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 then 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

Custom Trainer

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

Arts Management Systems

Custom Trainer

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.