

names and things that have them

naming conventions in tessitura and beyond

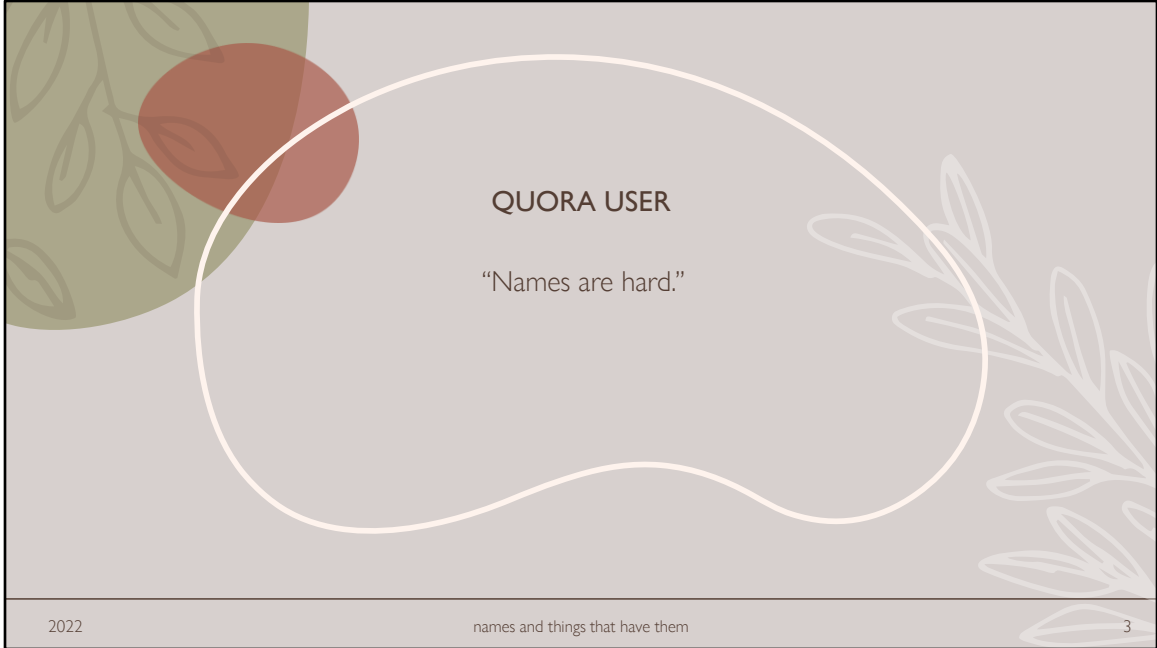
My talk to you is about names. Many things have names, most things, in fact. Tessitura is no different, but it is a fan of rather short character limits. This is where naming conventions can become extremely useful.

introduction

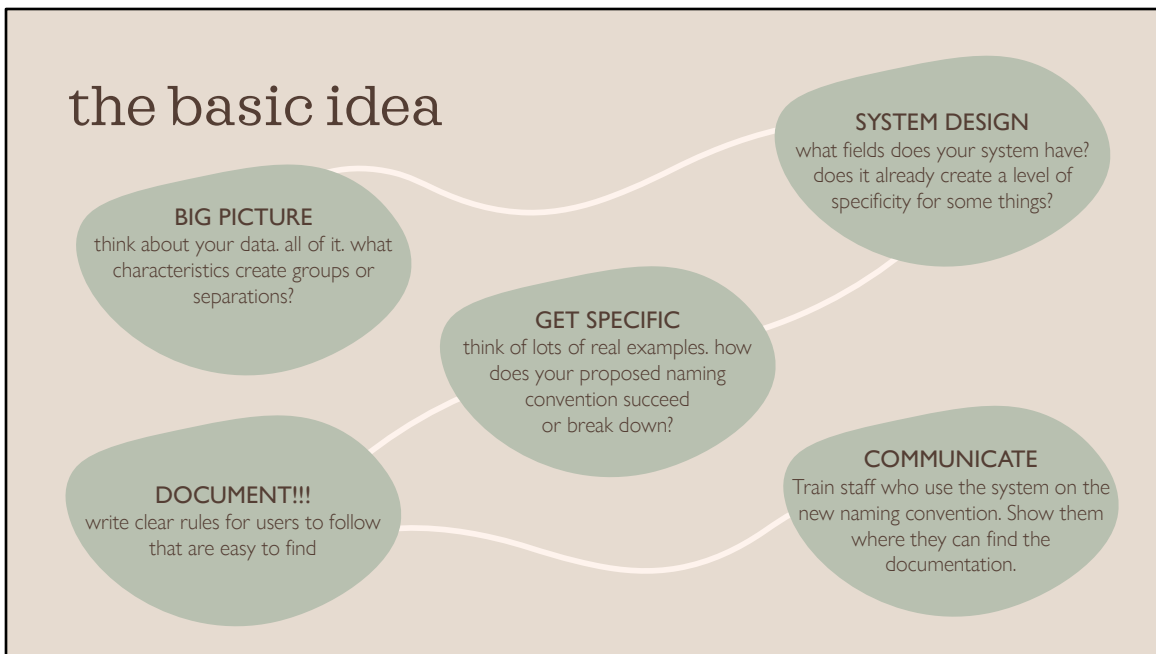
laura hooks
(she/her)
data & crm analyst
wexner center for
the arts



But first! My name is Laura Hooks, my pronouns are she/her, and I am an average height white woman my 30s with long blondeish/brownish hair. I'm wearing ..something. And I am the Data & CRM Analyst here at the Wexner Center for the Arts. Now, back to the task at hand.



In preparing for today, I looked to see if there were any interesting quotes about naming conventions. This is the best one I found thanks to a user on Quora. It's simple, but specific. Names ARE hard. When you only have a certain amount of space, it's important to use it wisely. I was reminded of this just over 5 years ago when we were going through our Tessitura implementation, and I was helping set up our structure in List Manager.



30 characters. That's all you've got to work with for list names in List Manager, so you'd better make the most of them. So where can we start when thinking about names?

-Big picture: consider your data as a whole. What about your data is alike and could be used to group it together, what separates it. How could that data could be used? Who uses it? What differences are meaningful and have a strong implication for how you might organize it? Stay broad. Simple.

-System Design: How is your system tracking this data

already? Does it have metadata fields that are already creating a level of grouping and separation for you?

-Get specific: This is where it's time to get down into the weeds of the data you have and how you're working with it. Start experimenting with the grouping options from earlier with real examples. See how your grouping enhances the ability to sort information, find it, and quickly interpret it. This is where you iterate until you find a naming convention that works with your real data and see whether it succeeds or breaks down. You're essentially stress testing your proposed naming convention.

-Document: Once you've come up with a plan that seems to work well with your existing data. Document it! Document any abbreviations your naming convention uses. Document whether and where people can use spaces, or special characters and which ones. Document date formats. Document how the naming conventions might be different for different use cases. The goal isn't one unified, perfect, singular naming convention. It's to make sure people have clear rules for when and where to use however many naming conventions you have.

-Communicate: And finally, if you want people to follow the rules you've spent all this time working on, communicate to your staff. Train them on how to use them, have examples, and make sure they have easy

access and know how to find the documentation.

in real life, something like this

BIG PICTURE	various users and departments, purposes (email, mail, data updates, research, etc.), lists are dynamic or static, contact restriction considerations
SYSTEM DESIGN	tessitura already indicates who built the list and can be grouped into folders
GET SPECIFIC	looked at lists for email (wordfly vs outlook), snail mail (list segments vs final list), lists for report filtering or other internal analysts
DOCUMENT	page on naming conventions in our internal tessitura documentation website. linked it in tessitura's help screen (tr_help_document_custom & tr_help_link_custom)
COMMUNICATE	training for new staff who manage lists, including naming conventions. talk about naming conventions in monthly data team meeting. email reminder if they get too wild.

2022

names and things that have them

5

So how does this actually work in real life? Well for me it went something like this.

As a big picture, we have various people in various departments making and using lists. They use them for all different reasons, some for sending emails or postal mail. Some lists are used to make data updates using Tessitura's utilities. Some I've started calling research lists, like reviewing a list of recent donors, or members. Maybe you're not the person who sends out thank you's or membership cards, so you're not necessarily taking action on it, but you just want to keep an eye on it. Some of our lists are based on criteria and update over time, like current members. Some of our lists are static like a list of people who purchased tickets to a event that's already passed. There are contact restrictions to consider. Lots to think about, but some basic, simple ways to think about our lists.

Tessitura already tracks some of this information for us. I can see who built a list in List Manager, so we threw that out of our naming convention considerations. Tessitura shows the date and time a list was built and last generated, but that's not always the most important date for a list. And some lists don't really have anything to do with a date anyway, it's not important information. We have a folder structure we can work with, so that gives us another way to group things.

Then I looked at some of the types of lists we already had or knew we would have. Our email lists needed their own naming convention because those list names get stamped on people's records in the Connections tab. We also use the same list names in WordFly when we pull the lists in and wanted to stay consistent with our existing naming convention for the sake of the info flowing into Google Analytics. For postal mail we had final mailing lists, but we also had list segments we used in Extraction Manager to build that final list. Again, these are used as sources in Tessitura. Then we have other lists used for a variety of purposes that could be static or dynamic. So I ended up with 4 separate naming conventions. 5 if you count the one I made for output sets.

Once I was sure this covered the use cases I knew we had, I documented the stuffing out of them. We have a sort of blog/wiki/internal website where we document.. Ideally all of, but I'll say lots of how we use Tessitura, why it's configured the way it is, and how to do certain processes. So this went there in a section on list building. Not I, but one of my fabulous former co-workers also linked to this site inside the Tessitura Help screen so it's really easy to get to. The TR_HELP_DOCUMENT_CUSTOM and TR_HELP_LINK_CUSTOM in the system tables were very helpful for this.

So. To get people to actually follow these rules, I had the luxury of being here when we first implemented, so I got to train staff on list manager. This was a large group of staff, but it was also optional, so I went one step further. We have a monthly meeting at the Wex of staffers who are largely responsible for maintaining their department's data in various systems including Tessitura. And I run these meetings. So we talked about it in one of those early meetings, and as we have new staffers come in, I do a list building training with them where we talk about our naming conventions as well. If I notice anything getting too wild in list manager myself, I will occasionally reach out to folks to remind them we have set up some rules for ourselves and where they can find them.

ultimately we came up with this

WORDFLY LISTS:

- o WCA YYYY-MM-DD Email Topic
- o ex:
 - WCA 2022-12-08 Weekly
 - WCA 2022-11-29 Giving Tuesday
 - WCA 2022-12-06 Director Note

POSTAL MAIL LISTS:

- o YY <programming area> <mailing name/performance name> <issue>
- o ex:
 - 22 At A Glance 3-Dec
 - 22 Exhibitions Invite-Winter
 - 22 Annual Report

INTERNAL/RESEARCH LISTS:

- o dynamic lists:
 - o department-use-listname
 - o ex: MK-em-Subscriber-All
- o static lists:
 - o YYYYMMDD-department-use-listname
 - o ex: 20221213-VE-em-ZoomSTB

And this is what they look like! One standard for our WordFly email lists which is pretty simple and has been working well. I'll say one standard for postal mail, but different mailings have different considerations, so they vary a bit. Not all mailings have an issue number, some are more institutional than programming area specific, things like that, but still working pretty well. And then we have our Internal/Research lists which have the same format, except static lists include the date the information was pulled so you know whether you might need to pull it again for more accurate info. These lists have a department abbreviation, then indicate the intended use of the list, like for emailing it should already be cleaned up against patron's contact preferences if it's likely to be used for something non-transactional. Or if it pulled a bunch of households initially it now includes the individuals in those households since we store email addresses on the individual records, not household. And then there's a short description of what the list is. So here we have a dynamic list that I can see is for the Marketing department to use, to send emails, and it's a subscriber list that includes all of our subscribers. Then we have a list that was pulled today for Visitor Experience to email Zoom single ticket buyers. (And that's a fake list, Joanna!)



then review
it and make
it better!

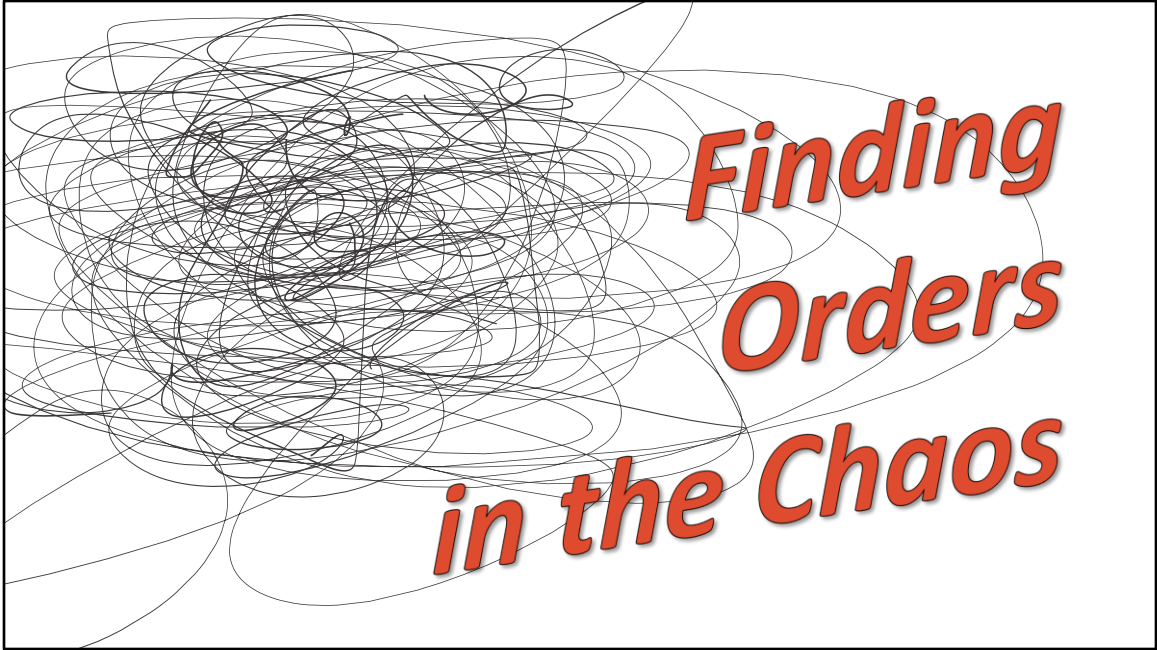
So we've been using these conventions for just over 5 years. We implemented December 5th 2017. They've all been working pretty well, but I don't think they're perfect. With any data project I don't think you're ever really done since you can almost always review things and make them better. And after putting together this presentation that's exactly what I intend to do.

The graphic features a light grey background with several organic, flowing shapes in muted colors: a reddish-brown shape on the left, a large olive-green shape on the right, and a white wavy line on the right side. In the top left corner, there are faint, light grey line drawings of leaves or branches.

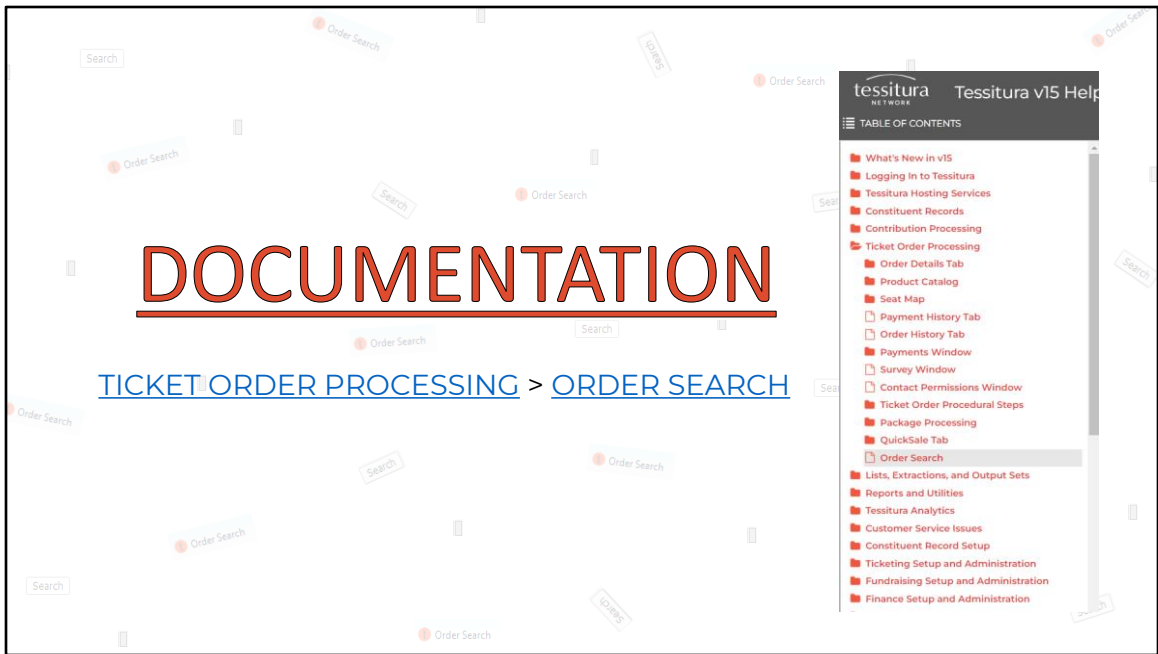
thank you

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Quick order searching at the box office.



Documentation can be found in the Tessitura Help Guides. They are linked in the slide, can be found on the Tessitura website, or can be accessed by pressing F1 in the Tessitura application.

BOX OFFICE SETUP

IRRELEVANT

Order Search open to current performance

Names sorted alphabetically

No filters. Ask for name, find the order.

Order No.	Order Date	Owner ID	Owner Name	First Product	Perf Date	Total	Balance	Delivery	Mode of Sale	Category
118481	11/10/2022 16:06:39	0		R22120219A	12/2/2022	\$0.00	\$0.00	Tickets in Hand	In Person	
117923	11/3/2022 10:18:30	0		R22120219A	12/2/2022	\$0.00	\$0.00	Tickets in Hand	In Person	
116682	10/25/2022 13:22:37	0		R22120219A	12/2/2022	\$20.00	\$0.00	Tickets in Hand	In Person	
116071	10/17/2022 10:12:58	0		R22120219A	12/2/2022	\$100.00	\$0.00	Tickets in Hand	In Person	
119779	11/25/2022 16:32:37	91226653	Ma...	R22120219A	12/2/2022	\$0.00	\$0.00	Hold at Box Office	Web	
120212	12/2/2022 16:38:23	91226832	M...	R22120219A	12/2/2022	\$12.00	\$0.00	Hold at Box Office	Web	
119900	11/29/2022 09:37:19	91226712		R22120219A	12/2/2022	\$24.00	\$0.00	Print at Home	Web	
119879	11/28/2022 19:03:09	91226707		R22120219A	12/2/2022	\$46.00	\$0.00	Print at Home	Web	
119175	11/16/2022 13:11:08	9444		R22120219A	12/2/2022	\$24.00	\$0.00	Print at Home	Web	
119592	11/19/2022 22:33:33	91226707		R22120219A	12/2/2022	\$12.00	\$0.00	Print at Home	Web	
120086	12/1/2022 18:29:30	91226707		R22120219A	12/2/2022	\$20.00	\$0.00	Print at Home	Web	
120116	12/1/2022 20:23:26	91226707		R22120219A	12/2/2022	\$36.00	\$0.00	Print at Home	Web	
120035	12/1/2022 08:34:28	91226707		R22120219A	12/2/2022	\$24.00	\$0.00	Print at Home	Web	
120208	12/2/2022 16:15:40	91226707		R22120219A	12/2/2022	\$24.00	\$0.00	Hold at Box Office	Web	
116523	10/23/2022 21:32:38	91226707		R22120219A	12/2/2022	\$12.00	\$0.00	Print at Home	Web	
116511	10/23/2022 18:56:01	91226707		R22120219A	12/2/2022	\$12.00	\$0.00	Print at Home	Web	
119941	11/29/2022 16:44:28	91226722		R22120219A	12/2/2022	\$24.00	\$0.00	Print at Home	Web	
120055	12/1/2022 12:45:26	91226765		R22120219A	12/2/2022	\$56.00	\$0.00	Print at Home	Web	
120088	12/1/2022 18:42:52	91226773	D...	R22120219A	12/2/2022	\$36.00	\$0.00	Print at Home	Web	
118830	11/15/2022 12:12:32	91226436	Mich...	R22120219A	12/2/2022	\$64.00	\$0.00	Print at Home	Web	

How I use order search to quickly find and reprint orders at the box office.

1. Select the product radio button and choose the event. You can also use the performance date, but if you have multiple events happening that day, it will not be helpful. Searching by constituent takes a long time, especially if you need to narrow down to the right patron.
2. Sort names alphabetically. It's easiest to just ask a patron their last name - they typically won't know their order number.
3. Don't filter. You just want a nice list of every order for the current performance, so you can just scroll through it. Sometimes it's helpful to sort by other fields, such as Order Notes. We use these for comp ticket names, so if someone says they have a comp but you're not sure which department record it's under, you could sort by order notes to quickly see all the comp names together.

PRINTING

Print Order

Select "Reprint Printed"

Prints the entire order

Print Order No. 119779

Tickets
 Print Unprinted
 Reprint Printed

Receipts
 Default Current Only
 All Print EMV Declines

Header

Details

Can print specific line items

History tab shows which tickets have been scanned

Order Details

Owner: 91226653 Mary Aboud Source: 174 Hold Until Date: 11/25/2022
Initiator: Channel: TNEW SubOrder: restweb
Order No: 119779 MOB: Web Category: (none) Alt Address: Email
Order Date: 11/25/2022 Delivery: Hold at Box Office Account: Payment Schedule: No

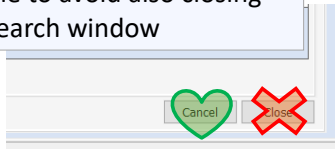
Line Items	Sub Line Items	Fees	Contributions	History	Transactions	Pricing Rules	Survey	Custom Data		
*****	R22130219A	Music Collaboration Concert	PA, 12/17/2022 07:30 PM	Student	Price 1	IS	3	5	0.00 TPO	
*****	R22130219A	Music Collaboration Concert	PA, 12/17/2022 07:30 PM	Student	Price 1	IS	3	5	0.00 TPO	

Print

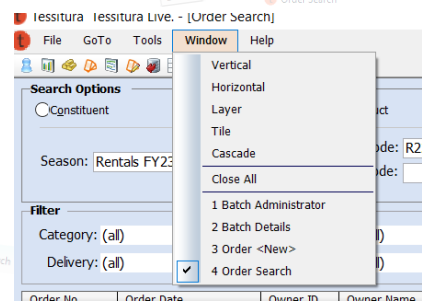
The main reason to keep order search up at the box office, is to reprint orders. The easiest way is to click the print order button on the bottom of the screen. This will print the entire order, so if some of the tickets in an order have already been picked up or if the order contains multiple shows, it is easier to print from the details tab. The Details tab will show you the order, but not let you do any money actions. You can select sub line items to print and can see if any tickets in the order have already been scanned in or printed.

BONUS TIPS

If you've opened an order to view or reprint tickets, select "cancel" when you are done to avoid also closing the order search window



Use the Window menu to quickly switch between order search and new orders, without having to reenter the search parameters



You can open orders from the order search screen to reprint the tickets, but make sure you select Cancel when you're done. If you select Close, it will close all the related order windows and bring you back to the batch details page and you will have to redo all the search parameters. If you select Cancel, it will clear out the current order and begin a new one, without closing the order search tab. If you are doing a new sale, don't hit cancel, just complete the sale

The main tip is to use the Window menu! You can switch between selling new orders and going back to the order search screen without having to close or redo anything. Realizing this changed my life. It also means that any of your box office staff can quickly reprint tickets in a pinch, if needed.

How To Add An Attribute

This Attribute is Recurring Donor On/Off

- We needed an Attribute to identify donors who've been with us for 2 or more seasons.
- Attributes can be used as Criteria for lists or with an Output Set.
- With this Attribute we can easily create a list of donors who are Recurring Donors.
- With any list, we can use the Recurring Donor Attribute in an Output Set to see who in the list is a Recurring Donor.

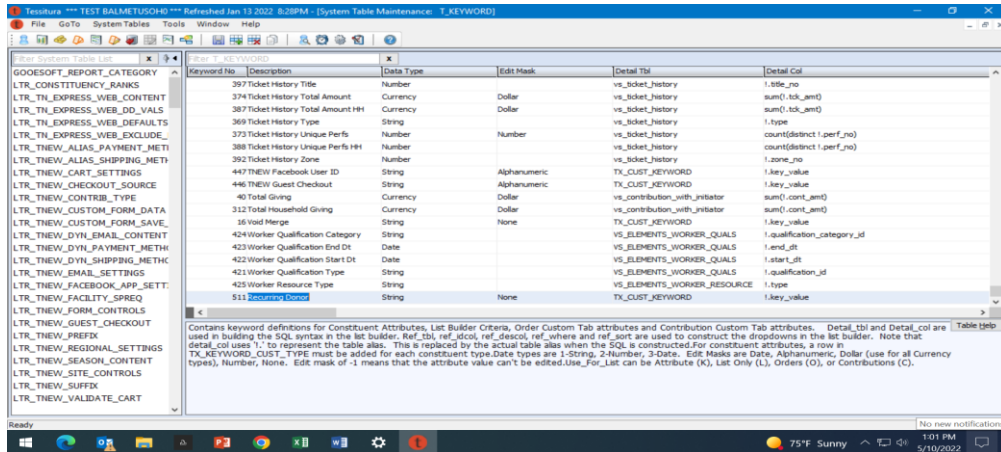
1. Go to System table T_KEYWORD

The screenshot shows the Siebel System Table Maintenance window for the T_KEYWORD table. The window title is "Siebel System Table Maintenance: T_KEYWORD". The main area displays a table with columns: Keyword No, Description, Data Type, Edit Mask, Detail Tbl, and Detail Col. The table lists various keywords and their associated details.

Keyword No	Description	Data Type	Edit Mask	Detail Tbl	Detail Col
419		Number		VXS_CUST_WORKER_TYPE	f.worker_type
70	Acknowledgement Letter	Number		t_ack_ext	f.letter_id
71	Acknowledgement Request Date	Date		t_ack_ext	f.tm_dft
114	Activity Date	Date	Date	vs_special_activity	f.sp_act_dft
116	Activity Host	String		vs_special_activity	f.sactor
117	Activity Name	Number		vs_special_activity	f.sp_act
324	Activity Note	String		vs_special_activity	f.notes
256	Activity Number of Attendees	Number		vs_special_activity	f.num_attendees
323	Activity Performance	String		vs_special_activity	f.perf
115	Activity Status	Number		vs_special_activity	f.status
358	Activity Worker	Number		vs_special_activity	f.worker_customer_no
315	Address Exists	Number		v_has_address	has_address
122	Address Type	Number		v_address	f.address_type
4	Archtics Acct ID	String	-1	TX_CUST_KEYWORD	f.key_value
5	Archtics Cust Name ID	Number	Number	TX_CUST_KEYWORD	f.key_value
448	Archtics Group Code	String	-1	TX_CUST_KEYWORD	f.key_value
180	Asset Acq. Date	Date	Date	vxs_cust_asset	f.acq_dft
182	Asset Description	String	Alphanumeric	vxs_cust_asset	f.description

Contains keyword definitions for Constituent Attributes, List Builder Criteria, Order Custom Tab attributes and Contribution Custom Tab attributes. Detail_tbl and Detail_col are used in building the SQL syntax in the list builder. Ref_tbl, ref_dcol, ref_descol, ref_where and ref_sort are used to construct the dropdowns in the list builder. Note that detail_col uses '!' to represent the table alias. This is replaced by the actual table alias when the SQL is constructed. For constituent attributes, a row in TX_KEYWORD_CUST_TYPE must be added for each constituent type. Data types are 1-String, 2-Number, 3-Date. Edit Masks are Date, Alphanumeric, Dollar (use for all Currency types), Number, None. Edit mask of -1 means that the attribute value can't be edited. Use For_List can be Attribute (K), List Only (L), Orders (O), or Contributions (C).

2. Find a similar Attribute, highlight it, copy it using the copy function on the tool bar and rename it.



3. The renamed attribute (here Recurring Donor) has been assigned a new number (here 511.) Highlight the new attribute and go to the column Ref Where and edit the column to reflect the new number assigned, here 511.

As shown in the next slide.

Testaura *** TEST BALMETUSOH0 *** Refreshed Jan 13 2022 8:28PM - [System Table Maintenance: T_KEYWORD]

File Go To System Tables Tools Window Help

System Table List

Filter: T_KEYWORD

Ref Tbl	Ref Idcol	Ref Descol	Ref Where	Ref Sort
tr_bill	id	description	used_in in ('P', 'B')	
tr_bill	id	description	used_in in ('P', 'B')	
vs_bill	id	description	used_in in ('T', 'B')	
vs_metuser	userid	userid	type in ('U', 'B')	
vs_metuser	userid	userid	type in ('U', 'B')	
vs_metuser	userid	userid	type in ('S', 'B')	
vs_metuser	userid	userid	type in ('S', 'B')	
T_METUSER	userid	userid	type <> 'Y'	
vs_pricing_rule	id	description	rule_action <> -3	
T_MEMB_LEVEL	memb_level_no	memb_level + ' ' + description	memb_org_no in (select memb_org_no from vs_memb_org)	
T_MEMB_LEVEL	memb_level	memb_level + ' ' + description	memb_org_no in (select memb_org_no from vs_memb_org)	rank
t_keycoded_values	key_value	key_value	keyword_no = 87	
t_keycoded_values	key_value	key_value	keyword_no = 85	
t_keycoded_values	key_value	key_value	keyword_no = 531	
t_keycoded_values	key_value	key_value	keyword_no = 530	
t_keycoded_values	key_value	key_value	keyword_no = 509	
t_keycoded_values	key_value	key_value	keyword_no = 508	

Contains keyword definitions for Constituent Attributes, List Builder Criteria, Order Custom Tab attributes and Contribution Custom Tab attributes. Detail_tbl and Detail_col are used in building the SQL syntax in the list builder. Ref_tbl, ref_idcol, ref_descol, ref_where and ref_sort are used to construct the dropdowns in the list builder. Note that detail_col uses ' ' to represent the table alias. This is replaced by the actual table alias when the SQL is constructed. For constituent attributes, a row in TX_KEYWORD_CUST_TYPE must be added for each constituent type. Data types are 1-String, 2-Number, 3-Date. Edit Masks are Date, Alphanumeric, Dollar (use for all Currency types), Number, None. Edit mask of -1 means that the attribute value can't be edited. Use_For_List can be Attribute (K), List Only (L), Orders (O), or Contributions (C).

Ready

75°F Sunny 1:10 PM 5/10/2022

4. Go to the System Table TX_KEYWORD_CUST_TYPE

ID	Keyword No.	Cust Type	Rank	Inactive	Created By	Create Dt	Create Loc	Last Updated By	Last Update Dt
TX_ANALYTICS_CUBE_TABLE_JOIN	348 496	Corporate Foundation		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
TX_ANALYTICS_DIVISION_ELEMENT	299 496	Corporation		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
TX_ANALYTICS_DIVISION_RANGE	313 496	Estate		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
TX_ANALYTICS_DIVISION_SURVEYQU	306 496	Foundation		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
TX_CONTACT_POINT_CATEGORY_PUB	320 496	Government		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
TX_CUST_TYPE_AFFILIATE	327 496	Household		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
TX_KEYWORD_CUST_TYPE	292 496	Individual		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
TX_MACHINE_LOCATION	341 496	Organization		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
TX_MACHINE_LOCATION_HIST	334 496	School		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
TX_NCOALBK_RESULT_ACTION	349 497	Corporate Foundation		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
	300 497	Corporation		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
	314 497	Estate		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
	307 497	Foundation		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
	321 497	Government		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
	338 497	Household		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
	293 497	Individual		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
	342 497	Organization		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
	335 497	School		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM
	350 498	Corporate Foundation		<input type="checkbox"/>	CONV	08/08/2020 11:49:57 AM	NASCKWCP006 schundu		08/08/2020 11:49:57 AM

Used to assign Keywords to Customer Types. Rank is the order in which keywords for a customer type will appear on the Attributes page. If Rank is empty, then the Keywords Table Help are sorted alphabetically, joining table between T_Keyword and T_Cust_Type. A row in this table makes an attribute type display for a particular keyword value and determines the order in which attributes are displayed.

5. Click on “insert” on the tool bar. A drop down will appear, select the new attribute.

Id	Keyword No	Cust Type	Rank	Inactive	Created By	Create Dt	Create Loc	Last Updated By	Last Update Dt
266	REQUESTS NO EMAIL	Estate		<input type="checkbox"/>	CONN	06/18/2020 11:56:16 AM	NASCXWCP003	schundu	06/18/2020 11:56:16 AM
263	REQUESTS NO EMAIL	Foundation		<input type="checkbox"/>	CONN	06/18/2020 11:56:16 AM	NASCXWCP003	schundu	06/18/2020 11:56:16 AM
269	REQUESTS NO EMAIL	Government		<input type="checkbox"/>	CONN	06/18/2020 11:56:16 AM	NASCXWCP003	schundu	06/18/2020 11:56:16 AM
272	REQUESTS NO EMAIL	Household		<input type="checkbox"/>	CONN	06/18/2020 11:56:16 AM	NASCXWCP003	schundu	06/18/2020 11:56:16 AM
257	REQUESTS NO EMAIL	Individual		<input type="checkbox"/>	CONN	06/18/2020 11:56:16 AM	NASCXWCP003	schundu	06/18/2020 11:56:16 AM
278	REQUESTS NO EMAIL	Organization		<input type="checkbox"/>	CONN	06/18/2020 11:56:16 AM	NASCXWCP003	schundu	06/18/2020 11:56:16 AM
275	REQUESTS NO EMAIL	School		<input type="checkbox"/>	CONN	06/18/2020 11:56:16 AM	NASCXWCP003	schundu	06/18/2020 11:56:16 AM
1975	Scholarship Recipient	Household		<input type="checkbox"/>	rseidgwic	05/14/2020 05:38:44 PM	RSEIDGWIC	rseidgwic	05/14/2020 05:38:44 PM
156	Scholarship Recipient	Individual		<input type="checkbox"/>	rseidgwic	05/14/2020 05:38:44 PM	RSEIDGWIC	rseidgwic	05/14/2020 05:38:44 PM
33	NEW Facebook User ID	Household		<input type="checkbox"/>	kalbrech	03/02/2020 03:45:56 PM	NASCXWCP003	kalbrech	03/02/2020 03:45:56 PM
33	NEW Facebook User ID	Individual		<input type="checkbox"/>	kalbrech	03/02/2020 03:45:56 PM	NASCXWCP003	kalbrech	03/02/2020 03:45:56 PM
32	NEW Guest Checkout	Individual		<input type="checkbox"/>	kalbrech	03/02/2020 03:45:56 PM	NASCXWCP003	kalbrech	03/02/2020 03:45:56 PM
17	Void Merge	Corporation		<input type="checkbox"/>	dbo	11/13/2013 02:42:28 PM	DWOODALLT	dbo	11/13/2013 02:42:28 PM
19	Void Merge	Estate		<input type="checkbox"/>	dbo	11/13/2013 02:42:28 PM	DWOODALLT	dbo	11/13/2013 02:42:28 PM
18	Void Merge	Foundation		<input type="checkbox"/>	dbo	11/13/2013 02:42:28 PM	DWOODALLT	dbo	11/13/2013 02:42:28 PM
20	Void Merge	Government		<input type="checkbox"/>	dbo	11/13/2013 02:42:28 PM	DWOODALLT	dbo	11/13/2013 02:42:28 PM
22	Void Merge	Household		<input type="checkbox"/>	dbo	11/13/2013 02:42:28 PM	DWOODALLT	dbo	11/13/2013 02:42:28 PM
16	Void Merge	Individual		<input type="checkbox"/>	dbo	11/13/2013 02:42:28 PM	DWOODALLT	dbo	11/13/2013 02:42:28 PM

Used to assign Keywords to Customer Types. Rank is the order in which keywords for a customer type will appear on the Attributes page. If Rank is empty, then the Keywords are sorted alphabetically. Joining table between T_Keyword and T_Cust_Type. A row in this table makes an attribute type display for a particular keyword value and determines the order in which attributes are displayed.

6. Go to the Cust Type column, select the Customer Type desired, and save. (repeat 4-6 for all Customer types needed)

Used to assign Keywords to Customer Types. Rank is the order in which keywords for a customer type will appear on the Attributes page. If Rank is empty, then the Keywords are sorted alphabetically joining table between T_Keyword and T_Cust_Type. A row in the table makes an attribute type display for a particular keyword value and determines the order in which attributes are displayed.

Id	Keyword No	Cust Type	Rank	Inactive	Created By	Create Dt	Create Loc	Last Updated By	Last Update Dt
266	REQUESTS NO EMAIL	Estate		<input type="checkbox"/>	CONV	06/18/2020 11:56:16 AM	NASCKWCP003 schundu	06/18/2020 11:56:16 AM	
263	REQUESTS NO EMAIL	Foundation		<input type="checkbox"/>	CONV	06/18/2020 11:56:16 AM	NASCKWCP003 schundu	06/18/2020 11:56:16 AM	
269	REQUESTS NO EMAIL	Government		<input type="checkbox"/>	CONV	06/18/2020 11:56:16 AM	NASCKWCP003 schundu	06/18/2020 11:56:16 AM	
272	REQUESTS NO EMAIL	Household		<input type="checkbox"/>	CONV	06/18/2020 11:56:16 AM	NASCKWCP003 schundu	06/18/2020 11:56:16 AM	
257	REQUESTS NO EMAIL	Individual		<input type="checkbox"/>	CONV	06/18/2020 11:56:16 AM	NASCKWCP003 schundu	06/18/2020 11:56:16 AM	
278	REQUESTS NO EMAIL	Organization		<input type="checkbox"/>	CONV	06/18/2020 11:56:16 AM	NASCKWCP003 schundu	06/18/2020 11:56:16 AM	
275	REQUESTS NO EMAIL	School		<input type="checkbox"/>	CONV	06/18/2020 11:56:16 AM	NASCKWCP003 schundu	06/18/2020 11:56:16 AM	
197	Scholarship Recipient	Household		<input type="checkbox"/>	rseedgwick	05/14/2020 05:38:44 PM	RSEDDGWICK rseedgwick	05/14/2020 05:38:44 PM	
196	Scholarship Recipient	Individual		<input type="checkbox"/>	rseedgwick	05/14/2020 05:38:44 PM	RSEDDGWICK rseedgwick	05/14/2020 05:38:44 PM	
33	THEW Facebook User ID	Household		<input type="checkbox"/>	kalbrech	03/02/2020 03:45:56 PM	NASCKWCP003 kalbrech	03/02/2020 03:45:56 PM	
33	THEW Facebook User ID	Individual		<input type="checkbox"/>	kalbrech	03/02/2020 03:45:56 PM	NASCKWCP003 kalbrech	03/02/2020 03:45:56 PM	
32	THEW Guest Checkout	Individual		<input type="checkbox"/>	kalbrech	03/02/2020 03:45:56 PM	NASCKWCP003 kalbrech	03/02/2020 03:45:56 PM	
17	Void Merge	Corporation		<input type="checkbox"/>	dbo	11/13/2013 02:42:28 PM	DWOODALLT dbo	11/13/2013 02:42:28 PM	
19	Void Merge	Estate		<input type="checkbox"/>	dbo	11/13/2013 02:42:28 PM	DWOODALLT dbo	11/13/2013 02:42:28 PM	
18	Void Merge	Foundation		<input type="checkbox"/>	dbo	11/13/2013 02:42:28 PM	DWOODALLT dbo	11/13/2013 02:42:28 PM	
20	Void Merge	Government		<input type="checkbox"/>	dbo	11/13/2013 02:42:28 PM	DWOODALLT dbo	11/13/2013 02:42:28 PM	
22	Void Merge	Household		<input type="checkbox"/>	dbo	11/13/2013 02:42:28 PM	DWOODALLT dbo	11/13/2013 02:42:28 PM	
16	Void Merge	Individual		<input type="checkbox"/>	dbo	11/13/2013 02:42:28 PM	DWOODALLT dbo	11/13/2013 02:42:28 PM	
379	Recurring Donor			<input type="checkbox"/>					

7. Go to the System Table T_KWCODED VALUES

Id	Keyword No	Key Value	Created By	Create Dt	Create Loc	Last Updated By	Last Update Dt
303	Auto Renewal Month	01-January	rседgwic	05/18/2020 10:45:20 AM	RSEDGWICK	rседgwic	05/18/2020 10:45:20 AM
304	Auto Renewal Month	02-February	rседgwic	05/18/2020 10:45:20 AM	RSEDGWICK	rседgwic	05/18/2020 10:45:20 AM
305	Auto Renewal Month	03-March	rседgwic	05/18/2020 10:45:20 AM	RSEDGWICK	rседgwic	05/18/2020 10:45:20 AM
306	Auto Renewal Month	04-April	rседgwic	05/18/2020 10:45:20 AM	RSEDGWICK	rседgwic	05/18/2020 10:45:20 AM
307	Auto Renewal Month	05-May	rседgwic	05/18/2020 10:45:20 AM	RSEDGWICK	rседgwic	05/18/2020 10:45:20 AM
308	Auto Renewal Month	06-June	rседgwic	05/18/2020 10:45:20 AM	RSEDGWICK	rседgwic	05/18/2020 10:45:20 AM
309	Auto Renewal Month	07-July	rседgwic	05/18/2020 10:45:20 AM	RSEDGWICK	rседgwic	05/18/2020 10:45:20 AM
310	Auto Renewal Month	08-August	rседgwic	05/18/2020 10:45:20 AM	RSEDGWICK	rседgwic	05/18/2020 10:45:20 AM
311	Auto Renewal Month	09-September	rседgwic	05/18/2020 10:45:20 AM	RSEDGWICK	rседgwic	05/18/2020 10:45:20 AM
312	Auto Renewal Month	10-October	rседgwic	05/18/2020 10:45:20 AM	RSEDGWICK	rседgwic	05/18/2020 10:45:20 AM
313	Auto Renewal Month	11-November	rседgwic	05/18/2020 10:45:20 AM	RSEDGWICK	rседgwic	05/18/2020 10:45:20 AM
314	Auto Renewal Month	12-December	rседgwic	05/18/2020 10:45:20 AM	RSEDGWICK	rседgwic	05/18/2020 10:45:20 AM
320	BalleMet 13-14 Stats	Acad Adult Student	schundu	08/10/2020 06:01:08 PM	NASCOWCP006	schundu	08/10/2020 06:01:08 PM
321	BalleMet 13-14 Stats	Acad Parent	schundu	08/10/2020 06:01:08 PM	NASCOWCP006	schundu	08/10/2020 06:01:08 PM
322	BalleMet 13-14 Stats	Nutoracker STB	schundu	08/10/2020 06:01:08 PM	NASCOWCP006	schundu	08/10/2020 06:01:08 PM
323	BalleMet 13-14 Stats	Single Ticket Buyer	schundu	08/10/2020 06:01:08 PM	NASCOWCP006	schundu	08/10/2020 06:01:08 PM
324	BalleMet 13-14 Stats	Subscriber	schundu	08/10/2020 06:01:08 PM	NASCOWCP006	schundu	08/10/2020 06:01:08 PM
325	BalleMet 15-16 Stats	Acad Adult Student	schundu	08/10/2020 06:01:08 PM	NASCOWCP006	schundu	08/10/2020 06:01:08 PM
326	BalleMet 15-16 Stats	Acad Parent	schundu	08/10/2020 06:01:08 PM	NASCOWCP006	schundu	08/10/2020 06:01:08 PM

Contains valid values for keywords which are validated with drop-downs.

8. Use the “insert” button to get a number. Use the dropdown to select the new attribute name. go to the key value column and type in the value. For this example, I will do this twice, for the values “On” and “Off.”

Testura *** TEST BALMETUSOHO *** Refreshed Jan 13 2022 8:28PM - [System Table Maintenance: T_KWCODED_VALUES]

File GoTo System Tables Tools Window Help

First T_KWCODED_VALUES

Id	Keyword No	Key Value	Created By	Create Dt	Create Loc	Last Updated By	Last Update Dt
424	Recurring Donor	On					
365	First Year Subscribed	00-01	schundu	08/10/2020 06:01:08 PM	NASCWICPP006	schundu	08/10/2020 06:01:08 PM
389	Scholarship Recipient	00-01	schundu	08/10/2020 06:01:08 PM	NASCWICPP006	schundu	08/10/2020 06:01:08 PM
366	First Year Subscribed	01-02	schundu	08/10/2020 06:01:08 PM	NASCWICPP006	schundu	08/10/2020 06:01:08 PM
303	Auto Renewal Month	01-January	rseidgwick	05/18/2020 10:45:20 AM	RSEIDGWICK	rseidgwick	05/18/2020 10:45:20 AM
367	First Year Subscribed	02-03	schundu	08/10/2020 06:01:08 PM	NASCWICPP006	schundu	08/10/2020 06:01:08 PM
304	Auto Renewal Month	02-February	rseidgwick	05/18/2020 10:45:20 AM	RSEIDGWICK	rseidgwick	05/18/2020 10:45:20 AM
368	First Year Subscribed	03-04	schundu	08/10/2020 06:01:08 PM	NASCWICPP006	schundu	08/10/2020 06:01:08 PM
305	Auto Renewal Month	03-March	rseidgwick	05/18/2020 10:45:20 AM	RSEIDGWICK	rseidgwick	05/18/2020 10:45:20 AM
369	First Year Subscribed	04-05	schundu	08/10/2020 06:01:08 PM	NASCWICPP006	schundu	08/10/2020 06:01:08 PM
306	Auto Renewal Month	04-April	rseidgwick	05/18/2020 10:45:20 AM	RSEIDGWICK	rseidgwick	05/18/2020 10:45:20 AM
370	First Year Subscribed	05-06	schundu	08/10/2020 06:01:08 PM	NASCWICPP006	schundu	08/10/2020 06:01:08 PM
307	Auto Renewal Month	05-May	rseidgwick	05/18/2020 10:45:20 AM	RSEIDGWICK	rseidgwick	05/18/2020 10:45:20 AM
371	First Year Subscribed	06-07	schundu	08/10/2020 06:01:08 PM	NASCWICPP006	schundu	08/10/2020 06:01:08 PM
308	Auto Renewal Month	06-June	rseidgwick	05/18/2020 10:45:20 AM	RSEIDGWICK	rseidgwick	05/18/2020 10:45:20 AM
372	First Year Subscribed	07-08	schundu	08/10/2020 06:01:08 PM	NASCWICPP006	schundu	08/10/2020 06:01:08 PM
309	Auto Renewal Month	07-July	rseidgwick	05/18/2020 10:45:20 AM	RSEIDGWICK	rseidgwick	05/18/2020 10:45:20 AM
373	First Year Subscribed	08-09	schundu	08/10/2020 06:01:08 PM	NASCWICPP006	schundu	08/10/2020 06:01:08 PM
310	Auto Renewal Month	08-August	rseidgwick	05/18/2020 10:45:20 AM	RSEIDGWICK	rseidgwick	05/18/2020 10:45:20 AM

Contains valid values for keywords which are validated with drop-downs.

Table Help

Ready

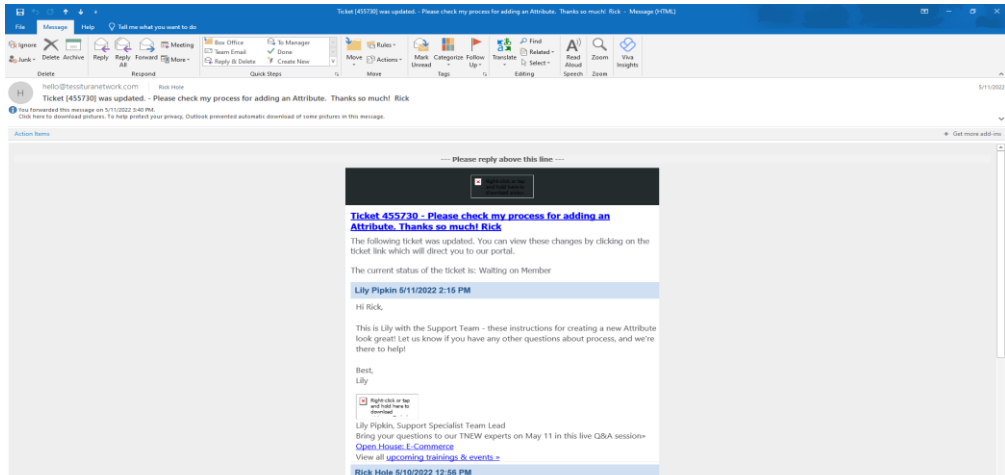
78°F Sunny 1:47 PM 5/10/2022

Tessitura *** TEST BALMETUSOH0 *** Refreshed Jan 13 2022 8:28PM - [System Table Maintenance: T_KWCODED_VALUES]

Id	Keyword No	Key Value	Created By	Create Dt	Create Loc	Last Updated By	Last Update Dt
	395	PLI Category Super Advocate	schundu	08/10/2020 06:01:08 PM	NASCIWCPP006	schundu	08/10/2020 06:01:08 PM
	396	PLI Category Buyer	schundu	08/10/2020 06:01:08 PM	NASCIWCPP006	schundu	08/10/2020 06:01:08 PM
	396	PLI Category Super Buyer	schundu	08/10/2020 06:01:08 PM	NASCIWCPP006	schundu	08/10/2020 06:01:08 PM
	424	Recurring Donor On	rhole	05/10/2022 01:46:01 PM	Rhrole233T	rhole	05/10/2022 01:46:01 PM
	425	Recurring Donor Off					
	294	Religion 7th Day Adventist				dbo	01/25/2012 10:57:20 AM
	278	Religion Buddhist				dbo	01/25/2012 10:57:20 AM
	291	Religion Presbyterian				dbo	01/25/2012 10:57:20 AM
	280	Religion Catholic				dbo	01/25/2012 10:57:20 AM
	292	Religion Quaker				dbo	01/25/2012 10:57:20 AM
	289	Religion Church of the LDS				Christn	10/15/2019 10:27:53 AM
	293	Religion Russian Orthodox				dbo	01/25/2012 10:57:20 AM
	282	Religion Episcopalian				dbo	01/25/2012 10:57:20 AM
	283	Religion Greek Orthodox				dbo	01/25/2012 10:57:20 AM
	284	Religion Hindu				dbo	01/25/2012 10:57:20 AM
	295	Religion Unitarian				dbo	01/25/2012 10:57:20 AM
	285	Religion Jehovah's Witness				Admin	10/14/2008 10:33:28 PM
	286	Religion Jewish				dbo	01/25/2012 10:57:20 AM
	287	Religion Lutheran				dbo	01/25/2012 10:57:20 AM

Contains valid values for keywords which are validated with drop-downs.

9. I sent these screen shots to the Tessitura Help Desk for confirmation.





Ticketing in the time of Omicron

How zone maps helped us stay flexible.

The Challenge:

Ticketing an event that people can attend online or in person.



Supporting a student group
TEDxOhioStateUniversity

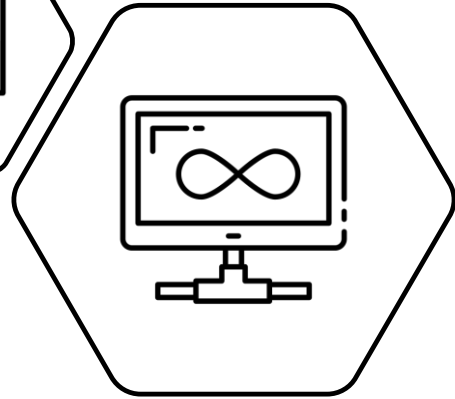
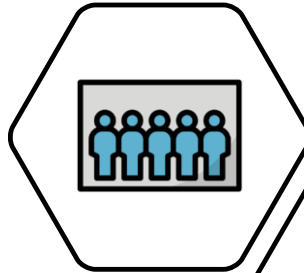
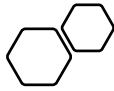


During arrival of
Omicron Variant



In-person and online

Our challenge was to host an event for a student group, TEDxOhioStateUniversity, during winter of 2022, a time which you may recall the Omicron variant had arrived. We were uncertain about whether the event could be in person or not. We opted to offer both in-person and streaming tickets for the event.



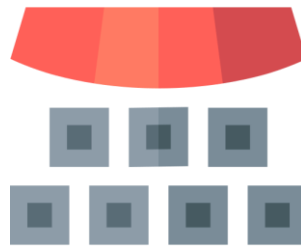
The Question

How do we set a capacity for the in-person event, while allowing unlimited ticket sales for the virtual event?

How would we offer both online and in-person events? Online, we could potentially support thousands of viewers. In person, our space was limited. We needed to have separate ticket capacities, while having one convenient event link for attendees.

The Solution

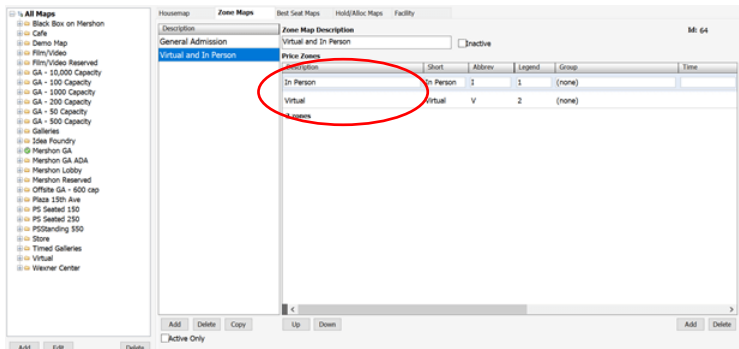
Zone Maps – not just for pricing!



The answer was zone maps! When we think of zone maps we typically think of pricing. They are what allows us to sell premium front row seats at a higher price than the seats in the last row of the auditorium. Zone maps can also help us organize a General Admission event for in-person and virtual ticketing.

Add a new zone map

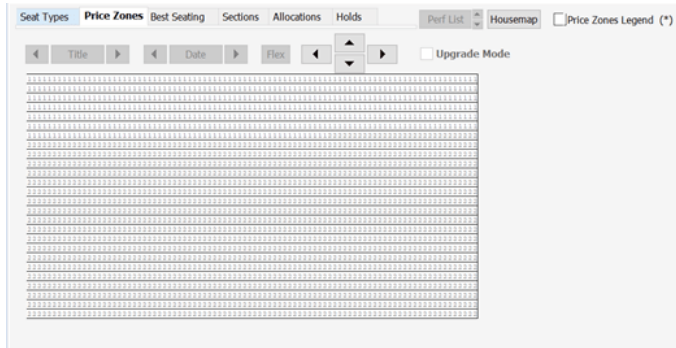
- In Person zone
- Virtual zone



The first step is to add a new zone map. Go to facility manager. Select the venue that the in-person event will be taking place. Then add two zones and name them 'In Person' and 'Virtual'. Note: If you don't anticipate having enough seats in the facility map to accommodate in-person and virtual attendees, start by creating a new facility map with higher capacity. There is documentation on Tessitura's website about how to do this.

Apply Zone Map to Facility Map

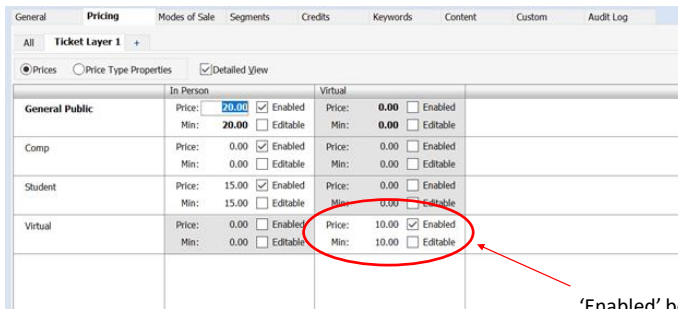
- Assign limited number of seats to **In Person Zone**
- Assign the rest to **Virtual Zone (can be thousands!)**



Next you will need to apply the zone map to the facility map. This is where you assign the number of seats you'd like to be available for the in-person event. Any remaining seats can be assigned to the virtual event.

Tickets can be assigned to a Zone

- In this example, Virtual tickets are only available in the Virtual Zone



	In Person	Virtual
General Public	Price: 20.00 <input checked="" type="checkbox"/> Enabled Min: 20.00 <input type="checkbox"/> Editable	Price: 0.00 <input type="checkbox"/> Enabled Min: 0.00 <input type="checkbox"/> Editable
Comp	Price: 0.00 <input checked="" type="checkbox"/> Enabled Min: 0.00 <input type="checkbox"/> Editable	Price: 0.00 <input type="checkbox"/> Enabled Min: 0.00 <input type="checkbox"/> Editable
Student	Price: 15.00 <input checked="" type="checkbox"/> Enabled Min: 15.00 <input type="checkbox"/> Editable	Price: 0.00 <input type="checkbox"/> Enabled Min: 0.00 <input type="checkbox"/> Editable
Virtual	Price: 0.00 <input type="checkbox"/> Enabled Min: 0.00 <input type="checkbox"/> Editable	Price: 10.00 <input checked="" type="checkbox"/> Enabled Min: 10.00 <input type="checkbox"/> Editable

'Enabled' box is checked for the Virtual Zone

When building the event, make sure that Virtual tickets are only available in the virtual price zone. Do this by checking 'enabled' in the virtual column, and unchecking 'enabled' in the *In Person* column.

Convenient for customers

- One event with two clear options to choose from



Feb 26, 2022 12:00 PM

TED^x
OhioStateUniversity
x = independently organized TED event

In Person
 Virtual

Customers had one event link with two clear options to choose from. In addition to being simpler for customers, it also allowed us to gather registration data in one place.

Create unique ticket design for Virtual tickets

- States **VIRTUAL TICKET** clearly
- Includes instructions
- Doesn't include barcode.



Optional! This is a wonderful example of how adding a new ticket design can be helpful. Here we added a virtual ticket design which was applied to the virtual ticket. The in-person ticket design had a disclaimer that depending on COVID-19 protocols, the event may go fully virtual.



Success!

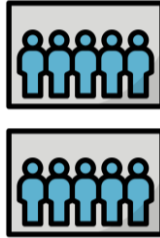
Using map zones we were able to support a hybrid event for in-person and virtual audiences.

Overall, this was successful for both the organizers and the audiences. The only drawback is that all ticket sales (regardless of in-person or virtual) will show up on nscan devices. Ticket takers should be notified in advance not to expect 100% attendance, as virtual tickets are not scanned.

How will you use map zones creatively?



VIP price tier
for reception



Events with 2 capacities



Use your imagination!

Since the TEDxOhioStateUniversity event, we have found another use for map zones. They can be used to offer a VIP ticket that includes reception entry. The map zones enabled us to limit the number of attendees for the reception, while keeping the other portion of the event open to many more people. This can be used for any GA event where you wish to manage two capacities. I invite you to use your imagination! There are many ways to use Tessitura creatively. Perhaps map zones could be the answer you're looking for!



V16 UPGRADE

Demystified

EMBRACE YOUR UPGRADE WITH CONFIDENCE!

TIPS FOR A SUCCESSFUL UPGRADE

- Timing is Everything! 
- Designate a Project Manager 
- Create (or borrow) a Project Plan 
- Test, test, test, test in TEST 
- Verify, verify, verify, verify in PROD 

CHALLENGES WE ENCOUNTERED

- "Early-adopters" find the defects
- The 2 things we were unable to test, failed in PROD
- Integrations didn't connect seamlessly
- Duplicate merge defect
- Learning curve for front-line staff

WHAT WE LOVE ABOUT V16

- User interface changes on the constituent record
- Ability to "favorite" pages, reports, tables
- Search feature on pages, reports, tables
- Using a QR code to login to our scanners
- The Interactions Cube = Mind Blowing!
- "Tess Express" for non-transactional users

WHAT WE LOVE ABOUT V16

- Constituent Steps without a Plan
- "Extractions" are now "Segmentations" and look like lists
- Reference table names are now in the English language
- Quick constituent add from Contribution menu
- Last used constituent names to select from

WHAT WE LOOK FORWARD TO LOVING ABOUT V16

- Soft Credits in Analytics
- Tessitura Merchant Services
- Mobile Tickets
- Mobile Tickets from receipt page - available to guest users
- Mobile Wallet for tickets
- New purchase pages in TNEW, incl Add-ons to tickets

Final Tips

- Get to know your Implementation Coordinator and schedule time with them frequently
- Reach out to others who have upgraded for help/advice
- Get your organization access to the v16 Sandbox
- When you're ready, embrace your upgrade with confidence!