

Tessitura Resources 101



Joanna:

Tessitura Application



PREFERENCES



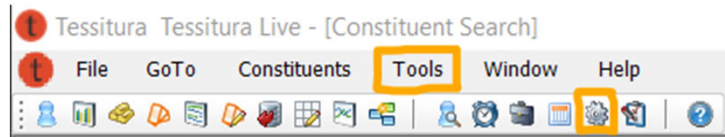
HELP SCREEN



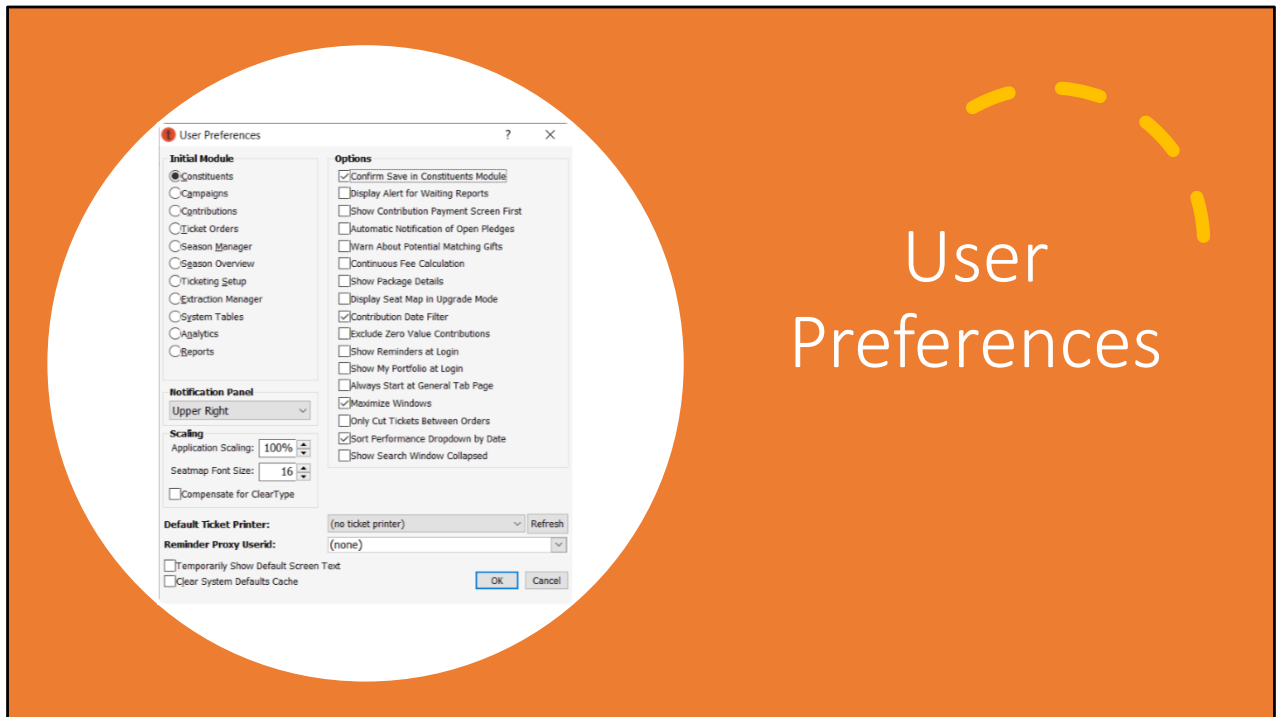
REMINDERS

Joanna:

Customizing your Tessitura Preferences



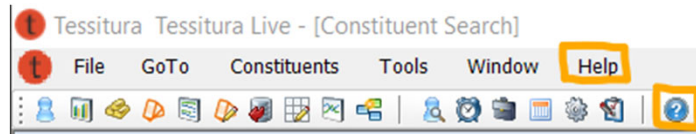
Laura: You can set your preferences in Tessitura by going to the gear icon in the menu bar, or by looking for Preferences in the Tools menu.



User Preferences

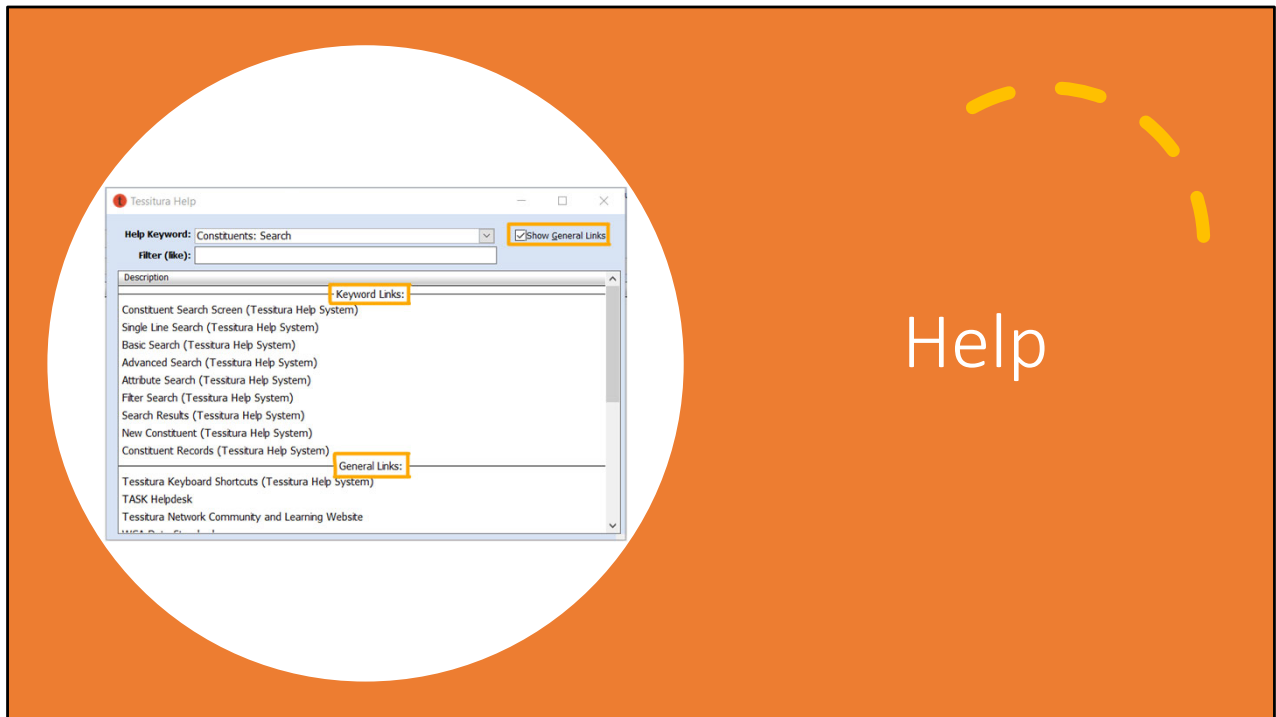
Laura: Here you can make decisions about which module you want to start in when you launch Tessitura, set your default ticket printer if you need to, and select from a number of other options. Everything from how certain dropdowns are sorted, to warnings, reminders, and where you start on in a constituent record can be customized here.

Help Screen



Can be accessed from menu, toolbar, or by pressing **F1**

Laura: At some point everyone gets to a point where they need some help. You can access Tessitura's Help system from directly within the Tessitura application by clicking on the '?' in the menu bar, by selecting Help from the Help menu, or by pressing F1 on your keyboard.



Laura: This launches the Tessitura Help screen where you can find links to Tessitura’s Help System as well as other useful links. In the Keyword Links section, Tessitura will do its best to try to figure out what you need help with based on where you are in Tessitura. You can also search by keywords in the Filter (like) section which will search through all Tessitura documentation, not just documentation for the module you’re in. For more general help with Tessitura, make sure to click the Show General Links checkbox in the upper right; Tessitura will remember your preferences here for next time you go to the help menu. These General Links will take you to useful keyboard shortcuts, Tessitura’s TASK Helpdesk where you can submit tickets to Tessitura, and the TLCC website.

Reminders

Customer Service Issue

Constituent ID: 91207338 Owner: Bob Belcher
Issue #: 2968
Issue Date: 11/03/2021 Urgent:
Contact Method: In Person Category: Patron Experience
Activity Type: Patron Support Origin: (none)
Season: (none) Performance: Package: (none)

Notes:
Would like to know if they can redeem expired coupon from 1996.

Created: 11/3/2021 16:08:41 by jhammer at NC066352 Modified: 11/3/2021 16:08:41 by jhammer

Reminders*

User	Date	Action Date	Action	System Date	Resolved
------	------	-------------	--------	-------------	----------

Add Action Save Close



You can assign CSIs to yourself or others and find them in the Reminders menu.

Customer Service Issue Reminder

Date	Created By	Assigned To	Task Type	Priority	Status	Warn Days	Complete By	Completed On	Cyclical	Notes
11/03/2021	jhammer	jhammer	Follow-Up	Medium	Not Complet		11/03/2021	00/00/0000		

Joanna: To add a reminder to a Customer Service Interaction (CSI), click on "reminders" button. In the next menu you will be prompted to assign the task to an individual. In the dropdown menu you will see a list of people that you have permissions to assign a task to- including yourself! If you wish to add a deadline, notes, or priority statues, you can do so in this windw.

The slide features a large orange square on the left with the text 'Super User Tips' in white. To the right of this square is a bulleted list of three tips. Further to the right is a screenshot of a software settings window titled 'Notification Panel'. The window has a dropdown menu set to 'Upper Right'. Below this is a 'Scaling' section with two spinners: 'Application Scaling' set to '100%' and 'Seatmap Font Size' set to '16'. At the bottom of the scaling section is a checkbox labeled 'Compensate for ClearType' which is currently unchecked. The background of the slide is white with decorative elements: a blue semi-circle in the top left, a green L-shaped line in the top right, a yellow semi-circle in the bottom left, and a yellow dashed semi-circle above an orange semi-circle in the bottom right.

Super User Tips

- Zoom in for detailed work, like editing maps.
- Sometimes you need to re-login to see changes.
- Add custom Help links with: TR_HELP_DOCUMENT_CUSTOM and TR_HELP_LINK_CUSTOM tables

Notification Panel
Upper Right

Scaling
Application Scaling: 100%
Seatmap Font Size: 16
 Compensate for ClearType

Joanna: Zoom can be helpful for building and editing facility seatmaps. Once you complete your task, you will want to turn the application scaling back to 100%, so that all the buttons and features you need will be visible without scrolling.

Laura: If you revisit the same help pages regularly, you can add a link to that in the F1 Help Menu. You can link to any website, such as internal documentation that your organization has created. You can add these links in the tables above.

Website Documentation



ACCESSING HELP
SYSTEMS



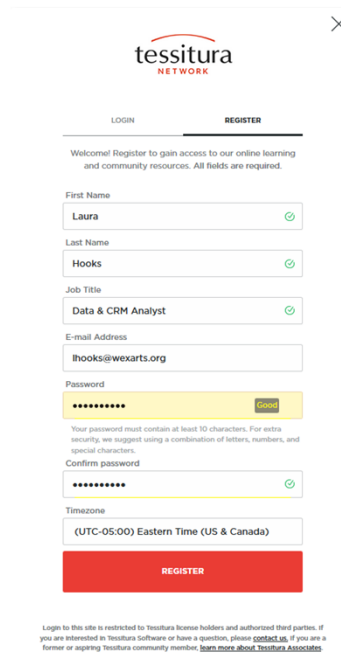
WHERE TO FIND THEM



NAVIGATING HELP
SYSTEMS

Laura: Next we're going to talk about navigating Tessitura's website www.tessituranetwork.com to find and navigate through the documentation.

Accessing Help Systems



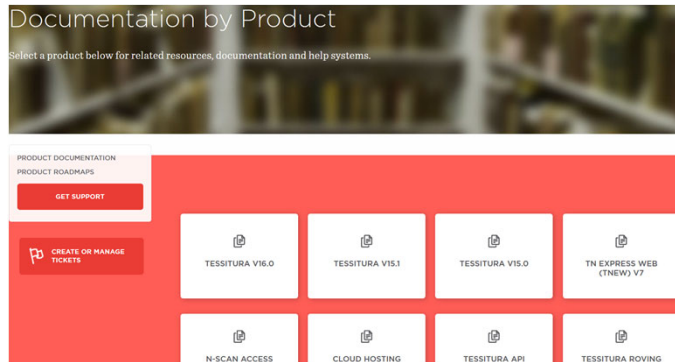
The screenshot shows the registration page for the Tessitura Network. The page has a white background with the Tessitura Network logo at the top. Below the logo, there are tabs for 'LOGIN' and 'REGISTER'. A welcome message states: 'Welcome! Register to gain access to our online learning and community resources. All fields are required.' The form includes the following fields: First Name (Laura), Last Name (Hooks), Job Title (Data & CRM Analyst), E-mail Address (lhooks@wexarts.org), Password (masked with dots), Confirm password (masked with dots), and Timezone (UTC-05:00 Eastern Time (US & Canada)). A red 'REGISTER' button is at the bottom. A small note at the bottom left states: 'Login to this site is restricted to Tessitura license holders and authorized third parties. If you are interested in Tessitura Software or have a question, please [contact us](#). If you are a former or aspiring Tessitura community member, [learn more about Tessitura Associates](#).'

- <https://www.tessitura-network.com/>
- Create an account on Tessitura's website and login
- Know what versions your Tessitura products are

Laura: Tessitura has some really great documentation to help you, but you'll need to be able to log in to Tessitura's website at www.tessituranetwork.com first. Create an account or log in. It's helpful to know what Tessitura product versions you use, but you can also find this in the Help menu of your Tessitura product.

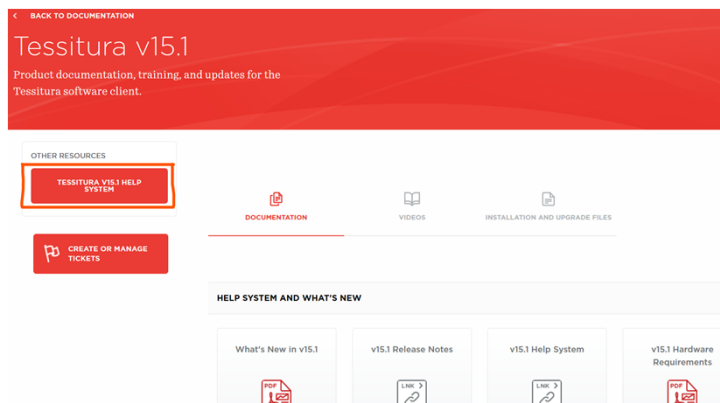
Where to find Help Systems

- Support & Learning > Documentation
- <https://www.tessituranetwork.com/Support/Documentation>



Laura: Once you're logged in you can find the Help Systems from the home page by going to Support & Learning, then to Documentation, which will bring you to a screen like the one here. This is where you'll select the Tessitura product you want documentation for including the version number where applicable.

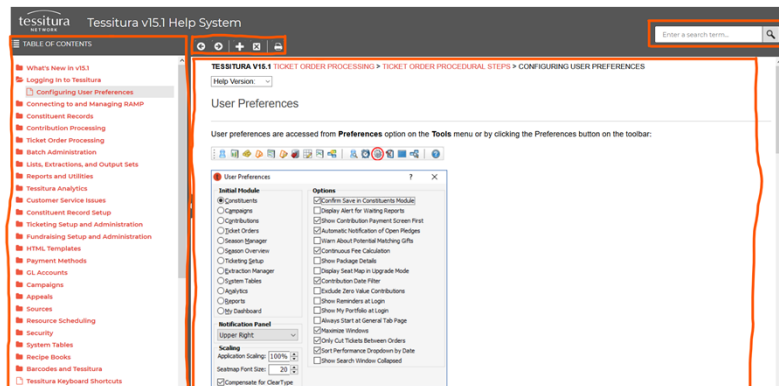
Where to find Help Systems



- Launch the Help System from the next page

Laura: After you select your product you'll launch the actual Help System from the next screen. If you're more involved in your organization's software administration you'll also find documentation here on hardware requirements, files for installing or upgrading to newer versions, and release notes.

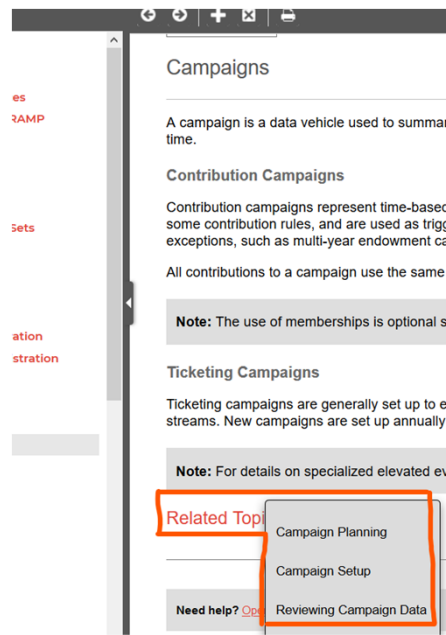
Navigating Help Systems



- Table of Contents on the left
- Search bar on the right
- Content in the middle
- Other options at the top

Laura: Each of the Help Systems have a similar structure. You'll find a Table of Contents on the left side organized into different folders. Clicking on content here will load the documentation in the middle of the screen. Often the documentation will have links to other pages within the Help System. If you want to get back to a page you were previously on, you can navigate back and forth with the arrow buttons at the top. If you're struggling to find what you're looking for in the Table of Contents you can also search for documentation in the search bar at the top right. Note the Table of Contents isn't in alphabetic order, so be sure to read through the options carefully to make sure you aren't overlooking any useful folders.

Navigating Help Systems

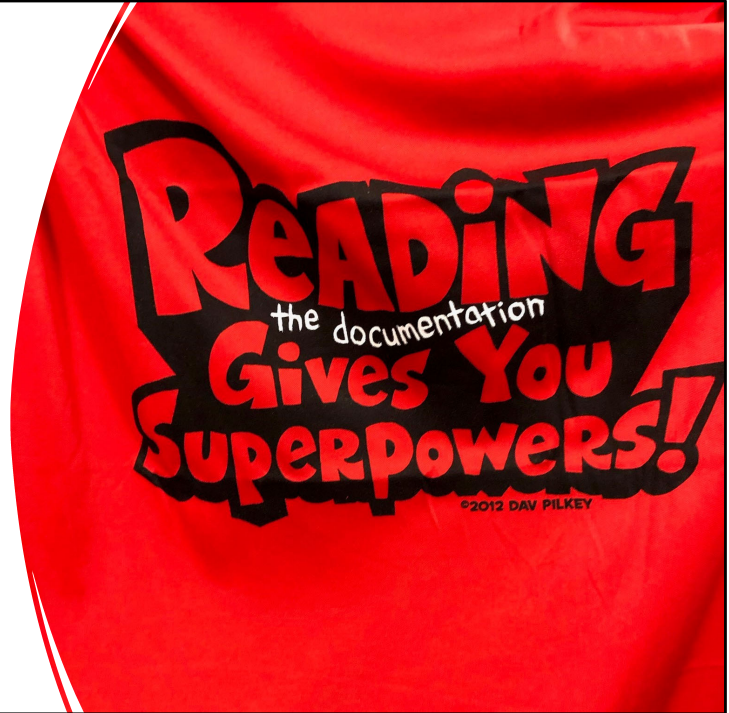


- Some pages have a Related Topics section at the bottom

Laura: Some pages will have a Related Topics section at the bottom. Sometimes these links are in the same folder in the Table of Contents, but sometimes they're in entirely different areas. This is one example where the navigation buttons at the top can become really useful.

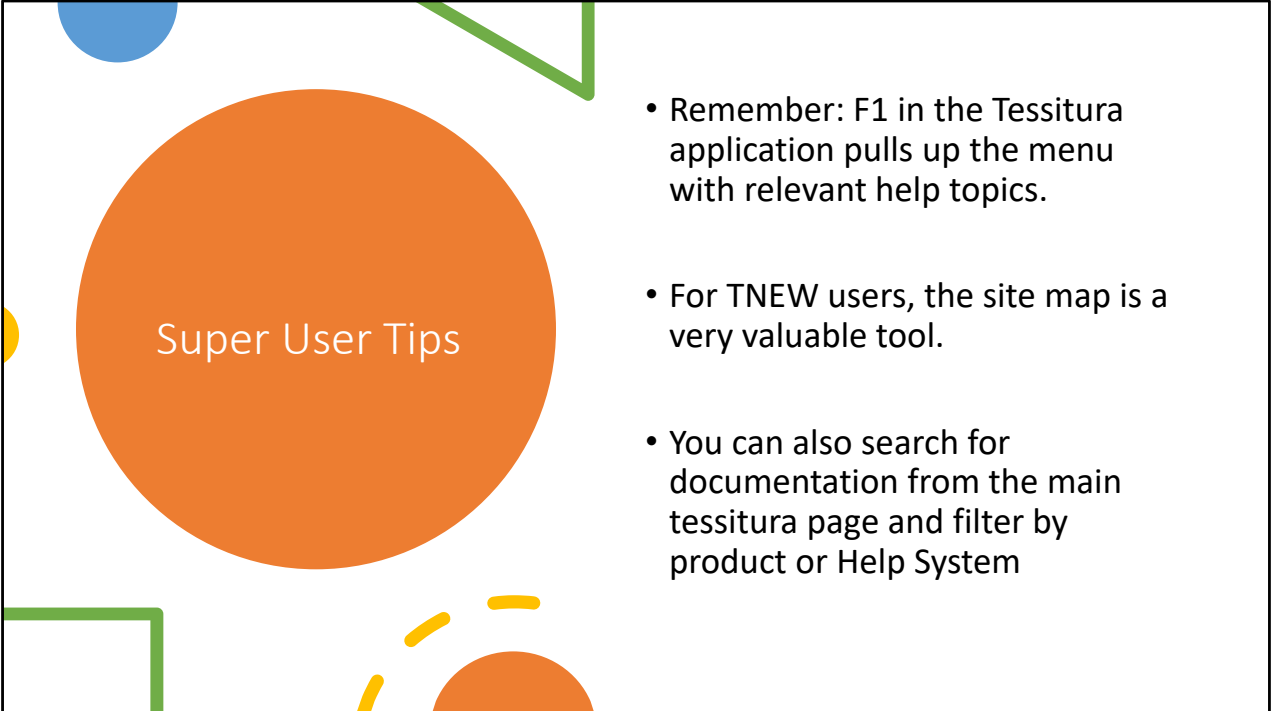
Remember

Reading the documentation
gives you superpowers!



Laura: We had an event a few years ago with Dav Pilkey where we had these capes to hand out that said Reading Gives You Superpowers. One of our very creative staff members took some of the leftover capes and created SuperUser capes because reading the documentation really does give you superpowers.

Joanna: You will also impress your colleagues with your seemingly endless Tessitura knowledge!



Super User Tips

- Remember: F1 in the Tessitura application pulls up the menu with relevant help topics.
- For TNEW users, the site map is a very valuable tool.
- You can also search for documentation from the main tessitura page and filter by product or Help System

Laura: Remember, in the Tessitura application, you can navigate directly to these pages from the Help Menu. If you use TNEW, the Site Map is super helpful to be able to see the customer paths, navigate directly to each page, and see what portions of the page are editable and where. You can edit directly on those pages if you are logged in to your TNEW admin page. I personally don't find the search results in the Help Systems to be very useful. You can also do searches from the main Tessitura website and filter those results down by a specific product or Help System. Sometimes I find this is an easier way to find things.

Website Webinars



FIND UPCOMING WEBINARS



WATCH PRERECORDED
WEBINARS

Joanna: On TessituraNetwork.com site, you can register for upcoming webinars and access prerecorded webinars.

Upcoming Webinars

24/7 SUPPORT CALENDAR HI, JOANNA

MARKETS - FEATURES - SERVICES - **SUPPORT & LEARNING** - COMMUNITY & EVENTS - ABOUT US - BLOG -

GET SUPPORT - SERVICE STATUS - PRODUCT ANNOUNCEMENTS - DOCUMENTATION - RESOURCES - **WEBINARS** - TRAINING - MORE -

Upcoming Events

Training, updates on Tessitura products and services, partner presentations, community conversations, and more.

TESSITURA MEMBER WEBINAR

TESSITURA MEMBER WEBINAR

TESSITURA MEMBER WEBINAR

Tessitura Analytics: practical adoption planning
ARTS & CULTURE • 75 MIN

Nov 8 • Get tips, resources, and a practical framework to kick-start Tessitura Analytics confidence across your organisation.

Implementing rankings: Demystifying the technology to drive results
BUSINESS STRATEGY / AUDIENCE DEVELOPMENT • 60 MIN

Nov 10 • Learn about the technical aspects of implementing rankings, including accessing your database, writing and editing code, and more.

Implementing rankings: Demystifying the technology to drive results (Encore Rebroadcast)
BUSINESS STRATEGY / AUDIENCE DEVELOPMENT • 60 MIN

Nov 17 • Learn about the technical aspects of implementing rankings, including accessing your database, writing and editing code, and more.

Joanna: Find upcoming webinars

at <https://www.tessituranetwork.com/en/Support/webinars>. The benefit of attending a live webinar is that you can ask questions and interact with the presenters.

Pre-recorded Webinars

Latest Videos

What do Rankings do?
Webinar

Rankings series: Metrics and engagement
BUSINESS STRATEGY / AUDIENCE DEVELOPMENT - 40 MIN
Supercharge your CRM data with a simple tool to help predict and drive future constituent behavior.

Filling My Cup
ARTS & CULTURE - 5 MIN
Katie reminds us of the importance of taking time for ourselves.

Hooked
ARTS & CULTURE - 5 MIN
Joanne shares the story of discovering a personal passion during lockdown.

[VIEW ALL VIDEOS](#)

Joanna: Keep scrolling down the page to find hundreds of pre-recorded webinars.

Super User Tips

Tessitura Resource Roundup

- Video: Managing Event Cancellations**
NEW WEBINAR
 TICKETING & ADMISSIONS / COVID-19
 14 MIN
 Learn more about how to retain revenue when you need to cancel events.
[Click here to watch.](#)
- TNEW: Gated Digital Content**
POP UP WALL DISPLAY
 TICKETING & ADMISSIONS / PRESENTING & PERFORMANCE
 61 MIN
 TNEW version 7.37 includes new gated digital content and country-restricted sale features that allow you to control access to digital experiences like live-streamed events and recorded videos, as well as virtual experiences and tours.
[Click here to watch.](#)
- Extending Output Sets**
NEW WEBINAR
 DATA, REPORTING
 25 MIN
 Tessitura is supplied with a large variety of standard output elements, but sometimes you may want more than what's provided in the box. Learn how to create custom output elements and filters, use the Output Set Manager Cookbook, fix errors with custom elements and filters and get the most out of each element. Some SQL experience is required.
[Click here to watch.](#)
- Mobile Tickets**
POP UP WALL DISPLAY
 TICKETING & ADMISSIONS
 45 MIN
 As organizations look for ways to provide more contactless customer service options, many are considering a move to mobile tickets. In this session, we'll cover how to set up and start using mobile tickets with TX Express Tech, as well as how to maintain and manage mobile tickets as an ongoing part of your ticketing operation.
[Click here to watch.](#)

Joanna: These are just a few of our favorite webinars. They are particularly useful in uncertain times when events can be cancelled unexpectedly. We'll share the complete list of our favorites in the Columbus Tessitura Community Forum.

Forums & Communities



FORUMS



COMMUNITIES

- Topical
- Regional

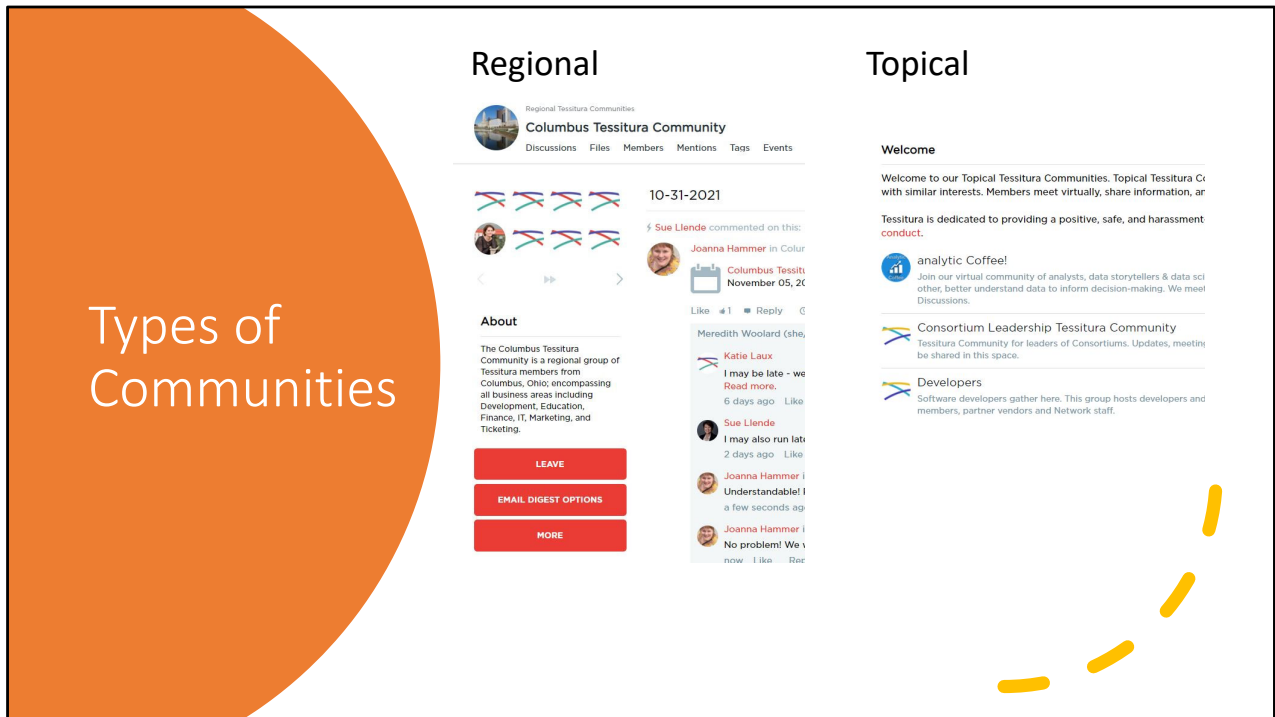
Joanna: Forums and communities are two different ways to interact with peers.

Forums

Search forums for the answers you seek! Not finding what you're looking for? Click **+ NEW** button to start a discussion on a forum.

Forum Category	Number of Discussions
Administration & IT	4,896
Consortia	91
Developers/Agile Software Development	71
Diversity, Equity, Accessibility, and Inclusion	15
Education	178
Finance	450
Fundraising	2,363

Joanna: Forums can be viewed here https://community.tessituranetwork.com/tessitura_software_forums/f Forums are divided into general topics. If you don't find the answer you are looking for, click the new button to start a discussion.



Joanna: The Columbus Tessitura Community is a regional group. In addition to regional groups, there are topical groups which can be found here https://community.tessituranetwork.com/topical_groups/subgrouplist Topical groups include particular areas of interest, as well as affinity groups like Neurodiversity, LGBTQ+, People of Color.

Regional Tessitura Communities

Columbus Tessitura Community

Discussions Files Members Mentions Tags Events

10-31-2021

Sue Liende commented on this:

Joanna Hammer in Colour

Columbus Tessit
November 05, 20

Like 1 Reply

Meredith Woolard (she,

Katie Laux

I may be late - we
Read more.
6 days ago Like

Sue Liende

I may also run lat
2 days ago Like

Joanna Hammer i

Understandable! I
a few seconds ag

Joanna Hammer i

No problem! We v
now Like Rec

About

The Columbus Tessitura Community is a regional group of Tessitura members from Columbus, Ohio; encompassing all business areas including Development, Education, Finance, IT, Marketing, and Ticketing.

LEAVE

EMAIL DIGEST OPTIONS

MORE

Joining a Community

If you are not yet part of the community, this will say "JOIN"

Joanna: Find the Columbus regional group here https://community.tessituranetwork.com/local_tessitura_user_groups/columbus-tessitura-user-group/ If you are not yet part of the community, click the "join" button. If you're already in the group you'll see a "leave" button.

Tip from a Super User

- Setting up and adjusting email notifications.

Reporting & Analytics

A forum dedicated to all things reporting and analytics included dashboards, T-stats, analytics, and more.

906 Discussions

TURN FORUM NOTIFICATIONS ON

MORE

Joanna: For any forum or group you can easily turn notifications on. Turning notifications on sends an email anytime a discussion is posted. We recommend turning on notifications for Columbus Tessitura Community, as you will primarily receive notifications from your Captain (me) about upcoming meetings. To manage your notification settings click "more".

Reporting



QUICK OVERVIEW



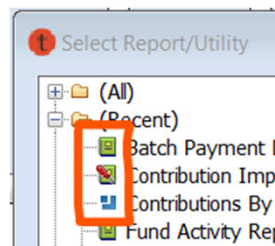
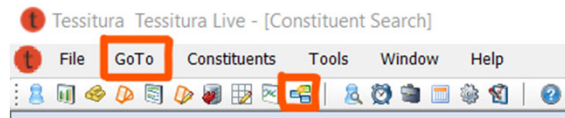
EXAMPLE REPORTS



ANALYTICS

Laura: Next up we have Reporting where we'll do a quick overview, see where we can view example reports and talk about resources for Tessitura Analytics

Overview

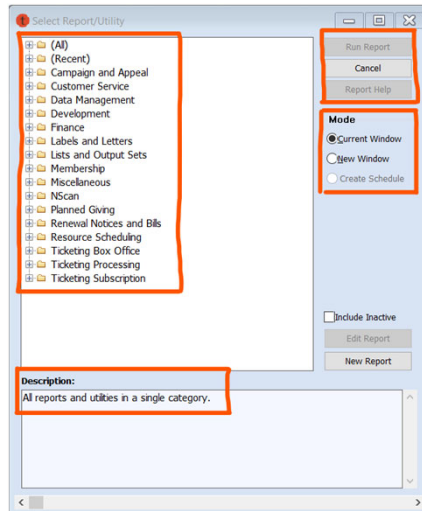


• Report Types

- SSRS Reports (blue)
- Infomaker Reports (green)
- Utilities (red)

Laura: Reports in Tessitura can be found in the menu bar or at the very bottom of the GoTo menu as Reports & Utilities. You'll see 3 types of reports. The icons with two blue squares are SSRS (SQL Service Reporting Studio) reports. This is the type of reporting Tessitura is moving towards. I believe all of the reports in v16 are going to be SSRS. These reports are nice because you can access them through Tessitura On-The-Go if you aren't at a computer with Tessitura installed. The reports with the green notebook icon are Infomaker reports which are not accessible in Tessitura On-The-Go, and are being phased out. Reports with the red screwdriver icons are utilities which mean they make changes to data within Tessitura; utilities can be either SSRS or Filemaker reports.

Overview



- List of reports
- Description of each report
- Report Mode

Laura: The Report/Utility selection screen organizes all of the reports into a file structure. At the top there is also an 'All' folder as well as a 'Recent' folder with reports you've run recently. Keep in mind these will change if you have multiple user groups you can log into, it will show the recent reports you've run in that user group. At the bottom of the screen you'll see a short description of what the report does; it will also show the folder the report is in which can be helpful if you are browsing through all and want to know which folder it lives in. On the right hand side near the top you can set your mode (this is where you can schedule reports), run a report you've selected, or get Report Help which takes you to the Help System.

Overview

Field	Value	Requirement
Membership Organization	WCA Membership	(Required)
Start level	STD-Student Staff Comp	(Required)
End level	TC-Trustees Circle	(Required)
Membership Expiration Start Date	01/01/2020	(Required)
Membership Expiration End date	11/30/2030	(Required)
Mode	Level	(Required)
List	(None)	(Optional)
Current Records only	No	(Required)

- Tessitura will remember your parameter choices
- Can Clear parameters if desired
- Go straight to documentation for each report

Laura: After you click Run Report you'll see a Parameter window which will change depending on which report you've selected. Required parameters are marked in red. Note that some reports have multiple pages of parameters and required parameters while usually on the first page, could be on the next page. Tessitura will remember the selections you made the last time you ran the report, but if you want to start over (which can be helpful for clearing dropdowns with multiple selections) you can Clear your selections in the bottom right. You'll also find another Report Help button here which is helpful if you don't know what a certain parameter means.

Example Reports

- Find samples of report results in the documentation! Look for Report Output near the bottom

When Review changes or Update is set to Review Only:

Autumn Ridge Performing Arts Center

Manage Constituency ksheehan 6/25/2008 09:51 AM
Page 1 of 1

Parameters: List: TKT-KJS Subs
 Constituency: Donor
 Action: Add to List
 Name1/Name2 Ind: Both
 End Date:

Mode: **Review Only**

Status	Const ID Name	N1N2	Start Dt	End Dt
Already active	21 Mr. Jennifer Bennethy	Both	5/3/2007	
Inserted - Review Only	333 Ms. Janice Benson	Both	6/25/2008	
Inserted - Review Only	482 Mr. Kathryn Blaser	Both	6/25/2008	
Inserted - Review Only	482 Mr. Blanche Blaeuer	Both	6/25/2008	
Inserted - Review Only	512 Ms. Vicki Bonsall	Both	6/25/2008	

Typical output for the report when run in Summary mode

Autumn Ridge Performing Arts Center

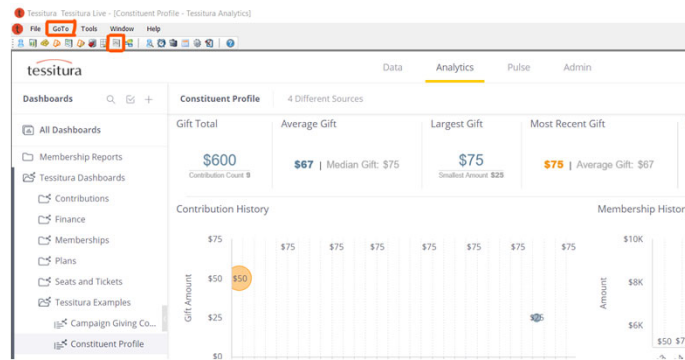
Contributions By Worker

Parameters
 Contribution Start Date: 2011-07-01
 Contribution End Date: 2013-07-22
 Campaign: (All)
 Worker Type: (All)
 Workers: (All)
 Mode: Summary
 List: (None)

Worker	Campaign	Const ID	#Gifts	Gift Amount	Received Amt	Average Gi
Kevin Sheehan (70013)			9	\$12,285.00	\$12,285.00	\$1,365.
	2011 AF Individual		6	\$12,100.00	\$12,100.00	\$2,016.
	2012 Museum Members		1	\$125.00	\$125.00	\$125.
	2013 Members		2	\$60.00	\$60.00	\$30.
Grand Total			9	\$12,285.00	\$12,285.00	\$1,365.

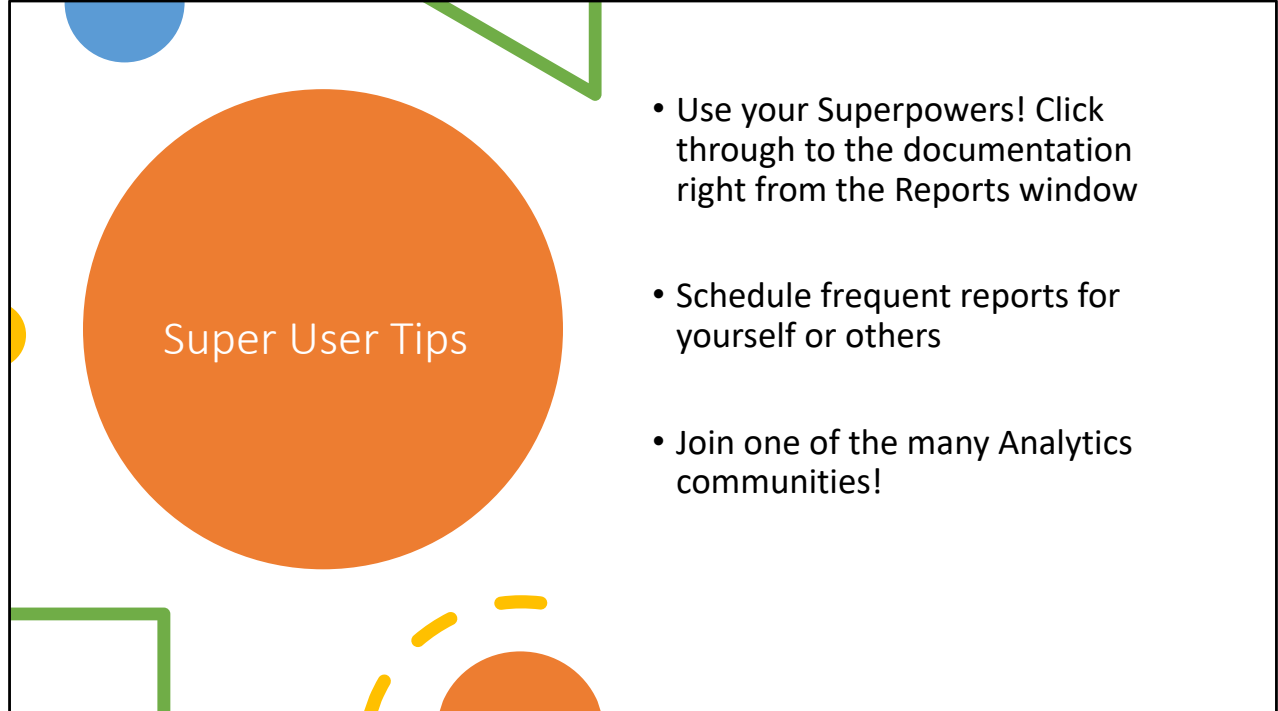
Laura: If you're looking for a report that provides specific information, it can be faster to browse through the documentation than to go through running multiple reports in the application. Most reports will have a Report Output section near the bottom of the documentation where you can see examples of the results, sometimes with multiple versions if a report has a detail and summary mode, or for utilities that have review and update modes.

Analytics



- <https://www.tessituranetwork.com/Support/Start/Analytics>
 - Watch Tessitura’s intro series of webinars
 - Schedule a free orientation for your team with Tessitura
- Start by viewing the standard reports and experimenting with the filters; then copy them and try editing the widgets

Laura: Tessitura Analytics can be found in the menu bar next to the reports and utilities or in the GoTo menu near the bottom. Tessitura has lots of resources for Analytics. I’d recommend starting with their series of webinars going over the feature. Tessitura will also do a free orientation of Analytics with your organization, but only once as far as I know, and there are three levels of the orientation, so watching the webinars first will give you an idea as to which level would be most useful for your org. Once you’re familiar with Analytics, you can start by looking at the sample dashboards Tessitura has created and experiment with the different filters. If you have permissions, when you’re ready, make a copy of one of the sample dashboards and try editing the widgets yourself.



Super User Tips

- Use your Superpowers! Click through to the documentation right from the Reports window
- Schedule frequent reports for yourself or others
- Join one of the many Analytics communities!

Laura: You may notice some repetition in these slides... the documentation is so useful for the reports section. I use this all the time to figure out what a report is including or excluding, what the parameters mean, and view sample outputs to see if the report is even useful for me or a coworker. If you're a support person at your organization, one of the first questions I ask people is 'what documentation have you found so far?' If you use a particular report on a regular basis, schedule it so you don't have to pull it every time. Have we mentioned the communities yet? There are multiple Analytics communities on the forums and they are full of super nice people who are super helpful. Are you in Marketing or Ticketing? Join TAMATO (Tessitura Analytics for Marketers and Ticketing Operations) ! Development? TAFFY (Tessitura Analytics for Fundraisers Yay)! Do you build the reports? Analytic Coffee is for you!

Other Tessitura Resources



TESSITURA HELP DESK AND
TESSITURA NEWSLETTER



ROADMAP

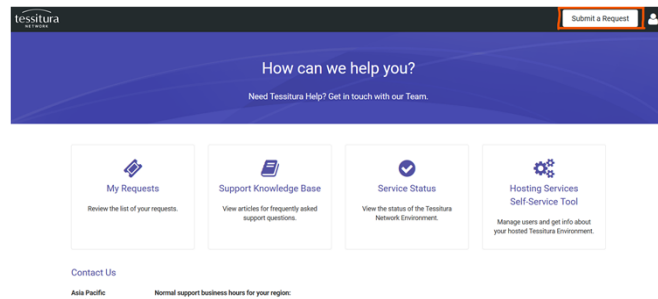


TESSITURA LEARNING AND
COMMUNITY CONFERENCE

Joanna: If the documentation and forums don't have the answers you seek, there are other resources to turn to.

Tessitura Help Desk

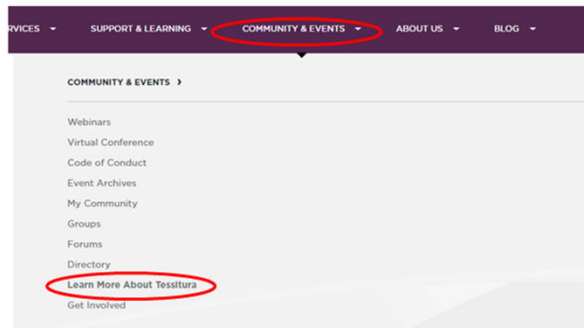
- Support & Learning > Get Help
- <https://hello.tessituranetwork.com/dashboard>



- Knowledge Base (FAQ):
<https://hello.tessituranetwork.com/knowledgeBase>

Joanna: You can open a ticket with Tessitura for assistance. Open a ticket here <https://hello.tessituranetwork.com/dashboard> A Tessitura representative will send an email reply. Responding to those emails will update the ticket. The knowledge base is another place to look for additional information. <https://hello.tessituranetwork.com/knowledgeBase>

Tessitura Newsletter



Get content curated for arts and cultural professionals by signing up for Tessitura email newsletters.

<https://www.tessituranetwork.com/System/Newsletter>

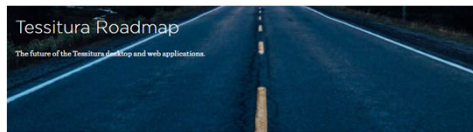
Joanna: You can open a ticket with Tessitura for assistance. Open a ticket here <https://hello.tessituranetwork.com/dashboard> A Tessitura representative will send an email reply. Responding to those emails will update the ticket.

The knowledge base is another place to look for additional information. <https://hello.tessituranetwork.com/knowledgeBase>

Tessitura Road Map

Support & Learning > Roadmap

<https://www.tessituranetwork.com/en/Support/Roadmap>



OVERVIEW
SERVICE PACK FEATURES
NEW FEATURES
ROADS ON OUR MIND
VIEW THE ROADMAP

Tessitura Roadmap

Please note: The bits of service pack and v6 features below are not comprehensive. They highlight some of the more significant features that we are developing.

Service Pack Features

(Near-term work)

NOW (currently working on)	NEXT (next immediate priorities)
The upcoming service pack includes only defect fixes, and no new features. Please reference the release notes for details on defect fixes in the release.	We have slowed our service pack release cycle to focus on v6 delivery. As a result, we currently have no upcoming features prioritized for Service Packs. We will update this page and let the community know if that changes.

Suggest new functionality by opening a ticket or emailing roadmap@tessituranetwork.com

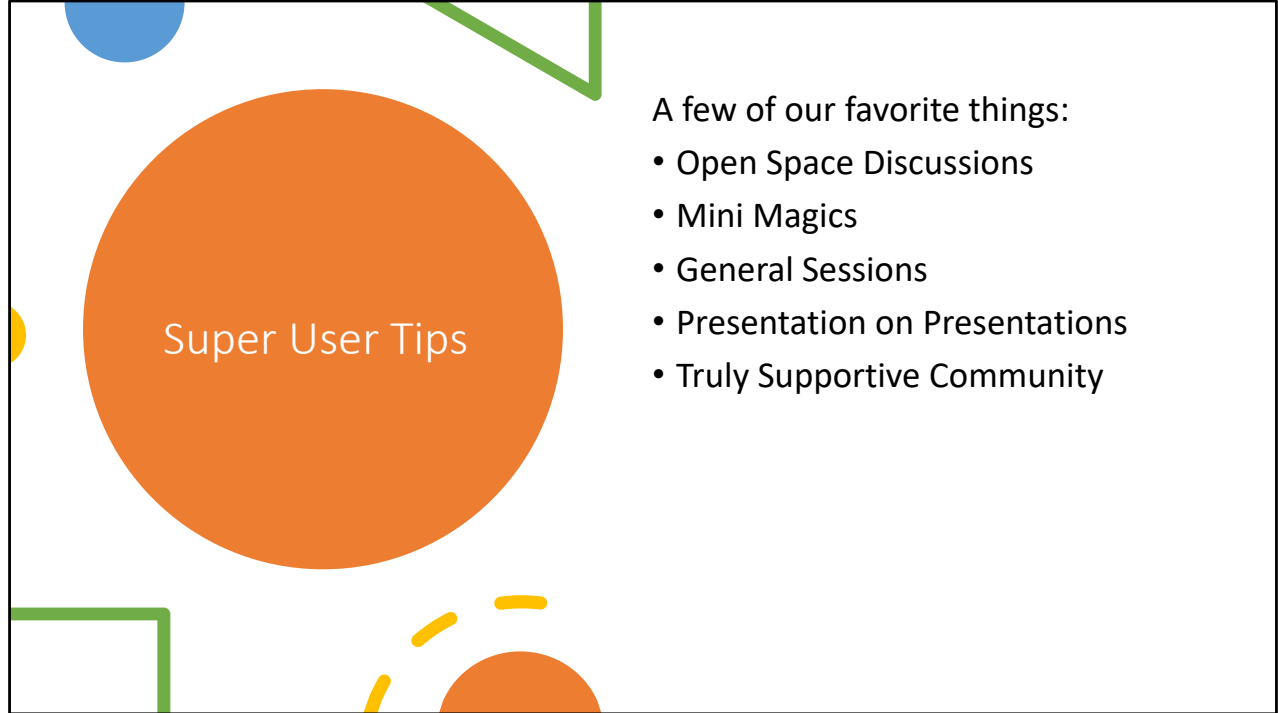
Joanna: Tessitura periodically adds new features and improved functionality. You can find what their future plans are by viewing the roadmap site. <https://www.tessituranetwork.com/en/Support/Roadmap> If you would like to suggest a new feature, open a ticket or email roadmap@tessituranetwork.com.

Tessitura Learning and Community Conference

- Community & Events > Event Archive
- <https://www.tessituranetwork.com//en/Community-and-Events/Conference-Archive>



Joanna: The Tessitura Learning and Community Conference is an excellent way to meet others in your industry and learn Tessitura tips and tricks. It is inspiring! You can find an archive of general session presentations here <https://www.tessituranetwork.com//en/Community-and-Events/Conference-Archive>



Joanna: Here are some of our favorite parts of the Tessitura conference. The most specific actionable information often comes from open space discussions. Mini Magics are poster board displays that show off creative Tessitura solutions. Mini magics are submitted by organizations to help others learn tips & tricks.

Laura: General Sessions are fantastic! They will leave you feeling energized and motivated. Don't sleep through them like Joanna does.

Joanna: If you have a chance to attend the session about presentations, I recommend it. Lots of useful tools to help people who are a bit shy about giving presentations.

Laura: Many benefits of attending the conference. The conference covers so many topics you will find relevant in your professional career- not just Tessitura focused. It is a truly supportive community where you can meet others who do your job and understand your struggles!

Any
Questions?



Joanna: If you have questions about this presentation, please reach out! My email address is JHammer@wexarts.org