

# Tessitura Dashboards and Widgets

The National Ballet of Canada

# Presenters

1. Deanna Underwood, Development
2. Mo(hiuddin) Faruqe, IT

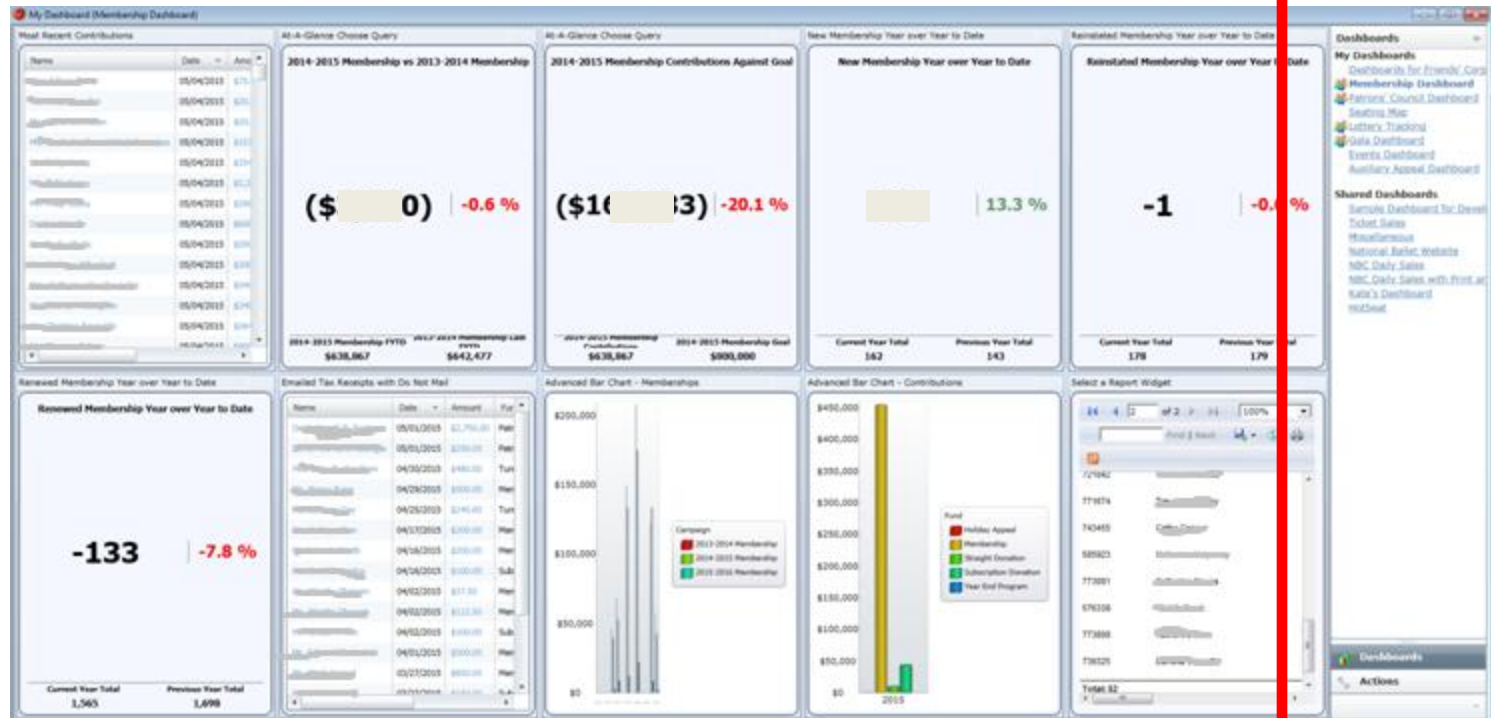
# Agenda

- ❖ Ballet Tessitura Environment
- ❖ Dashboards and Widgets Demonstration
- ❖ Best Practices, User Responsibilities, Security and Other Considerations – Beyond the Basics
- ❖ Q and A

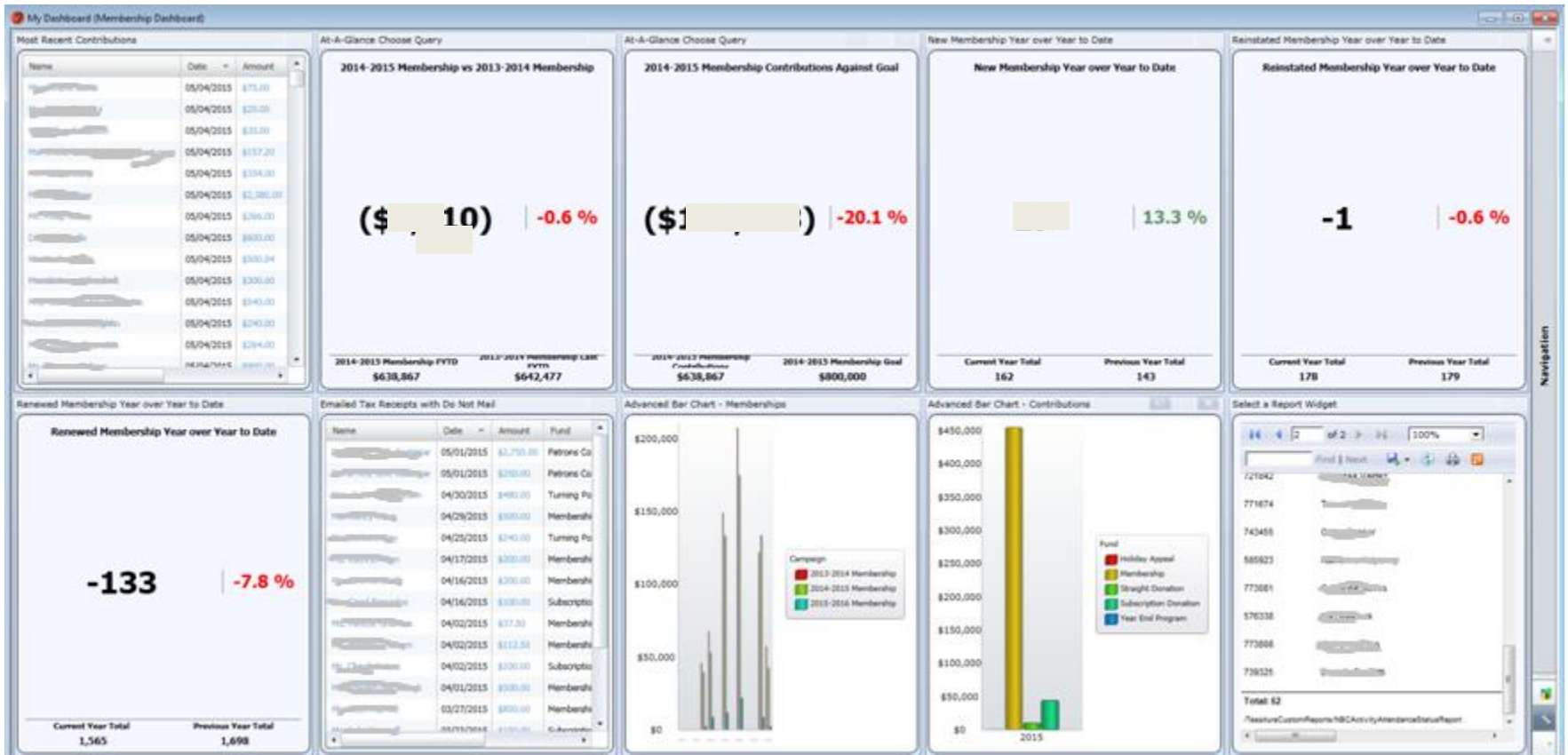
# Ballet Tessitura Environment

- ❖ Versions: Tessitura v12.1.2, T-Stats 4.0, Dashboards v2.0, RMA v4.0
- ❖ Widget Source: Out of the Box, In-house, Third Party
- ❖ Data Source: Tessitura, T-Stats and RMA
- ❖ Dashboard Access: Tessitura Client, Browser - Intranet, Browser – Internet
- ❖ Development Tools: SSRS, T-SQL

# Multiple Dashboards for Multiple Uses

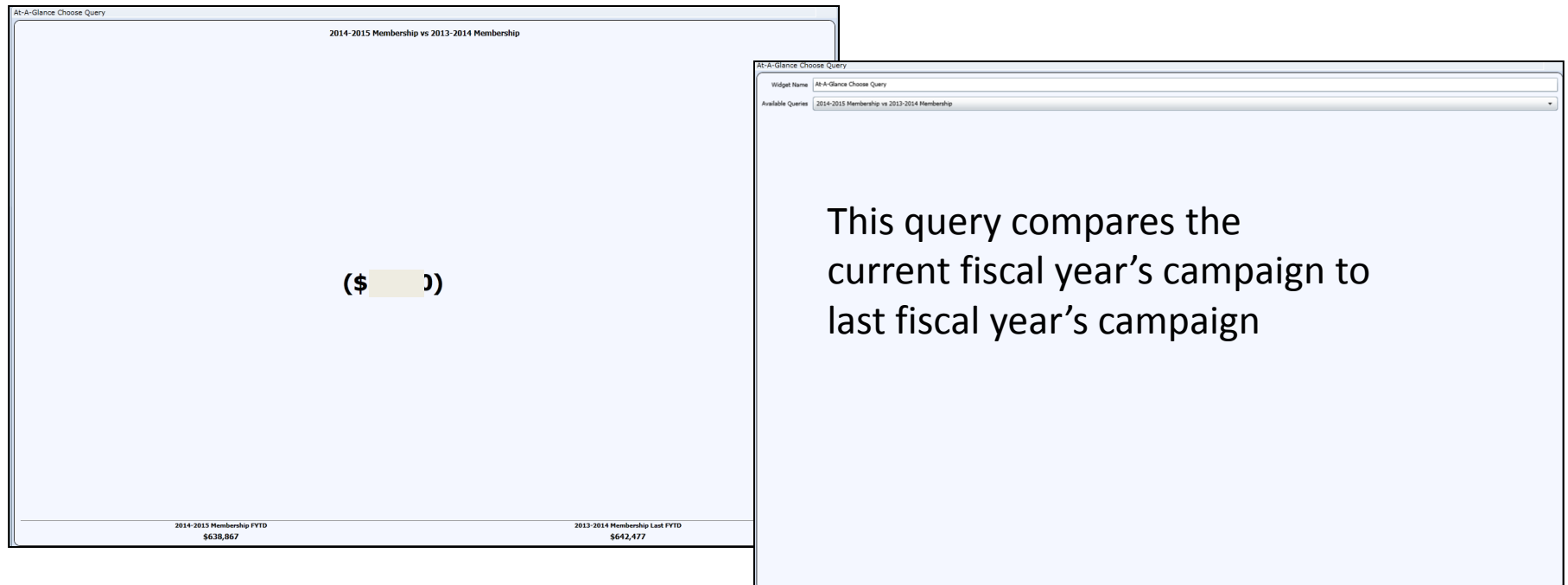


# Sample Membership Dashboard





# At-A-Glance Choose Query Widget



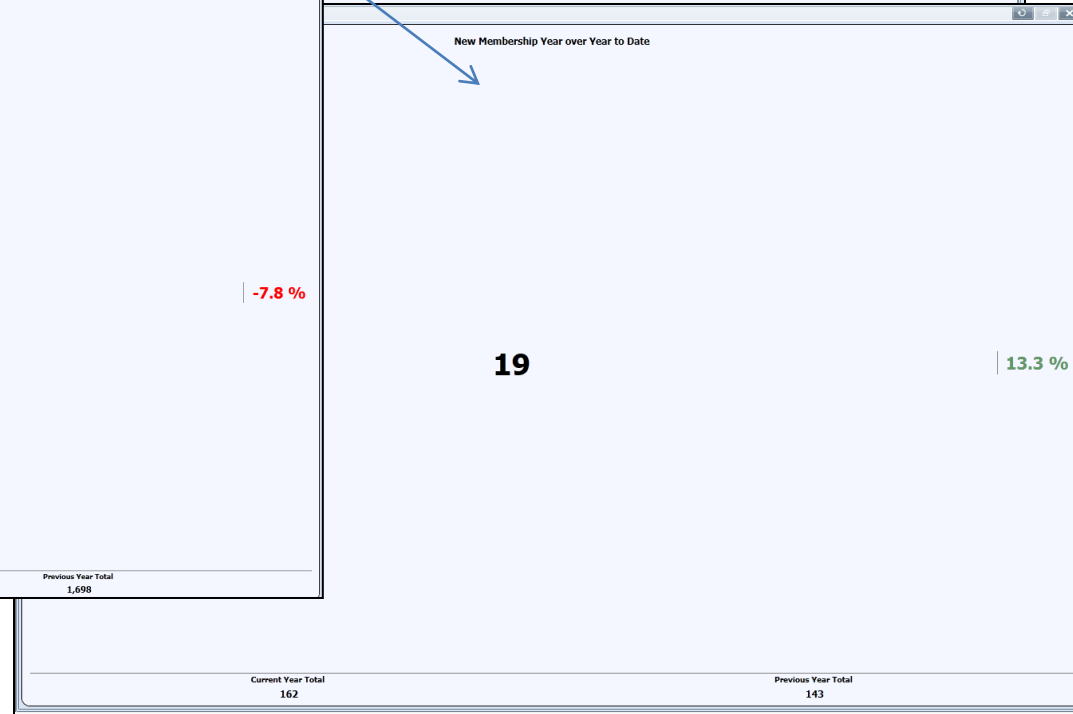
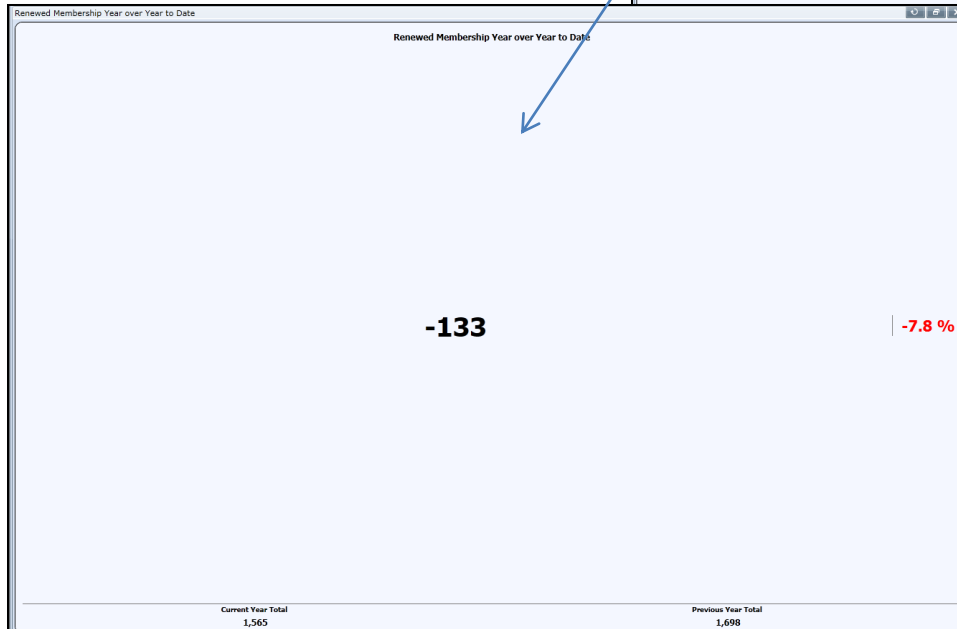
Helpful widget to benchmark campaign's success comparative to "x"

You can determine "x", as the queries are built in-house

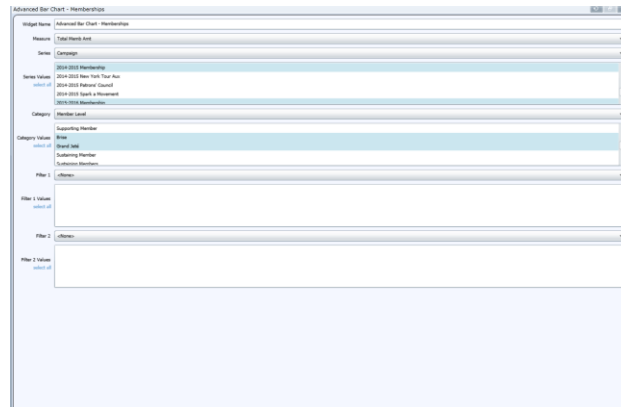
# At-A-Glance Memberships Widget

Using the same widget but with different criteria allows you to display the information so that it is quicker and easier to read

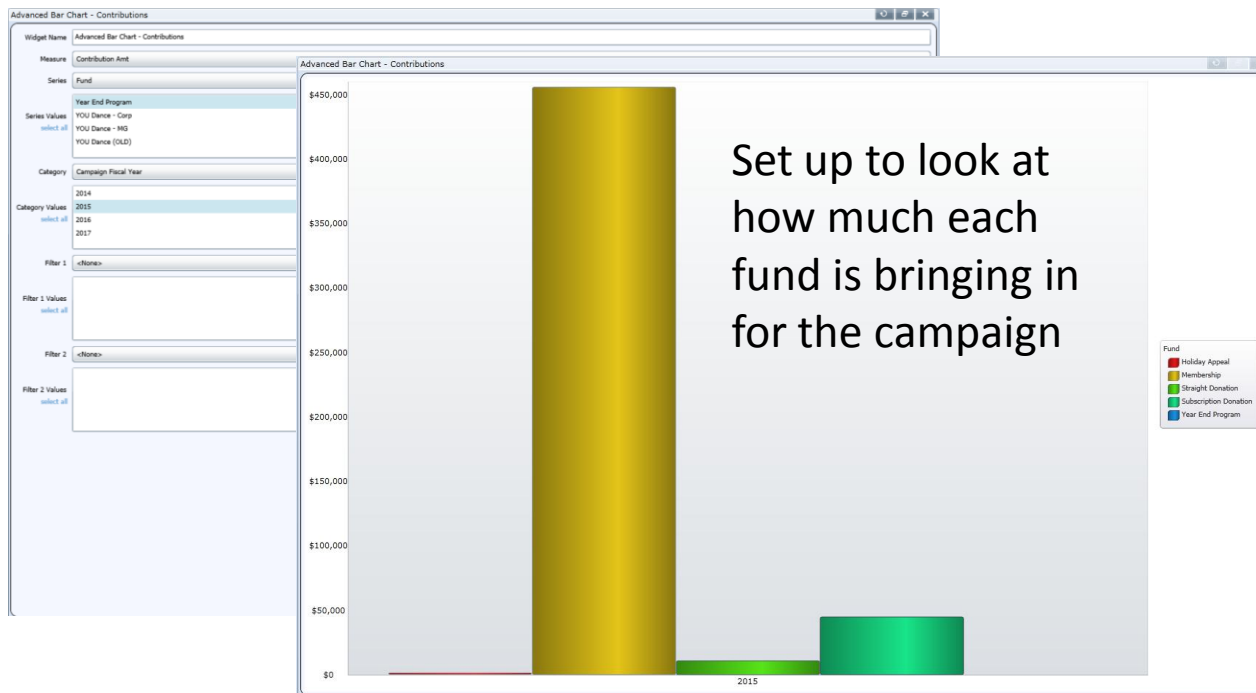
The screenshot shows the configuration interface for the 'Renewed Membership Year over Year to Date' widget. It includes fields for 'Widget Name', 'Measure' (Num Memberships), 'Reporting Period' (Current Fiscal Year/Prior Year), and two filters. Filter 1 is 'New Renew Rainstate' with values 'Renew'. Filter 2 is 'Member Level' with values 'Erise', 'Grand Jeté', 'Sustaining Member', 'Sustaining Members', and 'A - Archonship'.



# Advanced Bar Chart – Memberships and Advanced Bar Chart - Contributions



Allows you to quickly “check in” on your campaign’s success



# Select a Report Widget

My Dashboard (Membership Dashboard)

Select a Report Widget

100% Find Next

**NBC** Page 2 of 2

Activity: Friends' Corps Night Actual Date: 5/13/2015

Customer #	Customer	# Of Atts	Last Update Dt	Perf	Notes	Worker
658540	[REDACTED]	2	3/24/2015 1:22 PM	Friends' C		Deanna Underwood
562887	[REDACTED]	4	3/25/2015 1:21 PM	Friends' Corps Night		Deanna Underwood
583250	[REDACTED]	2	3/25/2015 1:23 PM	Friends' Corps Night		Deanna Underwood
658383	[REDACTED]	2	3/27/2015 11:10 AM	Friends' Corps Night		Deanna Underwood
524076	[REDACTED]	2	3/28/2015 7:29 PM	Friends' C		Deanna Underwood
507883	[REDACTED]	1	4/6/2015 9:38 AM	Friends' Corps Night		Deanna Underwood
541710	[REDACTED]	2	4/7/2015 2:23 PM	Friends' Corps Night		Deanna Underwood
609581	[REDACTED]	1	4/8/2015 9:49 AM	Friends' Corps Night		Deanna Underwood
709764	[REDACTED]	4	4/8/2015 11:29 AM	Friends' Corps Night	4 as per Deanna	Deanna Underwood
588375	[REDACTED]	2	4/13/2015 1:29 PM	Friends' Corps Night		Deanna Underwood
342308	[REDACTED]	2	4/14/2015 1:11 PM	Friends' Corps Night		Deanna Underwood
540823	[REDACTED]	1	4/16/2015 9:34 AM	Friends' Corps Night		Deanna Underwood
617523	[REDACTED]	3	4/16/2015 9:40 AM	Friends' Corps Night		Deanna Underwood
711230	[REDACTED]	3	4/16/2015 7:25 PM	Friends' C		Deanna Underwood
325799	[REDACTED]	3	4/21/2015 9:03 AM	Friends' Corps Night		Deanna Underwood
636375	[REDACTED]	4	4/21/2015 9:04 AM	Friends' Corps Night	as per Deanna	Deanna Underwood
613658	[REDACTED]	2	4/21/2015 2:04 PM	Friends' C		Deanna Underwood
721842	[REDACTED]	2	4/27/2015 3:25 PM	Friends' Corps Night		Deanna Underwood
771674	[REDACTED]	2	4/29/2015 10:58 AM	Friends' Corps Night		Deanna Underwood
743455	[REDACTED]	2	4/29/2015 12:04 PM	Friends' Corps Night	Joyce Chandler	Deanna Underwood

A great way to keep a report that is constantly used available to check throughout the day, even when not logged into Tess (can check dashboards online)

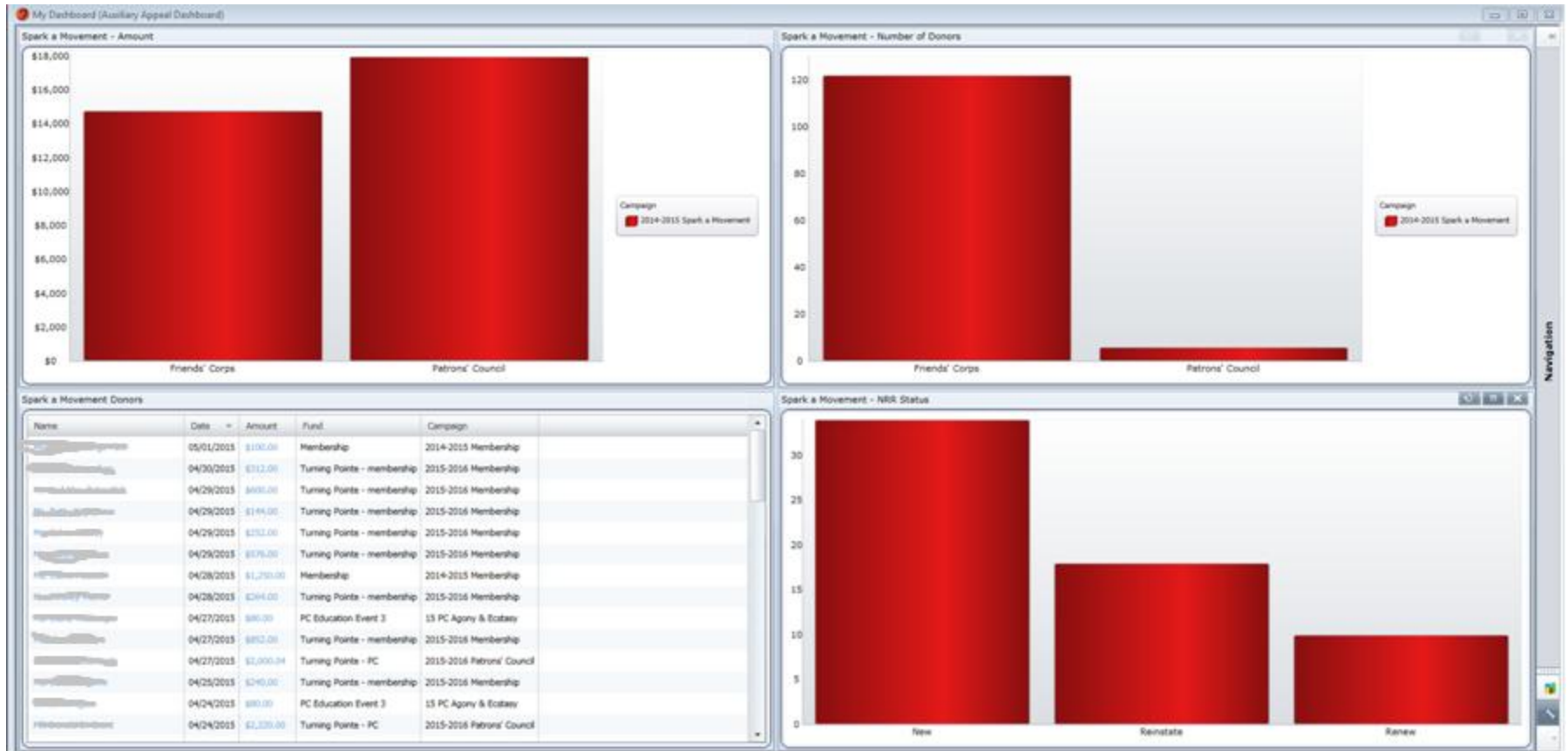


# Sample Elevated Event Dashboard

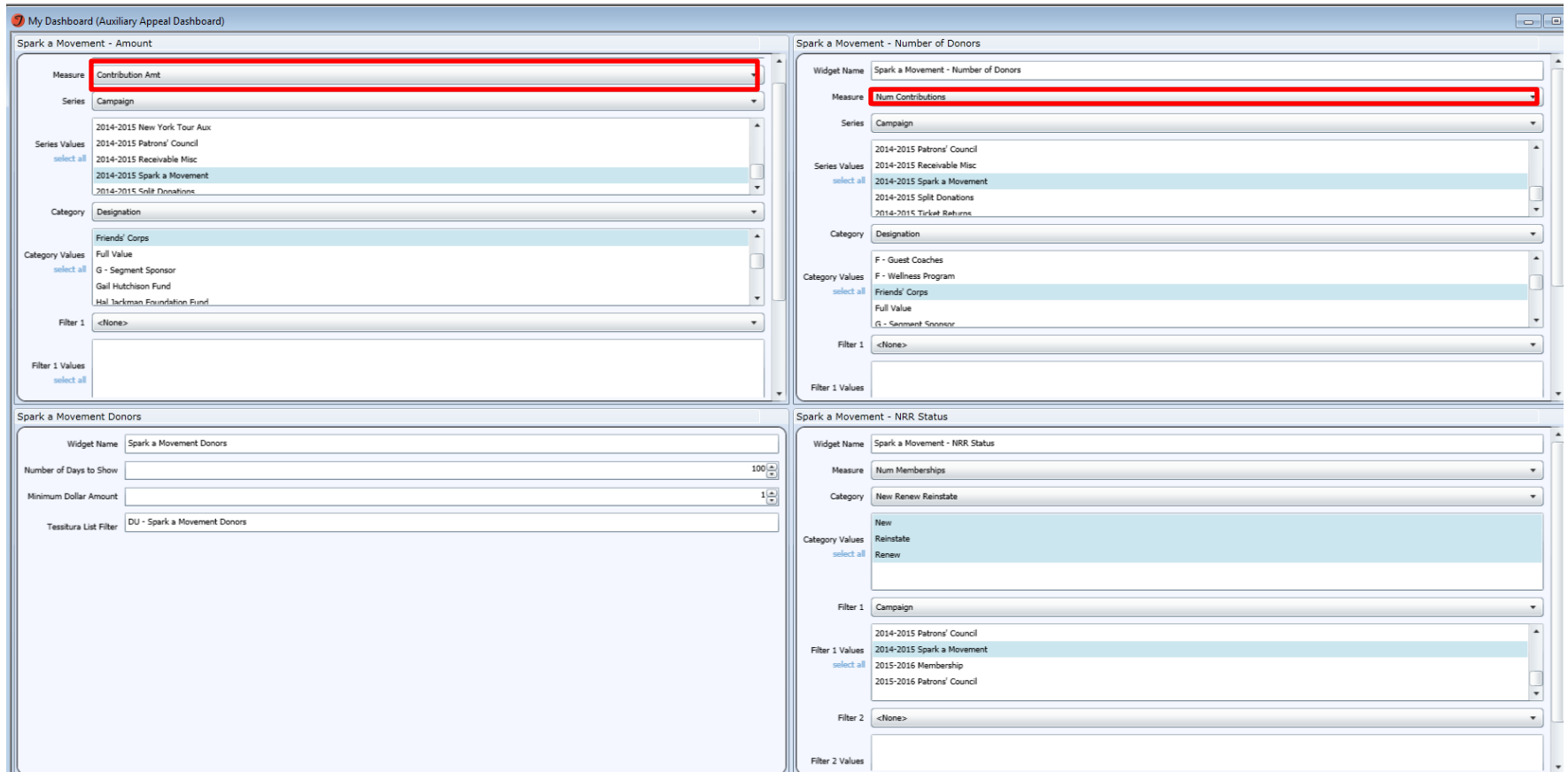
The screenshot shows a dashboard titled "My Dashboard (Events Dashboard)" with three widgets. The first widget, "PC Agony & Ecstasy - Amount", has a "Measure" dropdown set to "Contribution Amt". The second widget, "PC Agony & Ecstasy - Attendees", has a "Measure" dropdown set to "Num Contributions". The third widget, "PC Agony & Ecstasy - Number of Attendees", has a "Measure" dropdown set to "Num Contributions". The first and third widgets have their "Measure" dropdowns highlighted in red. Blue arrows point from the text below to the bottom of the first and third widgets.

You can keep track of both financials and attendance numbers by using the same widget in two different ways

# Sample Auxiliary Appeal Dashboard

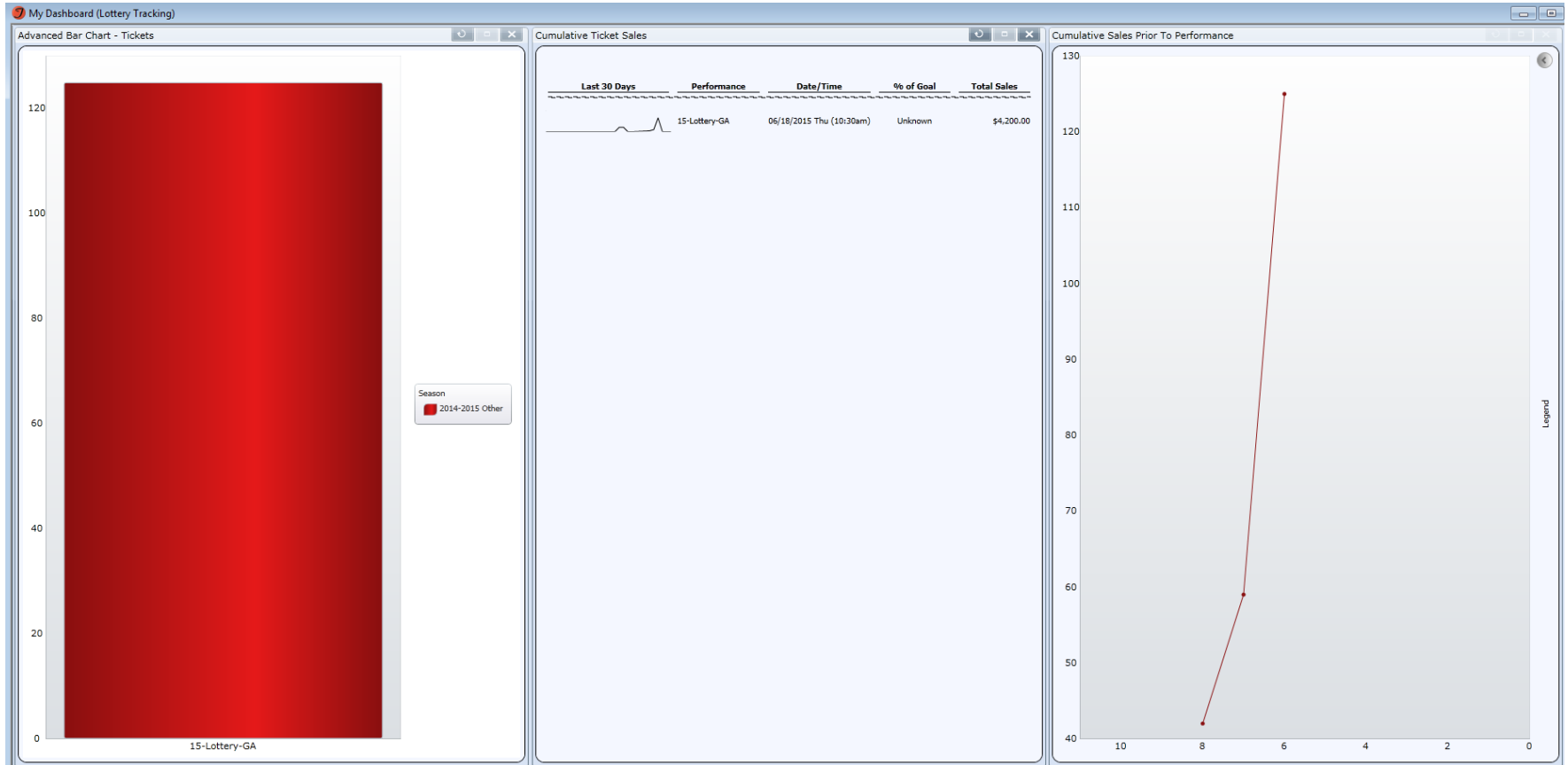


# Sample Auxiliary Appeal Dashboard



A combination of Advanced Bar Chart – Contributions (used 2 times with different criteria), Most Recent Contributions and Advanced Bar Chart-Memberships allow me to keep an eye on the success of Auxiliary Appeals

# Sample Lottery Tracking Dashboard



Our lottery is tracked like a performance (each ticket is a “seat”), but dashboards allow me to report on the success in a way that is useful to the Development Department’s needs

# Sample Lottery Tracking Dashboard

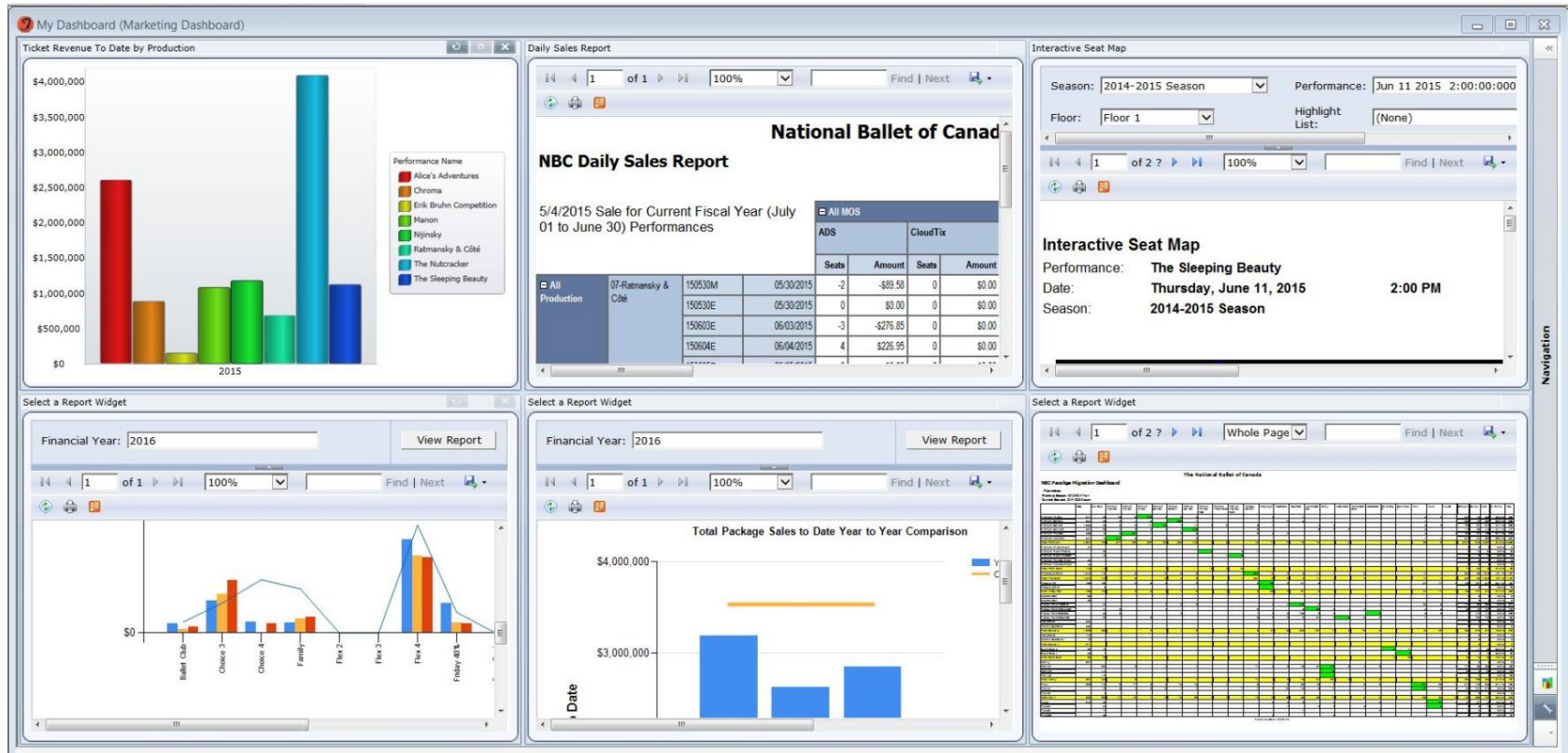
The dashboard consists of three side-by-side widgets. The first widget, 'Advanced Bar Chart - Tickets', has a 'Widget Name' of 'Advanced Bar Chart - Tickets', a 'Measure' of 'Num Tickets', and a 'Series' of 'Season'. It lists 'Series Values' including '2013-2014 Other', '2014-2015 Dress Rehearsal', '2014-2015 Education', '2014-2015 Other', and '2014-2015 Season'. The 'Category' is 'Production Season', and 'Category Values' include '15 Education and Outreach', '15-Class on Stage', '15-Lottery-GA', '15-The Nutcracker', and '16-The Nutcracker'. The second widget, 'Cumulative Ticket Sales', has a 'Widget Name' of 'Cumulative Ticket Sales', a 'Season' of '2014-2015 Other', and a 'Filter Type' of 'Production Season'. It lists 'Filter Values' including '15-Lottery-GA' and 'Souvenir Book'. The 'Total/Variance' is 'Total Sales'. The third widget, 'Cumulative Sales Prior To Performance', has a 'Widget Name' of 'Cumulative Sales Prior To Performance', a 'Measure' of 'Number of Tickets', and a 'Number of Weeks' of '10'. It lists 'Series Values' including '15-Lottery-GA'. 'Filter 1' is 'Performance Name', and 'Filter 1 Values' include '14DanceAbout', '15 DanceAbout', '15-Lottery-GA', 'Alice', and 'Alice's Adventures'. 'Filter 2' is '<None>'.

Advanced Bar Chart  
– Tickets Widget

Cumulative Ticket  
Sales Widget

Cumulative Sales  
Prior to  
Performance  
Widget

# Sample Marketing Dashboard



# Advanced Bar Chart – Tickets Widget

My Dashboard (Marketing Dashboard 3)

Advanced Bar Chart - Tickets

Widget Name: Advanced Bar Chart - Tickets

Measure: Ticket Amt

Series: Performance Name

Series Values: Ratsmansky S. C&B, Ratsmansky S. C&B-Dress, Romeo S. Juliet, Romeo S. Juliet - Dress

Category: Season

Category Values: 2014-2015 Education, 2014-2015 Other, 2014-2015 Season, 2015-2016 Season

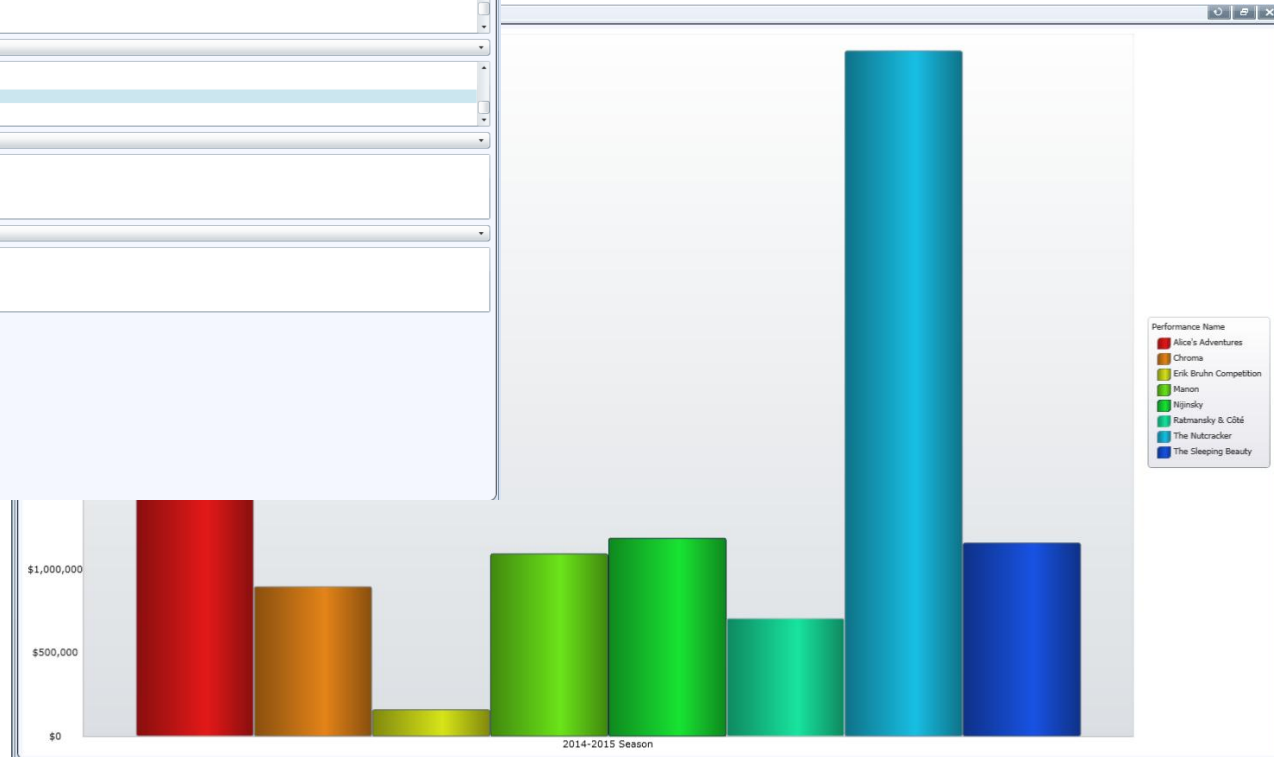
Filter 1: <None>

Filter 1 Values: select all

Filter 2: <None>

Filter 2 Values: select all

A great way to quickly see the success of each production in a fiscal year



# Select a Report Widget

Select a Report Widget

**National Ballet of Canada**

**NBC Daily Sales Report**

5/4/2015 Sale for Current Fiscal Year (July 01 to June 30) Performances

		ADS		CloudTix		DanceBreak		Group		NBC Co		Phone Room		Promotions		Rush		Subscription		Web sales		Window		MOS Total	MOS Total			
		Seats	Amount	Seats	Amount	Seats	Amount	Seats	Amount	Seats	Amount	Seats	Amount	Seats	Amount	Seats	Amount	Seats	Amount	Seats	Amount	Seats	Amount	Seats	Amount			
Production	07-Ramnansky & Cia	150530M		05/30/2015	-2																							
		150530E		05/30/2015	0																							
		150603E		06/03/2015	-2																							
		150604E		06/04/2015	4																							
		150606E		06/05/2015	0																							
		150606EZ		06/06/2015	0																							
		Prod Total:				-1																						
		Dress Rehearsal	150609E-CR		06/09/2015	-1																						
			Prod Total:				-1																					
		05-The Sleeping Beauty	150610E		06/10/2015	0																						
150611M			06/11/2015	0																								
150611E			06/11/2015	0																								
150612E			06/12/2015	0																								
150613M			06/13/2015	0																								
150613E			06/13/2015	0																								
150614M			06/14/2015	0																								
150619E			06/19/2015	0																								
150620M			06/20/2015	0																								
150620E			06/20/2015	0																								
Prod Total:				0																								
Gala	15GALA		06/17/2015	1																								
	Prod Total:				1																							
15-Lottery-GA	15LOTTERY		06/16/2015	10																								
	Prod Total:				10																							
Grand Total:																												

Select a Report Widget

Widget Name: Select a Report Widget

Report Name: NBC Daily Sales

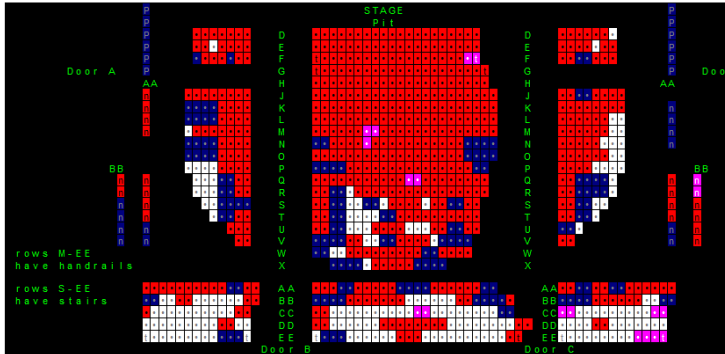
By using the Select a Report Widget, those who need to check on daily sales are able to do so without logging into Tessitura

# Select a Report Widget

**Interactive Seat Map**

Performance: The Sleeping Beauty  
 Date: Wednesday, June 10, 2015 7:30 PM  
 Season: 2014-2015 Season

Map Navigation



rows M-EE have handrails  
 rows S-EE have stairs

Summary	Count	From List	Seat Counts	#Seats	From List
Customers	293	1	Unpaid Seats	0	0
Orders	293	1	Paid Seats	578	0
			Donated	0	0
			Held	162	
			Available	182	
			Locked	0	0

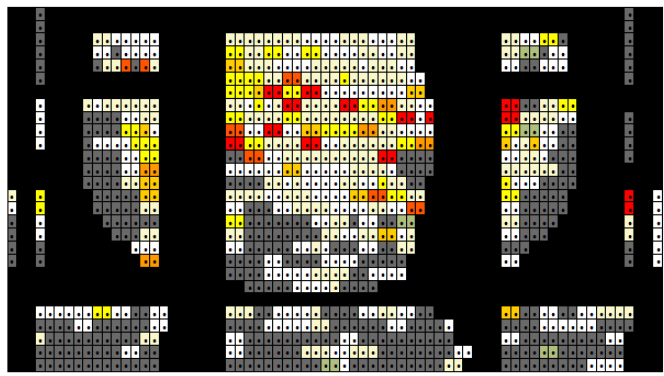
Hold Detail  
 Hold Count  
 Media 98

**National Ballet of Canada**

**Interactive Seat Map Development**

Performance: The Sleeping Beauty  
 Date: Wednesday, June 10, 2015 7:30 PM  
 Season: 2014-2015 Season  
 Floor: Main Floor  
 Include MG Pledges? Yes

Map Navigation



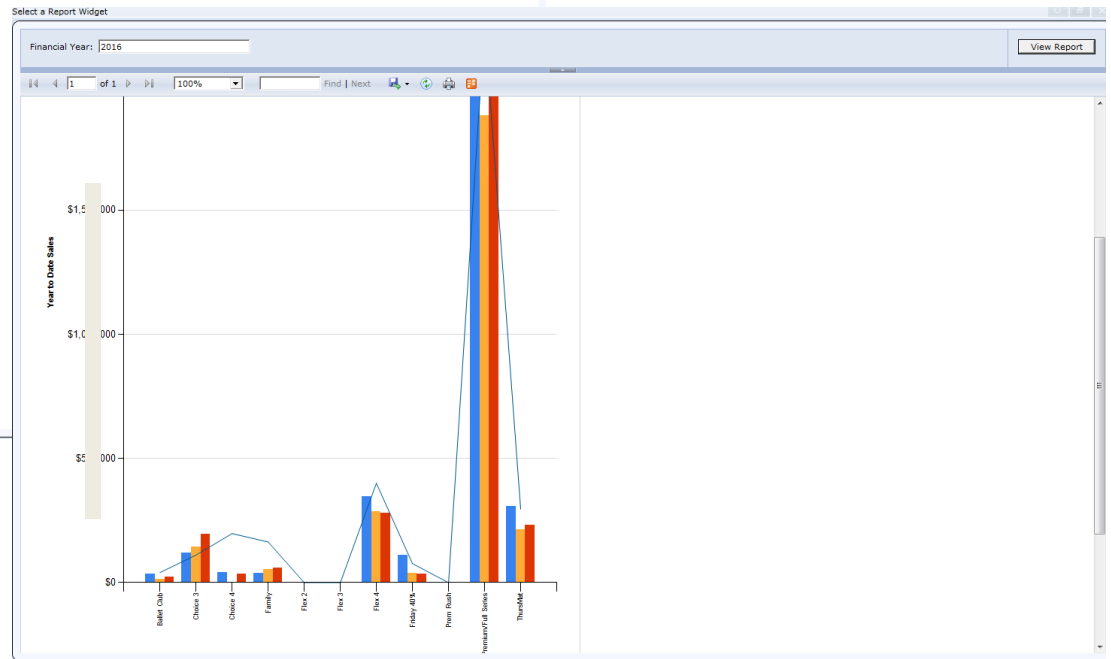
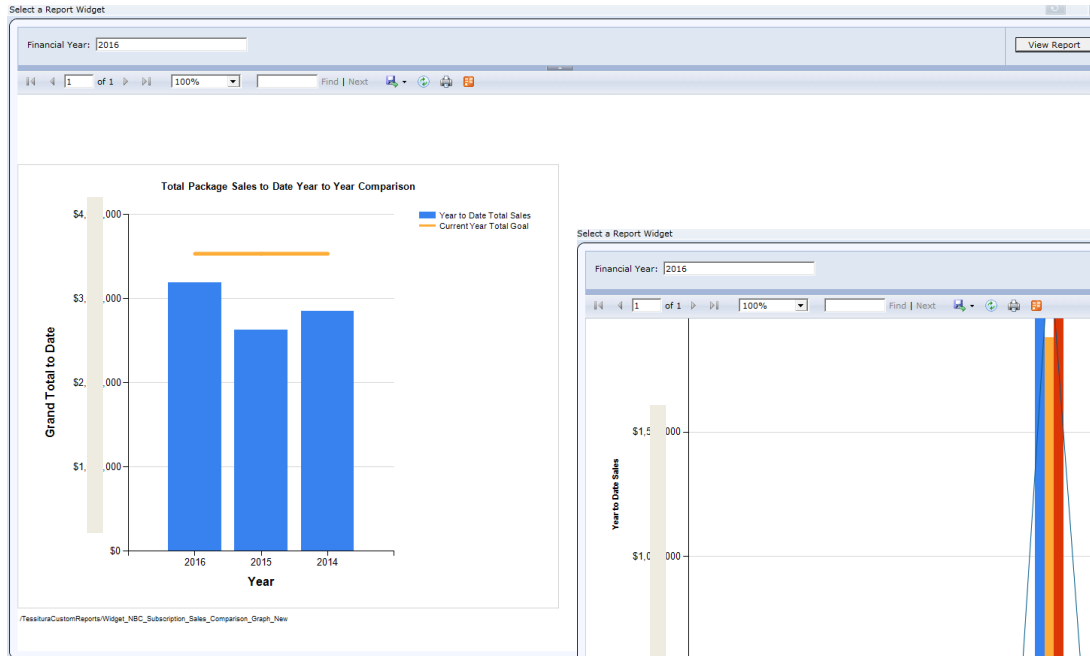
Contribution Levels

- \$ 0
- \$ 0 - 75
- \$ 75 - 2000
- \$ 2000 - 5000
- \$ 5000 - 25000
- \$ 25000 - 50000
- \$ 50000 - 100000
- \$ > 100000
- Unsold

NBC Interactive Seat Map Devlo Run by dunderwo on 5/4/2015 5:09:05 PM

Using the Select a Report Widget, we can display similar reports for side-by-side comparison, without the need to switch from report to report/screen-to-screen

# Select a Report Widget



Dashboards allow us to quickly and conveniently compare daily sales, cumulative sales and fiscal years

# Sample Third Party Dashboard

Pricing Institute Hotseat Index Widget



The Pricing Institute

JCA

THE NATIONAL Ballet OF CANADA

Karen Kaln Artistic Director

# Best Practices

- ❖ Avoid adding a report as widget that processes lots of data – use custom query to only pull required data
- ❖ Avoid adding a complex report as a widget – create a simpler version for widget to show KPIs only
- ❖ Take the similar security measure as you will do with a report
- ❖ Auto pull parameter values as much as possible – avoid any maintenance headache

# End User and IT Responsibility

- ❖ Requirement Submission: Business/End Users
- ❖ New In-house Widget Development: IT
- ❖ Backend Setup and Security: IT
- ❖ New Dashboard Creation and Sharing: Business/ End  
Users

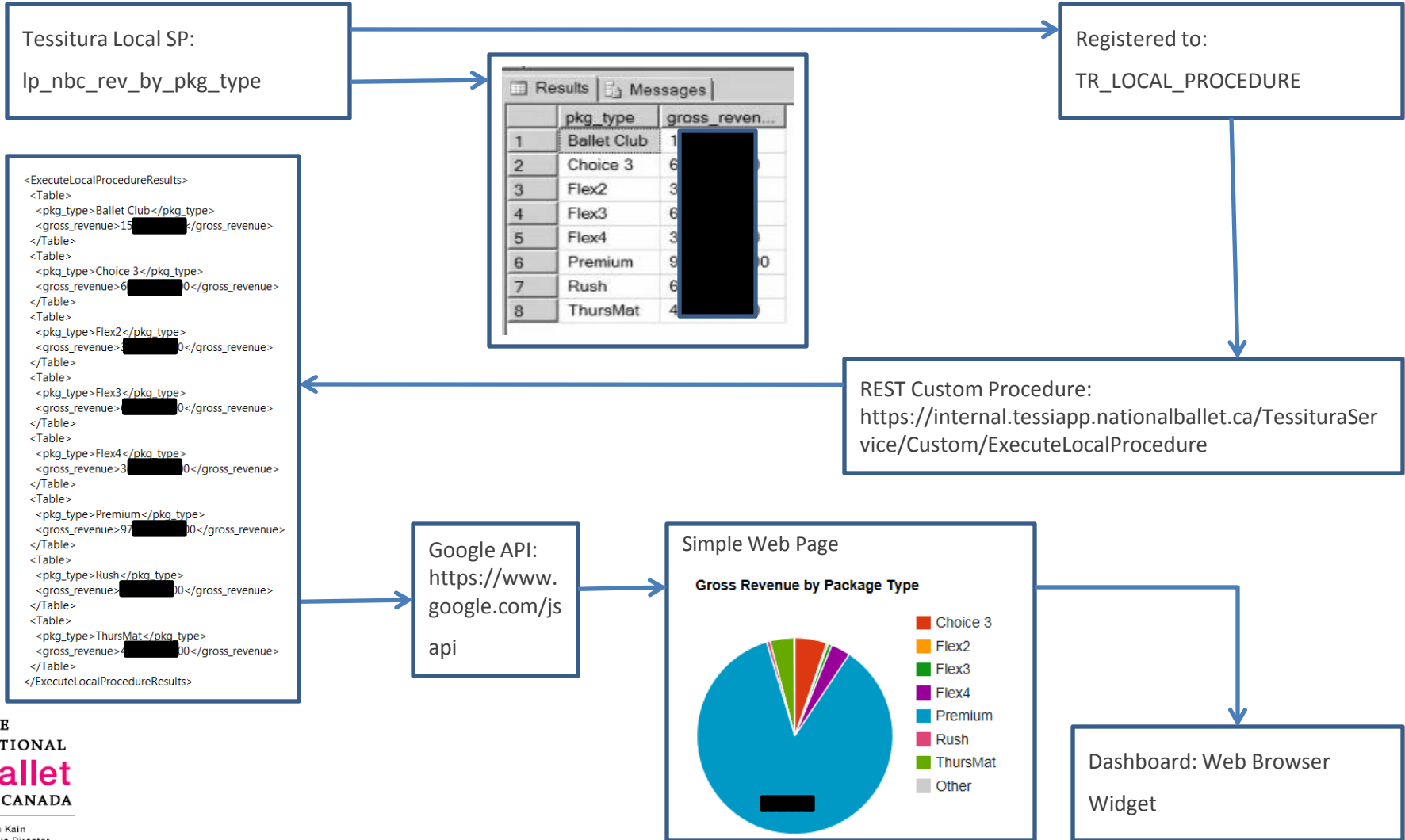
# Security Basics

- ❖ Screen and Service Resource Permission – Tessitura Security Module (IT)
- ❖ Widget Permission TX\_WIDGET\_USERGROUP System Table (IT)
- ❖ Dashboard Permission – Dashboard sharing from My Dashboard (End Users)
- ❖ Consortium – Separate Widget for different Division/ Organization (IT- at Setup Level)
- ❖ Data Transmission Security – SSL (<https://>)

# Other Considerations

- ❖ Create widget based on real time data – Select a Report Widget, At a Glance Choose Query Widget, Web Browser Widget
- ❖ Dashboard internet/ external Access – additional Dashboard setup in a DMZ environment
- ❖ JavaScript Charting Libraries (Open Source) – D3.js, Google Charts  
Data: Tessitura REST Web Service (XML/JSON)

# Google Chart Example



# Thank you!

## Q & A

Contact: [dunderwood@national.ballet.ca](mailto:dunderwood@national.ballet.ca) and  
[mfaruqe@national.ballet.ca](mailto:mfaruqe@national.ballet.ca)