

Annual To-Do Timeline for Tessitura Operations

- January
 - **EDU** Build the drama school merchandise season and performances
 - Do a data sync and add it in merchandise settings in Wordpress (this makes the merch available for add-on purchase on all current on-sale classes).
 - **EDU** 7 –TEST online drama school registrations before classes go on sale
 - **EDU** Start prep for auditions, audition workshops, and CAST/Homeschool build
 - **EDU** Add hold codes to all summer classes to bring them down to proper class sizes
 - **MKT** Confirm mainstage package options for next season with marketing director. Consult with web developers if any new package types will be offered.
 - **EDU** Update SQL procedures/jobs for D.S. summer classes ticket history
 - **MKT** Add seasons to TR_Rank_type –Mainstage, School Shows
 - **MKT** Create new constituencies and rank them in TR_constituency for STB, SUB, school group
 - Update LTR_constituency_update to include new constituencies
 - **MKT** Update is subscriber, is single ticket buyer constituencies for Tessitura Analytics
 - In TX_ANALYTICS_DIVISION_ELEMENT, update the data where column on the rows labeled is subscriber and is single ticket buyer--enter STB and SUB constituencies at the end of the code string
 - **MKT** update TR_Lang with season years (ie 2020-2021)
 - **MKT** Create the new seasons in TR_Season for Mainstage, School shows, school waitlist
 - Check EIS display for any seasons you want to show in Season overview-- and add season #'s to season overview jobs in SQL(update: I don't think this is necessary anymore, but leaving here in case ticket history is not populating then this needs to be done)
 - **MKT** Create campaigns for Mainstage and schools
 - **MKT/EDU** update LTR_pricetype_rules for current constituencies for DS and sub discounts
 - **FIN** Get GLs for new season from the business office, add them to GLs in Campaigns>references
 - **MKT/EDU** Deactivate unused price types if any
 - **MKT** Create SQL stored procedure for ticket history updates for singles, subs, and schools
 - **MKT** Set up fees
 - **FIN** Update TR_BATCH_PERIOD table for the coming fiscal year.
 - **EDU** January 28th-Summer Drama School on sale
 - **MKT** Get prices/show information for new season from Sales Manager and Marketing Director
 - Update one sheet to prepare for season set-up
 - Create price templates from previous season for each different price structure (i.e. preview, weekday, weekend) and make updates as necessary.
 - **MKT** Get production calendar for next season from production manager or associate, confirm with managing director and marketing director
 - Get ball rolling for identifying accessible/special performance dates for school and public
 - **MKT** Set up initial mainstage performances (to be copied) price layers, MOS
 - Set the default sales start date to be the actual on-sale date. This affects analytics.
 - Preview, Opening Night, ASL/AD, and Sensory Friendly performances have keywords that need to be added. These control the tag that appear next to the performance online.
 - Don't forget dummy performances for flex packages and vouchers
 - Productions for dummy performances need keyword "suppress unsold" added to them for Tessitura Analytics optimization. Subscriber/Flex Pass, Comps, Vouchers Productions.

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- They also need the “exclude from web listing” keyword to keep them off the website.
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- February
 - **MKT** Check set-up and copy initial performances to create full production calendar
 - Check start/end dates on publish and price types
 - Make Sure ticket designs are correct. Real performances use “SYOS ticket” design, flex vouchers use “sub voucher”, and comp tickets use “SUB free ticket”
 - Add preview, opening night, ASL, AD, and Sensory friendly keywords to appropriate performances.
 - Add ASL, AD and SF tags to short names
 - **EDU** start build for DS Performance Labs Tuition
 - **EDU** Build Homeschool/CAST classes for next school year
 - **MKT** Set up perf groups, packages for mainstage
 - **MKT** Add hold codes in season manager for mainstage
 - School, mainstage, preview, ASL interpreted, sensory friendly have separate hold maps
 - **MKT** Request live to test copy and change on sale dates in test. Test in application and on preview site.
 - import new seasons and productions into integrate 2 test data, sync data in integrate 2, then sync in WordPress
 - Let marketing know they can start setting up production detail pages on website.
 - **MKT** Go into LTR_PERF_GOAL and set up the SCT Ticket Sales Report.
 - Put the new season in the @season_str parameter of the Daily and 15 Minute Incremental - Season Overview Update jobs in SSMS. (update: I don’t think this is necessary anymore, but leaving here in case ticket history is not populating then this needs to be done)
 - **MKT** Create Analytics Dashboard for new mainstage/school season sales tracking.
 - **All** Consider timeline for April/May Tessitura upgrade
- March
 - **EDU** March 4- CAST and Homeschool on sale date
 - **MKT** Use season maintenance to bulk update GLs and MOS start dates to correct any errors.
 - **MKT** Ask Patrons Services Manager to update subscription order form, sub price chart, single price chart, etc.
 - **MKT** Ask Patrons Services Manager to Create outside source codes for subscriptions
 - **MKT** Ask Patrons Services Manager to Update and give guidelines for taking subscription orders to box office staff.
 - ~~**MKT** Check confirmation email text for any necessary updates (this should not be necessary, as we are now using standard/generic language on confirmation emails.)~~
 - **MKT** March 9- early bird renewal subscriptions on sale
 - **MKT** setup scheduled utility for subscription invoice billing on 15th and 1st of each month.
 - **MKT** setup scheduled utility “payment plan invoice utility” to move subscription payment plans to invoices.
 - **MKT** Set up school performance price layers, MOS
 - For all non-homeschool performances set web publish dates in the past and add keyword “exclude from web listing”. These two things keep school performances from showing up on our website.

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- **MKT** Have school show manager identify which performances will be homeschool performances. Give those performances the Web MOS and add “HS” tags to short names if not already done.
- **MKT** Add hold codes in season manager for school shows
- April
 - **MKT** Create outside source codes for school shows
 - **MKT** have marketing contact BOCA for ticket stock printing for next season. BOCA takes a three week break in July, so we need to get in their queue early to avoid a rush charge.
 - **MKT** April 22nd- sneak peek
 - **MKT** April 23rd - on sale date/public season announcement email
 - **EDU** Start planning for school year drama school build
 - request timeline for class details from Education Director/Programming Director
 - **EDU** April 30th- Casting announced—Tuition registration on sale
- May
 - **MKT** Setup EDU Preview performances and workshops
 - Previews are setup under production as a separate season
 - Workshop is setup under education outreach>professional development
 - Place hold codes to reduce number of spaces available.
 - **DEV** Contact Development Director for fund/campaign structure for upcoming fiscal year (if any changes).
 - **MKT** After season closes
 - change default in TR_Season to New Mainstage season
 - create New season on acct GLs and payment methods (campaigns>references)and set up security so they are available
 - Schools, EO, BOX, DS
 - update LTR_pricetype_rules—any subscriber discount price types, remove the outgoing season subscriber constituency, so only renewed subscribers will get discounts on upcoming season.
- June
 - **FIN** inactivate any GLs and/or payment methods that are no longer in use
 - **DEV** setup devo funds, campaigns, designations for upcoming fiscal year
 - If a campaign goal has been determined enter in in campaign setup.
 - **DEV** setup devo appeals and general sources
 - **EDU** setup education outreach seasons in TR_season
 - Setup EO GLs and fees
 - **ALL** create general web campaign, appeal and source
 - **DEV** setup devo acknowledgement letters for new fiscal year before fiscal year starts.
 - **EDU** Create order import set for new season in TR_import_order_set
 - **DEV** setup scheduled pledge billing for new FY campaign
 - **ALL** June 30/July 1—alert staff who post batches that they will need to back date their posting for the end of the fiscal year. All june batches should have posting date 6/30.
 - **ALL** June 29/30—assess scheduled reports—do any need to be recreated or end dates changed?
 - If any new ack letter types were created you will need to setup a new scheduled report.
 - **DEV/WEB** June30/July 1-Update donate forms on donate2 to use new FY campaign and source codes. If there will be a new Fund, you will need to update that in sct.org wordpress ninja form “Long donation form”.

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- **ALL** 6/30- Update default source code for web in T_defaults

- July
 - **DEV** July 10-15 Update Dev Analytics dashboards: Dev overview, Dev Individual, Dev Institutional, Dev Lybunt/Sybunt, Dev Activity by date.
 - Documentation found here: R:\Documentation\Analytics
 - **EDU** create enrollment fees, cancel fees, financial aid (update GL associated with payment method if GL has fiscal year association).
 - **All** July 10-use SQL to close old appeals
 - To check what will be affected
 - `use impresario select * from t_appeal where end_dt <='2020-07-01 00:00:00.000' and status = 'a'`
 - To update
 - `use impresario update t_appeal set status = 'c'where end_dt <='2020-07-01 00:00:00.000' and status = 'a'`
 - **DEV** ask Development team about their needs for selling tickets to any fundraising events in the coming year. If auctions will be involved, discuss the details of how they will be administrated.
 - **EDU** DS School year class build
 - July 1-5: Fall session Tessitura build
 - July 8-12: Fall Wordpress/Winter and Spring Tessitura
 - July 15-19: Winter Wordpress/Kanani on vacation
 - July 22-26: Spring Wordpress, / Oct, Nov, Winter Break Camps and Extended Care Tessitura
 - July 29-Aug2: Oct, Nov, Winter Break Camps Wordpress /Mid-Winter and Spring Break Camps and Extended Care Tessitura
 - Aug 5-9: Mid-Winter and Spring Break Camps Wordpress/ X-care pricing rules and packages in Tessitura
 - Aug 13: on sale
 - **MKT** update ticket design for new ticket stock (if needed)
 - Be sure to update SCT Sub Voucher with new expiration date and season years. Make sure SCT sub voucher is used on the fake flex pass performances prior to printing. Check that the intended ticket design is being used on real performances as well.

 - **MKT** ask if there will be any changes to birthday party packages/pricing and setup those fees.
 - **MKT** update school performance contract/invoice report (if needed) to reflect any changes from previous season.
 - **MKT/EDU** create outside source codes for single tickets (Patron Services Manager) and school year drama school
 - **MKT** setup any promo codes that will be active for single tickets on sale date

- August
 - **EDU** Deactivate Child constituencies on patrons 19+ -use manage constituency utility with a list by birthdate.
 - **MKT** 1- Single tickets go on sale
 - **EDU** Create SQL jobs that update ticket history for school year classes.
 - **EDU** Update LTR_constituency_update to include school year DS seasons
 - **EDU** 13-School year classes go on sale

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- September
 - **MKT** Create order export/seating reports for all upcoming season shows to be sent to sctseatingreport@gmail.com and sctseatingreport@sct.org
 - This report is a safe guard for system outages on the day of the show.
 - **EDU** Inactivate summer class fees
 - **EDU** Setup TR_Import_order_set for DS comp imports for new season.
 - Comp imports happen shortly after the first day of class for each session.
- October
 - **ALL** Consider timeline for Nov/Dec Tessitura upgrade
- November
 - **EDU** Use product creation tool to create summer class extended care performances in bulk
 - **EDU** Assist with creating pricing rules for Summer extended care and one-day seminars-product volume discounts
 - **EDU** Assist with creating Summer extended care perf groups and packages
 - Season maintenance can be used to add MOS and price types to packages in bulk
 - **EDU** Create Campaign, appeals and outside source codes for Summer Drama School
 - **EDU** Create DS Summer season in TR_season (if not already done by registrar)
 - **EDU** Create new constituencies in TR_constituency for summer drama school
 - Update LTR_constituency_update to include new constituencies
 - **EDU** Start Summer Classes Build
 - 11/4-11/8 Build prep, Extended Care with product creation tool
 - 11/11-11/15 Build prep, Pricing rules for extended care
 - 11/18-11/22 Weeks 1-3
 - 11/25-11-29 Week 4
- December
 - **EDU** Continue Summer Classes Build
 - 12/2-12/6 weeks 5-7
 - 12/9-12/13 weeks 8-9
 - 12/16-20 weeks 10-11
 - Add pricing rules for one-day seminars and any flexible multi-week classes.
 - Add all new pricing rules to pricing rule set
 - Add hold codes to reduce classes to actual capacity
 - Use season maintenance to bulk update GLs and MOS start dates to correct any errors.
 - Proofread classes (preferably not the ones you built) and have partner proof your build.
 - Pay special attention to ticket text, prices, default start date, keywords
 - Import classes to Integrate 2.
 - Update season names in Wordpress
 - To mask the season names, you can go to Tessitura -> Seasons to edit a season. Then update the "Season Title Override" with the display name.
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