Creating a Calendar Filter
- Creating a Project
- Creating and updating Tasks
- Updating Personnel with Positions

Notifications

Facility Management Notifications are different than Workflow Notifications. This section involves the management of what to do within the Pending Notifications Window.

- General Startup Warnings
- Tasks Assigned to You
- Letters or Emails to be Sent
- Email Responses Waiting to be Retrieved
- Unsent Notifications
- Awaiting Responses
- Task/Meeting Notifications
- New Responses from Participant Responses

Managing Incoming and Outgoing Personnel Email Notification Responses

- Managing the Email responses outside of the Notifications Window

Invoicing and Billing

- Printing out invoices for completed Projects
- Maintaining default set of invoice comments

Practice/Workshop Time

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

Day 4 – Afternoon

Introduction to Reports

The purpose of this session is not to learn each and every report in Theatre Manager, rather it is used to learn about the Report Criteria Window and how to access the data so you print Theatre Manager's reports.

Facility Management Reports

- In-depth review of Part of the Criteria Window
- Using Filters to quickly find data base fields
- Saving reports as PDF's for saving on the Server
- Creating Custom Categories
- Saving and using previously saved criteria
- Using the "Test" button
- Running similar reports with the same criteria
- Altering the criteria on the existing data
- Exporting data directly into MS Excel documents
- Producing reports in Theatre Manager that mimic the reports from your prior system (based on the reports that have been supplied to the Trainer)
- Creating criteria for reports that mimic the report criteria from your prior system (based on the reports that have been supplied to the Trainer)
- **Printing the Calendar
- **Printing the Gantt Chart
- **People attached to a Project
- **Who is doing What & When
- **Reports on Venue Activity
- **Reports on Staff Activity

Review of Outstanding Tasks

- Review of what has been completed to date
- Assigning of responsibility for each of the tasks to get completed
- Determine estimated time for completion for outstanding tasks

Meeting with Executive Director - Review of Onsite Training

- On how training went
- Outstanding tasks that need to be completed
- Missed topics that were part of the base curriculum and reasons why they were missed
- Possible options (future onsite training session, telephone training sessions) to catch up on any missed topics

Break Time

Open Floor Questions/Review of Prior Topics

- Project Management
- Task Management
- Resources Management
- Patron Management
- Employee Management
- Pending Notifications Management
- Invoices and Billing
- Reports
- Available time for revisiting a missed session

Practice/Workshop Time

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

Onsite Trainer Departs

All the best to all who participated during this training process! The optimum training process and experience is directly related to the effort that each one of the participants put into it on a daily basis.

Day 4 - Homework

Facility Manager

- Complete the setup of Employees to access Theatre Manager and assigning the required security access privileges.
- Continue to setup Resources and Inventory used within the facility.
- Continue to setup Personnel and assigning Personnel Positions/Job Functions.
- Continue to setup code table values associated with the Facility Management module.

All Staff

- Continue to work on all outstanding tasks that were not completed during training.