

Some Examples of Proctors and the REP's Attempts at Naming Schemes and Cleanup Process

• Staff Identification Process for Mail List and Saved Criteria Cleanup

First Email: OK Folks. We need to cleanup our TM mail lists. This is partially just good housekeeping, but more importantly, it is necessary for us to remove some because we have been running into issues with patrons attached to too many mail lists to be added to new ones.

After July 21st, we will be deleting all un-critical mail lists whose last updated date is 2015 or earlier. What does this mean?

- You need to tell us which of the old mail lists is critical and therefore must be kept.
 - What constitutes “critical”?
 - A list you ACTUALLY USE/NEED AND could not re-run in the future because
 - A) the criteria references a technical setup we are no longer familiar with OR
 - B) the list was the result of an import and is not criteria based.
 - Not feeling comfortable building criteria is NOT a sufficient reason to keep an old mail list.
 - If you haven't used it in the past 1-2 years, please think very carefully – you probably don't need it.
 - How do you tell us it's critical?
 - Send me, via email, the numbers of the lists you want protected and we will mark them DND and lock down their access. This will let us mark them consistently.
- Please review your lists that are currently marked “DND” and confirm, using the standards above, if they are indeed still critical or not. Please remove the “DND” from any such list that is no longer critical. Just to be extra cautious, we will protect lists starting with “DND” even if you don't tell us they are critical, but **please** help us use this opportunity for a good spring cleaning. The more lists we delete now, the longer we can wait until we have to do this again ☺

I will send a reminder, but you HAVE UNTIL 5PM on JULY 21. Thank you so much for adding this to your July list – I promise it has real value to all of us using the database!

Followup Email with Detailed Sort Instructions: OK all, here's another reminder about reviewing your mail lists before we start cleaning them up (i.e. DELETING THEM). You have until 5PM tomorrow/Friday (and no, Box and I will be working over the weekend, so there's no soft extension because of that). In summary, we need you to:

- Pull up all your mail lists (anything you created, edited or use).
- Sort them by Date Updated (you can add this column to the mail list search window if needed).
- Preferably for all lists, but especially for anything last updated prior to 2016, determine if it has critical value or not.

Critical value = a list you ACTUALLY USE/NEED & have used in the past year or two & could not re-run in the future because

- A) the criteria references a technical setup we are no longer familiar with OR
- B) the list was the result of an import and is not criteria based

- If it is indeed critical, take down the mail list number and email it to me. You may also put “DND” in the front of the Internal Name (I will double check naming conventions for all saved lists as well).
- If it's not critical, delete it yourself OR remove any “dnd” or “DND” or “do not delete” from the Internal Name.

I know it's annoying, but it makes all our lives easier, I promise. Thank you!

• Employee Access Levels – See Attached

• Event Codes – See Attached

• Campaign Internal Naming Scheme

Proctors Active – name as is

REP Active – start with “CR”, then name as is

UPH Active – start with “UPH”, then name as is

All Inactive – start with “Z_”, then continue with appropriate venue name tag, then name as is

Anything season specific – put season at very end and format XXXX-XX

Most commonly used (no more than 10) – start with a number ALA “1_” or “3_” and then follow with full name as indicated above (this will throw the most used ones up top in the dropdowns for CSA use)

• Pricing Map Naming Scheme

“*” (ONLY if a standard, up-to-date map with newest seat #s and seat views, etc. indicates that map is copyable in full, review each season)
“RETIRE” (if appropriate)
Number (do NOT use the # sign ever again)
Venue (“GE” or “MS” - do NOT add “Theatre”)
“GA” (if general admission, do NOT indicate anything for reserved maps)
“Tables” or “Tables & Seats” (ONLY if appropriate for GE, assume regular seating if nothing indicated)
Count Price Code, Count Price Code, Etc. (don’t skip this step - this is what makes it usable for future events)
Specific Event (only if appropriate)

No special punctuation except between price code listings

Examples:

*110 GE 30P, 358A, 50CC
112 GE 201A, 237B Hubbard Hall Opera
455 GE Tables & Seats 90P, 218A Stefon Harris
RETIRE 52 GE 90P, 234A, 114CC SLOC
*1148 MS 1626A, 374B, 320C, 326H
1150 MS 100VIP, 301P, 1225A, 374B, 488C, 158H

• Some Promotion Internal Naming Tags

For quick visual reference and searching, at end of internal promo name, use the following to indicate facility fee total:

\$5	^
\$4.50	§
\$4	~
\$3	(old REP fees, all promos started with “CR”)
\$2.50	**
\$1.50	*
\$0	leave as just promo name without a tag

For easy sorting within an order, start the following types of promos with:

Group Tickets	Group
Comp Tickets	Comp
Promo/Discount Offer	Code CODEWORD (include “(no X, X)” at end before facility fee tag if price code exclusions)
VIP or Meet and Greet Tickets	VIP

Employee Access Update 2017

TM Access Philosophies for Proctors, theREP and UPH

- Err on the side of trusting all employees with full access to the data
- Give all employees enough access to explore features on their own
- Scale access to adjust crucial event, campaign, pass and accounting setup information
- Hold codes, though there are recommendations below, can and should be individualized
- Except for hold codes and private donor notes, no employee lives outside of a standard level
 - Either move up/down an entire category or adjust the category for all
 - Keep track of employees attached to each category using the similarly named access groups

1. LEVEL A: VIEW ONLY

Example Employee: Luke Krauss

Volunteers/Per Diems/All Staff Without TM Access

Logon Level: API Only (to keep the star icon)

Min. Recommended Hold Codes/Data/Functions: none

2. LEVEL B: INTRO

Example Employee: Shayne Cameris

CSA's, most lightweight upstairs users including Marketing Acct Execs

Logon Level: Normal

Min. Recommended Hold Codes: o, q, s, t, v

Data/Function Philosophies: Taking money is easy, but require codes for getting rid of money view and insert lots of stuff for playing/learning

3. LEVEL C: INTERMEDIATE

Example Employee: Jen Cullen

Box 3rd Keys & Supervisors, Corporate Ticketing Agents, Education, Group Promo Builders

Logon Level: Normal

Min. Recommended Hold Codes: c, k, l, o, q, s, t, v, w, x, y

Data/Function Philosophies: Can test build new items but can't edit or delete existing ones, can provide money return codes, still can't get into major financial trouble or make en masse edits

4. LEVEL F: FINANCE

Example Employee: Suzanne Geertz

Most of Finance

Logon Level: Normal

Min. Recommended Hold Codes: c, k, l, o, q, s, t, v, w, x, y

Data/Function Philosophies: Intermediate access with anything accounting as well

5. LEVEL G: EVENT EDITERS

Example Employee: Austin Zehr-Scibilia

Box Supervisors, movie builders, others who edit performances

Logon Level: Normal

Min. Recommended Hold Codes: c, k, l, o, q, s, t, v, w, x, y

Data/Function Philosophies: Intermediate access with additional event edit access

6. LEVEL H: DEVELOPMENT

Example Employee: Carrie Kirkaldy

Corporate and Development employee

Logon Level: Normal

Min. Recommended Hold Codes: d, l, o, q, s, t, v, w, y

Data/Function Philosophies: Intermediate access with DonorSearch, campaign and donation access and no CCV

7. LEVEL D: ADVANCED

Example Employee: Sophia Morris

Box Mangers, heavyweight users, troubleshooters

Logon Level: Normal

Min. Recommended Hold Codes: c, k, l, o, q, s, t, v, w, x, y

Data/Function Philosophies: Almost everything with some major background job protection

8. LEVEL E: ADMINS

Master User and Admin Accounts (password access: IT Director and select members of IT team, CFO, Contract Administrator, Systems and Research Manager, HR/Payroll, Box Manager, Webmaster)

Department (as Financial Owner) (All)

Combined Spot - Category	Character	Meaning	Example
1 - Season Start Year	1-9		
2 - Season Start Year	1-9		
3 - Organizational Owner	-	Proctors	
	:	theREP	
	.	UPH	
4 - Event Type	A	Education Processing Events (i.e. residencies, afterchool billings, etc)	17-A
	B	TBD	
	C	Education School-Year Programs (i.e. master classes, teacher events, classes, etc)	17-C
	D	Development Fundraisers (i.e. special events, vendor billings, etc)	17-D
	E	Education Summer Camps/Classes (i.e. traditional SOPA camps)	17:E
	F	Fundraising Boxes	17-F
	G	Self-Produced Tours or Works in Other Locations (i.e. On-the-Go, etc)	17:G
	H	TBD	
	I	TBD	
	J	TBD	
	K	TBD	
	L	TBD	
	M	Movies	17-M
	N	TBD	
	O	Internal Processing (i.e. bar/concessions tracking, volunteer templates, merch sales, etc)	17-O
	P	Live Presented or Self-Produced Primary Programming (i.e. presented shows, REP season shows, etc)	17:P
	Q	TBD	
	R	Ticketed Rentals Happening On-Site (i.e. dance recitals, partner shows, etc)	17-R
	S	School Day Shows	17-S
	T	Test Events, Temporary Builds and Fake/Old Control Houses	17:T
	U	TBD	
	V	TBD	
	W	TBD	
	X	Ticketed Off-Site on Behalf of Others (i.e. Stockade Garden Tour, Casino, etc)	17-X
	Y	Non-Ticketed & Booked Off-Site on Behalf of Others (i.e. casino or The Alt calendar holds)	17-Y
	Z	Control House Events for Subscriptions	17:Z
5 - Series Subtype	0	Movie Passports or Vouchers	17-M0
	1	Dance Recitals	17-R1
	4	TBD	
	5	TBD	
	6	TBD	
	7	TBD	
	8	Partner - 8th Step	17-R8
	9	TBD	
	2	Partner - Schenectady Symphony Orchestra	17-R2
	3	Partner - Story Circle	17-R3
5 - Unique Identifier	A-Z		17-R81 (8th Step Event)
6 - Unique Identifier	1-9 or A-Z		