

KEY:

- 101 – Thorough overview of the fundamentals – beginners welcome
- 201 – Diving into the details - some experience with the topic is helpful
- 301 – Advanced needs or creative application use – comfort with the topic is strongly encouraged
- Roundtable – an open format for idea sharing and hands-on testing – your interests and needs will direct the conversation
- Presentation – a slightly more formal session with LOTS of room for questions and interaction



Monday, April 30

- 10am | Registration
- 11am | Keynote Welcome & Introduction
- 12:30pm | Proctors Tour
- 2pm | Travel & Tour of Troy Facilities
- 6pm | Group Dinner in Troy

Tuesday, May 1

8:30am | TM Storytime: Bloopers and Fixits – Roundtable

We are all mere mortals here! Share a notable frustration or error you made in TM and how you fixed it and learned from it. We've all been there at some point and the only shame is not learning from each other's experiences. How better to warm up than to remind ourselves of both the bottomless pit feeling AND the eureka moment?

9:45am | 201: Simple Web Customizations for Non-Techs – Presentation

For the no longer truly terrified, but as of yet uninitiated. A basic overview of the web page structures, what you can and cannot safely change and how to find a specific page and the text you wish to change within the html.

| 101: Donations – Presentation

Give us your money and we will show you the most efficient way to take it! Learn about reminder letters, payment schedules and more. We take cash, credit, checks, and unpaid pledges.

| 101: Criteria Building – Presentation

An introduction to criteria building structures and commonly used fields. We'll focus on tips to pose your question in a way a computer understands, find the right field and troubleshoot unexpected results. This is a teach a man to fish model, so bring questions and examples of that thing you just couldn't figure out for the life of you!

| 101: Life of a Price: Map and Event Basics for the Box Office – Roundtable

How do you become a ticket selling zen master? Understand how the events you sell are built. Together, we'll delve into the basics map creation and event building.

11:15am | 201: IT/Technology – Roundtable

Gadgets and Gizmos a plenty! A discussion on the back end of what TM runs on and all the peripherals such as database server, ticket scanners, web listeners, and anything else. We'll also discuss how outlets interact with each other in TM.

201: Donation Based Reporting – Roundtable

Want to learn everything about your donors? This is a great first step. Using donation reports you can find out how they give, when they give, and pull all sorts of nifty information like a playbill list or more!

101: Sub Setup to Sales – Roundtable

It's not as hard as you think! Together, we'll roll over patron data and create a subscription package using the control house to create, renew and change subscriptions.

201: Exports & Excel – Roundtable

Data is proof that Artsman loves us and wants us to be happy. You've moved past mail lists and reports and need to dig into some raw numbers, but that Excel class in college feels like it was a REALLY long time ago... Using ticket and donation data exports, we'll review good data format and foundational Excel structures and formula-building tips. Please bring an example of a recent research need and we'll do it together!

1:45pm | 301: API Queries and Case Use Examples – Presentation

That API thing sounds like da bomb - for someone else who can read gobbledegook. Artsman will open the hood and show you the API structure, how to navigate the tables and build simple queries. Still need inspiration? How about some real-life examples of how the API is being used to up the ante?

101: Facilities and Volunteer Management – Presentation

One of the most popular sessions from past conferences - Artsman dives into the facilities and volunteer management modules and the options available to track, schedule, remind and bill.

101: Finance/Accounting – Presentation

Discover how TM handles accounting entries from cash and receivables to deferred and earned revenue. We'll explore reports that will help you get all the info you need to get it into your accounting software. We'll also look at how event setup affects how entries are made.

301: Not So Simple Subscriptions – Roundtable

The subscription devil is in the details, right? Bring your setup examples and/or needs and we'll collectively find solutions using the subscription module, package setup (including multi-packages) and non-default rollover options. Topics include creating favorite seats in new maps or from non-control house events, cross-venue or cross-package models, auto-renewals and optional titles.

3:15pm | 201: G/L and Accounting Reporting – Roundtable

Where's the backup?... Accountants and auditors always need more info. We'll look at the most common reports to run to make everyone in your accounting office happy campers.

101: Online Order Customer Training and Troubleshooting – Roundtable

You know the old adage - patrons don't read. And then they call your Box Office and say "the website" is broken. This session is to explore common web sales use issues, including: identifying user errors from technical errors, tips for helping patrons who have trouble online, how to solve mystery orders, and basic web settings.

201: All Things Form Letters – Roundtable

Feel like there's a smarter way to customize your form letters? There probably is. If you find you're doing calculations in Excel and then mail merging to letters outside of TM, maybe it's time to re-asses your form letter build. We'll explore tables, row level tables and calculated fields. Familiarity with adding data fields in form letters is a plus. Want to make sure you get your specific letter need addressed? Bring in an example to use in the session!

101: Facilities and Volunteer Management Case Use Examples – Roundtable

The power of the facilities and volunteer modules is their flexibility. Sometimes, though, this just feels like choice overload. You know the options - come hear and share how other users have implemented the modules to track, schedule, remind and bill. Come prepared to share and ask questions!

4:30pm | TiMder

We want you to relax and focus on each session without worrying about finishing that hallway conversation. This is your time!

7:30pm | Group Outing: The King and I on the Proctors MainStage

Wednesday, May 2

9:00am | Open Spaces Format

A group-guided space, facilitated by MOPCO, a Schenectady-based improv troupe. With a format focused on constructive collaboration, we'll identify topics and brainstorm solutions together.

1:00pm | 101: Finance/Accounting – Presentation

Discover how TM handles accounting entries from cash and receivables to deferred and earned revenue. We'll explore reports that will help you get all the info you need to get it into your accounting software. We'll also look at how event setup affects how entries are made.

101: Reveal Dashboards – Presentation

If you haven't been playing with Reveal, TM's online visualization dashboard, you're missing out! It's been released for about a year and Artsman will get us up to speed on all the new features with recommendations for a personalized dashboard.

101: Criteria Building – Presentation

An introduction to criteria building structures and commonly used fields. We'll focus on tips to pose your question in a way a computer understands, find the right field and troubleshoot unexpected results. This is a teach a man to fish model, so bring questions and examples of that thing you just couldn't figure out for the life of you!

101: Life of a Price: Map and Event Basics for the Box Office – Roundtable

How do you become a ticket selling zen master? Understand how the events you sell are built. Together, we'll delve into the basics map creation and event building.

2:30pm | 201: G/L and Accounting Reporting – Roundtable

Where's the backup?... Accountants and auditors always need more info. We'll look at the most common reports to run to make everyone in your accounting office happy campers.

101: Sub Setup to Sales – Roundtable

It's not as hard as you think! Together, we'll roll over patron data and create a subscription package using the control house to create, renew and change subscriptions.

201: Ticket Based Reporting – Roundtable

This is our bread and butter, folks. If you don't feel comfortable pulling information based on ticket sales (such as house lists, sales summaries, and producer reports) come bring your questions and we'll get into the nitty gritty. We'll use Grouping and Having in criteria building and talk about when to jump out of reports and into a spreadsheet.

201: Exports & Excel - Roundtable

Data is proof that Artsman loves us and wants us to be happy. You've moved past mail lists and reports and need to dig into some raw numbers, but that Excel class in college feels like it was a REALLY long time ago... Using ticket and donation data exports, we'll review good data format and foundational Excel structures and formula-building tips. Please bring an example of a recent research need and we'll do it together!

4:00pm | Mini Sessions

New this year! - it's the speed dating of the user conference world! We'll have several stations rotating through a range of topics every 15-20 minutes. This is for those little fiddly things that don't need a whole session. Topics include: workflow notifications, plastic gift cards, fee setup options, and more!

Thursday, May 3

9:00am | 201: Ticket Face Builds – Roundtable

Wait! Don't change the channel! Artsman gave us a ton of helpful guidance last year and now we're making it a dedicated session. Bring your ticket face challenge and we'll master those PICK statements together. The focus will be useful resources and tips to help make your next ticket face a calm experience instead of a hunt and pecking nightmare.

101: Donations – Presentation

Give us your money and we will show you the most efficient way to take it! Learn about reminder letters, payment schedules and more. We take cash, credit, checks, and unpaid pledges.

201: For Outlets By Outlets – Roundtable

All things outlet. After a brief overview of what outlets are and roughly how they're structured, we'll dive right into questions and key topics such as reporting on sales for other outlets, challenges of a shared patron database, IT setup, managing technical issues, etc.

201: Intermediate to Advanced Criteria Building - Roundtable

You're the guru at the office and you're stuck. Bring that problem here and we will be your personalized brainstorm team. The focus will be getting information out of TM, but we're prepared to pop into Excel if needed. Keep comfort with Grouping and Having a plus. Feel free to bring example files.

10:30am | 201: Donation Based Reporting – Roundtable

Want to learn everything about your donors? This is a great first step. Using donation reports you can find out how they give, when they give, and pull all sorts of nifty information like a playbill list or more!

101: Reveal Dashboards – Presentation

If you haven't been playing with Reveal, TM's online visualization dashboard, you're missing out! It's been released for about a year and Artsman will get us up to speed on all the new features with recommendations for a personalized dashboard.

201: Ticket Based Reporting – Roundtable

This is our bread and butter, folks. If you don't feel comfortable pulling information based on ticket sales (such as house lists, sales summaries, and producer reports) come bring your questions and we'll get into the nitty gritty. We'll use Grouping and Having in criteria building and talk about when to jump out of reports and into a spreadsheet.

101: Patron Database Cleanup and Best Practices – Roundtable

Inconsistent data? Duplicates? Way too many mail lists? We'll hit upon the basics of manual merging and review auto-merging and data imports. Mostly, though, these technical options will be part of a larger conversation identifying bad data, creating better processes and building cleanup strategies.

1:00pm | ArtsMan Presentation

Straight from the horse's mouth...

2:00pm | ArtsMan Q&A (GE Theatre)