



Business Continuity Planning



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Business Continuity Planning

Losing access to Tessitura is a rare occurrence, whether your system is hosted locally or remotely. However, as with any enterprise system, some advanced preparation and planning can minimize the disruption to operations if a system outage occurs. This document outlines some recommended procedures for [preparing for a system outage](#), [operations during a system outage](#), and [entering offline data back into Tessitura](#).

If your organization experiences an unplanned situation that disrupts normal operations, this document also describes how to [communicate with patrons](#), and how to [manage your performances and transactions](#), including handling rescheduled and refunded performances.

Business Continuity Preparation

Backup Reports

One of the key challenges of a system outage is how to continue ticket sales, manage will call, and perform house management or visitor services activities for events taking place during the outage. Maintaining your ability to reference availability and existing sales information is vital. Which seats are still available for tonight's concert? How many tickets are still available for the 12:30 IMAX showing? Who has tickets for this afternoon's performance? What are the details for today's school groups? By scheduling some key reports to run on a regular basis you can ensure that you have access to the data you need to maintain operations during an outage.

For event-based organizations, schedule the reports to run at minimum once in the overnight or early morning hours prior to a performance. For shows with a high day-of sales volume, you may want to schedule a second run of reports a few hours prior the performance.

For admissions-based organizations, where there is a higher volume of day-of sales, schedule the reports to run at least twice a day, once in the early morning and a second time in the middle of the day. If your organization also sells fixed capacity events (such as IMAX screenings and timed admission exhibits), reports for these events should be scheduled at least once prior to the first showing or entry time of the day and a second time a few hours prior to the last showing or entry time of the day.

Reports scheduled to run as part of a system outage contingency plan should be set to email the results to a mailbox that will be accessible when your primary internet or network is down, such as a Gmail account or an externally hosted Exchange server. Multiple reports will be sent to this address one or more times a day, and the majority of the output will never be needed, so regular clean up of the mailbox is important. Consider setting up auto-deletion or archiving rules so that today's reports will always be easy to find.

The following are some suggested standard reports to use for business continuity preparation:

Performance Seating Book – Provides a listing of all constituents with tickets for a performance, with their seat locations. Useful for will call and reviewing seating problems. Even if a performance is general admission (such as an IMAX showing) or represents daily admissions for a venue, this report can still be useful as it lists all constituents who currently have tickets (such as those who purchased admissions in advance on your website).

Order Export Utility – Lists full details of orders that contain single tickets line items for a performance. Useful for will call. Can be set to only show unprinted orders.

House Map Print – Generates a seat map for a selected performance, which can be used to identify available seats.

Hold Code Report – Generates a listing of all held seats for a performance. Useful for reviewing seats that are available but held.

Performance Base Price and Availability Report – Presents a breakdown of the number of available seats in a performance by price zone. This can be used for timed admission performances that use zone times to check the remaining availability of the different admission time slots. This report can also be run to show seat details, in which case all available seats will be listed with section, row, and seat number.

Performance Sales Analysis – Details sales figures for an event broken out by price type and zone, including tickets sold as part of a package. Useful when you need to know how many tickets have been sold but don't need to know to whom they were sold.

Also consider scheduling the run of any custom reports for your organization that may be useful for assisting with operations during a system outage.

Backup Credit Card Processing

Processing credit cards during a system outage is another key challenge. Mobile credit card processing can serve as an effective backup. In order to use mobile credit card processing you will need to purchase mobile devices (phones or tablets) and have backup internet available as well. Some leading mobile credit card providers to investigate:

- Square
- Paypal Here
- Clover Go

Note: The Tessitura Network does not endorse or recommend any particular mobile credit card provider. The providers listed are examples only.

Backup Internet Access

When internet access goes down, credit card processing goes down, whether or not you have access to Tessitura. Having backup, mobile internet available can assure that your backup credit card processing will be viable and can be used to access your backup report output. Cellular enabled mobile devices work well for mobile card processing. Mobile hotspots are another option if you want to provide backup internet available over wireless to multiple devices (such as tablets and workstations).

Backup Paper Resources

During a system outage, ticket sales can be recorded on paper for later entry back into Tessitura. Pre-printing a set of order forms to keep stored for the event of a system outage can help minimize the transition to offline operations. Backup order forms should generally have spaces for: customer name, product, number of tickets, seat locations, price, and amount paid.

Tickets during offline operations will need to be handwritten. Consider pre-printing a set of tickets to keep stored for the event of a system outage to help minimize the amount of information that will need to be handwritten on the tickets. The tickets can be pre-printed with partial information, such as location or price type labels and event or product name. For assigned seating venues, you may want to print out a full set of hard tickets for all seating locations.

Offline Operations

During a system outage, rely on the preparation and backup resources you put together during your business continuity planning. This topic is broken into two sections of sample offline operation procedures, one for performing arts organizations and one for admissions based organizations.

Plans for all kinds of organizations begin with the following basic steps:

- Activate backup internet services
- Activate backup credit card processing
- Access backup report output
- Pull out backup paper resources (order forms and tickets)

Organizations that use N-Scan should also review N-Scan Offline mode, which can be used to record attendance data for later upload and limited ticket validation (if the N-Scan number is printed on tickets).

Performing Arts Organizations

Offline operations for a performing arts organization could consist of:

- Use the **Order Export** utility to look up the details of will call orders.
- Use the **Performance Seating Book** to look up seat owners and locations for ticket reprints and seating issue resolution.
- Use the **Performance Base Price and Availability Report**, run in detail mode, to look up available seats for walk up ticket sales.
- Record new sales on paper order forms.
- Hand write tickets for new sales and reprints.
- Process credit card sales on backup credit card units.

Admission Based Organizations

Offline operations for admission based organizations could consist of:

- Use the **Performance Sales Analysis** report to review advance ticket sales counts for the day
- Use the **Order Export** utility to look up the details of advanced sale orders
- Use the **Performance Base Price and Availability** report to review available capacity for timed admission exhibits and film showings
- Validate memberships for member admissions based on the information (expiration date and level) printed on member cards.
- Record new sales, including member admissions, on paper order forms.
- Hand write tickets for new sales.
- Process credit card sales on backup credit card units.

Entering Offline Data

After a system outage has been resolved, offline transactions need to be entered into the system. Depending on the volume and complexity of the offline transactions, manual entry of the offline orders may be the best option or the **Order Import** utility may be an option. For general admission and general public orders, you can consider putting all the offline transactions in a single order, whether that order is entered into the system with the order import utility or manually.

If you used backup credit card processing for offline orders, you will need a payment method created specifically for these offline payments, either a set of offline credit card payment methods to match your actual credit card payment methods, or a single offline payment method. You may also want a special offline MOS and source codes so that you can clearly identify these offline orders in reporting

If N-Scan units have been used in offline mode, the offline scan data should be uploaded into Tessitura. When you upload offline data from N-Scan back into Tessitura it is recorded to the attendance tables. The offline data is validated against the setup that was on the unit at the time of scan, and invalid scans will not be imported.

Communicating With Patrons

You may need to communicate with your patrons during a contingency situation about affected performances, changes in venue hours or access, or other topics.

Communicating with Ticket Holders

If you need to communicate with ticket holders about their upcoming performances, admissions, or other events, you can create lists of ticket holders in a number of ways:

The Ticketing category of criteria can be used in lists and extractions. The criteria for Ticket History Season, Ticket History Prod Season, Ticket History Perf Date, Ticket History Performance, and others prefixed "Ticket History" can be mixed and matched to generate lists of ticket holders. The Ticket History Role criteria can be used to target Owners, Initiators, Recipients, or combinations of those roles. Note that Ticket History is generated nightly at most organizations. Once generated, a list can be combined with an output set to generate a file of email addresses or other contact information.

The Order Export Utility, located in the Ticketing Processing folder of Reports and Utilities, can provide a complete list of ticket holders for a single performance at a time. Unlike Lists and Extractions, this data is based on live transactions. The utility does not modify system data unless it has been customized to do so, which is uncommon. The utility's output can be saved to Excel or CSV, and includes emails and other contact information.

Communicating with Members

If you need to communicate with members, you can create a list or extraction using the Membership category of criteria. The Membership Current criteria will isolate all current members when set to Yes. It can be combined with other criteria, including Membership Level, to further refine the list. Once generated, a list can be combined with an output set to generate a file of email addresses or other contact information.

Performance and Transaction Controls for Contingency Situations

You may need to adjust performances or make refunds when contingency situations arise for your business. Below are some common scenarios and general guidance which can be personalized to your organization and situation as needed.

Modifying TNEW Website Content

As your organization develops a plan for handling performances during a contingency

situation, your TNEW website has many fields that can be modified to help communicate with ticket buyers.

To add content applicable to all events, you can edit **Heading Instructional Text** in the [Page Editor](#) for almost any TNEW page, including:

- Listing/Calendar Page
- Event/Item Detail Page
- Production Season Overview Page

To add content applicable to a production season:

- Edit **Heading Instructional Text** in the Page Editor for the Production Season Overview page
- Edit **Production Season Description - Long** in the Product Editor for the Event/Item Detail page
- Edit **Performance Description** in the Product Editor for the Event/Item Detail page

To add content applicable to a single performance:

- Edit **Production Season Description - Long** in the Product Editor for the Event/Item Detail page
- Edit **Performance Description** in the Product Editor for the Event/Item Detail page

To message an event as canceled or rescheduled on the calendar or in listings, enable **Performance Availability Messaging** for the page, and edit the applicable messages in the [Product Editor](#) for the production season or performance:

- **Performance Sold Out Message**
- **Performance Not On Sale Message**

Pausing Ticket Sales

The **On Sale indicator** checkbox located on the General tab of a performance can be used to pause sales of a performance. When unchecked, the performance cannot be added to new orders and the status of seats in this performance cannot be changed in existing orders (no returns and no new reservations). TNEW websites will display the **Perf Not On Sale** message when this box is unchecked. This can be used to immediately pause all transactions until your organization determines how existing sales will be handled. It will need to be checked when you are ready to modify orders.

The most effective way to pause the sale of tickets to performances and packages while still retaining the ability to modify and return existing sales is to set the **End Date** on some or all of the **Modes of Sale** associated with the products. When modifying end dates, set the date to the current date and time. The products will not be available to new orders in those modes of sale, but existing orders can still be modified as needed. TNEW websites will not display a performance past the Mode of Sale end date.

- On an individual performance or package, the end dates are modified in the Modes of Sale tab of either the performance or the package.
- On groups of performances or packages, the end dates can be modified through Season Maintenance.
- Note that if a performance is sold through single tickets and through packages, it is possible to continue purchasing tickets to a performance through a package even when the performance is off sale, so both must be addressed when pausing ticket sales.

The **Performance Status** dropdown field located on the General tab of a performance can be used to show information about why a performance is not on sale, but it does not affect the ability to sell tickets or modify orders.

Rescheduling Performances

To reschedule an existing performance to a new date and ensure all existing sales and ticket remain valid:

1. On the General tab of the performance, modify the **Date/Time** field to the new performance date and time.
2. On the Mode of Sale tab of the performance, and on any packages that the performance is part of, modify the **End Dates** of all applicable modes of sale so that tickets can be purchased until the new performance date (or until your organization's standard sale cutoff procedure). If any **Offers** are associated with the modes of sale, their End Dates should also be modified.
3. On the Pricing tab of the performance, switch to the Price Type Properties view and modify the **End Dates** of the price types that should remain available. In many cases, this can be handled on the All tab if the dates for all price layers should remain consistent. Your organization's pricing structure might require additional adjustments on the individual price layers.
4. TNEW website text that contains written references to the performance date, such as performance and package descriptions, can be modified in the TNEW admin area; see the Modifying TNEW Website Content section. A similar step may be required for custom websites and integrations.

5. For TNEW websites, you will see the changes on your website as soon as you refresh the cache. A similar step may be required for custom websites and integrations.

Once a performance date has been changed, the new date is immediately shown on all orders, reports, and other screens in Tessitura. Previously printed tickets can be scanned in N-Scan without any additional configuration, even if the previous date is printed on the ticket.

Refunding Performances

Performance refunds must be processed order-by-order. Consideration should be given for:

- The organization's standard refund and exchanges processes, including how fees are handled, and whether those will remain the same in a contingency situation
- How cash, check and other non-digital payments will be refunded
- How to handle when a credit card can no longer be refunded, such as when the customer canceled the card
- How to handle refunds when multiple payment methods are present
- How to refund a ticket paid through an exchange of a different ticket
- If the ticket holder would prefer to donate the ticket instead of receive a refund

Sales can be returned in the original order or in new orders according to your organization's policies. A list of orders for a performance can be created using:

- The Order Export Utility, located in the Ticketing Processing folder of Reports and Utilities.
- The Performance Seating Book report, located in the Ticketing Box Office folder of Reports and Utilities.
- The Order Search screen, using the Product Search option.

Sales can also be returned as ticket donations if the purchaser prefers. Your organization's policy might be to handle this through a ticket order donation, or using the donate for resale function.

Optionally, the Performance Seat Release utility, located in the Ticketing Processing folder of Reports and Utilities, releases and returns seats in bulk for a selected performance. Refunds are placed on account for constituents. General public orders are not handled by the utility.