

Check List

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

Check List

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

Check List

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.