



altermedia

Organize. Manage. Simplify.

(Preliminary)

USER'S GUIDE

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AlterMedia, Inc.
3727 W. Magnolia Blvd #830
Burbank, CA 91505

www.studiosuite.com
www.altermedia.com

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1

Introduction

Welcome to Studio Suite!

Congratulations and thank you for investing in the most affordable and complete Studio Management Software package available! Studio Suite is designed to be invaluable for any type of recording, post-production, video, film, radio, TV, graphics, internet/web, games, DVD or multimedia production company, ranging from the small, personal basement studio up to the large, corporate, multi-room commercial facility.

Studio Suite is an extremely powerful software package, sold at a very reasonable price. If it does so much, why is it so affordable? Our goal was to make the same software available to individuals as well as large facilities. Other Studio Management packages are not cross-platform or user customizable, and are expensive (some as much as \$70,000, priced out of reach for the individual or small to medium-sized facility). We wanted to create the standard system so you can get right to work with Studio Suite at any studio anywhere in the world. Today, Studio Suite is being taught in media production schools and colleges and is the number one choice of individuals and top studios in at least forty countries worldwide.

A quick word about relational databases

The relational database consists of many co-dependent and inter-tangled files. Many large corporations employ a full-time staff to maintain their company's database. FileMaker is one of the easiest database programs to use, but an implementation such as Studio Suite is a considerable thing to manage (despite great efforts by FileMaker, Inc. and AlterMedia to make it user-friendly). Do yourself a favor and thoroughly read the FileMaker Pro and Studio Suite User's Guides to give yourself a head start in understanding the basic concepts of files, tables, records, relationships, portals, lookups, Browse mode, Find mode, Layout

mode, Preview mode, and a “found set”.

It's important to understand that Studio Suite is not a stand-alone application like Quicken® or MS Word®. It is a “solution” operating *within* a database program (FileMaker Pro) which is designed to work across-platforms (Mac OS X and Windows XP) and is networkable for up to 250 workstations.

Studio Suite is a large collection of “modules”, each reflecting a particular facet of studio management. Each module references data from related or “interconnected” background and support files, to provide a seamless, single solution. They are explained in greater detail later in this User's Guide.

The 29 modules: *(in alphabetical order)*

| | | |
|----------------------|------------------|-----------------|
| Barcodes | FTP | Purchase Orders |
| Budgets | Invoices | QuickLog |
| Calendar | Library & Labels | Rates |
| Categories and Items | Maintenance | Recall |
| Communications | Media Inventory | Rooms |
| Contacts | Parts | Samples & Clips |
| Customizations | Patchbay Labels | Tasks |
| Employees Schedules | Petty Cash | Titles |
| Equipment | Productions | Web Glancer |
| Events | Projects | Web Request |

How to use this User's Guide

For the first time the Studio Suite Manual is a searchable Pdf. It contains links and bookmarks within each chapter to help you better navigate it's contents. You have the option of printing out your Pdf or ordering one from AlterMedia, Inc. for \$50. You may find a few blank pages at the end of chapters, this is done intentionally for printing purposes, because if you do decide to print your Pdf in it's entirety, we suggest that you do so double sided and the blank pages make the chapters all start in the right place. That being said, there is no index for the printed copy because it is mostly intended to be used as a Pdf.

Computer users often skip reading their manuals and just get started. You will find that by looking at the Main Menu and the tabbed interface, Studio Suite is very intuitive. And, it is. But, like anything, there are a few basics you must learn and certain information about your studio must exist in the system for it to run properly.

Take some time, read the manual, and be open to this new approach to studio management. With feedback from all of our users, Studio Suite has gradually been perfected since 1997 into a well-designed “system”. When you understand the “Studio Suite Way”, you will notice a significant increase in the efficiency and professionalism of your studio.

It is **VERY IMPORTANT** that you read the following chapters of this User's Guide.

Chapter 2: Installation - After you have installed Studio Suite, complete the Seven things you must do chapter in this User's Guide, which tells Studio Suite about your Studio Suite Users, your company, your rooms, your equipment, your contacts and your virgin media inventory.

Chapter 5: Studio Suite Basics - A quick overview of some universal aspects of Studio Suite.

Chapter 7: Seven Things You Must Do - How to set up Studio Suite for future success.

Chapter 8: Tutorial

Chapter 14: Calendar module

Chapter 31: Projects module

Once you are familiar with the information in these chapters, you are ready to explore the rest of Studio Suite. This User's Guide assumes that you are familiar with the basic operation of your computer, as well as the basic operation of FileMaker Pro.

We have applied certain conventions throughout this User's Guide to keep information consistent and easy to understand.

Conventions

- **Bold Text** - Different modules within Studio Suite will be shown in bold; i.e.: "In the **Contacts** module ...".
- *Tabs* - Studio Suite has a tabbed interface, meaning that different layouts are selected by clicking on the file folder-like tabs. Tabs and sub-tabs will be shown in italic; i.e.: "Click on the *Detail* tab to view ..."
- We interchange the words screen, layout and view, which all refer to a database layout.
- **Field** - a field is a place where you enter text, dates, graphic or numerical information. Field names will be shown in bold; i.e.: "Enter the **Price** you will sell the media for ...".
- *Buttons* - There are many buttons in Studio Suite that perform specific functions. Button names will be shown in italics; i.e.: "Click on the *Go To* button."
- **⌘/ Ctrl** - In FileMaker Pro, the Command (⌘) key on a Macintosh operates in the same manner as the Control (Ctrl) key on a Windows machine. For example, if the instructions say "Press Command + N", this means that you will hold down the Command key and type an N, then release both keys (Ctrl + N on Windows).

Versions

Studio Suite X Studio Management Software has four program versions suited to your specific business needs and applications.

Solo

New with the release of Studio Suite X, the **Solo** version is designed for a student, hobbyist or a personal

studio with one room, up to 100 pieces of equipment, and 5 bookable staff.

Solo is non-customizable and intended for a single user only. It does not include *Web* or *iPhone* remote access items or employee scheduling and web request.

Pro

The **Pro** version is designed for a single user only, and is best suited for a small professional studio or production facility.

Pro does not include *Web* or *iPhone* remote access items or web request. Pro can upgrade to the **Network** and **Internet** versions of Studio Suite and requires the purchase of FileMaker Server software.

Network

The **Network** version is designed for facilities with multiple users. It requires FileMaker Server software. Additional “seats” and seat bundles of 1,5,10,15 & 20 or more are available.

This version includes iPhone and iPad access to the **Calendar**, **Contacts**, and **Tasks** modules with a downloadable app called “FileMaker Go”. More about this app in the Mobile Devices chapter.

Network is upgradable to the **Internet** version.

Internet

The **Internet** version is designed for facilities with multiple users needing access via a web browser or over the Internet. Additional “seats” and seat bundles of 1,5,10,15 & 20 or more are available.

The Internet version utilizes FileMaker Server Advance’s powerful Instant Web Publishing (IWP) to provide web accessibility via a standard browser to the entire database for all users.

About The Creator Of Studio Suite

Studio Suite is the brainchild of multi-platinum award-winning engineer, mixer and producer Joel Stoner. He started building Studio Suite in 1995 to meet his personal needs and soon recognized the lack of a standardized system for the recording industry. In early 1997 he hired a staff of programmers to help bring the product to market. Soon after its initial release, the demand for Studio Suite expanded into other industries such as post-production, video, film, radio, TV, graphics, internet/web, games, DVD and multimedia production and has been rewritten and expanded to accommodate these users. Studio Suite is now used in over 40 countries on 6 continents.

A 25 year veteran of the music industry, Joel has worked on countless records, films, TV shows and jingles in over 100 of the best studios in the world. He has a Bachelor’s Degree in Music Production and Engineering and has held the office of Vice President of the Atlanta chapter of NARAS (the National Academy of Recording Arts and Sciences). He has also served as an Advisory Associate of SPARS (the Society of Professional Audio Recording Services) and is a member of AES (the Audio Engineering Society), NAMM (the National Association of Music Merchandisers), and the FileMaker Solutions Alliance. Joel is a published author, college lecturer, and has been a panelist, judge, and moderator on topics related to the recording industry.

Special Thanks And Credits

Special thanks to the following people, whose brilliance and dedication over the years has proved instrumental in completing this project (in alphabetical order):

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Thanks also to my family and friends for their support and patience.

- Joel Stoner

2

Installation

The installation process for Studio Suite X is different from all of the versions that came before it. Please read this chapter and User's Guide thoroughly to get the most out of your Studio Suite X use.

Hardware and software requirements

Single User or Client:

- Macintosh (G5) 10.4 or later, Intel Mac 10.4.5 or later, or PC with Windows XP (SP2)
- Minimum 512 MB RAM (more is better!)
- Minimum 1 GB available hard disk space
- FileMaker Pro 12

Server:

- Macintosh (G5) 10.4 or later, Intel Mac 10.4.5 or later, or PC with Windows Server 2003 (SP 2) (recommended for PC) or Windows Server 2008 or Windows XP Pro (SP2) (not recommended)
- Minimum 2 gig MB RAM (more is better!)
- Minimum 1 GB available hard disk space
- Backup Drive
- FileMaker Server 12

What should I do first?

Studio Suite requires that you have FileMaker® Pro 12 by FileMaker, Inc. already installed on your computer. If it's not already installed, go ahead and install it. If you are using FileMaker Server, install FileMaker Server 12 on your server.

If you purchased your FileMaker as a bundle with Studio Suite, be sure to enter "AlterMedia, Inc.", as the Licensee. These versions of FileMaker (both FM Pro and FM Server) are actually licensed to AlterMedia for use in these bundle packages (as part of FileMaker's "Solutions Bundle Agreement"). If you have questions regarding the installation of FileMaker Pro or FileMaker Server, please consult the .pdf manuals on the FileMaker CD.

Important Considerations

Networking Studio Suite

NOTE: If you will be using Studio Suite on a single computer, you may skip this section and proceed to the next section – Installation.

Using Studio Suite on two or more computers means that you are networking. In a network situation, Studio Suite data files are installed on ONLY ONE computer, and that machine is considered the Server/Host of Studio Suite, and any user who accesses a hosted file from the Server/Host is a *Client/Guest*.

There are two methods in which FileMaker files can be hosted to multiple users:

- Using FileMaker Server (strongly recommended).
- Using regular FileMaker Pro (**not** recommended).

For clarity, when using FileMaker Server, we refer to the files as being "served". When using a regular copy of FileMaker Pro as the desktop workstation host of multi-user files, we will refer to those files as being "hosted".

NOTE: 100 or 1000 mbit Ethernet is faster than 10 mbit.

Using regular FileMaker Pro instead of FileMaker Server

Although hosting to multiple users with FileMaker Pro (not FileMaker Server) is possible, it is not the ideal server for a multi-user environment (as it is not designed for high volume data throughput to multiple users). Further, when hosting to multiple users using FileMaker Pro instead of FileMaker Server, if the user of the host machine is using another application (such as a web browser), FileMaker Pro becomes a "background application" and operates much slower than the foreground application. This causes other "guest" users to have poor performance. For this reason, and others outlined below, we strongly recommend that you use FileMaker Server in multi-user environments.

Using FileMaker Server

Advantages

The advantage of using FileMaker Server is that it is much faster and can handle more simultaneous files and users than hosting from regular FileMaker Pro (which was designed to be a workstation application and not a networked data server).

The FileMaker Server application automatically opens and serves all of the files in the FileMaker Server Folder. Once these shared files are served, they can be accessed by Client/Guest machines.

Another primary advantage of using FileMaker Server is that it includes the ability to create backup schedules. Because these backups are initiated by FileMaker Server, it pauses the databases while the backup is being made and saves the backups in a “closed” state. Even if you are using 3rd-party backup software, it is *vital*ly important to use the FileMaker Server backup scheduler to create the initial backup files. Then you can use the 3rd-party backup software to backup the backup files that FileMaker Server creates. Otherwise, the backups will be made on files while they are in an “open” state, and therefore likely not to be complete or even usable backup files which defeats the entire point of backups. This is not something to take lightly. Please see Appendix D for more information on making backups.

Disadvantages

The disadvantage of using FileMaker Server is that you cannot view or ‘use’ any of the served Studio Suite files on the Server machine; it **ONLY** serves the Studio Suite files out to Client/Guest machines on the network. (i.e., it is not usable as a workstation). We recommend that you do NOT have regular FileMaker Pro and FileMaker Server launched at the same time on the Server machine.

Seat Licenses

Each Client/Guest machine must have a Seat License to access Studio Suite.

You can create an unlimited number of Studio Suite Users, but you cannot exceed the number of simultaneous Users that your Seat License allows. For example, if you have 22 employees, but only 15 of them will regularly work on Studio Suite at the same time (15 Seat License), you can define each as a Studio Suite User, but only 15 of them can access Studio Suite simultaneously.

To purchase additional Seats of Studio Suite, or call AlterMedia at 1.800.450.5740 (if you are calling from outside the US or Canada, phone 1.818.955.9550).

FileMaker Pro and FileMaker Server Running Simultaneously

You should not have FileMaker Server and FileMaker Pro running at the same time on the same machine. While both applications can be installed on the same computer at the same time, you should only have one launched at a time. If you need to open the files on the server in FileMaker Pro, be sure to use the FileMaker Server Admin tool to properly Close the databases first. This prevents the possibility of two different applications having the same file open at the same time.

Shared Folder

The Studio Suite files on the Server/Host should NOT be in a shared folder. Although this seems counter-

intuitive, FileMaker has its own built-in network protocol that bypasses the single-user status of a folder. If the folder is shared, performance will be dramatically decreased as that folder will spend a lot of time, hard drive and I/O resources sharing itself to other computers on the network. Further, this makes it possible for files to be opened incorrectly over the network (using regular file-sharing instead of the required FileMaker network protocol). Opening them this way will almost guarantee that the files will become corrupted. Having the files in a Shared folder also makes them available to anyone on the network - a potential security risk. Do not share the folder holding your Studio Suite files.

Client/Guest machine

When launching Studio Suite from a Client/Guest machine, if it asks you to find a file on the Server/Host, ALWAYS use the *Remote* button from the Open File dialog box. This tells FileMaker to look for and connect to files opened on the remote Server/Host through its own proprietary network path, as opposed to the normal network path that the operating system uses. This is important!

DO NOT put any other Studio Suite files on the Client/Guest machine except for the Studio Suite X.fmp12 file, or you risk completely scrambling your data. Some people may try to install the main Studio Suite files on more than one computer, instead of accessing them via a network. This would be a huge mistake, not because of any “legal” rules about copying software (which also apply by the way), but because you would then have two copies of the same data and it would get quite confusing (for you and Studio Suite) to figure out which copy is the most recent.

Further, because the Studio Suite files are very intertwined with each other, simply replacing one file on a desktop computer with the one you have taken with you on your laptop could result in misalignment of serialized data in related files. DO NOT DO IT!

File Names

DO NOT CHANGE the names of any Studio Suite files. Because it is a relational database, the files are programmed to look for specifically named files. Changing the names would “break the relationship”, disabling the relational capabilities and wreaking havoc.

The data in Studio Suite may be one of your most valuable assets. Guard it with care. If someone has physical access to your server and knows your passwords, they have access to all of your data. If you can, keep your server behind locked doors, and do not leave your passwords stuck to the wall on a post-it note!

Data Corruption

Be sure to read **APPENDIX A** regarding data corruption, recovery, and making regular backups of your data. Since your entire business may rely on mission critical information stored in Studio Suite, please do not risk it by neglecting this vital task. Believe it or not, computers have been known to error on occasions. Specific requirements for recovering files must be adhered to.

Backups are REALLY IMPORTANT!

Be sure to read **APPENDIX D** for details on how and when to make Backups!

Installation

Installation Prerequisites

- It is important that you read all of the installation instructions before proceeding with the actual Installation to become familiar with all of your options.
- FileMaker Pro 12 must be installed on all computers using Studio Suite. If you acquired your FileMaker license(s) from AlterMedia, On the FileMaker installation/registration screen, enter your name in the User field. For the Organization, enter "ALTERMEDIA, INC." (no quotes). The License key for the FileMaker Software is on your Invoice.
- If you are using FileMaker Server, you should have FileMaker Server installed on your Server/Host machine. You should not access the Studio Suite files from the Server/Host machine, only from a Client/Guest machine, unless advised differently by AlterMedia Technical Support.

Installation Options

Before we get to the actual installation, there are a few more things to know. There are five installation options available when you launch the Studio Suite installer. The first three are the most common, but it is important to make sure you understand which version is the appropriate one to use:

- Single User
- Server (Network Version)
- Server (Internet Version)
- Desktop Host
- Client
- Plug-ins Only
- Barcode Fonts Only

Single User Installation

Use this Installation option if you are using Studio Suite on a single computer.

How to install Studio Suite on a single computer:

1. Choose the Single User Installation. Studio Suite will be installed in your Documents folder.
2. If you have multiple copies of FileMaker Pro installed, the installer will ask you to specify which version you want it to install the plug-ins into. No matter what you choose, the plugins are installed in the following locations:
 - All 64-bit editions of Windows: C:\Program Files (x86)\FileMaker Pro 12\Extensions
 - All 32-bit editions of Windows: C:\Program Files\FileMaker Pro 12\Extensions
 - Mac OS X: Macintosh HD:Users:User Name:Library:Application Support

This option creates a main Studio Suite folder in your Documents folder and then installs the Studio Suite X folder with eight Studio Suite files, the plug-ins (into the FileMaker Extensions folder), a Studio Suite Backups folder, and a Studio Suite alias/shortcut. The installed Studio Suite files will be preset to *not* allow network access. If you later add more seats to your license later, you will need to adjust these settings in your FileMaker application's Sharing settings.

Server (Network Version) Installation

Use this install on your server if you are using FileMaker Server. This option installs the Studio Suite Server Network Version files, omitting the Studio Suite Client and plug-in files. Make sure you have the FileMaker Server application installed on the Server machine before proceeding.

The basic step for this Installation is:

1. Choose the Server Installation option.

The Studio Suite X Server folder, with 8 Studio Suite files inside, is installed into the FileMaker Server folder. The 9th file, Studio Suite X.fmp12, is not installed, as it is only installed on Single User installs, and Studio Suite Client machines that need to access a Server. **This installer should not be run if you have purchased Studio Suite X Solo, Pro, or Internet.**

When the Server Installation is complete, you should restart the Server machine, then proceed with the Client Installations on all of the Client/Guest machines.

- On **Macs**, the files are installed at :[hard disk]/Library/FileMaker Server/Data/Databases.
- On **PCs**, the files are installed at: ProgramFiles\FileMaker\FileMaker Server\Data\Databases.

The FileMaker Server application will look in these locations automatically. If you decide to move the files to a different location, make sure the files are closed within the FileMaker Server application, then move them. You can then use File Maker Server to re-upload the files from the new location.

There are some particulars to the operation of FileMaker Server. Rather than cover them here, please refer to the pdf manual on the FileMaker Server installation image for important information. Particularly important however, is to be sure that your server has a static IP address, as the client machines will be looking to a specific IP address to find the served files. If the server address changes, the client machines won't be able to find it, you will have to relocate the server each time (possible, but annoying).

The FileMaker Server application cannot be used as a workstation. All it does is "serve" data for client machines to access from other machines networked to the server. As such, it does not occupy a Studio Suite seat.

Server (Internet Version) Installation

Use this install on your server, which will require FileMaker Server Advanced. This option installs the Studio Suite Server files, omitting the Studio Suite Client and plug-in files. This also installs additional files specifically for Studio Suite X Internet Versions. Make sure you have the FileMaker Server Advanced application installed on the Server machine before proceeding.

The basic step for this Installation is:

1. Choose the Server (Internet) Installation option.

The Studio Suite X Server folder (with 8 Studio Suite files inside), is installed into the FileMaker Server folder. The 9th file, Studio Suite X.fmp12, is not installed. It is only installed on Single User installs and Studio Suite Client machines that need to access a Server. **This installer should not be run if you have purchased Studio Suite X Solo, Pro, or Network versions.**

Server Add-Ons

When either the Network or Internet versions of Studio Suite X Server finish installing, they will launch add-on installers if you so choose. These provide additional functionality such as the Web Glancer, Web Request and mobile add-ons as well as special Internet add-ons if you have installed Studio Suite X Internet.

The “Studio Suite X Add-Ons” installer includes the Web Glancer, Web Request and mobile add-ons which are included only with Studio Suite X Network and Internet. These files are actually specially-designed websites which can be accessed by other users.

- On **Macs**, the files are installed at the currently logged-in user’s Home directory, within the Sites folder, for example: [hard disk]/user/Sites/StudioSuite.
- On **Mac OS X Server**, the default location for hosted sites is /Library/Media/Documents. Please refer to the official Apple documentation for OS X Server for optimal setup.
- On **Windows Server**, the files are stored in the “wwwroot” folder or its equivalent. In most cases this is “C:\inetpub\wwwroot”, however your configuration may vary.

There is important (and critical) information already well documented about web sharing in the FileMaker Server manual. Rather than re-print it here, please read the relevant sections of that manual for more information on how to share databases over the web.

If you wish to access these modules from outside your LAN, you will need to enable port forwarding on your network. Typically, port 80 should be forwarded to your Studio Suite server, but your specific configuration may vary.

Web Request Add-On

The Web Request add-on can be used in conjunction with a website to enable prospective clients to request a service. Requests made here will show up in the Web Requests module within Studio Suite.

To access the Web Request add-on, simply point your web browser to the following location:

- If these files are hosted on a **Mac**: {Server IP}/~username/StudioSuite/WebRequest/addrecord.php
- If these files are hosted on a **PC**: {Server IP}/StudioSuite/WebRequest/addrecord.php

Where {Server IP} matches that of your server, e.g. “192.168.1.10,” and ~username matches the user account on the server that has the files installed to its Sites folder (if on a Mac). If accessing this add-on from outside of your LAN, you will need to substitute the IP address of your server with your network’s

public address.

Mobile Add-On

The mobile add-on provides basic read-only access to the Contacts, Calendar and Tasks modules in Studio Suite and can only be accessed from an mobile or iPod Touch.

To access the mobile add-on, simply point your device's web browser to the following location:

- If these files are hosted on a **Mac**: {Server IP}/~username/StudioSuite/mobile
- If these files are hosted on a **PC**: {Server IP}/StudioSuite/mobile

Where {Server IP} matches that of your server, e.g. "192.168.1.10," and ~username matches the user account on the server that has the files installed to its Sites folder (if on a Mac). If this site is accessed with a regular web browser and not on an mobile device, you will be redirected to the Web Glancer add-on page. If accessing this add-on from outside of your LAN, you will need to substitute the IP address of your server with your public address.

Limitations:

- No Record Level security
- No event or task filtering

Web Glancer Add-On

The Web Glancer add-on provides basic read-only access to the **Contacts**, **Calendar**, **Tasks**, and **Library** modules in Studio Suite, similar to the mobile add-on but formatted for a larger screen. It can be used on any web browser.

To access the Web Glancer add-on, simply point your web browser to the following location:

- If these files are hosted on a **Mac**: {Server IP}/~username/StudioSuite/WebGlancer
- If these files are hosted on a **PC**: {Server IP}/StudioSuite/WebGlancer

Where {Server IP} matches that of your server, e.g. "192.168.1.10," and ~username matches the user account on the server that has the files installed to its Sites folder (if on a Mac). If accessing this add-on from outside of your LAN, you will need to substitute the IP address of your server with your network's public address.

Limitations:

- No Record Level security
- No event or task filtering

Internet Add-On

The "Internet Add-On" installer will launch if you have chosen the Server (Internet Version) package. After displaying a caution regarding this add-on, the "Internet Add-On" package will be pre-selected.

- On **Macs**, these files are installed at :[hard disk]/System/Library/FileMaker Server/Web Publishing.
- On **PCs**, these files are installed at Program Files\FileMaker Server\Web Publishing.

These files can then be accessed by launching a web browser and going to the following address:

- `http://{Server IP}/fmi/iwp`

Where {Server IP} matches that of your server, e.g. “192.168.1.10.” If accessing this add-on from outside of your LAN, you will need to substitute the IP address of your server with your network’s public address.

When the Server Installation is complete, you should restart the Server machine, then proceed with the Client Installations on all of the Client/Guest machines.

- On **Macs**, the files are installed at: [hard disk]/Library/FileMaker Server/Data/Databases.
- On **PCs**, the files are installed at: ProgramFiles\FileMaker\FileMaker Server\Data\Databases.

There are some particulars to the operation of FileMaker Server. Rather than cover them here, please refer to the pdf manual on the FileMaker Server installation image for important information. It is very important to make sure that your server has a static IP address, as the client machines will be looking to a specific IP address to find the served files. If the server address changes, the client machines won’t be able to find it, and you will have to relocate the server each time (possible, but annoying).

The FileMaker Server application can not be used as a workstation. All it does is “serve” data for client machines to access from other machines networked to the server. As such, it does not occupy a Studio Suite seat.

Desktop Host Installation

Use this Installation option if you will be hosting Studio Suite from FileMaker Pro (not FileMaker Server) on a machine that will also be a workstation. This option creates a main Studio Suite folder in your Documents folder. Within that folder it installs the Studio Suite X folder with eight Studio Suite files (preset to Multi-User mode), the plug-ins (into the FileMaker Extensions folder), a Studio Suite Backups folder and a Studio Suite alias/shortcut. While we have provided this installation as option, it is NOT RECOMMENDED.

If your network has more two or more users, it is strongly recommend that you use the FileMaker Server application, this will provide much better performance and access to a greater number of simultaneous users than the regular version of FileMaker Pro and it will provide specialized backup utilities.

How to perform a desktop host Installation:

1. Choose the Desktop Host Installation option.
2. If you have multiple copies of FileMaker Pro installed, the installer will ask you to specify the version that you want it to install the plug-ins into.

Client Installation

Use this option for computers that will be accessing Studio Suite over a network as Client/Guest machines, of a Server/Host machine. Each Client/Guest machine must have a Seat License to access Studio Suite. This installation creates a main Studio Suite folder in your Documents folder. The Studio

Suite X.fmp12 file is then installed into that folder, placing several FileMaker plug-ins in the FileMaker Extensions folder in the FileMaker 9/10 Folder on your computer, along with an optional Studio Suite alias/shortcut.

How to install Studio Suite on a Client/Guest computer:

1. Choose the Studio Suite Client installation option.
2. If you have multiple copies of FileMaker Pro installed, the installer will ask you to specify the version that you want it to install the plug-ins.

Please see the specific directions later in this chapter on how to launch Studio Suite in a Client/Server installation.

Plug-ins Only Installation

This Installation only installs the FileMaker plug-ins in the FileMaker Extensions folder in the FileMaker Folder on your computer. Use this installation if you have had to reinstall your FileMaker Pro for any reason and consequently need to reinstall the Studio Suite plug-ins. This installation is typically not needed, but is provided for your convenience.

How to install plug-ins only (in the case of a reinstall):

1. Choose the location of your desired FileMaker Pro Extensions folder.

The plug-ins are installed in the following locations:

- All 64-bit editions of Windows: C:\Program Files (x86)\FileMaker Pro 12\Extensions
- All 32-bit editions of Windows: C:\Program Files\FileMaker Pro 12\Extensions
- Mac OS X: Macintosh HD: Users: User Name: Library: Application Support: FileMaker: Extensions

Barcode Fonts Only Installation

This installation only installs the barcode fonts to your system's fonts directory. Use this installation if you have deleted the barcode fonts or barcodes are not properly displaying within Studio Suite. This installation is typically not needed, but is provided for your convenience.

How to install Barcode fonts only (in case of deletion or display issues):

1. Choose the "Barcode Font Only" installer package.

Installing Studio Suite for Macintosh

How to install Studio Suite on a Mac system:

1. BE SURE the FileMaker Pro and/or FileMaker Server applications are installed on this computer. Quit all other applications. download Studio Suite X onto your computer, open it, double-click on the Studio Suite X Installer icon, then click *Continue*.
2. Read the License Agreement, then click *Continue*, then *Agree* (if you agree).
3. Select the Hard Drive to which you are installing. We recommend your primary internal drive.
4. Select one of the seven Studio Suite Installation options (as described above) from the checkboxes.
5. Click *Install*.
6. The installer will ask you to quit FileMaker if it is running. Do so, then Click *Continue*.
7. The installer will then search your hard drive for some time, checking to see if you have multiple versions of FileMaker Pro so that you can select which one to install the plug-ins into.
8. If you have more than one version of FileMaker Pro, you will see the dialog "Please select the desired FileMaker application." Pick the one you want the plug-ins to install to. Click *OK*.
9. If you only have one version of FileMaker Pro installed on this drive, the install may occur without the above dialog.
10. If you have selected a Server installation, the appropriate add-on installers will launch.
11. "Would you like to put an alias of Studio Suite on your Dock?" Click *Yes*.
12. If you installed either the Single User or Desktop Host installs, you'll be asked if you want to launch Studio Suite now. Do so if you wish!
 - If you installed the Client, it will tell you to see the User's Guide for directions on how to launch the client. That section is coming up next.
 - If you installed Server, it will tell you to restart the machine and configure your Server.
 - If you installed just the plug-ins, it will simply finish.
13. Proceed to the following section: Registering Studio Suite.

Installing Studio Suite for Windows

How to install Studio Suite on a PC system:

1. BE SURE the FileMaker Pro and/or FileMaker Server applications are installed on this computer. Quit all other applications. Download Studio Suite X onto your computer, open it, then double-click on the Studio Suite X PC Installer. You will see a Microsoft warning about an “Unknown Publisher”. You know us... we make Studio Suite. Click Run.
2. From the splash screen, click *Next*. From the Welcome screen click, *Next* again.
3. Read the License Agreement. Click Yes (If you accept the terms).
4. Pick from one of the 7 installation options described earlier, and click *Next*. Then click *Next* again.
5. The installer will then search your hard drive, checking to see if you have multiple versions of FileMaker Pro so that you can select which one to install the plug-ins into.
6. If you have more than one version of FileMaker Pro, you will see the dialog “To ensure that we install the Studio Suite plug-ins in the correct location, please select the most recent version of Filemaker Pro” (Pick the one you want the plug-ins to install to). Click *OK*.
7. If you only have one version of FileMaker Pro installed on this drive, the install may occur without the above dialog.
8. You’ll get a final warning about quitting FileMaker if it is running. Then click *OK*.
9. The installer will then install the appropriate files for the option you selected.
10. If you have selected a Server installation, the appropriate add-on installers will launch.
11. You’ll be asked: “Do you wish to add a shortcut to Studio Suite X to the Quick Launch toolbar?” Click your selection.
12. If you installed either the Single User or Desktop Host installs, you will be asked if you want to launch Studio Suite now. Do so if you wish!
 - If you installed the Client, it will tell you to see the User’s Guide for directions on how to launch the client. That section is coming up next.
 - If you installed Server, it will tell you to restart the machine and configure your Server.
 - If you installed just the Plug-ins, it will simply quit.
14. Proceed to the following section: Registering Studio Suite.

Registering Studio Suite

When you launch Studio Suite (described in the following section) for the very first time, you will be asked to register it using the **Registration Number** that you should have received via email when you downloaded Studio Suite. This applies whether you will be running a Demo version or a purchased copy of Studio Suite. Even though registering comes after launching, we put this section here so you will know what to do after you launch it.

How to register Studio Suite:

1. Make sure that you are connected to the internet and that any firewall you may have allows access to <https://www.suitecloud.net>.
2. When you see the window asking you to initiate your copy of Studio Suite, simply enter your **Registration Number**, then click the *Submit* button.
3. You'll then be asked to confirm the specifications of your copy of Studio Suite. If all looks good, click the *Continue* button.
4. You should then see that your copy of Studio Suite is being registered, and then it should proceed to the Main Menu.

This process takes your unique **Registration Number** and authorizes the files that make up Studio Suite for the specific number of Seats you have purchased. It also embeds your name and assigned **Registration Number** throughout Studio Suite, uniquely identifying it as your copy should it somehow slip into the wrong hands.

NOTE: The Registration screen only appears on your first launch. Once your Registration Number has been successfully entered, you will not see this screen again. Also note that Studio Suite validates your Registration Number against our server each time you login, where it also checks for any upgrades (see below) that you may have purchased.

Launching Single-User or Desktop Host installations

When you launch Studio Suite for the first time only, you will be asked to register it (see above).

NOTE: If you have installed Studio Suite on a server running FileMaker Server, you can not "launch" Studio Suite on the server, only on the client machines.

Use this method if you have used either of the above installations.

How to launch Studio Suite for Single User or Desktop Host installations:

1. Double-click on the Studio Suite icon in the Dock (Mac) or the shortcut on your desktop (PC), (or the **SSX** file in the SSX Folder). The **SSX.fmp12** file is actually just a "launcher" that then opens the main file in Studio Suite, called "SSX_Main".
2. FileMaker Pro will launch, if it is not already running.
3. When the SSX_Main file opens, it will ask you for your Account Name and Password. For your initial log in, enter:
Account Name: **Admin** (Account names are not case sensitive)
Password: **Admin** (Passwords ARE case sensitive)
Click *OK* or press the RETURN/ENTER key.
4. Studio Suite will then open. This may take a few moments, depending upon the speed of your computer.
5. You are at the **Main Menu** and ready to use Studio Suite!

Launching a Client Installation

Use this method if you have installed the Studio Suite Client and you want to launch it as a Client/Guest to a Studio Suite Server or Desktop Host installation on a different machine.

- If you are serving Studio Suite with FileMaker Server, be sure it is actually being served on the Server/Host machine and that all the Studio Suite files are open. The Client installation cannot open Studio Suite as a client/guest if it is not running on the Server first. For more information on how to get FileMaker Server to serve your files, please consult the FileMaker Server manual.
- If you are hosting Studio Suite with a Desktop Host installation, make sure that Studio Suite is up and running on that machine. The Client installation can not open Studio Suite as a client/guest if it is not running on the Desktop Host first.

How to launch Studio Suite on a Client/Guest computer or a Desktop Host installation on a different machine:

1. Double-click the Studio Suite icon in the Dock (Mac) or the shortcut on your desktop (PC), (or the Studio Suite X file in the Studio Suite Client Folder). The Studio Suite X.fmp12 file is actually just a “launcher” that then opens the main file in Studio Suite, called “SSX_Main” (in this case, that file is on the Server/Host machine).
2. FileMaker Pro will launch if it is not already running.
3. You may be asked to locate the **SSX_Main** file. In the dialog box, click on the *Remote...* button in the bottom right of the dialog. This will scan the network and show the currently available FileMaker Hosts. Click on the name of the server where you installed the Studio Suite Server, and you will see a list of (at least) 7 files:

- SSX_Contacts
- SSX_Invoicing
- SSX_Library
- SSX_Main**
- SSX_Projects
- SSX_Projects
- SSX_Resources
- SSX_Tech
- SSX_Web Request

Double click on the **SSX_Main** file.

- a) If you do not see any Hosts or files available after clicking the *Remote* button, type in the IP address of the Host. Click “Add to Favorites, and type in the address. If you still do not see the Host or the files, then the files are not open on the Server/Host machine, or they are open but not set to Multi-User or you may have a networking challenge between the machines.

In the resulting window, make sure **Network Sharing** is “On”.

2. You’ll see a list of “Currently open files”. Select each one individually, and set the **Network access to file** to “All users”.
3. After you have changed the access for each file, click *OK*.
4. If you were using FileMaker Server, restart that application (Mac) or service (PC).
5. Try launching again from the Client machine.
- c) If you find that all of the files are definitely open on the Server/Host machine, and set to “All users”, read the networking sections of the FileMaker Pro and FileMaker Server User’s Guide.
- d) As a Client/Guest, DO NOT open any of the Studio Suite files in any other manner (such as through regular Windows or TCP/Ethernet network access). Doing so may corrupt your data. *Always* use the *Remote* button to open Studio Suite files from a Client/Guest machine if they don’t launch for you automatically.
4. When the SSX_Main file opens, it will ask you for your Account Name and Password. For your initial log-in, enter:
Account Name: **Admin** (Account Names are not case sensitive)
Password: **Admin** (Passwords ARE case sensitive)
Click *OK* or press the *Return/Enter* key.
5. Studio Suite will then open. This may take a few moments, depending upon the speed of your computer, network, and server.
6. You are at the **Main Menu** and ready to use Studio Suite!

“Slow” Client Launch: Updating the Reference Path to the Server

If you are launching from a Client install, and find that the launch is very slow, or you have to repeatedly show Studio Suite where the SSX_Main file is, follow these steps:

How to launch if previous launches are launching slowly:

1. With Studio Suite NOT running, engage the *Caps Lock* key, and double-click on the Studio Suite X.fmp12 file. In the resulting popup dialog, click *Modify*. This will bring up a Define File References window.
2. Double-click on the File Reference named “SSX_Main, which will bring up the Edit File Reference window.
3. Click the *Add File...* button in the upper right
4. In the resulting Open File window, click the *Remote...* button, which will show a list of Hosts and Available Files that are being Hosted. Select your Server/Host, then double click on the SSX_Main file.
5. Click *OK* to close the Edit File Reference window.
6. Click *OK* to close the Define File References window
7. Type in the Account Name and Password, click *OK*.
8. Done! Next time you launch Studio Suite, it will find the SSX_Main file automatically.

Upgrading Studio Suite

At some point, you may need to add more Seats to your User License to accommodate more simultaneous Studio Suite Users. Or, you may have been using a Demo version and wish to continue using Studio Suite. In either case, please contact AlterMedia to purchase what you need. Then all you must do is simply logout of Studio Suite and back in again to be taken to the Upgrade screen, which is similar to the Registration screen, above, and with a virtually identical procedure. In this case, your **Registration Number** will appear automatically, so just continue on to confirm your new specifications and complete your upgrade.

A further explanation of Seats can be found in the **Seven Things You Must Do** chapter of this User's Guide (in the Step Three: Your Studio Suite Users section, pages 17-24).

Next...

Now that you have installed, launched, registered, and relaunched Studio Suite, there are some basic concepts you should become familiar with from the **Studio Suite Basics chapter**, then proceed to the **Seven Things You Must Do chapter** to set up your Studio Suite Users, and basic information about your Company, your Contacts, your Users, your Rooms, your Equipment, and your Media Inventory.

3

What's New?

This chapter is primarily intended for previous Studio Suite Users. If you are a new User, you can skip this chapter; however, after reading about Studio Suite X's new features and capabilities, you may get a better sense of how powerful this studio management software really is.

In General...

- Available only via download.
- Downloaded demo version able to become a full purchased version, allowing users to start right away.
- The “Solo” version is finally available.
- Built-in web-based registration process.
- Full-fledged, read/write **iPad & iPhone** access for Network and Internet versions (requires FileMaker Go on each device - purchased separately.)
- User Guide is now a searchable .pdf. Printed version available for purchase separately.
- New modern appearance with changeable Main Menu skins.
- “Quick Find” is now in record navigation bar instead of status bar.
- New Audit Log tracks changes made to each record (who, when, from what, to what).
- Available in multiple languages (Spanish, Italian, French, Dutch, German, Japanese)
- Improved language management for easier customizing of terminology.
- Built in chat, client can send SMS messages.
- Push Notifications.
- Includes “Resource Permission Groups”, which can define who can use what resources.
- Greater number of User preferences and permissions.
- Integrates with:
 - Active Directory

- Google Calendar
- Google Contacts
- QuickBooks Online (PC only and requires additional add-on purchase)
- MYOB (additional add-on purchase)
- Account Edge (additional add-on purchase)
- AddressBook (requires additional add-on purchase)
- Outlook (requires additional add-on purchase) MAC & PC

Current modules with improved features:

Budgets

- Deeper integration with Projects and Production modules.
- User-definable Templates.
- New links to the Rates module for default Rates for Budget items.
- Can link to Purchase Orders and Petty Cash

Calendar Module

- Faster.
- The Web Glancer calendar is much faster and improved from early version of Studio Suite 9, now showing a weekly “resource-based” calendar instead of a list of events on a single date.
- Syncs to Google Calendar.
- Displays by Client, Resource or Project.

Contacts

- Supports an (essentially) infinite number of phone numbers and emails per contact.
- Optionally integrates/shares data with AddressBook & Outlook MAC & PC (requires additional purchase).
- Can import contacts from QuickBooks.
- Allows the definition of Resource Permission Groups (to define who can use what equipment).
- Contacts can be linked to another new feature- Rate Cards.
- Can initiate a Skype call.
- Can send an SMS message.
- Bookable contacts can be either the person or the company.

Employee Schedules

- Includes categorisation color-coding for schedules - Work, Vacations, PTO, Illness, etc. with summarized reporting via category.

Invoices

- Exports to QuickBooks Online (PC only).
- MYOB (requires additional add-on purchase).
- Option to specify QuickBooks accounts as either names or numbers.
- Account Edge.
- More flexible discount options.

Library

- DiskLog can now log entire hard drives.
- Disklog can gather more meta-data than before including IPTC, XMP, EXIF, GPS, URL, description, duration, timecode (begin & end).
- DiskLog now include ability to FTP logged files.
- DiskLogs now have a printout.

Productions

- Can now view all related Project Events collectively from within Productions module.

Projects

- Completely revised “Budget” and “Actual” views - now separate records for each.
- Deeper integration with Budgets, Petty Cash, and Purchase Orders module.
- Improved “Rental” workflow.
- Revised navigation between views.
- Add Items screen can now factor in Resource Permissions of Client.
- Add Items screen now includes Rates and Quantities.
- Allows the user to create Rate Cards for specialized rates.
- More flexibility discount options.
- Displays views of assembled Project Line Items from the perspective of an AICP/AICE Budget.
- Improved sorting, hierarchy management, and printing.
- Improved color-coding options for Project identification in a Production timeline.
- “Multiplier” filed per line item adds additional pricing, discount and quantity flexibility.
- Added color-coding for Project identification in a Production timeline.
- Can add items using “+” button and hierarchal item menu selector.
- Easy method to add items to other items.
- Faster.

Rates

- Allows the user to create Rate Cards for specialized rates.
- Can now include a default associated “Action” for Events that use this Rate.
- Special “Child Item” rates allow for different pricing when used within packages.
- Now links to the Budget module.

Rooms

- Rooms can belong to defined Buildings.
- Rooms can be identified with specified Resource Permission Groups.

Equipment

- Includes Equipment depreciation schedules and reports.
- Equipment items can be identified with specified Resource Permission Groups.
- “Collection” and “Pool” options better handle rental workflow and large quantities of like-kind equipment.
- Automatic ROI calculator, based on usage of each item.

Web Request

- Allows user to specify which resources they want to book, with separate dates/times for each item.
- Improved screen layout.

Purchase Orders

- Allows (essentially) infinite number of line items.
- Line Items can become Project line items individually (instead of just the entire PO).
- Entire PO can become a Project line item.
- Calculates both Markup and Margin formulas (user definable).

Tasks

- Provides assignment of Tasks to multiple people, groups, or all people with a specified title.
- Emails Tasks directly from Studio Suite.

Titles

- DiskLog with meta-data options including IPTC, XMP, EXIF, GPS, URL, Description, Duration, Timecode (begin & end).

4

Studio Suite Basics

Now that you have successfully installed, registered, and launched Studio Suite for the first time, there are a few basic concepts that you should become familiar with before entering your studio-specific information in the **Seven Things You Must Do** chapter.

In this chapter you will read about how to:

- Use the Audit Log to view the data from a deleted record
- Delete an entry from a field with a pop-up
- Insert a Logo

FileMaker Pro

Studio Suite runs within the FileMaker database application. You should be comfortable with FileMaker's concepts of the following:

- files
- tables
- records
- fields
- relationships
- portals
- lookups
- *Browse mode*
- *Layout mode*
- *Preview mode*
- *Find mode*

- replaces
- the concept of a “found set”

Why? Because many of Studio Suite's functions are actually FileMaker functions, and a major part of how Studio Suite works. It is important that you understand them. Please give yourself a head start and make use of this FileMaker User's Guide.

What is '.fmp12'?

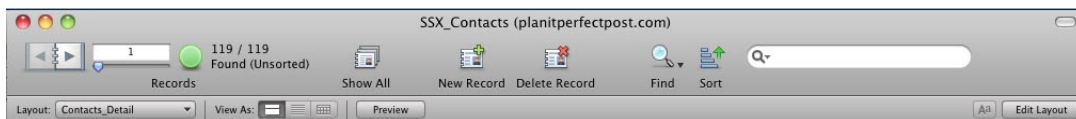
The Windows OS requires that file names include a three-character extension. For example, in “Contacts.fmp12”, the “.fmp12” is the FileMaker 7, 8, 8.5, 9, and 10 file extension. To safely use Studio Suite files on a Windows machine or network, or a cross-platform network (Macs and Windows), the file name must include this three-character extension. However, regardless of your platform or workstation configurations, **DO NOT** delete these extensions or change the file names in any way. Doing so will disrupt the relationships between files. This includes all users – the single computer user (Mac or Windows), Mac only networks, Windows only networks, or networks across Mac and Windows platforms.

FileMaker Status Toolbar

The *FileMaker Status Toolbar* is the primary interface to search for existing records, create new ones, delete, find and sort as needed.

You can customize what icons appear on your status bar by right clicking on it and choosing ‘customize’. You can drag and drop any of the options to the status bar. Keep in mind that some of the functions already appear in the Function Bar, such as *New*, *Delete*, *Duplicate*, *Find* and *Sort*.

FileMaker version 12 Status Toolbar:



The **Records** control area on the top left allows you to view the total amount of records available in the selected module. You can also select a Record of choice by clicking the forward or back “book” arrow keys. Clicking and dragging the blue slider tab below the Records field will additionally allow quick navigation through all found records within the module.

The Filemaker 12 version **Status Toolbar** includes options; **Show all Records**, **Delete Records**, **Find** and **Sort**.

A **Layout** area is located on the lower left side. It contains a search-find field with a drop- down list of the most recently viewed files. Additional layout options are page *View* types, *Preview* mode (continue/cancel function), and FileMaker design tools in the **Edit Layout** mode located on the far right.

Studio Suite file structure

Studio Suite consists of 8 FileMaker Pro (.fmp12) files. Each module within Studio Suite is either grouped within (or refers to) one of the following seven files:

- **SSX_Main.fmp12** – contains:
 - **Main Menu**
 - **Setup, Company setup**
 - **User Accounts & Permissions**
 - **Preferences**
- **SSX_Contacts.fmp12** – contains:
 - **Contacts** module
 - **Communication** module
- **SSX_Invoicing.fmp12** – contains:
 - **Invoices** module
 - **Rates** module
 - **Petty Cash** module
 - **Purchase Orders** module
- **SSX_Library.fmp12** – contains:
 - **Library & Labels** module
 - **Titles** module
 - **Media Inventory** module
 - **Samples & Clips** module
 - **FTP** module
- **SSX_Projects.fmp12** – contains:
 - **Projects** module
 - **Events** module
 - **Web Request** module
 - **Tasks** module
- **SSX_Tech.fmp12** – contains:
 - **Rooms** module
 - **Equipment** module
 - **Maintenance** module
 - **Patchbays** module
 - **Parts** module
 - **Barcodes** module
 - **Recall** module
- **SSX_Resources.fmp12** – this is a reference file for postal codes in the **Contacts** module (explained next) and device diagrams (pictures) in the **Recall** module. It also holds translations for different Languages. Because this file would typically not have any *new* data within, it is not usually necessary to make regular backups of it.
- **Studio Suite X** - This file does not do anything but launch Studio Suite. Its primary reason for existence is for networked installations of Studio Suite, (where it is the only file on the Client machine), to store the path to the Server for the rest of the Studio Suite files located on the Server. It's also included in Single User versions as well to provide a consistent way to launch Studio Suite.

As you navigate around Studio Suite, you will notice that the name of the window will be the name of the file that you are currently in. Be aware of this, so you do not get confused if you see that the window name is “Library” when you are in the Media Inventory module - it’s because the Media Inventory module is in the Library file.

FileMaker plug-ins

Studio Suite X requires nine, third-party FileMaker plug-ins. Each plug-in performs a specific task that is ESSENTIAL to the operation of Studio Suite. They are installed into your FileMaker Pro/Extensions folder. We have licensed these plug-ins from their manufacturers for distribution with Studio Suite, and thus, you are only licensed to use them with Studio Suite (they will only work when Studio Suite is running).

You will not directly interact with any of these plug-ins; however, they must be installed for Studio Suite to operate correctly.

Plug-ins:

- **Event Script**- This plug-in triggers scripts based upon user actions.
- **SMTPit** - This plug-in enables users to send email directly from within Studio Suite.
- **Troi File** - This plug-in operates in the background of Studio Suite to create and access external files and folders.
- **Troi Text** - This plug-in operates in the background of Studio Suite to facilitate specialized reporting and data handling by enhancing the text-calculating, exporting, and programming features of FileMaker.
- **Troi Dialog** - This plug-in allows Studio Suite to present OS level Dialog boxes.
- **MMColor** - This plug-in is used to display a color chooser dialog for selecting calendar event status colors.
- **CNS Menu** - This plug-in is used to present some of the floating pop-up menus within Studio Suite (necessary to accommodate some multi-language menus).
- **FileBooks** (for Quickbooks) - If you are running Studio Suite on a Windows system, you have the option of purchasing Filebooks for Quickbooks. This plug-in runs in Demo mode unless you have purchased a registration number for it.
- **Reactor** - Used in the Timeline Calendar.
- **360Works FTPeak** - Used in the operation of the FTP Module.

Remote Network Access

There are a few options to access Studio Suite remotely. One is to log onto your studio’s server from home, using FileMaker software, just as you do at the studio. This requires that you have a cable or DSL connection on both ends. It may take several minutes to log on (as at least 100 megabytes are moved over the internet), but once logged-on, the speed will be faster.

Another option is to have a “remote access terminal” computer available at the studio. You can log into it from home using remote access software such as Timbuktu™, PC Anywhere™, or one of the many VNC

options. This will offer a much faster log on, and eliminate the need to have FileMaker installed on the home computer. It does require that you have full access to a computer at the studio, though.

FileMaker and a scroll wheel mouse

A computer mouse with a scroll wheel is great, however, scrolling the wheel in some views actually changes the record you are working on. This could cause user errors if you are not careful (thinking you're on one record when you've accidentally scrolled to another). This problem could depend on the operating system you are running. You may want to experiment in List and Detail views to become familiar with how this may affect you. What's more, the behavior differs depending on your Operating System platform. On a PC, the mouse scroll wheel will scroll through records in Form or List view. On a Mac, it will scroll the page.

FileMaker windows

Each window that appears within Studio Suite will size and position itself automatically. If you want to adjust them, drag the bottom right corner of each window to the desired size.

Avoid using the Filemaker Window menu as it will disrupt the navigations engine in Studio Suite. If you are using Studio Suite on a Macintosh, avoid using Expose to switch windows, as this could potentially disrupt the Navigation engine and land you in a window without Studio Suite expecting you to be there.

Tabbed interface

Studio Suite performs all of its navigation through a tabbed interface, resembling file folder-like tabs. Click a tab to switch to a new screen or go to a different module.

The colors of the tabs and their meanings

- White: you are currently viewing that screen.
- Brushed Silver (Main Tabs): another screen within your currently active module.
- Light Gray: another sub-screen within your currently active module.
- Orange: will take you to a different, but logically related module.
- Red: will take you to the **Main Menu**.

As you navigate around Studio Suite, a good way to keep track of where you are is to look for the large white text, which will show you the name of the module in the upper left, (and below that) you'll see a hierarchy of gray-labeled tabs and sub-tabs. For example, Contacts (the module) will be in white, and Employee (the tab) and Messages (the sub-tab) will all be in gray, giving you a "quick scan" awareness of where you are.

Attach & FTP tab

Many modules have an *Attach & FTP* or an *Attach* tab. Please read the **Attach & FTP** chapter in this User's Guide for a more detailed explanation of how to use this tab.

Report tab

Most modules have a *Report* tab (known as the *Print* tab in previous versions). You can both run reports and print the record that you are viewing from this tab. If the module you are in has one, it is best to print your documents, lists or reports from the automated buttons within the *Report* tab rather than selecting 'Print' from the **File** menu. Doing this will print the screen you are viewing on (which is designed and sized for a computer screen) rather than from a layout designed and sized for a paper printout.

Print sub-tab

Most modules have multiple options for printing the record that you are viewing, you will find them under the *Print Options* sub-tab.

Audit Log sub-tab

NEW FEATURE: Audit Log sub-tab

The *Audit Log* sub-tab is one way to access the Audit Log within a module. It is a sub-tab of the *Report* tab and it's purpose is to track when changes were made to a record and by whom. This feature is a great way to maintain accountability as well as a handy short cut helping you know where to direct your questions about the record.

The Audit Log sub-tab is in the Report tab of the **Contacts**, **Projects**, **Events**, **Invoices** and **Rooms** modules.

Another time the Audit Log is used is when a record gets accidentally deleted and needs to be rebuilt. Read on to find out how to use the Audit Log to rebuild a record.

How to Use the Audit Log to view the data from a deleted record:

1. Click Window in the FileMaker toolbar.
2. Choose Show Window.
3. When you see the choices for Windows, choose SSX_Audit Log (you may only see the "A" of Audit Log).
4. You will see a list of deleted records. They are organized by order of deletion, not by module. To view any one record, click on the Go To button.



Print This button



Some modules have a *Print This* button next to the *Report* tab. The button provides quick access to a printed version of what you're seeing on screen, so you do not have to navigate to the *Print Options* function.

Keyboard shortcuts

To minimize the amount of mouse control movement and to speed up operations, memorize the following key combinations to switch between modules. You can also go to the *Scripts* menu and select any of the scripts to perform these keyboard shortcuts.

Keyboard Shortcuts:

Type Command (⌘ - Mac) or Control (Ctrl - Win) plus the following number keys:

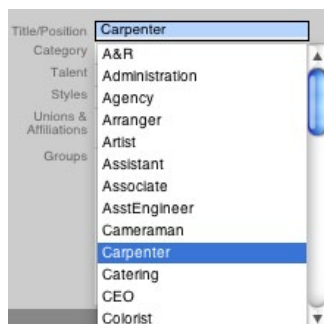
- ⌘ (Ctrl) + 1 Go To MAIN MENU
- ⌘ (Ctrl) + 2 Go To CONTACTS
- ⌘ (Ctrl) + 3 Go To PROJECTS
- ⌘ (Ctrl) + 4 Go To CALENDAR
- ⌘ (Ctrl) + 5 Go To QUICK LOG
- ⌘ (Ctrl) + 6 Go To INVOICES
- ⌘ (Ctrl) + 7 Go To LIBRARY
- ⌘ (Ctrl) + 8 Go To MEDIA INVENTORY
- ⌘ (Ctrl) + 9 Go To TASKS

Drop-Down lists, Pop-up Menus, & Floating Pop-up Menus

Studio Suite uses three different menu types, each with its own look and/or functions. It is important to know the difference as these menus are instrumental in using Studio Suite and they will be referred to specifically throughout this Users Guide.

IMPORTANT NOTE: While you may grow to prefer one menu type over the other, we strongly recommend that you check with us before changing the format.

Drop-Down list

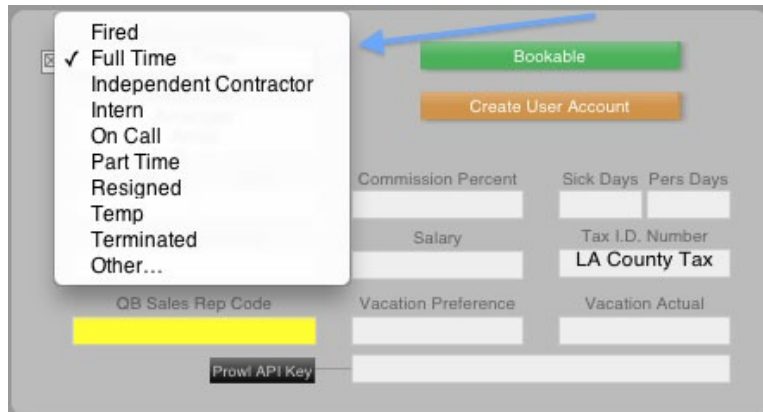


A drop-down list is a list menu that drops from an open field. These 'list menus' will typically display a scroll bar to the right, allowing you to scroll up or down through the list.

Once your cursor is in the list, you can type the first few letters of your selection until it is highlighted. Hit the RETURN key. You can also use the up and down arrows on the keyboard to move up and down through the list.

If you need to enter something that doesn't show in the list or if you need to erase your entry, hit the ESCAPE or DELETE key on the keyboard and enter your information. When the List is of 'Related' data from another area, (such as a list of **Clients** or **Projects**), make sure to use one of the existing values as it will relate to that record in the database.

Pop-up Menu



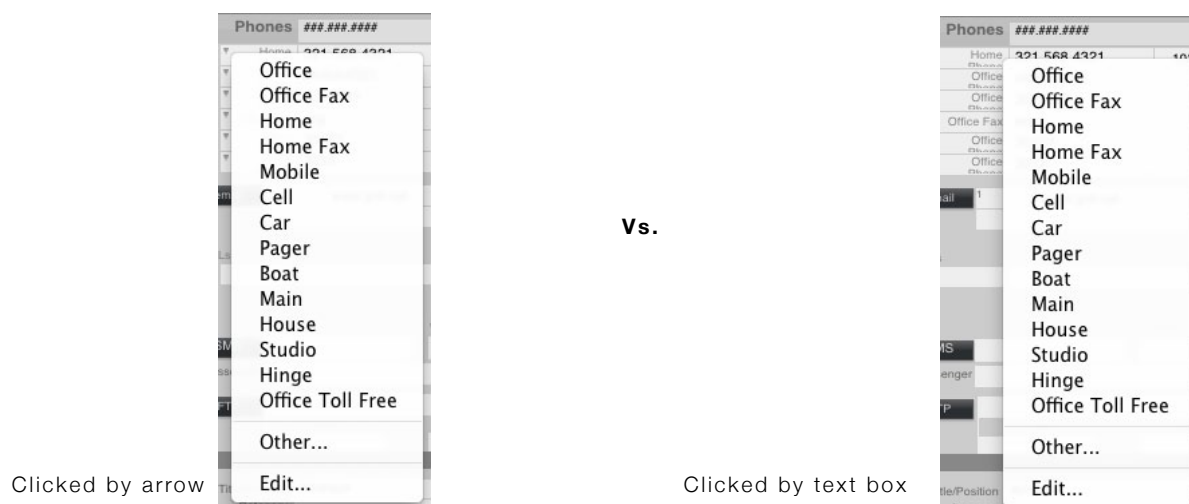
A Pop-up menu will float (centered) below a field once the open field is clicked. It will stay open until you choose something from the menu or click anywhere outside the menu. Many of Studio Suite's pop-up menus have "Edit" and "Other" at the end of each menu. Choosing "Edit" will allow you to make changes or add new entries to the menu. To add line separators in a value list, click the "-" (hyphen or minus sign) on its own line. The "Other" selection will allow you to enter a one-of-a-kind entry that you might only use once. If the "Edit" or "Other" options are not available, it is best if you do NOT manipulate the list.

How to delete an entry from a field with a pop-up menu:

1. Select the "blank" entry from the menu (just above "Edit" and "Other"),
2. You can also press the SHIFT key and click an entry to clear it.
3. In some areas, Studio Suite provides a white *Clear* button labeled "C" that will clear the contents of the field when you click on it.

If you ever need to select more than one item from a pop-up menu (such as to indicate that someone is a Producer, an Engineer, and an Editor), press the SHIFT key on your keyboard, then click on each desired selection in the menu.

Floating Pop-up menus



Floating Pop-up menus are almost identical to regular Pop-up menus. However, rather than staying centered on the field, their display position depends on where you click within the field. These menus will look slightly different than regular pop-up menus. This is because Floating Pop-up menus are created from the Operating System of your computer (using the CNS menu plug-in to accommodate some multi-language menus).

NOTE: For the purpose of this manual, we refer to both regular and floating pop-up menus as simply 'Pop-up menus'.

Buttons

When you click on any of the various buttons within Studio Suite, they perform functions specific to themselves and the modules they are included within. Below are several buttons that are universal throughout Studio Suite.

Function Bar buttons

Many functions you typically perform to manipulate records in a database, such as *New*, *Duplicate*, *Delete*, *Find*, *Find All*, *Omit*, and *Sort* are available in Studio Suite's *Function Bar* at the top of each Module. You can also use the FileMaker keyboard shortcuts to perform these functions. An additional option is the *Back* button.



Function Bar Key Commands

- ⌘ (Ctrl) + N New
- ⌘ (Ctrl) + D Duplicate
- ⌘ (Ctrl) + E Delete
- ⌘ (Ctrl) + F Find
- ⌘ (Ctrl) + J Find All
- ⌘ (Ctrl) + T Omit
- ⌘ (Ctrl) + S Sort

Delete & Omit buttons

The *Function Bar* has a *Delete* button and an *Omit* button. These buttons perform their own, specific actions, which are quite different than others.

- *Delete* - Will permanently delete the selected record from your database.
- *Omit* - Will temporarily omit (or hide) the selected records from the list view. Holding down the SHIFT key when clicking *Omit* will present a dialog asking you how many records to *Omit*.

Back button

In the *Function bar*, you will notice a *Back* button. Click this button to return to the previously viewed screen, regardless of what module you are viewing. For instance, if you are viewing the *Detail* tab of the **Rooms** module and click the orange *Equipment* tab to go to the **Equipment** module, clicking the *Back* button will return you to the *Detail* tab of the **Rooms** module.

The *Back* button is only meant to return to Layouts or Modules. Be aware that it may not always return to the previous Record or Found Set.

Go To button



The *Go To* button is usually seen in list views and *Detail* tab windows. This button takes you to a view with more detailed information about an item. Sometimes, it is within the same module and other times it takes you to a record in an entirely different module. For example; if a *Go To* button is next to a person's name, it will probably take you to their detailed record in the **Contacts** module.

IMPORTANT NOTE: *always be aware of which module you are in before clicking on a Go To button, as well as which module it takes you to. The file name is in the window's title bar.*

NEW FEATURE: Go To button Audit Log tool tip

Audit Log is a new feature in Studio Suite X and one of the ways it can be accessed is by hovering over the *Go To* button in the **Projects**, **Productions**, **Equipment**, **Invoices** (on line items), **Events** (on line items), and **Library** modules. When you hover your cursor over the *Go To* button, a log of who made a change to the record belonging to the *Go To* button along with what change they made and when they made it. This is a great way to maintain accountability as well as a handy short cut helping you know where to direct your questions about the record.

Bookable/Not Bookable toggle button

This button exists in the **Contacts**, **Rooms**, **Equipment**, **Media Inventory**, **Library & Labels** and **Calendar** modules. When clicked, it toggles between *Bookable* (green) and *Not Bookable* (gray), and indicates whether a resource can be booked in the **Calendar** and **Projects** modules

When a new record is created in the modules listed above, this button defaults to *Not Bookable*. After making something *Bookable*, you will see a dialog giving you the choice of making it Visible or not Visible in the **Calendar** module. If you select *No* (not Visible), you can always make it Visible later from the *Calendar Settings* button.

Sort buttons

Many windows within Studio Suite contain multiple records, known as 'List Views'. Within List Views, each field is in a column and each column header contains a title at the top. In all 'List Views', when a title is seen as underlined, the title is a clickable *Sort* button. The *Sort* button arranges all of the found records in either ascending order (1 - 9 and A-Z) or descending order (Z-A and 9-1) by its associated field. In an ascending sort order, any records with empty or blank fields will appear first, then spaces, then numbers, then letters. The reverse is true for a descending sort order.

Clear button

The *Clear* button is only used for fields with pop-up menus or pop-up lists to delete or clear an unwanted entry. Instead of selecting the 'blank' entry from the list, or SHIFT+clicking on an item to deselect it, you can simply click the *Clear* button to quickly delete the information.

Continue button

When using buttons from the *Print Menu* tab (if you are using FileMaker version 10), the *Continue* button

often appears in the Status area in the upper right side of the Window. *Continue* allows you to preview your printout before actually printing. Click it to continue the print process. In Filemaker version 11, the *Continue* button is located on the left side in the Status Toolbar.

Trash Can button



The Red *Trash Can* button appears on each line (or row) of an individual record within a portal, or row. Click it to permanently delete that particular record from its original module.

Using graphics in Studio Suite

Studio Suite supports TIFF (.tiff), JPEG (.jpg) and PNG (.png) graphic file types. You can easily use graphics in many of the container fields throughout Studio Suite. The higher the initial resolution of the graphic, the better it will look. However, the file size of the graphic image will have an effect on the launch speed of Studio Suite. The bigger the file size, the slower Studio Suite will open. You should try to keep the file size as small as possible.

Container fields with high resolution graphics that may slow launch speed:

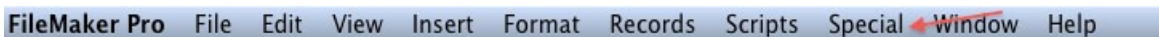
- Company Logo.
- Digital photos of Employees in the **Contacts** module.
- Face plate drawings of gear in the **Recall** module.
- A photo of a console in the **Equipment** module.
- A scanned picture of a room in the **Rooms** module.

You can also place your logo one time in Studio Suite. Perform this task from the *Logos* tab in the **Main Menu - Setup** section. The logo you embed can automatically print on reports, media labels, and other printouts. Again, make sure to use a smaller version of the file. To start, click the *Setup* button located at the bottom of the **Main Menu** page.

How to insert a Logo:

1. Within the **Main Menu - Setup** section, click the *Logos* tab. Select the appropriate container field for Logo No. 1, Logo No. 2, or Logo No. 3.
2. Right click and select *Insert Picture* from the menu.
3. A standard operating system search dialog will appear.
4. Use this dialog to locate the image (picture) within your selected computer drive.
5. Double - click on it or select it and click *Open*.
6. In the 'Insert Picture' dialog box, you also have the option of checking a box to "Store only a reference to the file". (Make sure to deselect the "**Store as Reference**" checkbox). This will display the graphic only on the machine that performed the *Insert*, and a reference link will display to all other networked users.
7. This will embed the picture into the field and the image will be stored within Studio Suite.

Special Menu



Some modules will contain Special Menus in the FileMaker application menus at the top of your screen. These contain special menu options for that module. Their functionality is described in that module's chapter.

Sample records (using and deleting)

Studio Suite ships with many "Sample" records containing example data. These records are included to illustrate how different fields and modules are intended to be used. Take a quick look around each module to get a feel for where things go by clicking the various tabs. As you become more familiar with how to operate Studio Suite, you may choose to delete these records by selecting the "Delete Sample Records" script from the *Special* Menu of the Main Menu. Selecting this option will present a dialog box allowing you to specify which Modules will delete their sample records.

IMPORTANT: When entering your own information into Studio Suite, DO NOT simply duplicate, add to or change any of the "Sample" records that currently exist in Studio Suite.

Even if you change all of the data in a "Sample" record, it will still be flagged as a "Sample", and will be deleted when you use the "Delete Sample Records" script.

To create new records, click the New button on the Function Bar at the top of each window.

Some modules have existing records (data) that are not "Sample" records, and thus, you can add to, duplicate or change them. They are Pictures, Samples & Clips, and Postal Codes.

NOTE: We suggest you read the chapters associated with each module before deleting the Sample records so you can get a feel of how the data is used.

Current record vs. Records being browsed

Because FileMaker is a database, it manages 'records'. The FileMaker print dialog contains the option of printing either the 'Current Record' (typically used for forms) or 'Records being Browsed' (typically used for lists of data).

Types of records:

- Current record - the single record you have selected or are viewing on-screen.
- Records being Browsed - your entire 'found set' of records, which is not necessarily all of the existing records.

NOTE: Although Studio Suite will usually set this to the likely choice, be aware of this setting when you print. Otherwise, you may end up printing much more than you expected!

Duplicate Record Numbers

Each record in Studio Suite gets its own 'record number' upon creation, which is used to uniquely identify that record. If you should somehow end up with duplicate record numbers (especially after importing data), this will be problematic to the related functionality in Studio Suite. To find duplicate records (so you can correct the problem), enter Find mode and put an exclamation mark in the **Record ID** field (the blue number in the upper right corner of most screens). This will only return the record, that have duplicate record numbers. From there, go to a list view and click the *Sort* button at the top of the **Record ID** column.

Field Labels and Text Objects

Field labels in previous versions of Studio Suite were layout text objects. Field labels in the current version of Studio Suite come from the database so that you can change languages. If you want to change or add new text or layout objects, you can create them as text objects.

Printing and layout adjustments

You may find that you want to remove some fields from layouts. We suggest that rather than delete them, you simply move them to the right of the normal screen view.

Since there are so many different manufacturers and models of printers on the market, you may need to make minor tweaks or adjustments to any printing layout to make it fully compatible with your printer. All printers handle paper and scale graphics differently, and minor layout adjustments are really a NORMAL occurrence. You may also choose to make stylistic changes to some layouts as well. Refer to your FileMaker User's Guide about the *Layout* mode, and how to move and arrange fields.

NOTE: Before printing on expensive letterhead, label sheets or fancy paper, perform a test-print on regular paper to be sure everything prints properly.

Fonts

For cross-platform consistency, we have used a single font throughout Studio Suite. No matter what operating system you use, everything should default to the Veranda font. This font maintains a consistent appearance and spacing on both Macintosh and Windows. You may change fonts on a case-by-case basis if desired, however, if you are in a cross-platform environment, be aware of any font size inconsistencies.

Speed

While this version of Studio Suite is faster than previous versions, you may notice that it is slower than some applications that you are used to using. Please note the following explanation:

The typical operation of Studio Suite uses many related databases. The fact that they are related means that they all refer to one another; sharing, comparing, and calculating information based on data that exists in one or more Studio Suite database files. If you are using a network, this requires that there be constant movement of data between your Client/Guest machine and the Server/Host machine. This is quite a bit different from using something like a word processor or email program directly from your local computer, which has "flat" data on your local hard drive.

You will find that the speed may be mildly sluggish each time you launch Studio Suite. The screens will render faster after they have loaded at least once.

User-customizable fields

Once you become familiar with Studio Suite and FileMaker, you may discover you need a new field. We have provided many User fields in each module that you can customize to accommodate specific information. We have pre-formatted these fields to be Repeating fields; their number of repetitions are displayed next to the field name in brackets. The fields that contain the word “Global” are defined as Global fields, which means they have the same value for all records. To use a user field, you may go into the *Layout* mode (within any module) and drag out one of these fields to store your specific data.

The fields are named as follows:

- User_Container1
- User_Container2
- User_Date1
- User_Date2
- User_GlobalContainer1
- User-GlobalContainer2
- User_GlobalDate1
- User_GlobalDate2
- User_GlobalNumber1
- User_GlobalNumber2
- User_GlobalText1
- User_GlobalText2
- User_GlobalTime1
- User_GlobalTime2
- User_Number1
- User_Number2
- User_Text1
- User_Text2
- User_Text3
- User_Text4
- User_Text5
- User_Text6
- User_Time1
- User_Time2
- User_TimeStamp1
- User_TimeStamp2

Be sure to use the appropriate field type (text, number, date, time, container, or global text) for the kind of data you will storing. Since there is no access to *Define Fields* mode, you will not be able to change the actual field name, but you can adjust the field label on your layouts. No user-customizable calculation fields are available.

Customizing Studio Suite

We have provided the above mentioned User fields, and access to *Layout* mode and *ScriptMaker* mode so that you may make minor modifications to suit your needs. Of course, **if you break something, we are NOT responsible for fixing it!** Because details about altering layouts and scripts are not covered in this User's Guide, we recommend that you contact us before making any significant, permanent changes.

AlterMedia Customizing Services:

1. We email or FTP the files back and forth as needed.
2. We advise you via phone as you perform the work.
3. We do the work remotely via remote access software.
4. We visit your location and work on your files.

If you are interested in getting more information about any of these Customizing Services and their associated fees, please call us at **1.818.955.9550**.

Getting Help

If you are having a problem or need help, please determine if the problem is related to the operation of Studio Suite or FileMaker Pro before calling.

If you purchased your FileMaker with Studio Suite as part of a bundle, please contact AlterMedia for all Studio Suite and FileMaker help. If you acquired your FileMaker from another source, please look in your FileMaker Pro User's Guide for information about contacting them for support.

To contact us for technical support for Studio Suite and FileMaker (if you purchased FileMaker with Studio Suite), call **1.818.955.9550** however, if you are not on one of our support programs, you will be charged on a per-call basis.

Support

We offer two support programs:

- A one-year program @ 20% of the software you own.
- a two-year program @ 15% per year.

Most problems can be solved fairly quickly.

This policy is an industry standard due to the high costs of providing quality technical support. Further, it enables us to keep the purchase price of Studio Suite low, while charging individually for support only as needed.

If you call for support, please be near your computer with Studio Suite loaded and have your CD, Registration Number and credit card handy.

Installation, Set-up and Training Services

In addition to our Customizing Services, we also offer on-site installation, training, and customizations. This can be an effective way to get a large number of people up and running quickly, and have the workflow customized to your needs.

If you think these services would be helpful to you, call us at **1.818.955.9550** for more information. We are very familiar with studios and the media industry (in general) as it relates to the operation of Studio Suite.

Now, please read and complete the **Seven Things You Must Do** chapter to get the most out of your new software! If you are not yet comfortable with the operation of your computer or FileMaker Pro, take some time to become more familiar with them before proceeding.

5

Studio Suite Internet

Studio Suite X offers more internet access than any previous version. This chapter is designed to explain the way in which accessing the internet via Studio Suite is different than accessing it through a browser.

The remainder of this chapter has not been updated for SSX. It will be updated in the next edition.

The **Internet** version utilizes FileMaker Server Advance's powerful **Instant Web Publishing (IWP)** to provide web accessibility via a standard browser to the entire database for all users.

In this chapter you will read about how to:

- Get started
- Customize your Status Bar

General Features and Functions notes

- Access to *Studio Suite* from anywhere with Internet access.
- Users can edit a majority of records in most modules.
- Some functions are limited. For example, functions utilizing Filemaker plug-ins are not executable via IWP. These will display a "Non-web compatible dialog."
- By default, the 'Layout:' drop down menu under the status bar will display the current layout name and the "Reset Navigation" layout.
- Occupying a seat on IWP occupies a Studio Suite seat.
- User login is similar to **Client** version, so all preferences are preserved.
- IWP specific configurations are located in the FileMaker Admin Console.
- When you click a button or feature reposition the mouse slightly until the hand icon appears and

- then click to complete the task or function.
- When navigating, FileMaker occasionally prompts with “Record Not Found” dialog. Click ‘Ok’ and try navigating again. If navigation still fails, go to the **Main Menu** and log out then log back in.
 - Should Studio Suite navigate to a non IWP layout, simply use the Studio Suite navigation bar to go to another layout and then navigate back to your desired layout.
 - The ‘List view’ jumps to the selected record. In other words, when selecting a record in ‘List view’, it will jump and become the first record in list.
 - After a find, the List view sometimes jumps to the last record making it appear as if though the last record is the only record. To view the other records click the Navigate Record Icon to up view the others.
 - If you are in Find Mode and you want to cancel the find, click on the *browse* button in the upper left of the status bar.
 - Different Browsers render Differently
 - Some Pop-Up and Drop down lists are in alphabetical order instead of custom specified order
 - IWP access is not optimized for printing.
 - Because of differences in how browsers render, some Radio Buttons and check boxes may display limited options.
 - Calendar drag and drop, Timeline calendar features are not included.


Getting Started


Once the program is properly installed and configured, the “inside the network” database access should be located at <http://<server-ipaddress>/fmi/iwp>, where as <server-ipaddress> is the IP of the router hosting the network when “outside the network”.

How to get started:

1. Click on “Click here to Log-In” and access the SS9_Main.fp7 file and authentication. Authenticate as you would on your FileMaker Pro client.
2. The user is presented with a Main Menu log-in prompt as they would normally.
3. Should you fail to see the homepage or the authentication page please review the FileMaker: Instant Web Publishing Guide and review the installation procedure and make sure your server is properly configured for web hosting.
4. After a successful log-in, some notable differences include a constant presence of the *Status Bar* (left) and shadow less graphics. Instant Web Publishing cannot display transparency, and the occasional omission of a button altogether, i.e. the *Re-Login* button has been omitted from the Main Menu. Similarly, because we are now in a browser the entire FileMaker Application menu is also not available.
5. For optimal usage and stability we highly recommend that you only utilize the buttons and fields presented by the GUI and only use the *Status Bar* when instructed to do so.
6. Due to the limitation of FileMaker Instant Web Publishing, our usage of Plug-ins and the complexity of some of our functions; Studio Suite Internet has been optimized for record viewing and basic record editing. We also recognize the need to perform some standard functions like ‘Creating a New Project’ or ‘Making a Resource Bookable’ and thus have also made these functions available. However, a number of functions have been disabled in order to retain a strong emphasis on stability.

Status Bar

The *Status Bar* should remain open at all times in order for **IWP** to function properly. Occasionally a function might utilize the “Show/Hide Status Area” script step and cause the *Status Bar* to disappear. Before proceeding, you should click on the *Show Status Bar* icon  to bring the *Status Bar* back into view.

The Status Bar has an array of icons that reflect similar functionality in FileMaker Pro, we do not recommend using these icons unless for specified circumstances. For further explanation of the Status Bar and the related icons simply click on the help icon  in the Status Bar.

As previously mentioned circumstances do arise that requires the use of certain Status Bar icon. Following is a list of icons and their appropriate use.

The Status Bar is customizable to a degree.

How to customize your Status Bar:

1. If your Status Bar isn't showing, click the Status Bar icon to the left of the Browse mode button at the bottom left of the Filemaker screen.
2. Right click on the Status Bar on a PC or on a Mac, hold down the Control key and click on the Status Bar. Choose 'Customize Toolbar'.
3. A drop down menu will appear with elements for you to add to your Status Bar.
4. To add any of them, drag and drop them to where on your Status Bar you would like them to end up.
5. At the bottom of the drop down menu is a 'default set' that you can use instead.

Edit Current Record

Makes the currently viewed record editable, normally you could simply click on an editable field and the entire record goes into edit mode, but this is not the case all of the time. For instance, trying to add a new related record via a portal fails to throw the record into edit mode if this is the first related record.

Submit button

After successfully editing a record click the *submit* button to save the changes to the database. Record and Event Item changes are final only after they have been successfully submitted to the database.

Periodically after the operation of a function, the record is left in edit mode, click the *submit* button to save record changes and then proceed with the program. Similarly, after initiating a function the program might navigate to another layout and leave you on a record already in edit mode, this behavior is usually intentional. Simply edit the record, submit the changes and click the desired button to exit the screen. When a dialog or a screen is presented that has its own commit buttons- i.e. *OK*, *Cancel*, etc. the user should use these buttons instead of the Status Bar *Continue* button to advance the script.

Perform Find button

Because we recommend triggering a 'Find' request from Studio Suite Record Function Bar, this often result with a *Perform Find*, *Extend Found Set*, *Constrain Found Set*, *Continue*, and *Cancel* buttons. Because some modules have specific instructions for performing a Find, you should click the *Continue*

button instead of the *Perform Find* Button to properly execute the find.

Continue button

The *Continue* button is visible when the user is in the middle of a script and the program has paused for further data entry. When a dialog or a screen is presented that has its own commit buttons- i.e. *OK*, *Cancel*, etc. the user should use these buttons instead of the Status Bar *Continue* button to advance the script. Failure to use Studio Suite Commit buttons can result in irregular data and may cause the program to malfunction.

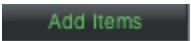
Cancel button

Very rarely should you use the *Cancel* button in the status area. However in extreme cases where a script has become non responsive and the user is on a foreign layout not normally visible to users, cancel the script before attempting to exit the present situation.


Log Out button

You should always use the *Log Out* button from Studio Suite's Main Menu, but in extreme cases where it is not possible to return to the **Main Menu** for log out, you can use the *Log Out* button from the Status Bar. If you use the Status Bar to Log Out, you should wait a few seconds before attempting to re-login.

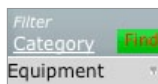
Add Item (Projects)

A rectangular button with a dark background and the text "Add Items" in green.

When adding a new item to a Project, click in the **Category Filter** field and select the desired Category.

Submit the change to the database, then click the green *Find* button that appears to execute the category lookup. 

After submitting the category to the database, the Sub-Category (if applicable) becomes populated with data. Clicking into the Sub-Category field will display the related list and likewise after submitting your Sub-Category to the database another *Find* button appears above the field.



Similar to the two fields above, clicking into the **Item** field allows you to type in a find parameter, then once submitted another green 'Find' button that when clicked executes a find in that field with the specified parameter.

After locating the appropriate Bookable Item, select to add to the project and exit the screen as normal.

Edit Line Item (Projects)

After editing a project, the portal showing the related events will show zero related events. This is a result of the Project to Events relationship not refreshing. To refresh simply navigate away from the Projects_Events layout and then return. This will cause the relationship to refresh and display the related events.

Create New Item AlsoBook (Categories/Items)

Adding

When creating a new item from Categories/Item or the **Add New Item** screen in Projects, if you want to add an **AlsoBook** item to the **New Item Being Created** you should select and submit the desired category for the also book. Then select and submit the **AlsoBook** from the drop down item list, after which a black and green *Add* button appears, clicking this button adds the AlsoBook item to the newly created item.

Removing

To remove an **AlsoBook** item, select and submit the desired category then select and submit the desired item from the item drop down list. If the select item is already an **AlsoBook** for this item and is currently visible in the **AlsoBook** portal below, a green *Drop* button appears. Clicking the *Drop* button removes the **AlsoBook**.

Event Status Colors (Calendar)

Occasionally the Events Status Colors breaks and displays the colors in red regardless of their originally specified color. A Studio Suite administrator should reset the broken colors on Pro by going to Calendar->Settings->BookingStatuses and reset the broken color. So if Red is not your chosen Status Color for a particular event, then it is likely broken.

After resetting the Status Color existing of events in IWP, it will still show the incorrect color unless they are manually changed. However future it entries will show the correct status color.

This covers all of the basics of the various Studio Suite **Versions** and **Internet** access.

6

Transferring Data from **Previous** Versions

This chapter explains how to transfer data from Studio Suite 9 into Studio Suite X.

If you have a version prior to Studio Suite 8, please locate the separate .pdf file “Transferring Data from Studio Suite 5” in the Documentation folder inside the Studio Suite X folder on your computer.

In this chapter you will read about how to:

- Convert pre-FileMaker 12 Studio Suite files to the new FileMaker 12 format
- Transfer data from Previous Versions
- Complete the import process

Prepare for conversion - Important!

Before proceeding, make sure you have an account with the **User Name / Password** of **Admin/Admin** in your *old* files, and that you have successfully completed the FileMaker 12 and Studio Suite X installation process.

Converting your files to the FileMaker 12 file format:

FileMaker 12 is a file-format change from previous versions of FileMaker. This means that your existing files will need to be converted to the new format. Before converting, please make a backup of your files and put them in a safe place!

1. If you are currently using FileMaker Server, ‘close’ the files in FM Server (or locate a very recent backup). If you are using FileMaker Pro, just close the files.
2. Drag your SS8 or SS9 files onto a FileMaker Pro 12 application icon. This will initiate the conversion process.

3. If you are using FileMaker Server, use the FileMaker Server console to Upload the converted files to the **same folder** as the Studio Suite X files.
4. If you are using FileMaker Pro, move the converted files into the Studio Suite X folder located in your Documents folder.

How to transfer data from Studio Suite 8 or 9:

1. Log into Studio Suite X and create one "000_Administrator" level user account that has the same Account Name and Password as an account that exists in Studio Suite 8 or 9 (also at "000_Administrator"), or use Admin / Admin as described above. The default account name/password of Admin / Admin exists in the new files already, so if you still have that account in SS8/SS9, you do not have to do anything.
3. At the Studio Suite X Main Menu, from the "Special" menu (between "Scripts" and "Tools" in the Menu bar), select "Import Data from..." then select "Studio Suite 8" or "Studio Suite 9".
4. Read steps #1-6 on the screen. If you check box #3, each individual table (there are many) will present an import-mapping dialog box and several subsequent "Ok" dialogs per table. Only select #3 if you need to.

Checking box 4 will automatically delete any existing data in the SSX tables, including any sample data, as well as any previous import attempts. Most of the time, you will want this box checked, unless you specifically DO need to retain data that exists in Studio Suite X already.

Studio Suite 8 Import Screen

1 If you are importing data files from the previous version of Studio Suite, PLEASE make sure to read Chapter 5 in the Users Guide first, for very important information.

Then....

2 The default Tables have been selected for you at right. Typically, you'd leave these as they are, but if you want to make any adjustments, do so.

3 ☐ Monitor Import Mapping
The import field mapping has been present for every table. If you've had any field modifications done to your copy of Studio Suite, you may want to monitor the import mapping. If so, check the above checkbox.

4 ☒ Delete any SS9 data prior to Import
To allow control over potential consecutive imports, this checkbox will, prior to import, delete ALL existing data in the tables that you are importing into. Typically this is checked, unless you need to do multiple imports into one table, or you wish to save Sample Data.
Note: If this box is checked Sample Data will be deleted!

5 ☐ Split Project Budgets & Actuals on Import
Previous versions of Studio Suite held Project Budget line items in the same Event record as Actual line item data. This version creates separate records for each. If you did Budgets & Actuals in your previous version, check this box to split that data into separate records for this version. (this will take longer to import...)

6 Depending on your data, this process could range from several minutes to several hours. Click Continue when the time has been set aside.

Cancel Continue

Import Data from Studio Suite 8 (only!)

File Filter: Select Defaults Clear

| File name | Table | Done |
|---------------|------------------------|------|
| SS8_Contacts | CallBacks | |
| SS8_Contacts | Communications | |
| SS8_Contacts | Contacts | |
| SS8_Contacts | FormLetters | |
| SS8_Contacts | MailGroups | |
| SS8_Contacts | InvoiceLI | |
| SS8_Invoicing | FileGlobals | |
| SS8_Invoicing | InvoiceLI | |
| SS8_Invoicing | Invoices | |
| SS8_Invoicing | PettyCash | |
| SS8_Invoicing | PurchaseOrders | |
| SS8_Invoicing | Rates | |
| SS8_Invoicing | TaxesDiscounts | |
| SS8_Library | Attachments | |
| SS8_Library | Clips | |
| SS8_Library | DiskLog | |
| SS8_Library | Library | |
| SS8_Library | Library_Globals | |
| SS8_Library | Library_ReleaseBatches | |
| SS8_Library | Licenses | |
| SS8_Library | Locates | |
| SS8_Library | MediaInventory | |
| SS8_Library | QC_Items | |

☒ = selected

Tables to Import

- CallBacks
- Communications
- Contacts
- FormLetters
- MailGroups
- InvoiceLI
- Invoices
- PettyCash
- PurchaseOrders
- Rates
- TaxesDiscounts
- Attachments
- DiskLog
- Library
- Library_ReleaseBatches
- Licenses
- Locates
- MediaInventory
- QC_Items
- QC_Reports
- Samples
- Submissions
- SampleUsageInTitles
- Uses
- Writers
- Companies
- LoginOuts
- Prefs_NonGlobal
- TaskGroups
- TaskDefaults
- TitlesPerCompany
- UserAccounts
- Booking_Statuses
- BookableItems
- Calendar
- Calendar_Resources
- CalendarPresets
- Categories
- DailyNotes
- Events
- Participants
- Projects
- Talent
- Barcodes
- Connectors
- Equipment
- Maintenance
- Parts
- PartsGroups
- Patchbays
- Recall
- RecallItems
- Rooms

Tables Imported

Studio Suite 9 Import Screen

1 If you haven't already... drag & drop your SS9 files onto the FM12 application which will convert them to the fmp12 format. At the end of the conversion, click OK or Cancel to all of the resulting dialogs that will pop up.
Make sure you have a backup!

2 The default Tables have been selected for you at right. Typically, you'd leave these as they are, but IF you want to make any adjustments, do so.

3 ☐ **Monitor Import Mapping**
The import field mapping has been present for every table. If you've had any field modifications done to your copy of Studio Suite, you may want to monitor the import mapping. If so, check the above checkbox.

4 ☒ **Delete any SSX data prior to Import**
To allow control over potential consecutive imports, this checkbox will, prior to import, delete ALL existing data in the tables that you are importing into. Typically this is checked, unless you need to do multiple imports into one table, or you wish to save Sample Data.
Note: If this box is checked Sample Date will be deleted!

5 ☐ **Split Project Budgets & Actuals on Import**
Previous versions of Studio Suite held Project Budget line items in the same Event record as Actual line item data. This version creates separate records for each. If you did Budgets & Actuals in your previous version, check this box to split that data into separate records for this version. (this will take longer to import...)

6 Depending on your data, this process could range from several minutes to several hours. Click Continue when the time has been set aside.

Import Data from Studio Suite 9 (only!)

File Filter: All Select Defaults Clear

| File name | Table Name | Done |
|--------------|---------------------------|------|
| SS9_Main | Companies | |
| SS9_Main | Prefs_Global | |
| SS9_Main | Prefs_GlobalSource | |
| SS9_Main | Prefs_NonGlobal | |
| SS9_Main | Prefs_PerModule | |
| SS9_Main | UserAccounts | |
| SS9_Main | Permissions | |
| SS9_Main | Navigation | |
| SS9_Main | LoginOuts | |
| SS9_Main | TaskGroups | |
| SS9_Main | TaskDefaults | |
| SS9_Main | Help | |
| SS9_Main | TitlesPerCompany | |
| SS9_Main | UserAccounts_CalendarItem | |
| SS9_Main | PrivSets | |
| SS9_Main | FileGlobals | |
| SS9_Main | MainMenuScreenshots | |
| SS9_Main | Registration | |
| SS9_Main | Tables | |
| SS9_Contacts | Contacts | |
| SS9_Contacts | Communications | |
| SS9_Contacts | CallBacks | |

Legend: ☒ = selected

Tables to Import

- Contacts
- Communications
- CallBacks
- FormLetters
- MailGroups
- Invoices
- InvoiceLI
- Rates
- PerityCash
- PurchaseOrders
- TaxesDiscounts
- Budget_CodeDefaults
- RateSplits
- Budget
- Budget_Items
- Budget_Types
- MediaInventory
- Library
- Library_ReleaseBatches
- Titles
- Locates
- QC_Reports
- QC_Items
- Samples
- Clips
- Attachments
- Writers
- SampleUsageInTitles
- Licences
- Submissions
- Uses
- FTP_Server
- FTP_Library
- FTP_Log
- FTP_Favorites
- SS9_Dialog
- Companies
- Prefs_NonGlobal
- UserAccounts
- LoginOuts
- TaskGroups
- TaskDefaults
- TitlesPerCompany
- Projects
- Events
- Calendar
- Calendar_Resources
- BookableItems
- CalendarPresets
- Booking_Statuses
- Categories
- Tasks
- Talent
- Participants

Tables Imported

Cancel Continue

Which Files and Tables to Import?

Typically, you will just use the default setting, which is "All". Relative to checkbox #3 above, if you need to be surgical about your transfer, you have the option of narrowing the list of tables to those from a specific file by using the **File Filter** menu. After making a selection, click the green button to auto-select the default tables for the selected file you'll want to transfer. You can adjust these by clicking on tables you don't want to import, which will turn them white. Only highlighted tables will be transferred when you click *Continue*. This is useful if you discover after the fact that you DID need to do some adjustments to the import mapping.

Import-ant! ;-)

Data Structure Change Regarding 'Budget & Actual' in Projects & Events in SSX

In previous versions of Studio Suite, when you added an Event to a Project, that one 'Event' appeared in both the Budget and Actual sides of the Project. SSX handles each side separately, ie, you book to one or the other, and there are separate records for each 'side'.

As such, when importing from previous versions (that did not behave this way), we need to specify if, how, and where the old Events data will import. If you never really cared about the "Budget" side of the Projects module, you can skip this section, and leave the "Split Project Budgets & Actuals on Import" button unchecked. If you DID use 'both sides' of the Projects module, you'll want to check this checkbox. Doing so will import the Events from your previous version *twice*- once for Budget, and once for Actual (with appropriate numbers for each) and maintain the ability to compare your Budgets v. Actuals. This will definitely take longer though, so only do it if you need to.

How long will it take? Of course, it depends on the amount of data you have and which options you select for box #3 and #5. It can take anywhere from a few minutes to an hour or more. You'll want to set aside some

time to do this, and also to confirm the data has been transferred cleanly.

When table transfers have been completed, their names will move from the **Tables to Import** field to the **Tables Imported** field.

After all of the files and tables have been transferred, you will see a dialog saying “Almost done!” including the following instructions:

Follow these directions!
How to complete the import process:

1. Quit FileMaker and Studio Suite X now (important!).
2. Re-launch Studio Suite X.
3. Re-enable User Accounts.
4. For each User Account, you will need to re-specify Calendar settings that determine which Preset will appear for each user. To do so, log in as each User, go to the Calendar module, and select a Preset.
5. Go to Calendar > Settings > Booking Statuses, and re-specify your Status Colors.
6. Optional: Go to the Tasks module and specify Task Status colors.
7. Optional: Go to the Maintenance module and specify Maintenance Status colors.
8. Have fun with Studio Suite X!

Important Notes:

- As the transfer occurs, you may see messages about duplicate records numbers. Write down which modules these messages refer to so you may correct any problems.
- Its definitely **important** to quit FileMaker after the import, otherwise Studio Suite will not behave properly.
- Regarding step 4 of the dialog above, we have slightly changed the way status colors are rendered in SSX, requiring that you re-specify the colors. You'll be able to see the old colors, you'll just need to pick new ones that are similar.
- In SSX, the **Productions, Projects, Tasks, Maintenance, and Employee Schedule** modules can now include a status color. You can specify those colors in those modules.

Finally, enjoy Studio Suite X! Please see the rest of the User's Guide for more tricks and how to use the new features.

7

Seven Things You Must Do

There are “seven things you must do” before Studio Suite can properly manage your facility. Performing these seven initial steps is ESSENTIAL and will enable all of the “related” information in specific files to interact as a cohesive unit. **Please do not skip these steps.**

If you are importing data from previous versions of Studio Suite, some of these steps may be done already. However, please skim through this chapter anyway (as a refresher).

In this chapter you will read about how to:

- Log in
- Create your company
- Add a graphic (logo)
- Create a new tax rate
- Set up a tax rate as a Default rate
- Assign taxes to rates
- Select who pays the bill
- Link QuickBooks and Studio Suite
- Link QuickBooks Online (for PC systems and Studio Suite)
- Link MYOB and Studio Suite
- Create category names
- Define customized booking statuses

- Change record number in the **Contacts** module
- Add contacts
- Import contacts
- Access User Accounts
- See a list of all User Accounts
- Create and/or edit a user (after initial set up)
- Adjust Permissions
- Add additional seats with a registration number
- Change your User Account password
- Change your User Account Setup password
- Set up a Room
- Create a new Rate
- Enter a new piece of Equipment
- Add media to your Media Inventory
- Define your services

Brief explanations of each step are below. For more detailed information on each module, read its chapter in this User's Guide.

Setting up your system

Tell Studio Suite About Seven Things:

- **One:** Your Company (**Main Menu:** *Setup*)
- **Two:** Your **Contacts**
- **Three:** Your Studio Suite Users (**Main Menu:** *Setup: User Accounts*)
- **Four:** Your **Rooms**
- **Five:** Your **Equipment**
- **Six:** Your Blank/Virgin **Media Inventory**
- **Seven:** Your Services (**Categories & Items**)

How to Log In:

1. Double-click the Studio Suite icon in the Dock (Mac), the shortcut on your desktop (PC), or the **Studio Suite X** file in the Studio Suite X Folder. The **Studio Suite X.fmp12** file is actually just a “launcher” that then opens the main file in Studio Suite, called “SSX_Main”.
2. FileMaker Pro will launch if it is not already running.
3. When the SSX_Main file opens, it will ask you for your Account Name and Password. For your initial log in, enter:
Account Name: Admin (*Account names are not case sensitive*)
Password: Admin (*Passwords ARE case sensitive*)
4. Click OK or press RETURN/ENTER. Studio Suite will then open.
5. The **Main Menu** opens and you are ready to use Studio Suite.

NOTE: If you have trouble launching Studio Suite in a multi-user environment, please see the Installation chapter for detailed directions on launching Studio Suite as a client.

Step One: Your Company (System Setup)

Studio Suite can run more than one company simultaneously.

The companies you own may include a studio, video post production company, publishing company, higher learning institution, management company, equipment rental company, a division of a large corporation, etc., each with different company names and/or locations.

While many of the following settings must be completed, others are optional (where indicated) and explained here to provide a good overview of how things work. You may also find that many of the existing default settings already suit your needs and do not require editing.

Main Menu: System Setup button

Click on the *Setup* button (at the bottom left of the screen) to enter the **Main Menu Setup** screen. The **Setup** area consists of a series of tabs that allow you to edit many of the global settings that determine how Studio Suite operates. Click on a tab to view its contents. The first tab is the **Location** tab.

Setup button: Location tab

This is the location information (**Name/Address/Country**, etc) about your company that will be used throughout Studio Suite on labels, letterheads, invoices, etc.

How to create your company:

1. Click the black and black and green *New* button and enter your **Company Name** (or click the *Delete* button to delete a company).
2. Your first new company record should automatically get a **Company Number** of "1", making it the default, primary company.
3. If you have more than one company to enter, be sure your main company has the **Company Number** of "1", your second most important gets "2", and your third gets "3" etc.



| Company Name | Company Number |
|-----------------------|----------------|
| Super Bangin' Studios | 2 |

4. Repeat this process to create records for each of your companies. The *Up Arrow* and *Down Arrow* buttons scroll through your different company records.
5. Enter the full Company Address, Company Phones and Country of your studio.
6. The **Company Phones** field is "right-aligned", as this is the format used on Studio Suite print outs for phone numbers. Make sure everything looks correct.

7. Enter your local **Currency** symbol up to three characters (leading or trailing).
8. Choose "US" or "EURO" as your **Address Format**, and each new record in the **Contacts** module will have that editable designation, which affects how addresses are displayed on printouts.
9. Enter any comments about the company in the field at the bottom.
10. To the right, choose a **Language** that you would like text to be displayed in Studio Suite.
11. Specify a default Phone Number Format. Each new record in the **Contacts** module will inherit this format, which may then be changed per contact as needed. If you do not wish to have numbers auto-formatted, you can just clear this field.

Most of the modules in Studio Suite have a *Reports* tab and a **Company Selector** field with a pop-up menu showing all of the companies you created in the *Location Info* tab. When you select a company, its letterhead and logo information will appear on the printout, if applicable. This field also assigns Contacts, Productions, Projects, Equipment, Invoices to the company selected.

If you already have printed stationery for your company and do not want to use any of Studio Suite's "generated" stationery, create a new "dummy" company record with no information in it other than a **Company No.** At any *Print Menu* tab, select the "empty" (no) company from the **Company Selector** pop-up menu. Your printouts will have no company information or logo, so use your own stationery when printing. Alternately, you can specify that the "Custom Letterhead" is your default (described below). If you do not insert a Custom Letterhead graphic, all printouts will print with a "blank" custom letterhead.

Setup button: Logos tab

From the **Main Menu Setup**, the *Logos* tab is used to enter your company's logo. Each logo box varies in its function.

Logos:

- **Logo No. 1** – where you will insert your main company logo for screen display.
- **Logo No. 2** – where you will insert the logo you will use for printing.
- **Logo No. 3** - where you may insert a very light or gray scale logo as a 'watermark'.
- **Letterhead** - this is to contain an entire letterhead image, as an alternative to the one Studio Suite "constructs" from your company data and Logo No 1.

How to add a graphic (logo):

1. Click in the center of the box (**field**).
2. Click the Insert menu at the very top of your screen and choose *Picture*. You can Right-Click on the image and choose 'Insert Picture' from the pop-up menu.
3. A file selector dialog will appear. Use this to browse your hard drive for an image of your company logo. Use one with a small file size to increase load times.

4. Make sure the check box labeled 'Store only as a Reference to the File' is NOT checked.
5. When you have found the logo file, select it and choose Open.
6. Studio Suite will "auto-size" the image to fit into the field.

NOTE: Try to keep the file size of these graphics as small as possible by using compressed graphic formats such as JPEGs or PNGs (instead of larger formats like TIFF or EPS files).

On the right side of this screen, you can specify and preview which letterhead style (Auto or Custom) is your default. Most print menus will default to this choice.

Taxes tab

Next, click on the *Taxes* tab to enter required Tax information in the three tax areas provided.

The Taxes tab is broken into three sections, each with a specific function regarding how and which taxes are displayed throughout Studio Suite.

Taxes tab: SECTION ONE

Creating New Taxes

You should create a new Tax for each and every Tax you may ever charge, including Local, County, State, National, Province, etc. If you ship materials to areas with different Tax rates, enter those as well.

How to create a new tax rate:

1. Click on the black and black and green *Create New* button. A new record will appear at the top of the portal.

Create New

2. Enter a specific **Tax Name**, like "LA County", then tab to the **Rate** field and enter it as a decimal number (8.725% tax is entered as .08725).

| Create New | |
|---|-------|
| San Francisco Co Tax | 8.50% |
| LA County Tax | 8.75% |
| San Diego Tax | 7.75% |
| | |
| (enter as decimal, ie, 8% = .08) | |
| <input type="checkbox"/> Reveal Tax after Tax options <small>Necessary in some parts of Canada to tax one Tax with another Tax.</small> | |
| QuickBooks Tax Agency Name CA Board of Equalization | |

3. Repeat for all Taxes that apply to your company.

4. Some areas (such as parts of Canada) apply one Tax to another Tax. If this scenario applies to you, check the **Reveal Tax After Tax options** box to make these specific fields visible to you throughout Studio Suite.
5. For most, entering a **Tax Name** and **Rate** for each tax is all you need to do.
6. For those needing advanced tax options, such as taxing one Tax with another Tax, click the *Go To* button to view and edit the details of this Tax Rate in the **Rates** module. To return, click the *Back* button in the *Function Bar*.
7. In the last field, you can enter a QuickBooks Tax Agency Name. This is who you will report to for the taxes you have collected.

Taxes tab: SECTION TWO

Setting Tax Defaults and Billing Terms

Here, you will select up to three Taxes (that you have just created in Step One) that would most commonly be used for a new client. The pop-up menu shows All Taxes created in Step 1 (Creating New Taxes).

How to set up tax rates as Default rates:

1. Click the first **Default Client Taxes** field.
2. Select a tax from the pop-up menu.
3. Do the same for the second and third fields (if you have second or third taxes).
4. If you need to, click the 'C' button to clear a field.

Click the field below **Invoices are due in:** and select the number of days you want your invoices to be due. If you edit this list, make sure the first "word" is the number of days because the number is used to calculate your invoice aging.

*NOTE: Each new record in the **Contacts** module will lookup from these default settings. These can be changed per contact, as needed.*

Taxes tab: SECTION THREE

Assign Taxes to Rates

Here, you will select the Taxes that would apply to each of the following Rate Categories; **Rooms, Equipment, People, Services, Media, Library** and **Misc**. When a new **Rate** is created in one of these Categories, these associated Taxes will automatically be used for that **Rate**. You should select all taxes that could apply to that Category. For example, in California, studios should charge tax for tape, disks, materials, etc they sell to customers. If they ship that item to another county, they are *supposed* to charge the tax rate for the county they ship to, not the county where the studio resides. In this case, the Media category would contain the tax rates for all counties to which a California studio might ship.

How to assign taxes to Rates:

1. Click the **Rooms** field.
2. A pop-up menu will appear listing the taxes you created in Step 1.
3. Make a selection from the list.
4. To select multiple taxes, hold down the SHIFT key on your keyboard while clicking your selections.
5. To apply all taxes in the list, click the *All* button. To clear the field, click the white “C” button.
6. Repeat these steps for all other category fields.

IMPORTANT NOTE: We are not tax advisors! Obviously, you should discuss your sales tax situation with your accountant, as tax rules may be different for your specific kind of work, location, or tax scenario.

Titles tab

The *Titles* tab is where you specify the default “participants” that are automatically added to each new **Project**. These are not people that are scheduled or billed for, but rather someone who is “softly attached” to the project (such as a coordinator or someone who would typically attend a Session from the Client’s side).

The field labeled ‘**Client**’ must refer to what you call the entity that pays the bill. This can be an **Account**, **Division**, **Agency**, **Student**, etc. Once default titles are created, they can be edited per project and per Session.

How to select who pays the bill:

1. Click the **Client** field and make a choice from the pop-up list.

To define typical personnel titles for your projects:

1. Click the black and green *Add* button.
2. This will create a new row below. Click the empty highlighted **Title** field and select Producer (For example) from the pop-up menu.
3. Repeat steps 1 & 2 for all of the **Titles** that would typically attend a session.
4. You can use the values on the **Sort** field to change the order in which they appear.
5. To edit the list of choices, select *Edit*.

The screenshot shows the Studio Suite X interface. At the top, there is a 'Client' field with a dropdown menu currently showing 'Client'. A line points from the text 'Pays the bill.' to this field. Below the Client field is a table with two columns: 'Titles' and 'Sort'. The table has a header row with 'Add', 'Titles', and 'Sort'. Below the header, there are four rows: 'Producer' with '1', 'Editor' with '2', 'Director' with '3', and 'Writer' with '4'. Each row has a trash icon in the 'Sort' column. To the right of the table, there are four lines of text with arrows pointing to the table rows: 'Appears as the main name on the spine of media labels below the Reel Title, and/or the Project Name. Usually a subtitle for the project, like Artist, Episode, etc.' points to the 'Producer' row; 'Appears in this order beneath the above on the face of labels and in Calendar displays.' points to the 'Editor' row; 'Appears after the above only on media labels.' points to the 'Director' row; and 'Appears only in Projects and Sessions & Events (and printouts).' points to the 'Writer' row.

| Add | Titles | Sort |
|-----|----------|------|
| | Producer | 1 |
| | Editor | 2 |
| | Director | 3 |
| | Writer | 4 |

Titles tab

Sort order

The order in which these titles are sorted determines the order in which they appear throughout specific modules in Studio Suite as well as printouts. The sort order is as follows:

- The 1st title in the list also appears on the spine of media labels below the **Asset Title** and/or the **Project Name**. It also could be a subtitle for the **Project** like **Artist**, **Episode**, etc (although these can also a part of the Project name).
- The 2nd and 3rd names appear in that order beneath the first name on the face of labels as well as in the **Calendar**.
- The 4th title appears after the 1st, 2nd and 3rd names on media labels ONLY.
- The 5th title (and any additional) appears in the **Projects** module, the **Events** module and on printouts.

Module Prefs tab

This is where you will configure global preferences for various modules in Studio Suite. The settings made here provide a starting point for new records you create. You can edit these parameters on the new records when they are created in each module.

The first sub-tab is *Invoices*, where you can specify some invoice related preferences.

Invoices sub-tab

The left side of this tab corresponds directly to the *Letter Entry* tab in the Invoices module. It allows you to type “form” letters regarding overdue invoices. Letters or emails sent out for late invoices will contain this text, with the exception of the merge fields (**Invoice Number**, **Invoice Date**, **Project Name**, and **Balance** due), that are specific to each invoice. Although you can edit the text here, the best place to do it is in the Invoice module- the display here is for mainly for reference. Once it is created, this text can, of course, be edited per letter.

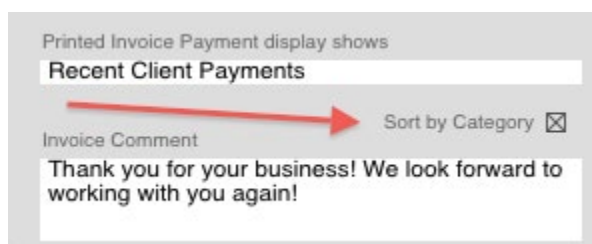
On the top right, you will see General Invoice settings. Here, you can specify your default Terms (same field as on the Taxes tab actually). Each new Contact will have this default setting and each Project for a Client will have the Client’s Billing Terms. This may be edited per Contact and per Project, and per Invoice as needed.

When invoices are overdue, you can add a Late Fee, which will use the default **Late Fee APR** specified here.

The **Aging Based Upon** allows you to specify if the invoice aging is based on the Invoice Date (as QuickBooks does), or on the Due Date (as in previous versions of Studio Suite).

Below that, you can specify which recent payments will appear on printed invoices - either all “Recent Client Payments” or just “This Invoice’s Payments”.

Sort by Category



The **Sort by Category** checkbox defines how invoice line items are sorted. Unchecked, the items will be in the order they were imported (i.e., the order they were in Projects or creation order), or sorted by Category. This affects both the screen version and the print version. However, the print version will also subtotal by Category if this box is checked.

Invoice Comment is where you can enter a default comment that will be on all new invoices. You can edit this comment per invoice, as needed.

Invoices sub-tab

Accounting System Export Settings

On the bottom right, there is an area for Accounting System Export Settings. This area is only relevant if you wish to transfer Invoices from Studio Suite to external accounting software.

In order for Studio Suite to talk to external accounting software, you need a special registration number (available for purchase from AlterMedia, Inc.). This plug-in file is included in your Studio Suite installation, but you need the registration number for it to work.

NEW FEATURE: New Accounting Plugins

Studio Suite is now offering a plugins for QuickBooks online (PC only), MYOB and Account Edge for purchase.

How to link 3rd party accounting software and Studio Suite:

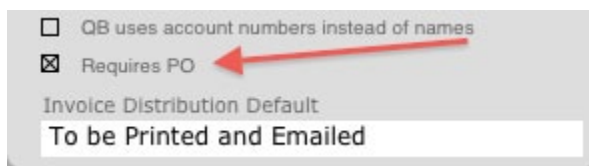
1. Click the blue "Registered" text. This will prompt you for your accounting export registration number.
2. Enter the number when you click the *Establish* button. (If you are using a PC, follow the rest of the instructions.)
3. If you are using QuickBooks, make sure your QuickBooks company file is already open with "admin" credentials, and that it has been set up with at least one user (go to "Company/Set up users...").
4. Choose a company file, which may be located at C:\Program Files\Intuit\QuickBooks 20XX\YourFileName. A served file is OK but each user must have QB installed on their computer.
5. Once you have selected a file, you will get the message "A connection has been established".
6. In QuickBooks, choose "Yes, always..." then under "login as:" choose a user name.
7. IMPORTANT: DO NOT CHOOSE "Admin" SINCE THIS WILL LOCK OUT OTHER USERS!
8. Do not move the QuickBooks file from the original location, or the connection will be lost.

To properly communicate with external accounting software, Studio Suite will need to know the names of the following Accounts in the external application:

- **Deposit Account**
- **Expense Account**
- **COGS Account**
- **Asset Account**

Enter these names in the fields provided exactly as they are in your accounting program.

Quickbooks: Requires PO



This default setting for QuickBooks specifies that Invoices require a Purchase Order number. This option is in place to manage the default setting in QuickBooks that requires Purchase Order numbers on imported invoices.

More information about QuickBooks and other accounting software is explained in the chapters for the **Contacts** module, the **Rates** module, and the **Invoices** module.

Module Prefs tab

Projects sub-tab

Select a default Client title to be used each time you create a new project (this is the same as what you entered on the Titles tab).

The Multi-Day Events as Continuous checkbox is here for reference, but is described further down in the *Events* tab section.

You may select a default for including the Phones and emails of people booked on a Project here. You can edit these per Project on the Reports tab in the Projects module.

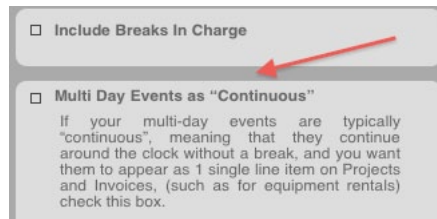
Quick Entry Default Times

In a number of places within the **Projects** module, you will see a group of four buttons (labeled 1-4). These are the *Quick Entry Time* Buttons. Use these to quickly recall four different time settings that you most commonly use. Enter your default times of choice in the provided fields. You can define up to 4 typical time blocks for sessions. In all of the booking screens, you can click corresponding buttons that will set the start and end times of the project or event to the times entered here.

Module Prefs tab

Events sub-tab

- **Include Breaks in Charge** - This sets a default for your policy on break times during sessions. If you “stop the clock” during session breaks, check this box, and the break time will be subtracted from the total length.
- **Multi-Day Events as Continuous**



“Multi-Day Events as Continuous” checkbox is explained on screen in the *Events* sub-tab as:

- If your multi-day events are typically “continuous”, meaning that they continue around the clock without a break, and you want them to appear as 1 single line item on **Projects** and **Invoices** (such as for equipment rentals), check this box.
- If your multi-day events break between days and you want each day to be a separate line item in Projects and Invoices (such as for a week of sessions in a studio), do not check this box.
- This becomes the default setting for the “Continuous” checkbox in Projects and on the Add Item screen, which can be edited per **Project** and per **Event**, as necessary.
- **Invoice Description** - This is an advanced setting if you need to adjust the formatting of the calculated invoice description. You should probably leave this as is unless you are a FileMaker programmer or are working with AlterMedia tech support. The white area is the actual calculation. Below that, is a text version to paste back in if you have problems making edits.

Module Prefs tab

Media Inventory sub-tab

Studio Suite can keep track of your physical media inventory very precisely. Check the box next to “Reconcile Media” to reconcile all Media prior to Invoicing.

- **Reconcile Media** - A global setting that determines whether or not Studio Suite will require that all media used on a project (tapes, discs, etc) is reconciled with the inventory prior to invoicing. If checked, media items on a project will not be able to be invoiced until they are reconciled.
- **Automatic Reconcile Media** - This will automatically reconcile your **Media Inventory** when Invoices are created. This is convenient, but possibly inaccurate if quantities are not checked prior to invoicing.

Note: If both items are unchecked, this will allow these items to be invoiced without updating or consulting the available inventory

At the bottom of this tab, you can specify that barcodes made for Bookable media are derived from either the record number (as in versions of Studio Suite), or by the UPC code of the media itself. We suggest using the UPC code for Media barcodes.

Module Prefs tab

Library sub-tab

- In the **Formula for Library Number** field, you can define any prefixes or suffixes that will be a part of your Library numbering scheme. For example, you may want to include the initials of your studio before the number. Put your prefix or suffix inside the quotes.
- When new media assets are created in the **Library** module, they need to come from somewhere for the Media asset History data. Enter a default setting for what you would like any new, blank “virgin” media to be called in the **Acquired from** field for each Media asset. Some studios use the word ‘Stock’, some use ‘Virgin’ and, for others, most new media assets come from the ‘Client’.
- **Generate Barcode from Lib Num** - Putting a check here will automatically generate a barcode number from the library number when a new media asset is created.
- **Print w/Barcode option** - Media labels can optionally print with or without Barcodes. Make that global preference here.
- **Print w/Timecode option** - Media labels can optionally print with or without Timecodes. Make that global preference here.
- **TC Format default** - Click this field and select a Timecode default (Frame-Rate) from the drop-down menu.
- **Calculate Running Time as** - Choose between a **Summary of Individual (Title) durations** or **TC (timecode) Difference between first Start and last End**.

*NOTE: You can select the default method that calculates a media asset's total **Running Time**. If you choose “Summary of individual (Title) durations”, it will add all of the individual title **Durations** together. If you choose “TC difference between first Start and last End”, it will calculate based on the time codes.*

Module Prefs tab

Petty Cash sub-tab

The fields in this sub-tab determine how Petty Cash transactions are handled when they are transferred into Project Line Items, and subsequently to invoices. Aside from the Default Markup (or to adjust for language), you can leave these as they are.

Or, if desired, adjust **Deposit Name**, **Transaction Name**, **Default Status**, **Default Category**, **Default Rate** as needed!

Value Lists tab

The *Value Lists* tab is where you edit the pop-up Value Lists for two menus that are used throughout Studio Suite. There are two sub-tabs: *Booking Statuses* and *Categories*.

Categories sub-tab

Throughout Studio Suite's various modules, you will notice pop-up menus displaying choices for categories such as **Rooms**, **Equipment**, **People**, etc. Some categories (though not ALL) are linked to a specific module from the *Categories* sub-tab. You can edit the category name and you must link it with its associated module (if any).

How to create category names:

1. Click the black and green *New* button.
2. A dialogue will appear allowing you to enter new name of the **Category** that you are creating. Specify a **Sort Order** that defines the order in which this category appears in the pop-up list. If necessary, you can use decimals in the Sort field to control the order.
3. You can edit a Category name and Sort by clicking on its button *Name*.
4. You can delete a Category by clicking the red *Trash Can*.

NOTE: Each value in the 'Name Internal' can only be used once. In other words, you can only associate a module to ONE category name. This sub-tab allows you to define the Categories of bookings you make. These should be broad or general category types, so do not get too specific. Printed invoices will be grouped and sub-totaled by the Categories you define here, and reports in the Projects and Events modules are also summarized by Category.

Account Name is used for linking/syncing exported invoices with your accounting program. If you will be doing this, set default Account Codes for each Category (as needed) and each newly created Rate will auto-enter the Account Code defined here for its Category. Once each **Rate** is created, the Account Code may be edited per **Rate** (as needed) in the **Rates** module.

Type is the QuickBooks account "Type" that corresponds to the **Category** and **Account Code** you have entered. Be sure to match these exactly as you have them in your QuickBooks.

Invoice Descriptions is where you can define (per **Category**) how the default "description" on Invoice line items is initially calculated in the **Events** module prior to exporting to the **Invoice** module. For example, some kinds of items do not need to have the **Time** included (such as Media, or daily Equipment rentals). But others, such as Hourly Studio Time) need both a **Start** and **End Time** on the Invoice Description. The preferences for Invoice line items descriptions are defined here. They then flow to each newly created **Rate**, on to **Events** based on that **Rate**, and finally to each Invoice Line item. The Descriptions can be edited at each of those locations, but the chain starts here.

Share Calendar is where you specify which Categories of items can be shared with external calendars (iCal on the Mac, Outlook on the PC). For example, you might want to share the calendars for **Room** and **People** events, but not for **Equipment** or **Media** events. The sync to Google Calendar is a separate setting defined in the Calendar Settings area.

NOTE: Calendar sharing is described further in Step Three, Creating User Accounts, and in the Calendar chapter.

For more detailed information about this sub-tab, see the **Main Menu** chapter of this User's Guide.

Value Lists tab:

Booking Status sub-tab

This sub-tab allows you to define customized **Booking Statuses** (in any language), and assign a special color to visually represent each. You can customize your default Value List to include terminology used in your particular business lines (i.e.: Confirmed, On Hold, Completed, Cancelled, Postponed, etc.). You can also use colors to designate **Statuses** of booked events such as a Meeting, Vacation, or Birthday.

How to define customized booking statuses:

1. Click the *Booking Status* sub-tab, and then click the green “Edit” button at the top of the list.
2. Make your Status changes to the *Edit Value List* screen prompt, then click *OK to complete*.
3. After your list is set, *click the Status Color field next to the new or updated Status Name. Select an appropriate Status Color from the provided color palette. Click OK upon completion.*

Each status has checkboxes that further define its behaviors, such as **Skip Conflict Check**, **Omit from Reports**, **Don’t Show in Calendar**, etc..

Booking Status sub-tab: Special Statuses

Studio Suite needs to know your version of some special statuses so that it can set them automatically (different users may call them different names). Select a status from each pop-up menu that most closely matches the specified names.

Record Numbers tab

Each record created in Studio Suite is automatically numbered serially. The *Record Numbers* tab allows you to change the next serially created number for a record in a particular module.

NOTE: Previous to SSX, this Record Number was a ‘key’ value that governed the relationships to other data. In SSX, these numbers are only for display, and the key value is a hidden UUID (Universally Unique Identifier). This means that the Record Numbers are now more able to be modified or customized as needed.

How to change record numbers in the Contacts module:

1. Click the *Contacts* button.
2. The Contacts Record # pop-up dialog will appear.
3. This will display what the next record number will be along with the highest existing number.
4. Type a new starting number for the next record.
5. If you enter a number that is lower than the highest existing number, a pop-up message will appear warning you that you may have potential duplicate numbers.
6. Make sure to enter a number that is greater than the highest record number, or you will end up with duplicate numbers. You do not want this to happen!
7. Repeat as needed for other modules.

Misc. tab

Some things do not fit anywhere else, so we have clumped them into the *Misc.* tab.

- **Optimize Startup** checkbox. If selected, it does not reload language and graphics upon startup. If you want to enable this option and are using FileMaker Server (and have altered any default language and images), there are a number of steps that you need to do before enabling this option to properly “lock” everything to your current settings:
 1. close the files on FM Server.
 2. open the files directly with FM Pro, then close them.
 3. re-open on FM Server.
- **Navigation History Days to Keep** - Enter how many days you would like the Navigate History to store.
- **Save Log-in Logs** - for a specified amount of days.
- **New Task Status** - Not Done, Incomplete, Preliminary etc. as examples.
- **Default Salutation** for Letters - Enter the default salutation, such as ‘Dear’, that you would like to appear on all newly created letters.
- **Save files and folders in** - Studio Suite creates many different types of files. Different users want (or need) to save the different locations, depending upon their preferences and computing environment. Use the **Save files and folders in** field to select from the radio button list. Save new documents in **Documents** files, your system’s **Applications**, on the computer **Desktop**, or in **Temporary** files.

New Feature: Twitter section

Studio Suite can now send tweets and direct messages to Twitter. This section is where you set up who the tweets will be coming from. When you set up each of your companies, you can set up a different Twitter connection with each one.

How to link your company’s Twitter to Studio Suite:

1. NEW - In the bottom section you can enable Studio Suite to send tweets and direct messages through Twitter. First, your company needs to have a Twitter account already set up (it needs to be one that is for the company, not an individual working at the company).
2. Next, click the Authorize Twitter App button.

Authorize Twitter App

3. This will take you to a screen (similar to the one pictured below) where you can enter the company’s Twitter handle and password.

The screenshot shows a Twitter authorization page. At the top, there's a Twitter logo and a 'Sign up' link. The main heading is 'Authorize Studio Suite to use your account?'. Below this, it lists permissions: 'This application will be able to: Read Tweets from your timeline, See who you follow, and follow new people, Update your profile, Post Tweets for you, Access your direct messages.' There are input fields for 'Username or email' and 'Password', a 'Remember me' checkbox, and a 'Forgot password?' link. At the bottom, there are 'Authorize app' and 'Cancel' buttons. On the right side, there's a Studio Suite logo and text: 'Studio Suite www.studiosuite.com/ Studio Management Software'. At the very bottom, it says 'This application will not be able to: See your Twitter password.'

- Once you fill out this form and click the Authorize App button, it will fill in the necessary information for you to send tweets and direct messages to any contact whose Twitter handle you have in the contact records.

| | | |
|-----------------------|---|-----------------------|
| Twitter Handle | Studio_Suite | Authorize Twitter App |
| Twitter Access Token | 22316965-Jh6PriW4GLGholHDk4bw21XtKeRZiEmUDKtVb28Y | |
| Twitter Access Secret | V8B0g02bX8DLvpL4nlAL68GhuWJ2YEnjsreCDTuf4o | |

This section, *Step One: Your Company (Main Menu Setup screen)* covers most of the functionality of the **Main Menu**. However, more information about this module is available in the **Main Menu** chapter of this User's Guide.

Click the *Main Menu* tab to return to the **Main Menu** and proceed to Step Two.

Step Two: Your Contacts

Contact module

The **Contacts** module keeps track of any person or company you work with on a regular basis. To book (or bill!) a project for a Client or add a staff Editor or Engineer to a Project, they must first exist in the **Contacts** module.

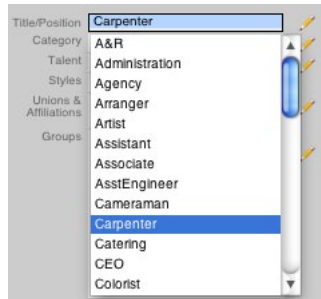
All of your employees must also be created in the **Contacts** module before you can create a User Account for them to access Studio Suite. Although this module keeps track of many things (as described in it's chapter of the User's Guide), the important things for now are to enter the names, address, phone numbers, type (Client, Vendor, Employee, Personal or Prospect), category (Producer, Engineer, etc.) and their bookable status (if they are an employee).

How to add contacts:

Note: Only your staff needs to be defined as Bookable, not your clients.

- From the **Main Menu**, click the *Contacts* button (in the left column) to go to the **Contacts** module.
- Click on the *New* button at the top of the screen to create a new Contact record. Repeat for each new record you need to create.
- Enter in all of your contacts, including their **First** and **Last** names, **Company**, **Address**, **Zip** (which will auto-fill their **City** and **State**), **Phone** numbers. You can import this data from Excel files, vCards, or via other means. See Below.
- Use the check boxes above the first name to specify each Contact as a **Client**, **Vendor**, **Employee**, **Personal** or **Prospect**. In other modules, *only* those contacts identified as a Client will be selectable from the pop-up list of Clients. Similarly, this is the case with 'Vendors'.

5. Select their **Title** and **Category** from the editable, pop-up menus. If your choice is not included in the menu, choose “Other” for a one-time entry, or “Edit”, which will allow you to add to the menu of choices to include Titles and Categories you will use again.



6. Click the *Financial* tab to enter **Terms, Credit Limit, Account Numbers, Adjust Taxes, Discounts**, etc.
7. Click the *Rates sub-tab*. Client-specific Rates can be *viewed* here, but they can only be created in the **Rates** module (or from the respective **Rooms, Equipment, Media** modules). You can also assign a pre-existing, non-client specific related rate to this client (from the bottom portal) by clicking the blue (UP) arrow next to the Rate you want to assign.



8. For employees, go to the *Employee* tab and fill in as much information as possible, making sure the **Employee** checkbox is checked. Identify them as *Bookable* if you need to schedule them in the **Calendar** module, or charge for their time. Create Rates in the *Rates* sub-tab. Make sure to create a Contact record for yourself, as the next step is to create your user account.

Contacts module

Importing Contacts

Studio Suite also allows you to Import contacts that you may have in another application such as Excel, AddressBook, Outlook or other email programs. There are three kinds of imports;

How to import contacts:

1. If you have your contacts in an Excel file or in any kind of tab or comma separated list of values, See Appendix C – Importing Your Data Into CONTACTS.
2. If you are using AddressBook or Outlook, export a vCard of your contacts. Then, from within the Studio Suite Contacts module (under the Special menu), select vCard > Import, then select the file to import.
3. You may purchase a 3rd party plugin to connect to AddressBook or Outlook. This may require some custom development to finalize the connection process.

This completes *Step Two*. See the Contacts chapter for more information about this module.

Click the *Main Menu* tab to return to the **Main Menu** and proceed to Step Three.

Step Three: Your Studio Suite Users

Studio Suite security

Before assigning user accounts, it is important to understand the Security system that Studio Suite utilizes. This system is a hierarchy of three tiers: Privilege Sets, User Accounts and Permissions. It is designed to protect your Studio Suite Database, allowing certain users access to privileged areas while securing sensitive information (such as accounting, etc.) and establishing specific permissions for each user.

Privilege Sets

Privilege Sets are role-based, preset definitions that are pre-configured within Studio Suite. They correspond with roles a person can have within your studio facility (i.e. owner, manager, producer, engineer, receptionist, intern, etc.) and cannot be changed. These defined privileges determine whether a user can perform certain actions in each module.

Below, is the list of Studio Suite's Default Privilege Sets. The number next to each set shows its hierarchy within the system, which roughly translates to the hierarchy of employee positions within your studio.

- 000_Administrator
- 010_Owner
- 020_Manager
- 030_Accounting
- 040_Technician
- 050_Scheduler
- 060_Producer
- 070_Sales
- 080_Editor_Engineer
- 090_Assistant
- 100_Receptionist
- 110_Runner
- 120_Vault

If you are a large studio with many employees at various levels, this diverse set of Privilege Sets will be extremely useful and you may find that you use every account level. However, if you are a small studio in which some people maintain several positions simultaneously, you may want to stay within the first few account levels. Smaller studios with only one or two employees might only use the Administrator level.

User Accounts

Each user of Studio Suite should have their own User Account. Each User Account is assigned to a Privilege Set. Each Privilege set can have many User Accounts but a User Account can belong to only ONE Privilege Set. Only the following Accounts have permission to create other User Accounts:

- 000_Admin
- 010_Owner
- 020_Manager

Permissions

Within each User Account are Permissions, which can be granted or denied to a User Account. Typical

permissions (appropriate for each Privilege Set) will be added by default to each account upon creation. These permissions can only be edited by the following Privilege Sets:

- 000_Admin
- 010_Owner
- 020_Manager

Permissions are managed on a User-by-User, and module-by-module basis, allowing a high degree of granularity for defining exactly who can do exactly what within Studio Suite. Typical Permissions per module:

- Go To (Access to module)
- Edit
- Delete
- Export
- Print
- Layout Mode access
- Script Maker access
- Other special privileges appropriate to each module

How to access User Accounts:

1. From the Main Menu, click *Setup*.
2. Click the *User Accounts* tab in the upper right-hand corner of the window.
3. The **User Accounts** module will display its *List* tab window, showing the Account you are currently signed in as.

User Accounts tab: List tab

The List tab displays a list of all Studio Suite users in your facility.

How to see a list of all User Accounts:

1. Click the *Find All* button in the *Function Bar* to see all Accounts.
2. Click the *Go To* button next to a user in the list. This takes you to the *Detail* tab (explained next).

User Accounts tab: Detail tab

This is where you will create and/or edit user information as well as assign Permissions to the specific user.

How to create and/or edit a User (after initial set up):

1. You must first have an account that allows you to create/edit new users.
2. Click the black and green New button in the Function bar.
3. The 'Activate Account' window will appear.
4. Enter the following information for the User then Click OK:
 - **Account Name** - usually the user's full or first name, however, this can be whatever you wish. Every different user should have their own, individual account. This is because Audit Logging and Calendar displays (current week/month/day range and Items) are based on the user's account name, so all users can view different items/dates in the Calendar.
 - **Password** - this can be anything you would like, but remember it is caSE-seNSitivE.
 - **Privilege set** – from the drop-down list, select the Privilege Set this particular user should have.
5. Another window will appear confirming the command. Click *OK*.
6. The following message will appear: Please select a name from the 'Link to Contact' field for the person in Contacts to whom this account belongs. Click *OK*.
7. Then click the **Link to Contacts** field and select a person from the drop-down list. This is a list of people in the **Contacts** module flagged as "Employee". This links this User Account with that record in the **Contacts** module. If you have not yet created a record in Contacts for this person, please do so and come back and set the Link field for this User Account.

The **Enabled** checkbox is next to **Link to Contacts**. You can disable the account by deselecting this check box. All of the account preferences will remain, however, the account will be inactive until you enable it again by checking the box. The Activate Account dialogue will appear, prompting you to enter a new password for this account. Type a password and select a Privilege Set, then click OK. A message will appear stating that the account now has access to the system with the chosen Privilege Set.

You can delete the account by clicking the red trash can or the *Delete* button in the *Function Bar*.

Detail tab

Account Preferences sub-tab

This is where you assign preferences for this user.

Detail tab

General sub-tab

- **Main Menu selector** - If you have not granted Permission to a user to see certain modules through permissions, those buttons will disappear from the Main Menu. The Main Menu selector allows you to configure the amount of remaining buttons that are displayed in the Main Menu. Click the image of the Main Menu and select one of the 5 options, each with a decreasing number of buttons to click.
- **Contacts/New Records will Flag as:** This allows you to configure how a newly

created Contact will be flagged. Click the checkbox to choose between Clients, Vendor, Employee, Prospect or Personal. You can use this setting to save time while initially setting up data in the Contacts module.

- **Password** - Here, you can specify that a user is required to change their password at the next log-in (useful when creating new accounts), or every “x” days.
- **Startup Alerts** - This allows you to choose what alerts that will appear when first starting Studio Suite; you will be warned if you have:
 - * **Invoices Past Due**
 - * **Low Media Inventory**
 - * **Equipment Maintenance Overdue**
 - * **Overdue Rentals**
 - * **Overdue Library Items**
 - *

Detail tab - Account Preferences sub-tab

Email Setup sub-tab

This area contains your email settings. You can copy these settings from your email program or contact your IT department or email provider for settings.

- **User Name** - This is your email account User Name.
- **Password** - This is your email account Password.
- **Address** - This is your email address.
- **Signature** - This is the signature used at the bottom of your sent emails (optional)
- **SMTP Host** - This is your email host information.
- **Host Port** - This is the Port your email passes through your network. Generally, this is Port ‘25’, but yours may be different - for example, the port for gmail is 587.
- **Auth Type** - Authentication method of your email provider. Usually, this is set to ‘Auto’.
- **Use SSL** - This determines whether your email program should use Secure Sockets Layer. This is usually set to ‘False’.
- **Diagnostics: Show Transcript After** - you can set this to True if you have having troubles sending emails from Studio Suite to see what the problem might be.

Detail tab - Account Preferences sub-tab

Projects sub-tab

- **“Type” for New Projects** is the default Project type each time a Project is created.
- **“Status” for New Projects** is the default Project status when a new Project is created.
- **Default Project/Event Sort** is a pop-up menu allowing you to select how Projects and Events lists will be Sorted.
- **Filter Rates by** is where you can set a default Rate filter setting for Projects.
- **Default Start Time** for all bookings (Rooms, People, Media, etc). This time will automatically appear whenever this User makes a booking.
- **Default End Time** for all bookables (Rooms, People, Media, etc.). This time will automatically appear whenever you make a booking.

NOTE: If sessions are booked without a start and End Time, they will NOT appear in the Calendar.

- **Default Book Status** is the status all projects booked will have unless you select a different status when booking.

Detail tab

Calendar sub-tab

The *Calendar* sub-tab contains multiple setup preferences for the Timeline calendar scheduling view. These preferences can also be specified in the **Calendar** module, where their settings can be immediately seen. The **Calendar** chapter also contains a more complete description of these settings.

Calendar sub-tab: **Timeline** section

- **Load** range - For efficient and faster system information load times, choose a defined operating date load range window by entering **Days Before Today** and **Days After Today**.
- **Zoom** range - The zoom range view limit preferences are setup by **Days Before Today** and **Days After Today**.
- **Quantize Selection** preference is a default increment size when sliding or moving an event in Timeline. When you drag or slide an event item it will move accordingly in the increments set to this preset limit.
- **Default Duration** - the initial length of each new event upon creation.
- **Day Zoom** - Daily view beginning and end time zoom preference for the Timeline calendar view.
- **Show Employee Schedules** - specify that data from the Employee Schedules module appears in Calendar.

Optimize the best Load, Zoom, Quantize and Duration ranges for your workflow.

Calendar sub-tab: **Calendar** section

- **Always Keep Calendar Window Open** - Allows you to always keep the calendar window open.
- **Calendar - Hours in Linear Day** - this allows you to configure how many hours (in a day) are displayed in the Linear Week/Month Calendar view. Click the number field to toggle between 16 or 24 hours.
- **Allows for Projects and Calendar Sync** (to iCal and Outlook), and the additional option to **Automatically sync** Projects and iCal calendar Automatic sync checkbox. Typically, only one user would have the “Automatically” checked and other users would subscribe to their iCal or Outlook. *Directions for how to sync to Google Calendar (Network versions of Studio Suite only) are in the Calendar chapter.*

Detail tab

Account Permissions sub-tab

This sub-tab is where you assign Permissions for this user. The module name is listed along with the Permission Name. If you are not sure what a specific Permission is, read the notes in the Description field next to it. The Permissions for each Privilege Set are already configured, however, you may edit them (per-user) if you wish. This enables this User to leave two people with the same role-based Privilege Sets, but with different permissions.

How to adjust Permissions:

1. Use the **Filter** field to display only the permissions of a certain module.
2. If a Permission is highlighted in light blue, it is granted to the user.
3. Click each permission to toggle it active/inactive.
4. If you want to make ALL permissions in the list active, click the yellow *Select All* button.
5. The *Default* button will re-set this users permissions to those defined in the current Privilege Set.
6. On the right side is a text listing of a user's current permissions. Use the *Copy* and *Paste* buttons to copy a good list of Permissions from one user to another.

Navigation History tab

This tab shows a listing of all user navigation within Studio Suite. This is essentially used for back button functionality, but is also helpful if you want to research how someone was navigating through the system.

Log-in Log-Out tab

This tab shows a listing of all user log-ins and log-outs, helpful if you want to track when someone was using the system.

Permissions tab

Click the *Permissions* tab in the upper right. It will take you to the Permissions table. This area is for Advanced Studio Suite users/Administrators who would like to create additional Permissions that can be granted or denied to their users. If you would like to use this feature and are not familiar with its functionality, please contact AlterMedia technical support for assistance.

System Setup tab

This tab returns you to the Studio Suite System Setup.

Seat License

You can create an unlimited number of Studio Suite Users, but you cannot exceed the number of simultaneous Users that your Seat License allows. For example, if you have 22 employees, but only 15 of them will regularly work on Studio Suite at the same time (15 Seat License), you can define each employee as a Studio Suite User, but only 15 of them can access Studio Suite simultaneously.

Be sure to create a different User Account for each person who will be accessing Studio Suite.


Information about the List tab will be added in the next edition.

List tab

Detail tab

Changing your Password

Within Studio Suite, you actually have TWO passwords; The User Account Password and the User Account Setup password. It is important to understand the function of both.

A dark gray rectangular button with the text "Change Password" in a light gray, sans-serif font.

User Account Password

This password gives you access to the Studio Suite system.

How to change your User Account password:

1. From the Main Menu, click the *Setup* button.
2. Click the *User Accounts* tab.
3. Click the *Go To* button next to a user account name. This will take you to the *Detail* tab for that user account.
4. Click the *Change Password* button.
5. The 'Change Password' dialog will appear and you will need to enter your old password and a new password (twice).
7. Click OK.

User Account Setup Password

This password allows you to create and edit Studio Suite user accounts.

A dark gray rectangular button with the text "Edit Password to access User Account Setup" in a light gray, sans-serif font.

How to change your User Account Setup password:

1. From the Main Menu, click the *Setup* button.
2. Click the text *User Accounts* tab.
3. Click the long button labeled *Edit Password to access User Account setup*.
4. You will be asked to enter a new password twice.
5. When you have finished, click *OK*.

This completes *Step Three*. Click the *Main Menu* tab to return to the **Main Menu**. Next, proceed to Step Four.

Step Four: Your Rooms

Next, you should tell Studio Suite about the bookable rooms in your studio, so it can book them from the **Calendar** module and assign equipment to a location. Eventually, you should enter *all of* the Rooms in the building so you can keep track of your assets for inventory and insurance purposes.

How to set up a room:

1. From the **Main Menu**, click the *Rooms* button. This will take you to the **Rooms** module.
2. Click the *List* tab if you are not already there.
3. Click the *New* button from the *Function Bar*.
4. This will take you to the *Detail* tab and the cursor should be in the **Room Name** field (top left side of the window).
5. Enter the name of the room in the **Room Name** field.
6. Click the **Room Type** field and select the appropriate room type from the pop-up menu. If your **Room Type** is not included in the menu, choose “Other” for a one-time entry, or “Edit”, which will allow you to add to the menu.
7. If you have multiple **Buildings**, designate which **Building** this room is in.
8. Click the *Bookable* toggle button to define the room as *Bookable*. Only rooms defined as *Bookable* can show up in the **Calendar** module.
9. If you make it Bookable, you will see a dialog giving you the choice (Yes or No) of adding it directly to the **Calendar** views. If this is a room you book regularly, you will want to add it to the Calendar. If you select ‘No’, you can always add it to the Calendar later.

Rooms module

Define Rates for each room

Studio Suite can manage multiple “Rates” for things you charge for, such as Equipment, Engineers and Rooms. You will likely charge different amounts for different blocks of time in different rooms and different rates for different Clients. Each Rate can also have an associated **Expense**. These various combinations are stored in the **Rates** module, which also keeps track of Equipment Rates, People Rates, Miscellaneous Rates, etc. All Rates can be made in the **Rates** module, but you can also make them locally from the **Rooms**, **Equipment**, **Media**, and **Contacts** modules.

It is essential that you complete this procedure to properly use each room’s billing rates in the **Projects** and **Invoices** modules.

*NOTE: The **Rates-Create New** window cannot be closed. You **MUST** click the *Continue* button.*

How to Create a new rate:

1. Click the black and green *New* button in the *Function bar*.
2. “What kind of Rate do you want to create?” will appear. Choose *Standard* to create a normal rate.
3. Next, “What kind of Standard Rate do you want to create?” with the options: *Credit*, *Overtime* or *Regular*. For our current purpose, choose *Regular*.

- The **Create New Rate** window will appear, displaying fields for all the details of this Rate. Follow the instructions below to add detailed Rate information.

Create New Rate window

Rates - Create New

Internal Accounting Details

Category: **Rooms** Client: C Type: ☒ Regular ☐ Overtime ☐ Credit

Sub-Category: **Graphics** Action:

Item: **Studio A** Rate Card: **0 All**

Rate Name: **Studio A 3**

External Accounting Details

Class:

Item Type:

Item Name: **Studio A**

Account Name:

Unit of Measure: Qty. Hour(s) Hour(s)

From: **0** To: **999** Charge: Expense: Profit: Market:

Taxes (Multi Select): ☒ San Diego Tax ☒ LA County Tax ☐ All

Set As Default: ☒ Default For Item = Default For Client =

Hours Before OT: Charge: Expense: Price/Unit: Uses OT Rate: ☐

☐ Include In Rate Card ☐ Use as "Child Item" Rate

☒ Is Normally Invoiced ☐ Exempt From Client Discount

☐ Commissionable ☐ Exclude from Un-Invoiced Item Reports

Invoice line items containing this Rate will have a description in based on the following, in this order:

Start Date: Start Time: End Time: Action: Rate Name:

Additional Invoice Text:

R-1 Total/Designation
R-1 RelatedTotal/Designation

Continue

- In the top row, the **Category** and **Item** should be pre-entered. If you want to change the Category, select a new one from the Menu. If you want to assign additional items to this Rate, click the **Item** field and select as many items as needed from the popup window.
- Enter a rate description in the SS **Rate Name** field (i.e. 'ProTools Rig#1', or 'Studio A Hourly Rate', etc). The **Rate Name** is followed by a pre-entered number upon the creation because all Rate Names must be unique. You can remove or change this number as needed, as long as the name remains unique.
- If this Rate is to be a "Client-Specific" rate, click the **Client** field and choose their name from the popup window. This list displays each contact you have checked as a Client in the **Contacts** module. The 'C' button next to the **Client** name will clear any client(s) selected in that field. You may choose to list multiple clients for a single Rate (see below).
- Below the client and account detail, are **Class**, **Item**, **Account**, and **Type** fields used to link this Rate to external accounting software such as QuickBooks, MYOB, or AccountEdge. See more on external accounting details below.
- You may re-specify the **Type** of Rate (Regular, Overtime, Credit). **Regular** and **Overtime** are self-explanatory. **Credit Rates** are those which have a negative value on the total charge for a project. Examples of **Credit Rates**: "Deposit", "Payment", and "Credit Memo". Used when the client gives you money on a Project.

10. The Charge and Expense section is where you designate what you are charging the client and what the item costs (the expense). Click the **Unit of Measure** fields and select a unit of time for both the **Charge** and **Expense** from the pop-up menus. The unit of measure can be one "Day" (one bill day), or Hour(s), Week(s), Each (or per unit), and One Time (single charge). Type the amount you are charging the client and your expense (for the specified unit of time) in the fields below. **Profit** is automatically calculated by the difference. **Market** value is included in this section as a tool to prove worth of a project by internally comparing your rates to a specified market value. This is factored and compared (to your Rates) in the **Projects** module within the **Item/Difference** view.
11. The Charge and Expense section also includes fields to enter a resource quantity (**Quantity**) amount range. You can charge your pricing fixed by bulk amounts from a quantity of 0 to 999. ie, 1-10, 11-20, 21-50, 51-100, etc.
12. The **Expense** field is the amount that each Rate costs you in, labor cost, material cost (for media), or other overhead (electricity, heat, etc). Enter the amount this item is costing you for the specified unit of time.
13. Next, within the Overtime Rate Specs area, enter the number of **Hours Before Overtime** (begins) for the **Charge** and **Expense** associated with the device. Then, click the **Uses OT Rate** field and select the overtime rate from the drop-down list. The **Charges Per** field will display the dollar amount of the overtime rate chosen.

NOTE: To accommodate 3rd party accounting programs, Overtime in Studio Suite must be its own separate Rate. The Rates for the Overtime Rates will be visible but not editable on the O.T. Rates-field.

14. If the Rate is taxable, select (to the right) which taxes apply to the Rate in the **Tax Settings** field.
15. To use more than one tax, SHIFT and click on your desired tax types. To use all taxes, click the blue *All* button. (See *Selecting Multiple Taxes* below).
16. Check if you want to **Include In Rate Sheet**, whether the **Rate Is Normally Invoiced**, to **Exclude from Un-Invoiced Item Reports**, Rate is **Commissionable**, or if it is **Exempt From Client Discount**, or **Retired** (See *Standard Rates Checkbox options* below).
17. Change how the **Invoice Line Item** information (bottom row) will appear. This is the order in which the item information will appear on an invoice. (See *Invoice Line Items* below).
18. Enter any **Additional Invoice Text** that you want to appear on the invoice for this item in the text field below.
19. Click the *Continue* button to confirm your new Rate.

NOTE: The Rates-Create New window cannot be closed. You MUST click the Continue button.

The new Rate will now appear at the bottom of the Rates List. You may need to use the scroll bar to view items at the bottom of the list. For more information about Rates, see the Rates chapter of this User's Guide.

| Rates For: Studio A | | | | | Overtime Rate Specs | | | | (Multi-Select) | | Set As Default | |
|---------------------|----------------------|------|-----------------|---------|---------------------|--------------|------------|---------------|------------------------------|-----------------------|----------------|--|
| Item | Rate Name | Type | Unit of Measure | Charge | Hours Before OT | Uses OT Rate | Charge Per | Taxes | Client | Items Using This Rate | | |
| Studio A | Invoice Payment | LJ | Hour(s) | 25.00 | 3 | | | | * | D 1 | | |
| Studio A | Studio A Hourly | LJ | Hour(s) | 190.00 | 6 | Studio A OT | 200.00 | San Diego Tax | 55\$jjg kajfd bfgb, Jlm Tree | D 4 | | |
| Edit Suite | Edit Suite Hourly | LJ | Hour(s) | 100.00 | | | | | * | D 2 | | |
| Studio A | Studio A Daily | LJ | Day(s) | 1000.00 | 8 | Studio A OT | 200.00 | | * | D 1 | | |
| Studio A | Studio A (included) | LJ | Hour(s) | | | | | | * | D 1 | | |
| Studio A | Studio A VO rate MTV | LJ | Hour(s) | 185.00 | 8 | Studio A OT | 200.00 | SF Tax | * | D 1 | | |

This completes *Step Four*. For more information about Rooms, see the Rooms module chapter of this User's Guide.

Click the *Main Menu* tab to return to the **Main Menu** and proceed to Step Five!

Step Five: Your Equipment

You can skip this step if you do not book or rent equipment separately (i.e., if you rent the room with everything in it). However, if you rent equipment separately as an add-on item, this equipment must first exist in the **Equipment** module and be defined as *Bookable*.

With Studio Suite X, we've added new ways to classify equipment as either an Item, a Collection, or a Pool:

- **Item** - This is just a regular piece of equipment, however, it may be part of a Collection.
- **Collection** - This is a record that represents a "collection" of equipment. Typically members of a collection would be high-value items, such as Cameras, etc, ie, items that you need to track specifically, but also generically at times. It has some special properties that allow you to book a Collection record instead of a specific **Item** as a placeholder for a yet-to-be-determined **Item**. For example, bookings in advance where you may not know (or care) *WHICH* camera you need, you just need A camera. When the time comes to use it, you would swap the Collection booking to a specific **Item** booking. Collections help manage availability, and apply similar data (such as Rates, Manufacture, Model, etc to many like-kind items).
- **Pool** - If you have 100 cables, 50 stands, 30 adapters (each all of one kind), you may not want to create separate records for each single item in the Equipment Inventory module. You don't track them individually, they probably don't have serial numbers, they're all pretty much the same thing. So a Pool record allows you to have 20 of the same kind of thing in a single Equipment record. When booking these items in Projects, the availability is managed appropriately because it's flagged as a Pool.

More information about the above is in the Equipment chapter.

How to enter a new piece of equipment:

1. Select "Item", "Collection", or "Pool" underneath the *New* button on the *Function Bar*, then click *New*.
2. Click the **Manufacturer** list field and select a manufacturer from the drop-down menu. Repeat this step for **Model**, **Description**, **#**, **Type**, etc.
3. Enter all information in the pertinent fields, such as the **Serial #**, **Barcode #**, **Purchase Date**, whether you **Lease/Own** it, where you purchased it **From**, the **Version**, which of your multiple companies it is **Owned By**, when the **Warranty Expires**, and the **Smart Sort Priority**, etc.

4. Go to the *Rates* tab to define the different Rates you charge for each piece of equipment. This works exactly as previously described in the **Rooms** module.
5. If you are making a Collection, see the Equipment chapter for more info.

This is all you need to do here for now. For more information about Equipment, see the **Equipment** Module chapter for more information about this module.

Click the *Main Menu* tab to return to the **Main Menu** and proceed to Step Six!

Step Six: Your (blank) Media Inventory

To be able to book media for a Project, Studio Suite must first know that the “type” of media exists, and that there is a Quantity of it in stock.

The **Media Inventory** module keeps track of how much media you actually have in stock and which media is bookable. It also acts as a reference database of all the various kinds of media you may ever deal with (even if you do not typically stock it) to help specify media types in **Library**. It interacts with the **Projects** module, automatically reserving media when it is added to a Project and automatically removing it from inventory when it is actually used (reconciled).

How to add media to your Media Inventory:

1. From the **Main Menu**, click the *Media Inventory* button to go to the **Media Inventory** module. Some common media types have been pre-entered.
2. If you are using media that is not already entered, create a new record by clicking the *New* button in the *Function Bar*, which will create a new record and switch you to the *Detail* tab.

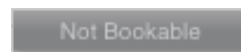


3. Click each field and select the **Brand**, **Size**, and **Format** of the media you are using from the pop-up menus. If your particular selection does not appear in the menu, you can add it by selecting “Edit”.
4. In the Media Code field, enter either the manufacturer’s model code or your own made-up code. Make sure the code fully and uniquely describes the media type. There are some suggested code formats in purple text (to the right of this window).
5. If you will be using a Barcode reader, scan the media’s barcode into the **UPC Barcode** field, to allow for adding this media to a project via barcode.
For more information about Barcodes, read the Barcodes chapter in this user’s guide.
6. In the **Qty in Stock** field, change the value to reflect how many you currently have in stock. Since you haven’t reserved any yet for a Project, the **Available for Use** field should show the same quantity as the **Qty in Stock** field.

7. In the **Min Alert** field, set the minimum number that you should ever have in stock. If the **Qty in Stock** ever goes lower than this number, you will receive two types of alerts: (1) The record will be highlighted in yellow and (2) an alert message will appear when starting Studio Suite.
8. Media must be defined as *Bookable* for it to appear in the pop-up menu in the **Projects** module. Click the *Bookable/Not Bookable* button to make the media Bookable.



OR



9. Media prices are stored as Rates in the **Rates** module. Entering a Unit Cost or Sale Price will automatically create a new Rate for this media. If you sell this media at various different prices, click in the *Rates* tab to enter in multiple Rates. Within a Rate you can specify “split rate” structures, so that different quantities of media have different prices. See the Rates chapter for more information on this.

There are a few more tricks to the **Media Inventory** module, as described in its chapter of the User's Guide. The important thing for now is to be certain you have each type of media entered, defined as *Bookable*, and with a sale price.

Step Seven: Define Your Services

So far, we have entered specific “resources” into Studio Suite: People, Rooms, Equipment and Media. These types of resources have many special kinds of details about them, so each type has its own module. You may provide (or bill for) services that do not necessarily fit into one of those categories of items. These can be defined in the **Categories & Items** module.

How to define your services:

1. From the Main Menu, click the *Categories & Items* button. This lands you on the *Items* tab.
2. You can use the **Category Filter** and **Item Filter** fields to narrow down the list of Bookable Items on the left.
3. Click the green *Create New Item* button, to view the **Create/Edit** Item window.
4. From the **Category** field, select “Services” (or any appropriate Category). You may type in an optional **Sub-Category**.
5. Give the service a name in the **Item** field.
6. Enter other details, as well as Rates on the *Rates* tab, as needed.
7. If a service always comes with other resources (ie, the “Editing” service always comes with “Edit Suite 2”), you may use the “Also Book” area to define those dependencies.
8. Click *Continue* to return to the **Categories & Items** screen, where you can continue to create more Service items.

Congratulations! You have completed the *Seven Things You Must Do* chapter and Studio Suite is now prepared to manage your facility. Read the following chapter to learn about the **Main Menu**.

8

Tutorial

SSX

This tutorial will take you on a tour of how to use Studio Suite by walking you through a project from beginning to end. It is best if you have performed the *Installation*, and have read the *Studio Suite Basics*, and *Seven Things You Must Do* chapters of the User's Guide before you proceed.

Some sample data has already been entered in the **Contacts, Rooms, Equipment, Media Inventory, Productions, Projects, Calendar, Library & Labels, Recall, Rates, and Invoices** modules, however feel free to enter some of your own data as you go along. Most of the pre-entered data (**Contacts, Rooms, Equipment, Rates, Etc**) is flagged as “sample data” to be deleted eventually, so don't modify it and consider it “keeper” material as it will vaporize if/when you perform the “Delete Sample Data” function.

Keep in mind that this tour is only scratching the surface of the capabilities of Studio Suite, and you will be performing mostly basic functions for the project below. Please also realize that there are many “workflows” available in Studio Suite - the one we describe here is only one of many ways to go about it. More detailed information about each module can be found in the associated chapters located in this User's Guide.

When you are finished with this tutorial, take an exploratory trip through all of the Studio Suite modules. You will be surprised by all you find!

In this chapter you will read about:

- Studio Suite Structure
- How to launch Studio Suite
- The Contacts module
- The Rooms module
- The Rates module
- Calendar views

- The Calendar module set up
- How to book a Project using the Timeline view
- How to create a Project
- How to add people to a Project
- How to include financial details for a Project
- How to edit details once a Project is created
- How to add items to a Project
- How to create hierarchical relationships between items in a Project
- How to add Tasks and Notes to a Project
- How to print a report of a Project
- How to view Project bookings in the Calendar module
- How to create a new Media asset
- How to log the contents of a folder or a hard drive
- How to add individual spots, cue versions, songs, etc. to a media asset
- How to deliver a media asset electronically
- How to print labels
- How to add media to a project
- How to use the QuickLog
- How to edit the details of an existing project
- How to apply a payment to an invoice
- How to print an Invoice
- How to apply a check to an Invoice
- How to release a client's media from Library & Labels

Structure: Productions, Projects, Events, Categories, Items & Rates! Oh My!

Here is the basic structure of project and resource management (and accompanying modules) in Studio Suite
- read it a few times, memorize it.

Studio Suite Structure:

- One Production contains many Projects.
- One Project contains many Events.
- An Event is when a specific resource or service (ie, a "Bookable Item") is scheduled, typically at a specific date and time, and probably for a price (as defined by a Rate).
- Bookable Items come in different Categories (Rooms, Equipment, People, Media, Services, etc).
- Each Bookable Item can have many Rates.

And again backwards:

- Bookable Items (Rooms, Equipment, People, Media, Services, etc) can have many Rates.
- Bookable Items come in different Categories (Rooms, Equipment, People, Media, Services, etc).
- An Event is when a specific Bookable Item (resource or service) is budgeted or scheduled, typically at a specific date and time, along with a Charge and Expense (as defined by the associated Rate).
- A Project contains many related Events.
- Some groups of Projects can be a part of a larger Production.

Each Project can also have linked Tasks, Media Assets (Attachments and Library items), and one or more Invoices.

Now that you've got that structure thoroughly memorized, let's get started!

How to launch Studio Suite:

1. Launch Studio Suite by double-clicking the Studio Suite icon in your Dock (Mac) or on the Studio Suite alias or shortcut on your desktop (PC).
2. Enter your **User Name** and **Password** (or continue with "Admin" and "Admin").
3. Click *Log In*.

The game plan...

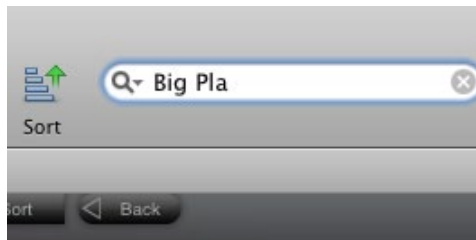
- First we'll create some items - a Client, an Employee, a Room, and a piece of Equipment (optional)
- Once we've got those, we go to the Calendar to create a Project
- Then we'll add some Tasks and Library items (media assets or elements)
- Then we'll make an Invoice
- After all that, we'll see how it all has been automatically linked back to the Client!

In the Office

The first two steps of the game plan is to create a Client and an Employee. Both of those tasks are done in the **Contacts** module.

Contacts - Explore!

1. From the **Main Menu**, click the *Contacts* button (or press ⌘-2 (Mac) or Ctrl-2 (PC)) to go to the **Contacts** module. You'll be on the *Detail* tab.
2. In the upper right of the screen, click in the **QuickFind** field and type "Big Pla", then press either TAB, ENTER, or RETURN (or click outside the field).



3. This will return a list of **Contacts** that work for Big Player Productions.
4. Click the *GoTo* button on the left near James Johnson's name.
5. You will be on the *Detail* tab. There is an "X" in the checkbox for **Client**, indicating that they he is one of your clients. (Mark all applicable **Client**, **Vendor**, and **Employee** checkboxes for each new contact so they will appear as needed throughout Studio Suite in specific menus. The rest of the fields are optional!)
6. Experiment with the black and green *New* buttons on the left side to create new records for **Callbacks**, **Calls & Notes**, **Letters**, **Faxes**, **Emails**, and **Additional Personnel**. These areas help keep track of all of your important communications with each client, and the additional people that work for each company.

7. Click on each of the tabs along the top of the screen to become familiar with the different types of additional information you can track for each of your contacts in the **Contacts** module). Notice that some tabs have red dots on them, indicating there is data there to look at.
8. Click the *Financial* tab, where you can define the **Billing Terms** and **Credit Limit** you want to extend to Big Player, as well as view a list of their previous invoices and whether they have been paid or not.
9. Clicking the *Rates* sub-tab will show the special rates you give only to Big Player.
10. The *Media Asset* tab is a portal to the **Library** module, which shows every media asset (or element, or media asset) that Big Player has ever had in your studio, and its current IN/OUT-**Status**. (we use the word “media asset” generically, to mean any object, literal or virtual, that contains content - it could be a hard drive, CD, DVD, a cartridge, P2 card, element, folder on a disc, file, or a media asset of film or tape.
11. Clicking a **Media Asset Title** field for a line item will highlight it yellow, and display detailed information including the **Titles** on that media asset in the yellow display area below.
12. Create a new **Contact** by clicking the black and green *New* button in the *Function Bar* at the top of the window, which will return you to the *Detail* tab.



Enter as much information as you like, making sure that the **Client**, **Vendor**, and **Employee** checkboxes are checked appropriately.

13. Now let's create an **Employee**. Click the black and green *New* button, and enter the details of one of your employee/staff members. Enter something in the **Title/Position** field. You can use the menu (which you can edit), or double click to type something in.
14. Click the gray *Not Bookable* button, and click “Yes” when asked if you want to appear in the **Calendar**.



The button will now be green and say “*Bookable*”, and this person will appear in the **Calendar**. The next section describes what Bookable means.

15. Chose the **Bookable Category**: *Person* or *Company*.
16. Now, go back to the **Main Menu** by pressing the black *Main Menu* tab in the top, right corner, or by pressing ⌘-1 (Mac) or Ctrl-1 (PC).

For more on **Contacts**, visit the **Contacts module** chapter in this manual.


Contacts, Rooms, Equipment & Media Inventory modules: Bookable Items

As described in the **Studio Suite Basics** chapter, some items in the **Rooms, Equipment, Contacts,** or **Media Inventory** modules can be made “**Bookable**” (i.e., made available as a resource in the **Calendar** and **Projects** modules). Below each *Bookable* button is a menu which allows you to specify which **Category** the **Bookable** item will belong to; for now leave these as they are.

When an item is made **Bookable**, you can decide whether or not you want the item to immediately appear on your calendar. Note that this process is only part of the initial “setup”, and *not* something you have to do every time you create a project!

The four types of items mentioned above (**Rooms, Equipment, Contacts, Media Inventory**) have specific modules, but you can create items that don't fit into those four categories (such as Services, Deliveries, Dubs, Creative Fees, etc.) in the **Categories & Items** module. For now, let's explore the **Rooms** module.

Rooms module tour:

1. From the **Main Menu**, click the button for **Rooms** module in the bottom left of the screen, beneath the “Tech” section.
2. You will see a list of all the Room records.
3. Click the *Go To* button  to the left of the room “Edit 2”. You are now on the detail page for Edit 2. Take a moment to see all of the information that can be stored about each room on the different tabs. Note that we have already created a couple **Rates** for this room on the *Rates* tab.
4. Back on the *Detail* tab, at the top of the screen you will see a gray *Not Bookable* button. Press this button.
5. A prompt will appear asking if you would like this item to be viewable in the **Calendar** module. Select Yes.
6. You will notice the button is now green and reads, “*Bookable*.” This indicates that the item is available to be booked on a project.

*Now let's add a new room to your studio and make it **Bookable**...*

8. Click the black and green *New* button at the top of the window. Enter a **Room Name**, and a **Room Type**, then click the *Not Bookable* button, and when prompted, click Yes to make it appear in the **Calendar**. Easy!

For more on **Rooms**, visit the **Rooms module chapter** in this manual.

Rates module

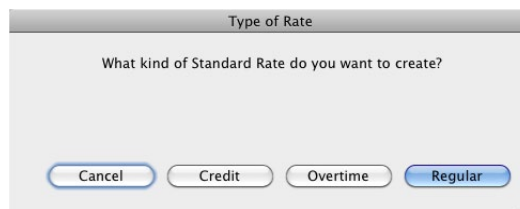
Each **Bookable** Item can have one or more **Rates**, and one of those **Rates** can be specified as the “Default” rate for that item.

Rates module tour:

1. To define a **Rate** that you charge for this room, click the *Rates* tab, then click the black and green *Create New Rate* button.



Then you will see...



2. A Dialog will appear asking what kind of **Rate** you want to create. For now, click *Regular*, which will drop you in the Rates - **Create New** screen.

Rates - Create New

| | | | | | |
|--|--|---|--|---|----------|
| Internal Accounting Details 1 Category: Rooms 2 Sub-Category: Edit Suite 3 Item: Avid 1 Rate Name: Avid 1 Daily | | Client: Comapny Name, Steven Johnson Action: Edit - On Line Rate Card: 0 All | | External Accounting Details 4 Class: Avid 1 Item Type: Service Item Name: Avid 1 Account Name: Revenue Account | |
| Unit of Measure: Hour(s) Qty. From To Charge Expense Profit Market 0 999 475.00 30.00 445.00 1,483% 500.00 | | Tax Settings LA County Tax C All | | Overtime Rate Specs Hours Before OT: 475 Charge: 475 Expense: 375 Uses OT Rate: 20.00 Avid 1 OT C | |
| <input type="checkbox"/> Include In Rate Card <input checked="" type="checkbox"/> Is Normally Invoiced <input type="checkbox"/> Commissionable | | <input type="checkbox"/> Use as "Child Item" Rate <input type="checkbox"/> Exempt From Client Discount <input type="checkbox"/> Exclude from Un-Invoiced Item Reports | | Set As Default: D Default For Item = Default For Client = | |
| Invoice line items containing this Rate will have a description in based on the following, in this order: Start Date Start Time End Time Action Rate Name | | | | | |
| Additional Invoice Text | | | | | |
| R-15 TotalDesignation R-15 RelatedTotalDesignation | | | | | Continue |

3. You'll notice that the **Category** (1) and **SS Item** (2) have been pre-entered for you, as well as an **SS Rate Name** (3). The **Rate Name** is suffixed with a sequential number to guarantee that it's unique (which is required). You can remove this number, as long as the **Rate Name** continues to be unique. You may want to rename the **Rate** something like "Edit 2 Hourly", or something like that.

The second row of fields (4) are used to specify how this **Rate** will sync with QuickBooks (QB), or other 3rd party accounting software. Ignore these for now.

4. Box 5 is where you specify the **Unit of Measure** used to calculate this **Rate**, and where you enter the **Charge** and (optional) **Expense** for this Rate. The **Qty.** (Quantity) fields are used for items sold by the piece (with "Each", or "One Time" selected as the **Unit of Measure**), such as CDs, DVDs, Tapes, etc. . This doesn't really apply for **Rooms**, so leave them as 0 (**From**) and 999 (**To**).

If you specify a **Unit of Measure** of "Day/s", you'll see additional fields labeled **Bill Days per Week** and **Bill Days per Month** appear. These allow you to specify the number of days that you bill for long term (week or month) bookings, typical for equipment rentals.

The screenshot shows the Studio Suite X interface. At the top, there are two dropdown menus for 'Unit of Measure', both set to 'Day(s)'. To the right, there are two input fields: 'Bill Days per Week' with the value '7' and 'Bill Days per Month' with the value '28'. A red arrow points from the 'Unit of Measure' dropdowns to the 'Bill Days per Week' field. Below these fields is a table with columns: From, To, Charge, Expense, Profit, Market. The first row shows '1' in 'From', '999' in 'To', '150.00' in 'Charge', '10.00' in 'Expense', '140.00' in 'Profit', and '1,400%' in 'Market'. To the right of the table is a 'Tax Settings' section with a 'Multi Select' dropdown and a list of taxes: 'San Diego Tax' and 'LA County Tax'. Below this is an 'Overtime Rate Specs' section with a 'Hours Before OT' field set to '8', a 'Price/Unit' field, and a 'Uses OT Rate' checkbox.

5. Once you have entered all the information you need, click the green *Continue* button at the bottom, which will return you to the **Rooms** module. Create additional **Rates** for this **Room** or others by clicking the black and green *Create New Rate* button again.
6. Optional: now that you know how to create new items, make them **Bookable**, and create **Rates** for them, navigate to the **Equipment** or **Media Inventory** modules to create new items there, along with associated **Rates**.

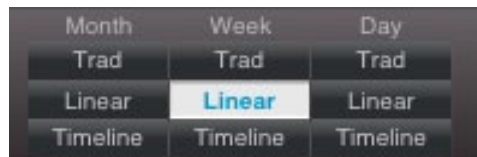
For more on **Rates**, visit the **Rates module chapter** in this manual.

Now, go to the **Calendar** module using by pressing ⌘+4 (Mac), or Ctrl+4 (PC).

Calendar module

The **Calendar** module is used to view and book sessions, **Task's**, and to track miscellaneous events like meetings, birthdays, etc.. There are three types of calendar views (in 3 different time zooms), accessible by the *Navigation* buttons in the upper left corner:

Calendar Views:



- **Traditional (Trad)** views look like a traditional wall calendar.
- **Linear** views resemble a grid or “gant” graph, showing time across the top, and bookable items (**Rooms, Equipment, People, Media, Misc.**) down the left side.
- **TimeLine** views are a more modern, fluid version of linear/gant views that allows zooming the time range, and dragging of events forward and backwards in time, and up and down from one Item to another.

The views are visible by the **Month, Week, and Day**, giving you nine different perspectives to view booking activity. Some views also show **Tasks** and **Daily Notes**.

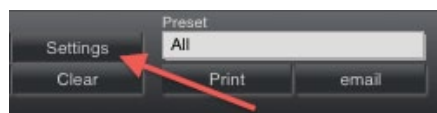
The items that are visible in the **Calendar** are (some of) the ones that have been made **Bookable**. Studio Suite downloads with some sample items already entered as **Bookable** for the **Rooms, Equipment, People** and **Media Inventory Categories**. You'll notice that items you just made **Bookable** are at the bottom of the list. Let's adjust the display order...

Settings button: Calendar Set-up

In the following steps, you will configure your **Calendar** setup. You will **not** need to go through this process for every booking, but for the purpose of this tutorial, let's take a look at the setup process. This setup process will give you an overview of how this **Calendar** can be tailored to your needs, and reveal its power and flexibility!

Press the *Settings* button in the upper right, so we can view and edit the calendar settings.

Calendar module tour / set up:



1. You should be on the *Calendar - Items* tab, the 2nd one from the right.
2. On the left of the screen you will see a filtered list of **Bookable Items**. On the right you will find the **Calendar Resources** list. From here you may choose not only which items appear on the **Calendar**, but also the order in which they appear.

- To do this, adjust the number that appears in the **“Display Order”** field. Change the **‘X’** to the number **1** by clicking in the field and choosing **1** from the drop-down menu. While you’re here, adjust the position of the other item/s you created as well.
- Items that are highlighted in yellow will appear in the **Calendar**. You may toggle this visibility on and off by clicking on the items.

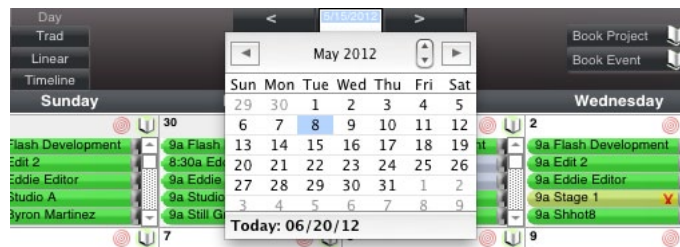


- Now press the blue **‘Back’** button to return to the **Calendar** page. You will now see the items listed in the order you specified!

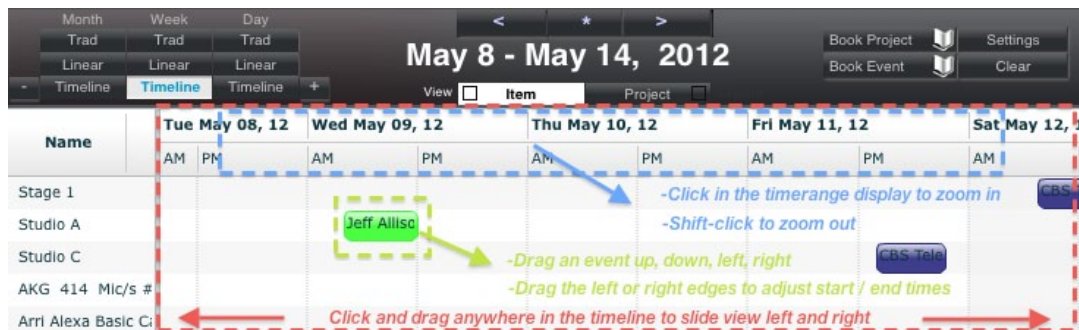
For more on **Calendar**, visit the **Calendar module chapter** in this manual.

Book a Session

Use the **View Selector** to view the **Timeline Week** view and click on the date range display to view the current week (if it’s not already being displayed). If you’d like to pick a different date, click in the **“star”** in the middle of the **< >** arrows, and navigate to a new date in the popup calendar.



In the **Timeline** view, you can also simply drag the **Timeline** left or right. Zoom in by clicking on the top of the timeline (where the dates & times are indicated), or you can zoom out by shift-clicking the same area.



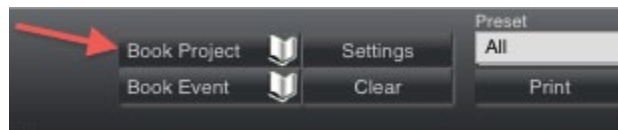
Let’s book the **Project**! We’ll use the **Timeline** view for the first part.

How to book a project using the Timeline view:

1. Zoom into any day by clicking a day or date in time display area of the **Timeline**.
2. Double-click at the start time for Edit 1, which will drop a box onto the **Timeline**. Drag the right side of it out to the desired end time.
3. Option-click (Mac) or Control-click (PC) the box, and drag it down to Eddie Editor's row (or someone else's). We'll save the remaining items we need to book to demonstrate other booking methods later.

| Name | Thursday July 19, 2012 | | | | | | |
|--------------------|------------------------|-----------|-----------|-------|-------|------|------|
| | 8 AM | 9 AM | 10 AM | 11 AM | 12 PM | 1 PM | 2 PM |
| Edit 1 | | New Event | | | | | |
| Edit 2 | | | New Event | | | | |
| Stage 1 | | | | | | | |
| Studio A | | | | | | | |
| Studio B | | | | | | | |
| Studio C | | | | | | | |
| Arri Alexa Basic C | | | | | | | |

4. To "book" this **Project**, click on the black and green *Book Project* button in the *Content Palette* at the top-right of the screen.



5. A pop-up dialog will appear asking: "Add to an existing project or create a New Project?" Click on the New button.

Projects

You will now be in the *Create New Project* screen of the **Projects** module, where you will enter details about the project to complete the booking process.

Projects **CREATE NEW PROJECT**

*Yellow fields are required.

Production: 4 The Mentalist - Season 2 Company Selector: 2 - Super Bangin' Studios

Client: 181 Andre Engineer Office Fax: 123.456.7890 email: Andre@andreengineer.com Client PO Required Field: ☐

Balance Due: Overdue: 31-60 Days Over: 61-90 Days Over: 91-120 Days Over: 121 Days Over: TOTAL Billed: 1,639.00 Year To Date:

Project Name: Red Sky at Night Episode: 8 Language: Project # 11918

Start Time: 10:00 AM End Time: 5:00 PM Event Status: Confirmed Project Type: TV Project Status: Approved to Print

People:

| Add | Title Name | Filter Names | Phones | | Add To Contacts | Position On Library Labels |
|--------------------------|------------------------------|--------------|--|--|--------------------------|----------------------------|
| <input type="checkbox"/> | Producer Raymond J Givins | | Office Phone 310.701.3589 ex:0011 Office Fax | <input checked="" type="checkbox"/> rgivins@staunchproductions.com | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | Director Kenneth M. Miller | | Office Phone 805.791.8273 ex:11 Office Fax | <input checked="" type="checkbox"/> kmillerca@sbcglobal.net | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | Editor Paulmichael Contreras | | Cell: 818.555.0114 | <input checked="" type="checkbox"/> paulmichael@studiosuite.com | <input type="checkbox"/> | <input type="checkbox"/> |

Notes:

Allow Release Of Client Material: ☐ No ☐ Yes

After you have entered at least the yellow fields, click the NEXT>> button to view scheduled items. You can enter more client information later by clicking on the Client Info tab.

Cancel Project Creation Create Quote ☐ Create Actual ☐ Next >>

Client Terms, Tax, and Discount values are looked up from the Contacts module. Changes made here will only affect THIS project.

Sales Person:

Terms: 30 days

Tax Rates:

| | Rate | Exempt |
|-----------------|-------|--------------------------|
| A LA County Tax | 8.75% | <input type="checkbox"/> |
| B | | <input type="checkbox"/> |
| C | | <input type="checkbox"/> |

Discount Rate:

Rate Card: 0 All

How to create a Project:

1. The cursor will be in the **Who** field of the **Client** section, and a pop-up menu of people marked as a “**Client**” in the **Contacts** module will appear.
2. Select a client, then enter the name of your **Project** in the **Project Name** field.
3. The **Booking Status**, and **Project Type** are automatically entered from the default settings, but you can edit them if you wish; ignore the **Start** and **End** times since we already entered them in the **Calendar**.
4. Change the **Project Status** to ‘**Confirmed**’ if it isn’t already. (Note - you can create your own statuses and status colors in the Calendar settings area).

How to add People to a Project:

1. The **People** section stores all of the people participating in this project.
2. If you click in the **Name** field next to each **Title**, you’ll see a list of people from the **Contacts** module who have that matching **Title**.
3. Click in the **Name** field next to the **Title** “Producer” and select “Joe Producer.” You will see that his **Phone** number and email have been automatically looked-up.
4. The **Titles** that appear here can be deleted or changed per project from this page, or globally from the **Main Menu Setup**.

How to include Financial details for a Project:

1. In the **Financial** section, some of the information about the client is looked up from the *Financial Info* tab of their **Contacts** record.
2. You can adjust the billing **Terms** and **Tax** and **Discount Rate** fields per project.
3. You may see that the client has an outstanding **Balance Due**. At this point you should probably change his billing **Terms** of “30 days” to “0 Days-COD” (from the pop-up menu) for this project until they get current. You may also want to verify that the **Client Media Release Setting** is set to “No”, so you don’t release their finished work until you get paid.
4. Click on the **NEXT>>** button which will book all of the marked Items.
5. Studio Suite will then check for and notify you of any booking conflicts.
6. When asked to “Do you want to view more Project Details or Return to Calendar?”, click *Project*, which will take you to the *Events* tab in the **Projects** module.

Congratulations! You have successfully booked a project from the **Calendar** module, and are now ready to explore the project’s details in the **Projects** module.

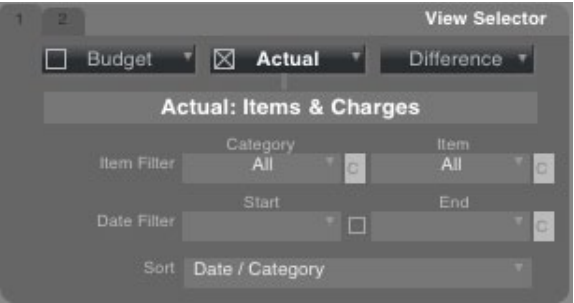
Project Details

You should now be viewing the *Events* tab of the **Projects** module with information about the new project displayed, including Edit 1 and Eddie Editor. You’ll notice that beneath Edit 1 is the Sony DVW video deck, which has been setup as an “Also Book” for Edit 1, so it’s booked automatically whenever Edit 1 is booked. You can adjust how line items in a **Project** are sorted with the *Sort* menu (above the *Set Status* button). There is more information about Hierarchies below.

Identical information was created in both the *Budget* and *Actual* areas (displayed by clicking their respective buttons in one of the View Selectors).

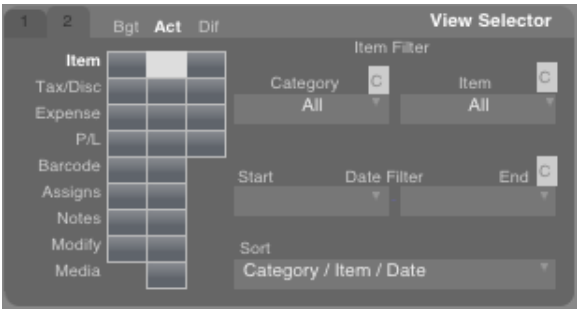
How to use the View Selector:

View 1



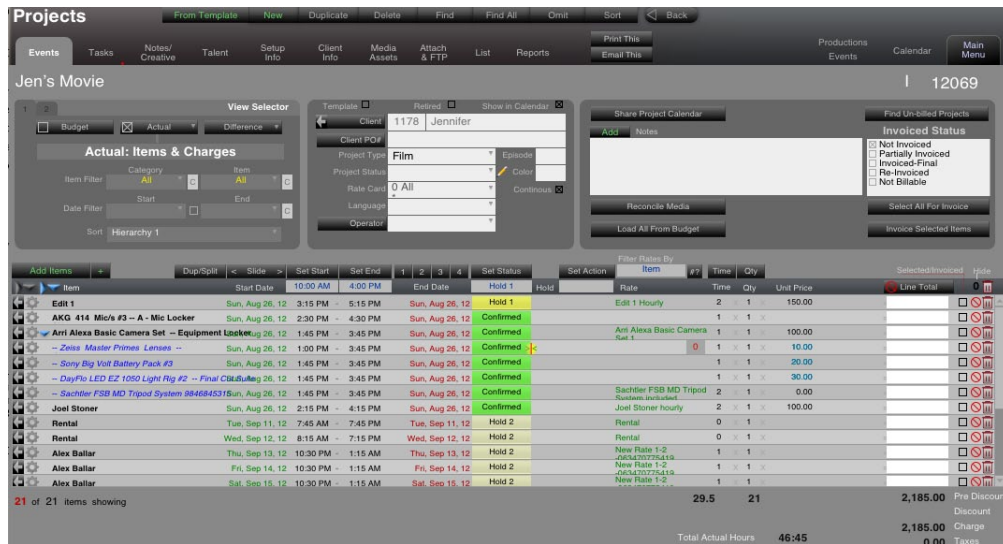
1. Under the *View 1* sub-tab, choose from the drop down lists under '**Budget**', '**Actual**' or '**Difference**'. Note if the box is unchecked in the header for one of those drop down menus, there will be no information displayed.
2. You also have the drop down option to chose additional filters such as: **Item Filter** (by **Item** and/or by **Category**), **Date Filter** (**Start Date** and/or **End Date**) and **Sort** order.

View 2



1. Under the *View 2* sub-tab, chose the button at the intersection that best describes the view that you are looking for.
2. You also have the drop down option to chose additional filters such as: **Item Filter** (by **Item** and/or by **Category**), **Date Filter** (**Start Date** and/or **End Date**) and **Sort** order.

NOTE: More detailed explanations of Budget, Actual and Difference views are described later in this section.



How to edit details once a Project is created:

1. You will see an individual row (event) for each Item booked.
2. If there is one, the default **Rate** for each Item has been entered automatically (green text). Clicking the **Rate Name** will show other **Rates** you can assign to each Item. For now there may be just one. The **Quantity** will be calculated based on the **Rate** definition to count hours, days, each, etc.
3. You can override the **Quantity** and **Price**, and these will show in blue so you can see you've altered them from the default values.
4. You can adjust any **Item**, **Start** and **End Dates**, **Start** and **End Times**, **Status**, etc., per individual event by clicking on the item.

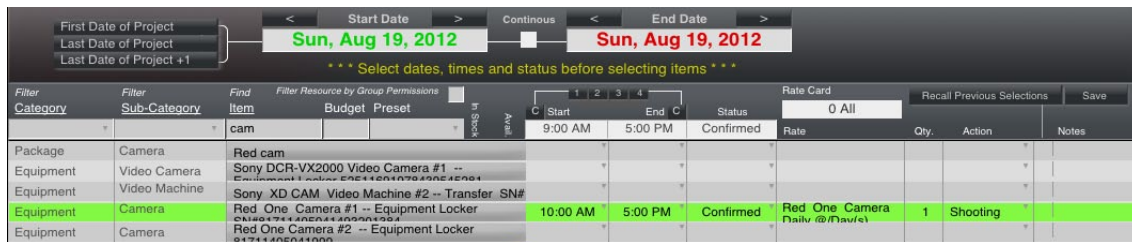
Filter

You can optionally filter your items in the Events list to show only those that belong to a particular **Category**, **Item**, or **Date Range**. For the purpose of this tutorial, leave the **Category** and **Item** filters set to 'All' and the **Date** filter blank. If necessary, click the C button next to the date range filter to clear any dates.

How to add items to a Project:

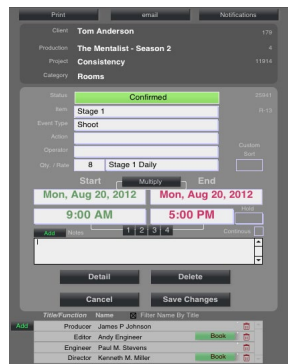
1. Click on the black and green **Add Item** button (at about 9 o'clock on the screen), and the **Item Picker** window will appear, showing your Bookable items. You can filter the items by Category, Sub Category, Preset, or you can just type the name of the item you're looking for in the **Item** field, reducing the list of items as you type.
2. Select a **Date**, **Time**, and **Status** from the fields at the top. If you are booking an event that spans several days (such as a 4 day equipment rental), click the **Continuous** checkbox to have it appear as one line item on the **Project**. If you want the long event to create a line item for each day (such as 4 days of studio time that starts and stops each day), leave the **Continuous** checkbox unchecked.

- Click the name of the item/s you wish to book. As you select items, the row will become the color associated with the status you have specified.



- When you have selected all your items, click the black and green *Add to Project* button (at the bottom of the screen), which will book the items and return you to the Projects window with the new items added. You can click the *Add Items* button again to add even more items.

*Note: You can edit the booked items / **Events** by clicking on an event, which will bring up the **Edit Event** window. You can re-assign different items, or adjust the date, time, or make notes.*

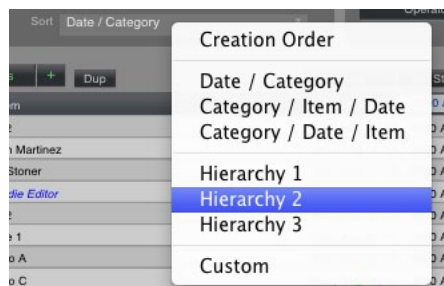


- Click the *Save Changes* button. You may or may not now see the Multiple Event Handler. This window will appear when you edit an item on a day with multiple items. This enables you to make changes to many events simultaneously, convenient when changes such as start time or status occur. Click yes or no.

Hierarchical items

How to create hierarchical relationships between items in a Project:

- From the **Sort** field, select "Hierarchy 2"



2. You'll notice that the Sony DVCW 1000 now appears below Edit 1 with an expanding/collapsing triangle, to show or hide the "Also Book" or "child" items.
3. To manipulate these parent/child relationships, click on the *Assigns* button in the View Selector, and explore the *Select*, *Assign to Me*, and *De-Assign* buttons.



4. Notice that when child items contain a price, that price is added to the parent item when the child is collapsed.

Additional information - Tasks, Notes...

You may want to add some specific Tasks to the project. Click on the *Tasks* tab and explore.

How to add Tasks and Notes to a Project:

1. Click the black and green *New* button at the left of the screen to add one Task, or click the *Load Task Group* button to load any of a group of user-definable task groups.
2. For each task, you can specify a **Priority**, **Status**, **Task**, **Due Date**, **Time**, (number of) **Days** and **Hours**, and who each task is **Assigned To**.
3. Each Studio Suite user will see their Tasks on the **Main Menu**. Tasks are visible on the **Calendar**, and can be viewed, edited, and managed from within the **Tasks** module as well.

You may also want to add some general notes about the project. Go to the *Notes* tab, enter them there, by clicking the *Add* button, which will place a Date/Time/User stamp in the text area, with the cursor ready for you to type.

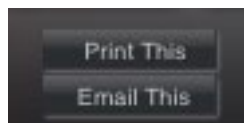
Reports

You are now ready to print reports about this booking.

How to print a Work Order, Printout or Report of a Project:

1. For a quick print, you can just click the *Print This* button upper right of the screen, just to the right of the *Print Menu* tab.
2. You can also click the *Email This* button, which will create a .pdf and give you the option of creating an email in your default email application (Outlook, Mail, Entourage, etc), or emailing directly out of Studio Suite (which requires that you have setup the email settings in the current User Account).

NOTE: the ability to create a .pdf is disabled in the demo version of Studio Suite.



3. To see more report options, click on the *Print Menu* tab to see the different reports you can generate about each project.
4. To view reports based on Events, there is a big button: *Other Report Options from Events*, that will take you to the Events module which features a wide selection of additional reports based on Item usage within a date range, etc.

For more on **Projects**, visit the **Projects module chapter** in this manual.

When you are finished looking around the **Projects** or **Events** modules, click on the *Main Menu* tab to go to the **Main Menu**.

To Recap

So far, **In the office** you have created a Client and a staff member in **Contacts**, created a Room with Rates, booked items in the **Calendar** into a **Project**, added more items, adjusted **Rates**, **Quantities** and **Prices**, added **Tasks** and **Notes**, and did some reporting.

It is time to get out of the office and begin working on this project in the studio. Click on the *Main Menu* tab to go to the **Main Menu** (if you are not there already).

In the studio

In this section, you will:

- View the bookings in the **Calendar** module.
- Keep track of related media in the **Library** module and the **Titles** module.
- Add some media in the **Projects** module.

Calendar

In the studio you will probably have a computer workstation also running Studio Suite (requires a Seat License).

How to view Project bookings in the Calendar module:

1. From the **Main Menu**, click on the *Calendar* button which will take you to the **Calendar** module.
2. You may need to navigate to the appropriate range and the desired view.
3. Roll your mouse over the events to see more details about each event.
4. In the **Timeline** view, you can simply drag the event up/down/left/right, or drag the left or right edges to adjust times for the event.
5. You can also double-click an event to view and edit its information, then click the *Save Changes* button and return to the **Calendar** view.
6. SHIFT-click on an event, and you will be taken to the **Projects** module, showing all of the events and details for that project.

Next we will explore the modules that deal with the media generated during a session.

Library, Labels and Titles

From within **Projects**, click on the *Media Asset* tab, which shows us a window into the **Library** module, showing all the media assets for this project. Since there isn't any media yet, click on the black and green *Create NEW related media asset in Library* button. This will present the **Create New Media Asset** screen.

Before we proceed, some background: The **Library** module is where you track pieces of media - we refer to them as "media assets", but they can be any container or collection or "element" content: reels, tapes, P2 cards, SD cards, cartridges, CDs, DVDs, a folder on a hard drive, an entire hard drive, or whatever. Each database record in the **Library** module corresponds to a "media asset".

Each media asset can have one or more **Titles** (spots, cuts, clips, cues, scenes, shots, songs, images, animations, etc.) entered by hand, and held in the **Titles** module.

Each media asset can also have one or more "Disk Logs" which are scans of folders or hard drives, storing all the folder and file names in a selected volume or folder, along with some basic metadata.

You will need to enter some general information about this new media:

How to create a new media asset:

1. The **Project** and **Client** fields will automatically be filled in, based on the Project information.
2. Click the **Media Asset Title** field and name it "Tutorial Media asset".
3. A Library number and Barcode have been created (you may specify a starting number for both in the Setup area).
4. The **Date Acquired** and **Time Acquired** fields automatically filled in with the current information.

5. Optional: Click on the *Detailed* and *Tracks* tabs to enter further information.
6. Click *Done*. This will take you to a new media asset in the **Library** module with all of your project information filled in. You can enter more information as needed (or not).
7. If you will be working on a hard drive instead of tape, click the **Drive** field (third column, above the *Bookable/Not Bookable* button), showing a pop-up list of equipment marked as a **Library Hard Disk** in the **Equipment** module. Make your selection from the menu. This **Library** content is now linked to that hard drive, and can be viewed from the **Equipment** module!

How to log the contents of a folder or Hard Drive:

1. Still in the **Library**, click on the *Disk Log* sub-tab (about 3 o'clock on the screen).
2. Clicking on the *Log a Directory* button will present a standard file browser; choose a folder with a few files in it and click *OK* (the more files there are, the longer it takes)

NOTE: You can select a folder or an entire drive, and Studio Suite will log the entire contents of that folder or drive into Studio Suite, allowing you to search for a particular file even when the drive isn't mounted.

NOTE: File and folders within a Disk Log are not stored within Studio Suite, only a path to where they are.

3. Clicking on a file name in the Disk Log will open it in its native application directly from within Studio Suite.

We have just logged all the digital assets, in relation to the physical object they're on, in relation to the Project, and in relation to the Client! Boom!

Titles

Now click on the *Titles* sub-tab. This is where you can add individual spots, cues, versions, songs, etc to this media asset.

How to add individual spots, cue versions, songs, etc. to a media asset:

1. Click in the **Titles** field to add two or three titles to this Media asset - "Spot 1, Spot 2, and Spot 3". Each time you add a **Title** then tab into the **Comments** field, Studio Suite creates a new record in the **Titles** module, and adds a new blank row for another title.
2. If appropriate, enter the timecode start and end times in the **TC Start** and **TC End** fields.

Optional:

1. Click on the blue *GoTo* button for one of the Titles.
2. This will take you to the *Detail* tab in the **Titles** module where you can enter much more detailed information about each **Title**. There are tabs for *Lyrics/Script*, *Takes/Locates*, *QC (Quality Control)*, *Production Notes*, *Storyboard*, *Publishing & Copyright (& Submissions)*, *Keywords*, and *List*. Browse through the tabs to become familiar with the information they store.
3. Return to the **Library** module by clicking the red "*Library & Labels*" tab in the upper right.

Attach & FTP tab

Back in the **Library** module, click the *Attach & FTP* tab. Here you can attach any file on your computer or shared network drive to this media asset, such as FinalCut files, ProTools session files, Photoshop, Word, Excel, movies, documents, or any other kind of file (as explained in the *Attach tab* section of the Studio Suite Basics). You can also attach URLs and Proxies, to document the location of files on the web or network.

There is also a built in FTP client, allowing you to retrieve and send files from within Studio Suite. The advantage here is that you will have a historical log of these transfers (in relation to the **Library** media asset, **Project**, and **Client**), documenting who did the transfer, when, from where to where. Studio Suite will also offer the option of billing the transfer back to a project, essentially creating a Project Line item that will show up on the Invoice, along with the date/time of the transfer.

How to deliver a media asset electronically:

1. Click the *Embed/Link File* button, and choose "Link".
2. A standard file browser will appear; select a file - your final edit or mix you want to deliver electronically.
3. You can also drag and drop a file from your desktop into this window.
4. The file is now linked to this **Library** record, and you can click it to launch it.
5. Click the *FTP* button to start the **Attach & FTP** module.
6. Enter an FTP **Server** address, **User Name**, and **Password**, and click *Connect*, which will of course connect to server.
7. Once connected, click the green *Upload File* button, and the file will be on its way!
8. You should be presented with the option to bill the **Project** with the transfer. Click *Yes*, and you'll be transferred to the **Item Picker** window with the FTP Upload already selected.
9. Click *Add to Project* and the transfer will now be a billable line item on the Project.
10. From **Projects**, click the *Media Asset* tab to see the new **Library** media assets, then click on the blue *GoTo* button to get to the Library, which will have a "found set" of the media assets on our **Project**.

Labels (optional)

How to print labels:

1. You should be in the **Library** module.
2. Click the *Report* tab to print labels for just about any kind of media (VHS, DigiBeta, CD/DVDs, Betacam, MiniDV, audio cassettes, 8mm, floppy, Barcode labels, U-matic, DAT, etc.) with or without **Barcodes**.
3. Click the button for the format you want to print. Everything is already filled out for you! These labels are user-customizable (but not in the Demo version).

For more on **Library** and **Labels**, visit the **Library & Labels module chapter** in this manual.

Go back to the *Detail* tab, then click on the blue *Go To* button next to the **Project** name. This will take you back to the *Events* tab in the **Projects** module.

Media Inventory

Now that you have added some media to this project in the **Library** module, you might want to update the project with the addition of these materials, so you can bill for them and manage your media inventory. (The **Media Inventory** module manages all of the “blank” media stock you have, as opposed to the **Library** module, which manages media that has content on it. You can explore the **Media Inventory** module on your own.)

How to add media to a Project:

1. Within **Projects**, click on the black and green *Add Item* button.
2. Select “Media” in the *Category* tab of the new window.
3. A list of media stock from the **Media Inventory** module will appear below.
4. Select a type of media.
5. Now click the black and green *Add to Project* button, which will add this as a new line item on the **Project**.

Studio Suite can reconcile your **Media Inventory** based on usage, but we won’t dig into that for this Tutorial. If you’re interested, see the **Projects** and **Media Inventory** chapters of the User’s Guide.

For more on **Media Inventory**, visit the **Media Inventory module chapter** in this manual.

QuickLog

Typically, staffers such as editors and engineers may not want to learn much about the powers of Studio Suite, but you still need them to be able to add themselves or other items (equipment, rooms, media, etc.) to **Projects** quickly and easily. For that, we have the **QuickLog** module.

How to use the QuickLog:

1. From the **Main Menu**, click on the *QuickLog* button.
2. This will present a list of Projects occurring this week. You can also type the name of the Project at the top of the window, which will reduce the list.
3. Click the *GoTo* button for the Project you’re working on, which will take you to the **Item Picker** screen.
4. Use the **Category** (and optionally **Sub-Category** fields) to narrow the list of items, or just type the name of the item you’re adding in the **Item** field to quickly find it.
5. Once you see the item you’re adding, click it to select it, then click the black and green *Add To Project* button.
6. Done! Now your staffers can easily add their time and other resources to Projects.

For more on **QuickLog**, visit the **QuickLog module chapter** in this manual.

CONGRATULATIONS! You have successfully completed the ‘**In The Studio**’ section of this tutorial. Click on the *Main Menu* tab to return to the **Main Menu**.

Back in the Office

During this section, you will:

- Update details of the **Project** to reflect what actually happened
- Make an **Invoice** and enter a **Payment**
- Release the media from the **Library & Labels** module

Projects

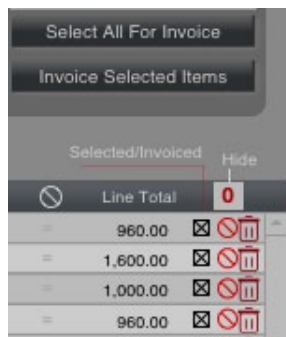
How to edit the details of existing Project:

1. From the **Main Menu**, click the *Projects* button to go to the **Projects** module.
2. Type the name of your **Project** in the search field in the upper right of the window, then press TAB, ENTER, or RETURN - you should be on your **Project!** If you're on the *List* view, there's more than one Project that matches your search criteria, so click the *GoTo* button on your project to get to the *Events* tab. You should now be on the *Actual Item* view of the **View Selector**.
3. Adjust the **End Times** of several events to reflect their actual times.
4. These changes will recalculate totals, based on the Rate definitions, and the total time and quantities.
5. When you have entered all of the *Actual* adjustments to the project, you are ready to make an invoice.
6. By navigating around on the View Selector, you can see and enter more information about the budget, budget-to-actual, expenses, taxes, and profit/loss.

Invoices and Payment

How to apply a payment to an Invoice:

1. Click on the *Select All for Invoice* button to mark an "X" in the **Selected/Invoiced** checkboxes for each item. You can de-select individual events if you don't want to invoice them now.



2. Once you have selected the items you wish to invoice, click the *Invoice Selected Items* button.
3. A pop-up dialog will appear asking "Is this the final Invoice for this project?"

- Click on *Final*, which will assign “Invoiced-Final” to the **Invoiced Status** field in the **Projects** module, then initiate a transfer of all of the checked items to the **Invoices** module.

NOTE: You could select ‘Partial’ if some events were unchecked and need to be invoiced later, or Cancel to stop the invoicing process.

NOTE: If you added media items, and your Preferences are set to require Reconciling of Media Inventory, you would be prompted to reconcile the media items with inventory.

- You should now be in the *Invoice Detail* tab of the **Invoices** module, which displays all of the details about this invoice.
- If you need to edit the detail of an Invoice line item, click its *Go To (<)* button.

You can print out this invoice, email it directly from Studio Suite, or export it to QuickBooks (additional plugin in purchase required) by clicking on the appropriate button.

How to print an Invoice:



- Click on the *Print this Invoice* button on the upper right side to print this invoice.
- You will see the invoice in *Preview* mode.
- Scroll down to see all of the details, then click on the *Continue* button in the status area.
- Click on *Print* to actually print this invoice, or *Cancel* to return to the *Invoice Detail* screen without printing.
- Click on the *Report* tab to see the different kinds of reports available in the **Invoices** module.

Let's suppose the client has actually sent you a check for the invoice!

How to apply a check to an Invoice:

- Click on the *Invoice Detail* tab and scroll down to the **Payments and Credits** area.
- Click the black and green *New* button above this area. The **Edit Invoice** window will appear.
- Click the **Date** field and choose a date the payment was made from the pop-up calendar.
- Click the **Method** field and choose a payment method from the pop-up menu.
- If the client paid by check, enter the **Check #**.
- Enter the **Amount** of the payment, or if it is the same as their **Balance** due (which it is), click on the *Make pymt Amount Same as balance* button, then enter a **Memo** if needed.

7. When you are done, click the green *Continue* button.
8. If you need to change or add information to a payment entry, click on its *Go To (<)* button.
9. Basic invoice information also appears in the Client's record in the **Contacts** module under the *Financial Info* tab.

Browse through the other tabs in the **Invoices** module to see detailed information like what invoices are overdue, and to perform tasks like printing form letters or emails requesting payment, and generating sales tax summaries, just to name a few.

Since the client has paid their invoice in full, you can release their media from the **Library & Labels** module.

How to release a client's media from Library & Labels:

1. Scroll to the top of the **Invoice Detail** screen,
2. Click the *Go To (<)* button to get to the **Projects** module.
3. In the **Projects** module, click the *Media Asset* tab to see all of the media attached to this project.
4. The red dot on this tab indicates there is some media for this project.
5. Click the *Go To (<)* button on the "Tutorial Media asset" row, which will take you to its record in the **Library & Labels** module.
6. From the **Library & Labels** module, click the *Detail* tab
7. In the upper-right corner of the screen next to **Status** you will see an *IN* button. In order to release media that is IN your library, click on the *IN* button.
8. When asked which media assets to release, click on *THIS*, then click on *Override* if warned that the Client's **Allow Release of Client Materials** status is set to "No".
9. Fill out the release information on the screen with the following: who the release was **Authorized By**, **Released By**, who it was **Taken By**, **Shipping Method** and **Tracking Number**, the **Date and Time Taken** (today's current date and time will automatically enter from your computer's internal clock setting), and where it was **Sent To**, then click *Done*.
10. A standard print dialog will appear. Click *OK*
11. The **Library Item Release** Form will appear in *Preview* mode.
12. Scroll down to see all of the details, then click on the *Continue* button in the status area.
13. Notice that the *IN/OUT Status* button has toggled to "OUT", reflecting the new **Status** of this media asset.
14. Click on the *Asset History* tab, where Studio Suite keeps track of the media asset's activity in descending order, with the **CREATED:** information at the bottom, and the most recent activity at the top.
15. Click on the *Main Menu* tab to return to the **Main Menu**.

CONGRATULATIONS! You have successfully completed the **Back in the office** section of the tutorial. Click on the *Main Menu* tab to return to the **Main Menu**. Studio Suite has saved all your work.

In closing

In this tutorial you have completed the **Project**, start to finish, using only a handful of the 29 powerful modules in Studio Suite. This has illustrated only a small portion of what it is capable of, but ...

STUDIO SUITE DOES SO MUCH MORE!

Explore it further on your own and you will realize that by using Studio Suite, you and your studio will finally become as organized as you've always needed to be.

Now you should have a good idea about the general flow of Studio Suite. Become an expert by reading the chapters associated with each module you will be using regularly.

Knowledge is power!
Read your User's Guide!

9

The Main Menu

File Name: SSX_Main.fmp12

SSX

Much of the **Main Menu** has been covered in the chapter titled **Seven Things You Must Do**, Additional information and some remaining details are described here.

In this chapter you will read about how to:

- Use skins (Including adding your own)
- Create a new Company/Location
- Add default client participants to Projects
- Edit or add a new Category
- Color code and rename booking statuses
- Set a numbering sequence in your records

Main Menu Navigation

After logging in to Studio Suite, the first screen you see is the **Main Menu**, which is central to the navigation of Studio Suite. Here, the User is provided a main access point for Project event management and accountability. From other modules, you return to the **Main Menu** by clicking on the *Main Menu* tab in the upper right hand corner of every screen. You can also return to the **Main Menu** with the keyboard shortcut: **⌘ + 1** (Mac) or **Ctrl + 1** (Win).

NEW FEATURE: Skins (Backgrounds)

The Main Menu is now customizable with different skin choices. Studio Suite comes loaded with over 100 different photo/color options for the background behind your buttons. You can upload any of your personal photos too quite easily, just read the directions below.

We recommend that you choose a picture that is already in the landscape format as opposed to the portrait format because of stretching and distortion.

**How to use skins (including adding your own):**

1. Go to the **Main Menu**.
2. In the lower right hand corner to the left of the AlterMedia logo is a box. Click on the box.
3. A pop up window will appear with background choices for you to choose from.
4. Click on the picture that you would like to use.

Or

1. When you see the pop up window, click the black and green *New* button on the top left.
2. Click on the *Insert Picture* button.
3. Above the picture you can add a **Name** and on the right you can enter the **Source** of your picture if you choose.
4. Once your picture shows up in the pop up window you are free to *Select* it or *Delete* it. You can upload as many pictures as you want, although to keep bandwidth usage down, keep the files small.

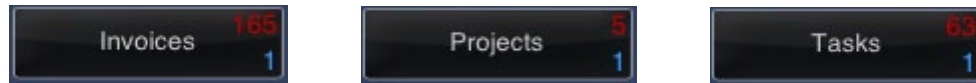
Modules

All Studio Suite modules are listed on the **Main Menu** screen. Modules are grouped by similar areas of work: **Office** (Administrative and Service Ordering), **Studio** (Asset and Resource Management), and **Tech** (Engineering).

Some module buttons on the **Main Menu** screen display 1 or 2 key numbers based on data from that module.

NOTE: you may not see these numbers initially, due to no activity.

- Red text number amounts seen in the upper right of a module reflect overdue items.
- Blue text number amounts seen in the lower right of a module view are items due "today".



Examples of red text numbers could include overdue billings in the **Invoices** module, and number of **Tasks** that have not been completed and are overdue in the **Tasks** module. Blue text numbers relate to items due today,

*NOTE: The **Equipment** module displays “maintenance due” totals from the maintenance tab of the “Equipment module”.*

Dashboard

To the right on the **Main Menu** screen, you will notice an information area. This is called the Studio Suite ‘Dashboard’, which displays various Studio Suite information to the User that is currently logged in.

Date

By default, today’s date will be displayed. If you would like the Dashboard to show information for another date, click on the **Date** and select another day from the pop-up calendar.

Today sub-tab

The *Today* sub-tab includes the following views and information of immediate interest to the Studio Suite user:

Daily Notes section

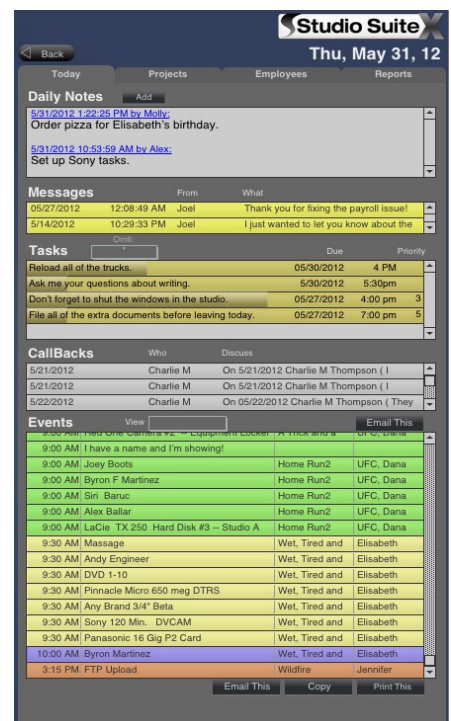
This field references the **Notes** field in the **Calendar** module. When a note is entered in the **Calendar Notes** field, it will appear in the **Daily Notes** field, and vice-versa. All users will see these notes.

Messages section

This area references messages entered in the **Communications** module. It displays messages for the User currently logged in.

Notes about Messages:

- A message highlighted in yellow indicates it is new.
- Click a message from the Dashboard to go to the *Messages* tab in the **Communications** module.



Tasks section

This area displays all of today's tasks for the User currently logged in. Click a task to reach the **Tasks** module, where you can view and edit your tasks.

Notes about Tasks:

- Hovering your cursor over a single task will provide more detail on the Due time, Status, Percentage of completion, and Project name.
- The **Tasks** view also shows a progress bar indicating completion status for each task.
- A **Tasks** view "Omit" filter omits certain task statuses from view, such as: Completed, Assigned, Overdue, etc.

Callbacks section

This area displays any callbacks that have been scheduled for the currently logged in user. Click on a callback to open a window in which you can edit the **Callback** or convert it to a call (which removes it from **Callbacks**).

Events section

This area displays all of today's **Events** from the **Calendar** module. Clicking on an **Event** will open the 'Edit Event' window, allowing you to view and edit **Event** details.

Notes about Events:

- Use the Events Filter menu above the Events list to reduce the showing of events to a single person. To return to the complete list of all events, select the 'View All' prompt.
- The *Email This* button on the top right of the Events list will create an email of the **Events** view in your default email program.
- At the bottom right, the *Print This* button will print the dashboard.

Projects sub-tab

Daily Notes section

The *Daily Notes* section of the *Projects* sub-tab is an expanded view of the daily notes.

Projects section

The *Projects* section of the *Projects* sub-tab is a filterable snapshot of the Projects that the Studio Suite user that is logged in is scheduled for.

Employees sub-tab

A portal for showing company employees their work schedule (as defined in the **Employee Schedules** module shown in blue). The **In-Out** check box on the right side allows an individual to share their current

availability for all to view.

Reports sub-tab

This new feature is a list of buttons that are short cuts to the **Events**, **Invoices**, **Contacts** and **Library** modules' *Reports* tab. Once on the *Report* tab of each of those modules, you can chose a variety of reports to run.

Main Menu Log detail

Across the bottom of the **Main Menu** screen, there is a row of text that describes some general user, application, and network information, i.e. who is currently logged in, etc. This is to help give the administrator (or technical support person) the information they may need about the status of Studio Suite.



Re-Log In button

The *Re-Log In* button allows you to log in as a different user without having to close and re-open the files again. For instance, if you are an administrator and need to make a change to a module that an employee does not have access to, you can click the *Re-Log In* button and log in with your user name and password.

NOTE: If you attempt to Re-Log in and type the wrong user name/password 3 times, Studio Suite will not allow anymore Re-Log In attempts for 5 minutes. However, you can still continue working under the current user log-in.

Log Out button

The *Log Out* button in the **Main Menu** is used to end your Studio Suite session. This button will close all Studio Suite files, but a screen prompt will you ask if you desire "Quit FileMaker too?" Click Yes to close all other FileMaker program files you may have open.

Setup button

Across the bottom of the **Main Menu** are three buttons: *Setup*, *Re-Log In* and *Log Out*.

The *Setup* button takes you to the area of the **Main Menu** where many operational defaults are set, all of which have been described in the chapter, **Seven Things You Must Do**.

Help button

The Help button is new feature that, when clicked, takes you to the Help Desk of the Studio Suite website.

Setup button

Location tab

This is the location information (Name/Address/Country, etc) about your company that will be used throughout Studio Suite on labels, letterheads, invoices, etc.

How to create a new Company/Location:

1. Click the black and green *New* button.
2. Enter your company information.
3. You can have many companies, however your main company should be '**Company No. 1**'.

Address Format

This is where you define the default address format. This is used in printouts to display addresses in US or European formats. Each new contact record will inherit this format, which can be changed per contact as needed.

Currency Symbol

In the fields marked **Currency Symbol** and **Leading** and **Trailing**, you can choose which currency symbol to use throughout Studio Suite and whether it precedes or follows the monetary amount. You also have the option in the **Invoices** module to choose a different currency per invoice. Please note that it only changes the symbol, it does not do any exchange rate calculations.

Languages

Although English is the default, Studio Suite is capable of operating in different languages. In the *Location* tab, you can also choose the Language you would like to use throughout Studio Suite. Simply click the language you want to use, highlighting your choice in yellow.

Phone Number Format

This is where you define a default phone number format. Each new contact record will inherit this format (you can change this per contact as needed).

Logos tab

This tab allows you to assign your company logo and letterhead for use in Studio Suite's various displays/printing.

Logo Locations for different uses:

- **Logo No. 1** – the location to insert your main logo for screen display.
- **Logo No. 2** – the location where you will insert the logo you will use for printing.
- **Logo No. 3** - the location where you will insert a very light or gray scale logo as a 'watermark'.

Letterhead Default section

Here you have the option of choosing an 'Auto' or 'Custom' letterhead. Many printouts have the option of using an 'Auto' letterhead, which is based on your company information and the logos at the left. The 'Custom' letterhead uses only the letterhead graphic for the entire letterhead.

Letterhead Graphic section

Insert your letterhead graphic in the large rectangular field at the bottom of the window. This of course requires you to have already created your letterhead in a graphic application.

Taxes tab

The *Taxes* tab is broken into three sections, each with a specific function regarding how and which taxes are displayed throughout Studio Suite. These sections are described in detail in the **Seven Things You Must Do** chapter of this User's Guide.


Assign Taxes to Rates section

Although this is previously described, here is more detailed information.

There are general Categories for the *Bookable* Items you charge for: **Rooms**, **Equipment**, **People**, **Media**, **Misc.**, and **Library**. For each Category, you'll want to select the Tax Rate(s) that are generally applied to that Category as a default setting. When a new Rate is created in the **Rates** module, these Tax defaults will automatically enter based on the *Bookable* Item's Category.

For example, in Los Angeles, Rooms, Equipment, and People Rates are not taxable. Media sales are taxable, and Library and Misc. Rates vary per Country, State, and County. For the Categories that are taxed (such as Media), we apply our LA County Tax of 8.75% and leave the other Categories blank, since no taxes apply.

NOTE: Please check with your accountant to verify which local tax laws apply to your company.

If more than one Tax applies to a Category, you can shift-click additional **Tax Rates** from the pop-up menu. For example, if you sell Media to clients in many Counties surrounding your company, they may all have different County Tax Rates, and each should be set as a default for your Media. Click the *All* button to apply all defined taxes to a category. The  button will clear the taxes field.

Creating New Taxes section

QuickBooks Tax Agency Name field

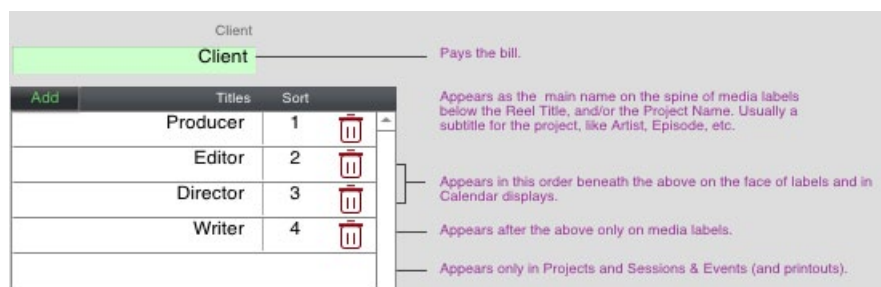
If you will be exporting Studio Suite invoices to QuickBooks, enter the name of the agency to which collected Sales Tax revenues are submitted.

Titles tab

This is where you specify the default 'client' participants that are added to each new **Project**. These are not people that are scheduled or billed for, but rather those who would typically attend a session from the client's side. The field labeled **Client** must refer to what you call the entity that pays the bill. Once created, these titles can be edited per Project. Click the **Client** field and choose what you call the person who pays the bill (from the pop-up list).

How to add default client participants to Projects:

1. To create additional default participants, click the black and green *Add* button.
2. This will create a new blank row below. Click the **Titles** field and select **Producer** from the pop-up menu.
3. Type the number '1' into the **Sort** field.
4. Click the black and green *Add* button again, to create another blank row.
5. Click in the **Titles** field and choose **Editor** from the pop-up menu.
6. Type the number '2' in the **Sort** field for Editor.
7. The **Producer** and **Editor** fields appear in order of their Sort number.



The screenshot shows the Studio Suite interface. At the top, there is a 'Client' field with a dropdown menu currently showing 'Client'. To the right of this field is a note: 'Pays the bill.' Below the Client field is a table with two columns: 'Titles' and 'Sort'. The table has four rows. The first row has 'Producer' in the Titles column and '1' in the Sort column. The second row has 'Editor' in the Titles column and '2' in the Sort column. The third row has 'Director' in the Titles column and '3' in the Sort column. The fourth row has 'Writer' in the Titles column and '4' in the Sort column. To the right of the table, there are four lines of text with arrows pointing to the corresponding rows: 'Appears as the main name on the spine of media labels below the Reel Title, and/or the Project Name. Usually a subtitle for the project, like Artist, Episode, etc.' (points to Producer), 'Appears in this order beneath the above on the face of labels and in Calendar displays.' (points to Editor), 'Appears after the above only on media labels.' (points to Director), and 'Appears only in Projects and Sessions & Events (and printouts).' (points to Writer).

| Titles | Sort |
|----------|------|
| Producer | 1 |
| Editor | 2 |
| Director | 3 |
| Writer | 4 |

Sort order

The order in which these titles are sorted determines the order in which they appear throughout specific modules in Studio Suite.

The sort order:

- The 1st title in the list also appears on the spine of media labels below the **Asset Title** and/or the **Project Name**. It is usually a subtitle for the Project like Artist, Episode, etc.
- The 2nd and 3rd names appear in that order beneath the first name on the face of labels as well as in the **Calendar**.
- The 4th title appears after the 1st, 2nd and 3rd names on media labels ONLY.
- The 5th title appears in the **Projects** module, the **Events** module and on printouts.

Module Prefs tab

The *Module Prefs* tab allows you to set preferences for the **Invoice**, **Projects**, **Events**, **Media Inventory**, **Library** and **Petty Cash** modules.

Invoice sub-tab

This sub-tab provides three fields for three different “late letter” template defaults. Late letters initiated from the **Invoice** module will use this text. You can use what is pre-entered here or edit the text if you wish, but make sure to use the <<field>> model to display data fields within the text.

To the right you can specify your default **Terms**, and **Late Fee APR**. The **Aging Based Upon** field allows you to determine whether the Invoice Aging is based upon the Invoice Date (good if every invoice has the same terms), or the Due Date, which better accommodates invoices with different Terms.

The **Printed Invoice Payment Display Shows** field lets you specify which group of recent payments will appear on a printed invoice: “This Invoice’s Payment” or all “Recent Client Payments” (for that client). Below that you can enter a default **Invoice Comment**, which will appear on each newly created Invoice (Subtotal).

General Invoice Settings section

Sort by Category check box



This default setting specifies that new invoices will print sorted and sub-totaled by category. This can be overridden per invoice as needed.

Accounting System Export Setting section

QuickBooks Settings fields

To get started, click the blue “Registered” text. This will prompt you for your QuickBooks Plug-in registration number. If you’re on a Mac, that completes the QuickBooks Registration process.

PC USERS ONLY: after you have entered the registration number, a prompt will ask you to locate your QuickBooks company file. After locating it, you should see the Path to the file in the QB Path

field. Once you have specified this path, do not move that file to a new location or the Studio Suite > QuickBooks connection will be lost.

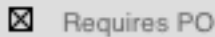
Below the Path field, you can enter your corresponding QB (QuickBooks).

QuickBooks accounts:

- Deposit Account
- COGS (Cost of Goods Sold) Account
- Expense Account
- Asset Account

Studio Suite will use these basic accounts (when appropriate) when communicating to QuickBooks. Accounts for specific Items (**Rooms, Equipment, Media, Services**, etc.) are managed in the **Rates** module.

Requires PO check box



This default setting specifies that Invoices require a Purchase Order number. This option is in place to manage the default setting in QuickBooks that requires Purchase Order numbers on imported invoices.

Projects sub-tab

When you add a new Event to an existing **Project**, Studio Suite needs to know if you want to add it to the “Budget” side of the **Project** as well as the “Actual” side. Check the “Add to Budget” checkbox to have Studio Suite prompt you for a decision.

If you do not wish to receive a prompt, un-check “Add to Budget” and put a check in the box labeled “Always add new Events to Budget”.

To the right, enter a default **Client Title Name** in the open field for newly created Projects.

Events sub-tab

The events sub-tab has three setup options:

- The checkbox for “Include Breaks in Charge” allows you to add any staff breaks as a billable item to the client.
- “Multi-day Events as Continuous” is explained in the text of this sub-tab.
- “Invoice Description” is the default setup detail you desire for an Invoice.

Media Inventory sub-tab

Studio Suite can keep track of your Media Inventory very precisely. Check next to “Reconcile Media” to reconcile all Media prior to Invoicing. With “Automatic Reconcile Media”; checking the box will reconcile the Media automatically.

NOTE: If both items are unchecked, this will allow these items to be invoiced without updating or consulting the available inventory.

At the bottom of this tab, you can specify that Barcodes made for Bookable media are derived from either the record number (as in versions of Studio Suite), or by the UPC code of the media itself. Moving forward, we suggest using the UPC code for Media barcodes.

Library sub-tab

Library sub-tab notes:

- Enter a **Formula for Library Number** (Barcode) in the open field.
- Label the source of your new Media (i.e., Virgin or Stock).
- **Generate Barcode from Lib Num** - Put a check here to automatically generate a Barcode number from the library number.
- **Print w/Barcode Option-** this will set the default for printing. You may change this option per print.
- **Print w/Timecode Option-** this will set the default for printing. You may change this option per print.
- **TC Format default-** click this field and select a Timecode default (Frame-Rate) from the drop-down menu.
- **Calculate Running Time as-** choose between a **Summary of Individual (Title) durations** or **TC (timecode) Difference between first Start and last End**.

*NOTE: You can select the default method that calculates a media asset's total **Running Time**. If you choose “Summary of individual (Title) durations”, it will add all of the individual title **Durations** together. If you choose “TC difference between first Start and last End”, it will calculate based on the time codes.*

Petty Cash sub-tab

These fields determine how **Petty Cash** transactions are handled when they are transferred into **Project Line Items**, and subsequently to Invoices. Aside from the Default Markup (or to adjust for language), you can leave these as they are.

Enter a **Default Markup**, **Deposit Name**, **Transaction Name**, **Default Status**, **Default Category**, and **Default Rate**.

Value Lists tab

Category sub-tab

As explained in the **Seven Things You Must Do** chapter, you can customize the **Categories Value List** to create new categories that are specific to your business, or to rename the existing **Categories** of Bookable Items, such as **Rooms**, **Equipment**, **People**, **Media**, **Production**, **Post-Production**, **Packages**, etc. This list can also be in a language other than English. Individual Items are grouped and sub totaled by these **Categories** on printed invoices and reports. DO NOT remove the “Tax”, “Discount”, “Credit”, or “Groups” categories.

How to edit or add a new Category:

1. To edit, click on the button for the associated **Category** you desire to change. From the screen prompt, make changes to the existing Category name and/or sort numbering order fields, then click *OK*.
2. To add a new **Category**, select the black and green *New* button on the upper left. From the screen prompt, enter a new Category and sort number in the open fields, then click *OK*. You can use decimals to insert items between other items.

Once you’ve edited the **Categories List**, you should adjust its associated **Internal SS Categories** to most closely match the entry in **Your Categories**. This will link **Your Categories** with internal calculations in Studio Suite that are appropriate for that type of Item and that correspond with specific modules such as **Rooms**, **Equipment**, **People**, **Taxes** and other **Rates**.

Some of **Your Categories** may not have an equivalent type available from the **Internal SS Categories** Value List. Just leave those blank.

These Categories are used for filtering in the **Projects**, **Calendar** and **Invoices** modules. For example; in **Projects**, you may choose to view only the “Rooms” you booked for a project. In the **Calendar**, you can choose to view only the Bookable “People” in order to book your People all at once. In **Invoices**, you might choose a Category report for “Equipment” showing the profit made on equipment rentals for a project or time period.

Category sub-tab

QuickBooks information fields (PC and Mac users)

If you are using the QuickBooks integration, you will need to configure the **Account Name** and **Quickbooks Type** for use with QuickBooks.

- **Account Name-** This is the name that will be given to newly created Rates in this Category.
- **QuickBooks Type-** Click this field and select the QuickBooks type from the pop-up menu. This Type will be given to newly created **Rates** in this Category

Booking Status sub-tab

This sub-tab allows you to define customized **Booking Statuses** (in any language), and assign a special color to visually represent each. You can customize your default Value List to include terminology used in your particular business lines (i.e.: Confirmed, On Hold, Completed, Cancelled, Postponed, etc.). You can also use colors to designate **Statuses** of booked events such as a Meeting, Vacation, or Birthday.

How to color code and rename booking statuses:

1. Click the *Booking Status* sub-tab, and then click the *Edit* button at the top of the list.
2. Make your status changes to the *Edit Value List* screen prompt, then click *OK* to complete.
3. After your list is set, click the **Status Color** field next to the new or updated Status Name. Select an appropriate **Status Color** from the provided color palette. Click *OK* upon completion.

Special Statuses section

Studio Suite needs to know your version of some special statuses so that it can set them automatically (different users may call them different names). Select a status from each popup menu that most closely matches the specified names.

Record Numbers tab

Each record created in Studio Suite is automatically numbered serially. The *Record Numbers* tab allows you to change the next serially created number for a record in a particular module.

How to set a numbering sequence in your records:

1. Click the *Contacts* button.
2. The Contacts Record # pop-up dialog will appear.
3. This will display what the next record number will be along with the highest existing number.
4. Type the number you would like the next record to begin with.
5. If you enter a number that is lower than the highest existing number, a pop-up message will appear warning you that you may have potential duplicate numbers.
6. You should enter a number that is greater than the highest record number.

Misc. tab

Some things do not fit anywhere else, so we have clumped them into the *Misc.* tab.

Definitions of what you'll find on the Misc. tab:

- **Optimize Startup** checkbox - If selected, it does not reload language and graphics on startup. If you want to enable this option and are using FileMaker Server, and have altered any default language and images, there are a number of steps that you need to do before enabling this option to properly “lock” everything to your current settings:
 1. Close the files on FM Server
 2. Open the files directly with FM Pro, then close them
 3. Re-open on FM Server
- **Navigate History Days to Keep** - Enter how many days you would like the Navigate History to store.
- **Save Log-in Logs** - for a specified amount of days.
- **New Task Status** - Not Done, Incomplete, Preliminary etc. as examples.
- **Default Salutation for Letters** - Enter the default salutation, such as ‘Dear’, that you would like to appear on all letters.
- Studio Suite creates many different types of files, and different users want (or need) to save the different locations. Use the **Save files and folders in** field to select from the radio button list. Save in System **Documents** files, your systems **Applications**, on the computer **Desktop**, or in **Temporary** files.

New Feature: Twitter section

Studio Suite can now send tweets and direct messages to Twitter. This section is where you set up who the tweets will be coming from. When you set up each of your companies, you can set up a different Twitter connection with each one. To see how this is done, check out the “How to create your company” box in the 7 Things You Must Do chapter of this Users Guide.

User Accounts tab

The *User Accounts* tab in the upper right corner of the window takes you to the User Account area where you can define Users and their account settings (explained in the Chapter titled **Seven Things You Must Do**).

To return to the Main Menu, click the *Main Menu* tab in the top right corner of the window.

This covers all of the basics of the *Setup* button in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

10

Attach & FTP tab

File Name: (All Files)

SSX

The **Attach & FTP** tab appears in many Studio Suite modules. This tab is used for attaching (recording, linking and/or embedding) external files, sounds, pictures, movies, URLs, Proxies, and FTP downloads to that record, in that module. The *Attach* buttons are used to link, embed or record external files (the actual references are held “behind the scenes” in the Attach table of the **SSX_Library.fmp12** file). The portal below the buttons displays a list of all linked, embedded, recorded, downloaded files or URLs. There are 2 versions of the portal - *Detail List* and *List*.

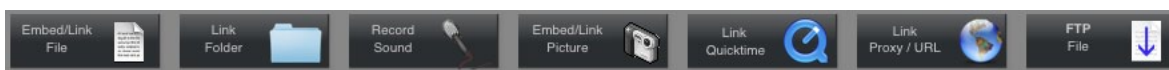
In this chapter you will read about how to:

- Use the Attach & FTP tab feature in various modules
- Link or embed a file
- Record and embed a sound file
- Embed or link a picture
- Link a QuickTime file

How to use the Attach & FTP tab feature in various modules:

- In the **Communications** module, you can attach a scan of a signed Certified Mail receipt or a Federal Express shipping confirmation slip.
- In the **Contacts** module, you can attach a legal agreement with the contact.
- In the **Equipment** module, you can attach a scanned receipt for a piece of equipment, a photograph of it, a .pdf manual, or a schematic.
- In the **Library & Labels** module, you can attach “ProTools® or Avid® files.

- In the **Projects** module, you can attach audio files or video clips associated with that project.
- In the **Purchase Orders** module, you can scan a copy of an invoice or a packing slip.
- In the **Recall** module, you can attach a digital photo of the settings on your outboard gear.
- In the **Rooms** module, you can attach a photographs, blueprints, or wiring diagrams of each room.
- In the **Events** module, you can attach a photo of a microphone setup to document how a sound was created.
- In the **Titles** module, you can attach script pages or lyric sheets.
- In the **any** module, you can attach a URL or Proxy of files with which you are working.
- In the **FTP** module, you can initiate a download from an FTP site, and link that to the current database record.



All of the *Attach* tabs throughout Studio Suite, display seven buttons.

The Attach buttons:

1. *Embed/Link File*
2. *Link Folder*
3. *Record Sound*
4. *Embed/Link Picture*
5. *Link QuickTime®*
6. *Link Proxy/URL*
7. *FTP File*

Each is designed to manage that particular file type, giving Studio Suite special instructions needed to link, open, or playback that file type, or display a thumbnail icon. In some cases, clicking the icon to play or open will play the file through *QuickTime®*. When you are finished with the *QuickTime®* player, click the *Close Window* button to return to the module.

How to Link or Embed a file:

1. Click on the *Attach* button that best suits the file that you are linking or embedding.
2. Follow the on-screen dialog to browse your hard drive (or network) and choose your file (picture, movie, document).
3. Choose *OK* to attach the file.

New in Studio Suite X is the ability to simply drag a file from the desktop into the window. While this is easier, you lose the benefit of specifying the file type (since you're not picking one of the buttons), so the resulting display or launch of the linked file isn't as specific. Depending on the file or your

preference, this may not matter.

To open (linked files/web pages) or export (embedded files) any file, just click on the icon in the portal.

Embed vs. Link

Before using the *Attach* buttons, it is good to understand their purpose, as they will either *Link* or *Embed* the file. Below are the differences between linking and embedding a file.

Link

When you *Link* a file, only the path to the file will be stored (this is the most efficient method).

The rules for linking a file:

- A file linked from a local, internal hard drive will only open or play from the workstation where it was attached. If an attached file does not open or play, note the file's path and retrieve the file manually from the workstation where it was attached.
- To access attached files over a network, you must link the file from a server or remote drive that all Studio Suite Users have access to in the same manner, ensuring that the path to that file will be identical from any workstation. Be sure the server drive is mounted before trying to open or play the attached file.
- If you have linked files held on external drives or removable disks that are uniquely named, the file should be found as long as that drive is mounted. If the drive is not currently mounted, you will be able to see the path to the file and the name of the disk it is on. For this reason, it is a good idea to name your removable media with unique names.
- If the file's location changes, or if folder or disk names are changed, the stored reference (path) in the Attachments tab is no longer valid to open or play the file. You could place the file back in this stored path location or trash the incorrect Attachments record and then reattach it to store its new path.

Embed

When you *Embed* a file, the file will be stored within Studio Suite, making it available to export and use on any workstation on your Studio Suite network. The disadvantage of embedding is that the files are stored within the database thus increasing the size of the file associated with the module. If this file becomes too large, the operation of Studio Suite may become sluggish. If you want all networked Studio Suite Users to access a file but want to minimize the size of your Studio Suite files, make sure it is on a drive accessible to all users and choose "Store as Reference".

Embed/Link File button

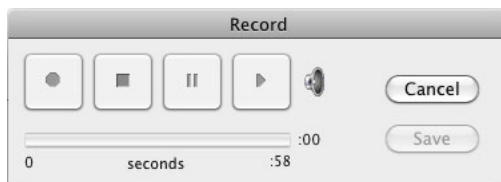
Click on the *Link/Embed File* button to bring up a file selector dialog box. This will allow you to select which file you want to attach to this record in Studio Suite. Make sure you choose the appropriate Link or Embed setting. If you know you will eventually be using the FTP Upload feature, it is best to use this button for ALL file types, as this will be the most consistently reliable.

Record Sound button

This button allows you to record (and embed) a sound file. It will record whatever the computer's audio inputs are assigned to (Line, Mic, CD, etc.).

How to record and embed a sound file:

1. Click on the *Record Sound* button, a small recording window will appear.



2. Click the *record* button to begin recording.
3. The resulting sound file will embed itself within Studio Suite.
4. Click the *sound* icon from the Attachments list to play the recorded sound in its entirety, from any workstation on your Studio Suite network.

NOTE: You may want to limit the length or quantity of sound attachments because they are stored within the database, which increases the size of the file associated with the module in which you are working. If this file becomes too large, you may notice a overall slower operation of Studio Suite.

Embed/Link Picture button

How to embed or link a picture:

1. Click the *Embed/Link Picture* button to bring up the message: "Do you want to store a Link to the file, or Embed the file into the database?"
2. Choose *Embed* or *Link* to bring up a file selector dialog box so you can select which file you want to attach to this record in Studio Suite.

NOTE: PC Users - In order for linked photos to work, you must make "Windows Picture and Fax View" application the default viewer for picture files.

Link QuickTime® button

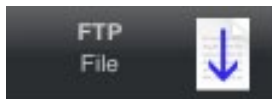
How to link a QuickTime® file:

1. Click on the *Link QuickTime®* button to store a path to the file.
2. Link the movie from a server or remote drive that all Studio Suite Users have access to in the same manner.
3. Make sure the path to the movie file will be identical from any workstation.
4. Make sure the server drive is mounted before trying to open or play the attached movie.

Link Proxy/URL button

Click on the *Link Proxy/URL* button to store a link to either a proxy or a website address (new to Studio Suite X). When clicked, the icon displayed in the portal will load the website address in a new window/tab in your default Internet browser application.

FTP button



This button takes you to the FTP interface, allowing you to download a file from an FTP server to a local directory on your computer, which is then added to the *Attach* tab for the current module. Every action any user takes on an FTP server is logged and actions involving a particular file are added to its **FTP Status** field in blue text. When the download is complete, you are given the option to add this download as a line item in a Project. Use the **QuickLog** module to pick the specific Project you want to add it to.

FTP Upload button



This button appears in each portal row for an attachment that is eligible to be uploaded to an FTP site. Currently, only files that are linked using the *Embed/Link File* button are able to be uploaded. Folders, Sounds, Pictures, QuickTime files, and of course URLs are not uploadable (unless files are attached using the *File* button).

Click this button to bring up a small FTP interface which you can use to connect to a server and upload the file. Once completed, you will be given the option of adding the upload as a line item on a **Project**. The transfer will be logged within the Attach record. Multiple transfers are stored with the most recent item on top. Hover over the log to display all transfers.

For more in-depth information on the **FTP** module, including adding servers to your favorites list, setting rates, etc, see the **FTP** chapter of this manual.

This covers all of the basics of the *Attach & FTP* tab.

Audit Log 11 module

The **Audit Log** module will be finished in the next version of the manual.

12

Barcodes module

File Name: SSX_Tech.fmp12

The **Barcodes** module generates and prints sheets of barcode numbers and labels for tracking used media in the **Library** module and equipment in the **Equipment** module. The ideal way to use the **Barcodes** module is to print a few sheets of the equipment barcode labels and the media barcode labels to have on hand.

In this chapter you will read about:

- Suggestions for printing Barcode labels
- How to print a label

Suggestions for printing Barcode labels:

1. When you add an item to your **Library** module, you would apply a media barcode label.
2. Then, enter this number into the **Barcode #** field on the *Detail* tab of the **Library** module, linking the number to that media asset.

OR

1. Apply an equipment barcode label on a new or existing piece of equipment.
2. Enter this number into the **Barcode #** field on the *Detail* tab of the **Equipment** module.

Barcode Font

Previous versions of Studio Suite generated barcodes with a series of dashes and spaces. This version uses an actual Barcode font.

Detail tab

The *Detail* tab of the **Barcodes** module prints two kinds of labels:

- **Media Tracking**- this prints Media barcodes (which you will put on media, tapes and disks in your library)
- **Equipment Tracking**- this prints Equipment barcodes (which you will put on your equipment inventory).

This tab provides three different choices for label sizes:

- Avery #5267 (1/2" x 2") for 80 labels per page
- Avery #8160 (1" x 2-5/8") for 30 labels per page.
- Dymo (1/2" x 2") for 76 labels per page.

How to print a label:

1. At the top of the view, (if desired) add your company name into the field provided. Select from the drop-down list of companies available in the system. The company name will be added to the bottom of all labeling.
2. If you are already using a barcode numbering system, enter the next number in sequence as the **Start #**, or use whatever number you like. (It is recommended that you preface the number with a letter in the **Prefix** field; perhaps "M-" for media and "E-" for equipment).
3. If you wish, enter the media barcode **Suffix**.
4. Each barcode type has a **Maximum Number of Characters** it can display. You can change the number of **Fixed Characters** (up to this maximum).
5. Click the appropriate print button for the type and size of labels you want.
6. A preview of that layout will appear on-screen. Click the *Continue* button to print. (If you click the *Cancel* button at this preview screen, it will stop this print script).
7. Click the *Return to Barcodes tab* button to return to the main *Barcodes* tab.)
8. If the labels printed correctly, click the red *Main Menu* button to get to other modules.
9. If you make an error in printing, click the appropriate *Reprint* button to print the labels again with the same **Start #**.
10. To return to the main *Barcodes* tab, click on the *Return to Barcodes tab* button.

Studio Suite will automatically calculate a new **Start #** for the next sequence of labels you may print later. It will add 30 new, sequential numbers to the 30 per page Avery layout, or 76 new, sequential numbers for the 76 per page Dymo layout. You may want to have several sheets of labels pre-printed and available for new

media and equipment that comes into your facility.

NOTE: Because all printers require a slightly different layout, perform a test print on plain paper before inserting and printing to labels. This will ensure the text lines up properly on the layout. Do this one time only for the style of label you are using, and you are finished. The corresponding number will print below the barcode so you can reference it visually.

Printer Types

It is best to use a laser printer to print the barcode labels since most ink jet printers are more likely to smear, and have a lower resolution. They also tend to fuzz the bars together, making them unreadable to a barcode reader.

General

Barcode readers are basically sending the same signal as a keyboard and are generally connected to your keyboard bus or plugged within the keyboard chain. Many barcode readers have adapters to work on either Macintosh or Windows, but be certain it is compatible with your computer system.

This covers all of the basics of the **Barcodes** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

13

Budgets module

File Name: SSX_Projects.fmp12

In this chapter you will read about how to:

- Create a new Budget

The **Budgets** module was new in Studio Suite 9, and is a revolutionary new concept in Budgeting, that maintains a simple, flat “Excel” style budget spreadsheet, but connects each line item to Actual Events scheduled within a Project or Production. This solves a major limitation of flat Excel file budgets, which could never summarize the actual scheduled events as they occur, and compare them to the original flat budget.

Similar to common budget forms, there are columns for “Budget” and “Actual”. At the top of each however is a set of buttons that lets you determine whether the numbers showing are “local” (meaning that you can enter values which are held locally), or whether they show summaries of actual Event/Items from either a Studio Suite Project or all of the Events on an entire Production (see the Productions chapter for more about the difference between a Project and a Production). This gives you an extraordinary amount of perspective in seeing how your budget is really shaping up against real scheduled events.

The key lies in the **Budget Code** field associated with each line in the Budget. These can be synchronized with a similarly named field in the **Rates** module, which links a Rate to a Budget Code. This Budget Code flows through to every Event that uses the Rate, allowing Events with Budget Codes to be summarized within Budgets via that Budget code. This further allows there to be many Events in one Production or Project to have the same code, yet still appear summarized on Budgets on a single line.

What’s different about a budget built in the **Budgets** module, and one built in the **Projects** module, is that they have essentially different purposes. The **Project** module’s primary function is to assemble and track actual schedules (specific resources at specific dates and times) and the associated costs. From this

perspective, one type of work, say “editing”, can span multiple days across multiple resources. Because you need to track many other details per day (rooms, people, start/stop times, breaks, rates, media assets, actions, status, tasks, notes etc), you would want to create one Event record per day. This results in potentially many line items for one type of work, the detail of which would be overkill in a Budget, where the topic of “Editing” would exist as a single line item. The integration between the Studio Suite Budget and **Projects** modules is what allows you to manage simple/flat budgets and the complexity of what really happens, from both perspectives.

The **Budget** module can be used “simply” as a traditional flat file budget (and many of you may use it in just this simple fashion, viewing *Local* values only), but it’s real power comes when you get your Rates setup to flow Budget Codes thru to Project Events, which can then show up summarized within Budgets.

Despite what was just written above, we’re going to forgo the “integrated” approach at first, and just talking about creating a simple budget first.

List tab

Coming soon

Detail tab: Creating a New Budget

Studio Suite comes with several typical budget formats as options (AICP Simple, AICP Advanced, and Recording Budget).

How to create a new Budget:

1. On the *Detail* tab, in the field just below the black and green *New* button, you can select the budget format type for what your doing, then click the *New* button. This will create a new Budget with appropriate Line Items for the type of Budget you selected.
2. To keep it simple for now, leave the **Production** and **Project** fields empty, but go ahead and enter in the ID of a particular Client if you know one. You’ll see their **Address, Phones, and Email** appear. Name this budget in the **Budget Name** field, and add any **Comments**.
3. Select the items to be Booked in the **Calendar** module, then click on the *Book Project* button, then select *New Project*, which takes you to the **New Project Entry** screen of the **Projects** module.
4. You can also create a new project directly within the **Projects** module by clicking the *New* button in the *Function Bar*, which takes you to the **New Project Entry** screen.

Line Item tab

Coming soon

Attach & FTP tab

Coming soon

Defaults tab

Coming soon

This covers all of the basics of the **Budgets** module in Studio Suite.

14

Calendar module

File Name: SSX_Projects.fmp12

The **Calendar** module is used to view, book, and edit sessions. You can also track **Tasks** and miscellaneous events such as meetings, birthdays, etc.

The **Calendar** module is also the only module that can stay “open” continuously within its own window. Based on a preference in your **User Account**, it can remain on your desktop while you work in other areas of Studio Suite.

In this chapter you will read about how to:

- Navigate in the Calendar
- Navigate in the Traditional Month view
- Navigate in the Traditional Week view
- Drag items in your Calendar
- Drag and drop in Linear view
- Book a Project in Linear Week view
- Assign a client to a Project
- Add additional people to a Project
- Book a Project in Linear Month view
- Book a Project in Linear Day view
- Book a Project in Timeline Day view
- Book Simple Events in the Linear views
- Book a Project in Traditional view
- Change the Auto-fill times
- Choose a preset
- Use the bookable items category filter

- Create a New item / Edit item
- Use 'Also book'
- Make a Bookable Item a Calendar Resource
- Build a Parent/Child relationship
- Expand/Collapse the Parent/Child view
- Configure a preset
- Save Calendar resources as a new preset
- Manage via the view presets button
- Customize the color and meanings for event statuses
- Define categories for invoices and QuickBooks

There are three types of calendar views; **Traditional**, **Linear**, and **Timeline**.

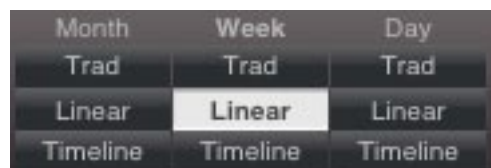
Traditional views look like a traditional calendar. **Linear** views resemble a grid or graph, showing time across the top and bookable items (**Rooms**, **Equipment**, **People**, **Media**, **Misc.**) down the left side. The **Timeline** view represents a continuous horizontal time view, that can zoom in and out, and drag forward and backward.

The **Traditional**, **Linear**, and **Timeline** views are visible by the **Month**, **Week**, and **Day**, giving you nine different perspectives to view booking activity.

Navigation in the Calendar module

Navigation throughout the **Calendar** module is accomplished from two places. First, you can navigate the nine different views from the buttons in the upper left corner (see the following example screens of each view), or you can use the tools above the date for moving within each view.

Navigation buttons

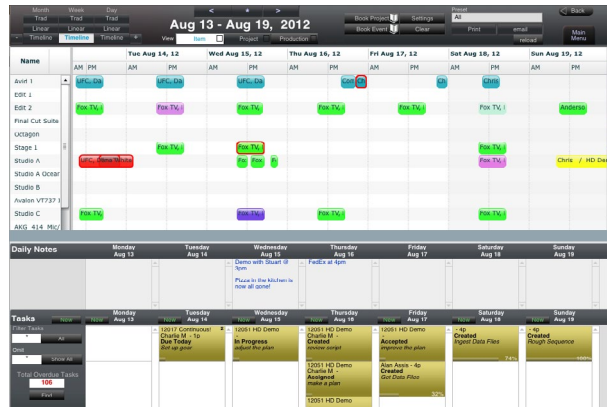


In the upper left corner of all **Calendar** screens you will notice buttons for selecting either a **Month**, **Week** or **Day** view for the **Traditional**, **Linear**, or **Timeline** views. These buttons allow you to jump between all views with one click.

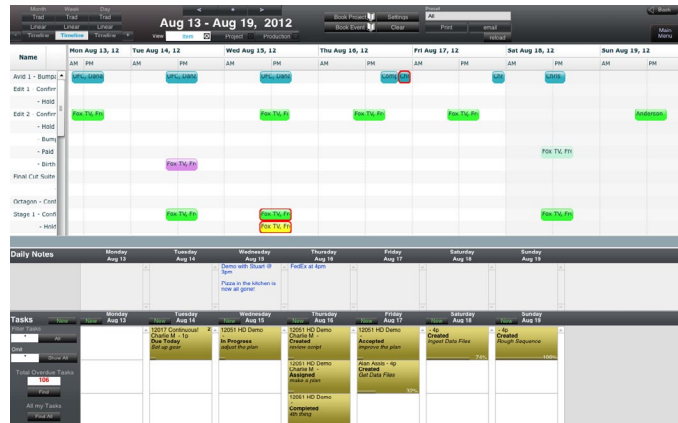
Timeline views (Overview)

Timeline views are an updated version of the **Linear** view. **Timeline** allows for greater flexibility of editing events by sliding and easily copying complete event items throughout the view.

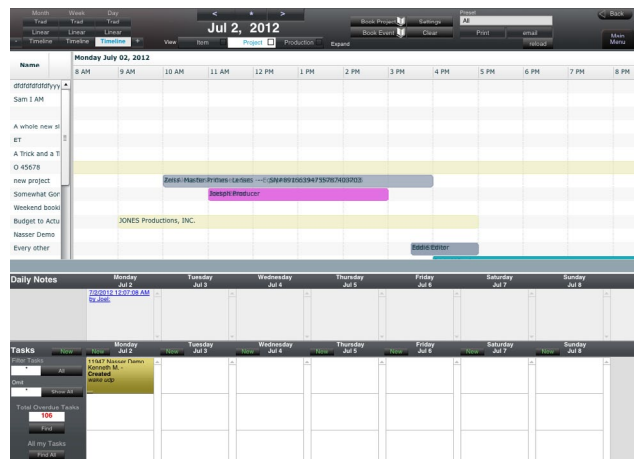
Timeline Month



Timeline Week



Timeline Day



Timeline views

The **Timeline** views show how a specific item or person is scheduled over a period of continuous time. A zoom-able time range is across the top and resources (**Rooms**, **Equipment**, **People**, **Media**, etc.) are in rows down the left side column. This enables you to see how a particular item is allocated throughout the course of the currently zoomed display range. By scrolling down, you see a virtually unlimited number of items.

There is an important aspect to understand about how the **Timeline** view works. When it draws, it loads a limited, user-defined range of data. The default setting for this to load 7 days prior and 45 days after to the current date. This is to minimize the amount of time it takes to load, because loading the essentially infinite number of events in all of time (past, present, and future) would take awhile!

Within the **Load** range, it will **Zoom** to a smaller defined viewing range, defaulted to 1 day prior and 5 days after the current date. After the initial draw, you can zoom and drag-scroll to a different range as needed (within the initial **Load** range). If you need work with dates outside the initial **Load** range, use the tools above the date to select or scroll to a different range.

You can adjust the default **Load** and **Zoom** range in the **Calendar** settings area by clicking the *Settings* button. More on this later, but keep in mind that the number of resources you are viewing and the size of the **Load** range will affect the speed of the draw. You will want to find a balance between **Load** range, the number of resources you are viewing, and an acceptable amount of time for the **Timeline** to draw.

Timeline Item / Project view selector

Below the red date range display in the **Timeline** view is the **Item / Project** view selector. The default view is “**Items**”, which shows how your resources are allocated over time. By clicking the *Project* button, the **Timeline** will redraw showing a list of **Projects** (within the **Load** range) on the left side (instead of **Items**), with a timeline of events within each **Project** indicated in the body of the **Calendar**. Note that because in this view many events can be layered on top of others, individual events are not editable.

Timeline view features

- Click and drag within the timeline to move forward or backward in time.
- To zoom in, click in the header of the timeline. Click again to zoom further.
- To zoom out, Shift+Click in the header. Shift+Click again to zoom further.
- Click within a **Month**, **Week**, or **Day** shown in the header (ex. September, W32, or Wed, Sept. 9, 09) to zoom you to that range.
- When you initially click on a specific date in the timeline header, it will zoom to your default **Day Zoom** preference, which you can adjust in **Calendar** Settings.
- To adjust the start time of an event, click on the beginning of the highlighted event and drag until the start time is where you need it to be. To adjust the **End Time**, click and drag the end of the highlighted area. To slide the event forward or backward, click in the middle of the event and drag. You will see that the exact **Start Time** and **End Times** are indicated in the yellow rollover as you drag.
- To reassign an event from one resource to another, simply drag it up or down to a different resource.
- To duplicate an event to a different resource, Option-Drag (Mac) or Control-Drag (PC) the event to the new resource.
- Click a highlighted event to open the **Edit Event** window, allowing you to view and edit details.
- Shift+Click on the event scheduled to get to the **Projects** module. You will see the **Project** and all events related to the highlighted event you selected.
- Conflicts are indicated by a red outline on the event highlight.

Timeline: Month, Week, and Day views

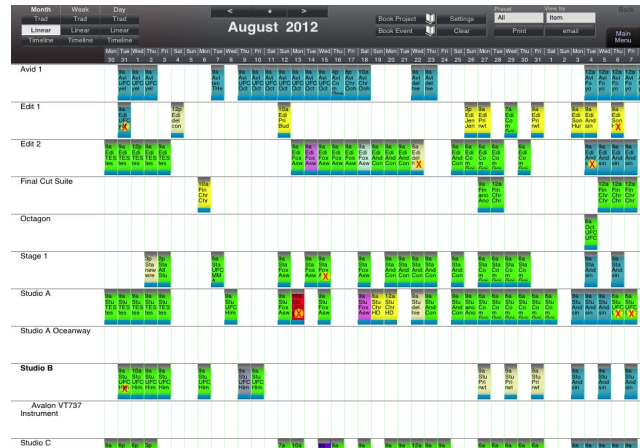
These are all essentially the same view, zoomed to a particular range. Within each of these views, there is also zoom in / zoom out button to the left and right of the *Month*, *Week*, and *Day* buttons.

This completes the uses and navigation of the **Timeline** views in the **Calendar** module. Next, we will cover the uses and navigation of the **Daily Notes** view.

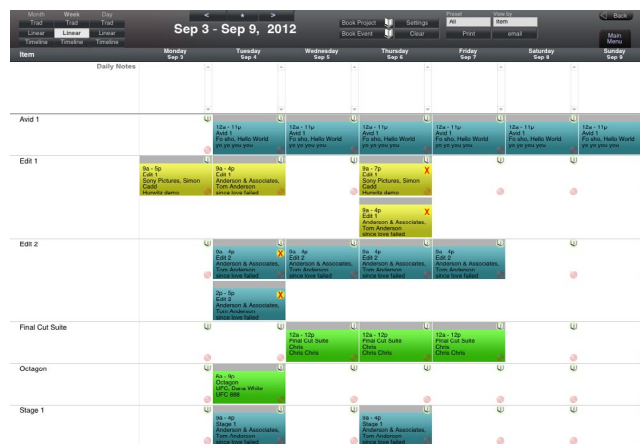
Linear views (Overview)

While **Traditional** views are designed to look like common calendars, they are not the best way to see how a specific item or person is scheduled over a period of time. The **Linear** views solve this problem.

Linear Month



Linear Week



Linear Day



Linear views

The **Linear** views show how a specific item or person is scheduled over a period of time. Time is across the top (**Days** or **Hours**) and items (**Rooms**, **Equipment**, **People**, **Media**, etc.) are in rows down the left side column. This enables you to see how a particular item is allocated throughout the course of a **Day**, **Week** or **Month**. By scrolling down, you see a number of items. Keep in mind that the number of resources you have showing affects the speed at which the calendar will draw.

Linear Month view

The **Linear Month** view shows you everything booked for a particular month in a scrolling list of detailed information. In the **Linear Month** view, the weekdays and dates displayed across the top of this view are also buttons which will take you to that day in the **Linear Day** view.

Linear Month view Tips

- Click on any date displayed across the top and it will take you to that day in **Linear Day** view.
- Click the *Blue Bar* at the bottom of each highlighted event to open the **Edit Event** window, allowing you to view and edit details.
- Shift+Click on the *Blue Bar* at the bottom of each highlighted event will take you to the **Projects** module, showing the **Project** and all **Events** related to the highlighted event you selected.

Linear Week view

The **Linear Week** view shows you everything booked for a particular week in a scrolling list of detailed information. The weekdays and dates displayed across the top of this view are also buttons which will take you to that day in the **Linear Day** view.

Linear Week view Tips

- Click on any date displayed across the top and it will take you to that day in **Linear Day** view.
- Click the highlighted **Event** to open the **Edit Event** window, allowing you to view and edit details.
- Shift+Click on the highlighted event will take you to the **Projects** module, showing the **Project** and all events related to the highlighted event you clicked.

Linear view: Drag and drop

As explained in **Traditional** view (earlier) the **Calendar** module gives you the option of dragging items from one area (day) of the calendar to another, or from one resource to another. This only applies to **Month** and **Week Calendar** views.

How to drag and drop in Linear view:



1. In the **Linear Month** view and **Week** view, you will notice a gray “handle” icon at the top of each item in your **Calendar**.
2. In the **Linear Week** and **Day** views, click-hold and drag this gray icon to another resource or day in the calendar, releasing it on the red ‘target’ icon in the bottom right hand corner.
3. In the **Linear Month** view, click + hold and drag this gray icon to another day in the calendar, releasing it on the bottom portion of the day.
4. If the project has more than one event on the same (original) day, the **Multiple Event Handler** window will appear, saying: ‘This Project has multiple items scheduled on this day’. It will list each item, then present you with the options ‘Yes’ (moves all selected events) or ‘No’ (moves the single event you dragged). You can also specify which items will be moved to match by selecting/deselecting the check boxes for the appropriate item(s).

Linear Day view

The **Linear Day** view shows you everything booked for a particular day in a scrolling list of detailed information.

There are actually two versions of the **Linear Day** view selectable by the *16 hr* and *24 hr* buttons just below the nine view buttons.

- *24 hr* button: shows increments of all 24 hours in the day.
- *16 hr* button: shows increments of 16 hours zoomed to 8 a.m. to 12 Midnight.

In both cases, the highlights are comprised of small vertical bars, each representing 15 minutes (the smallest bookable time unit available in this view).

In the **Linear Day** view, each event has its own row.

Linear Day view Tips

- When an item has more than one booking on a day, there will be a separate row and separate *Go To* button for each event for that item.
- Click the *Go To* button to take you to the **Events** module to view and edit all the details of that highlighted event.
- Shift+Click the *Go To* button to take you to the **Projects** module, showing the **Project** and all events related to the highlighted line item you clicked.

This completes the uses and navigation of the **Linear** views in the **Calendar** module.

Traditional views (Overview)

The **Traditional Month**, **Traditional Week**, and **Traditional Day** views are designed to look like common calendars.

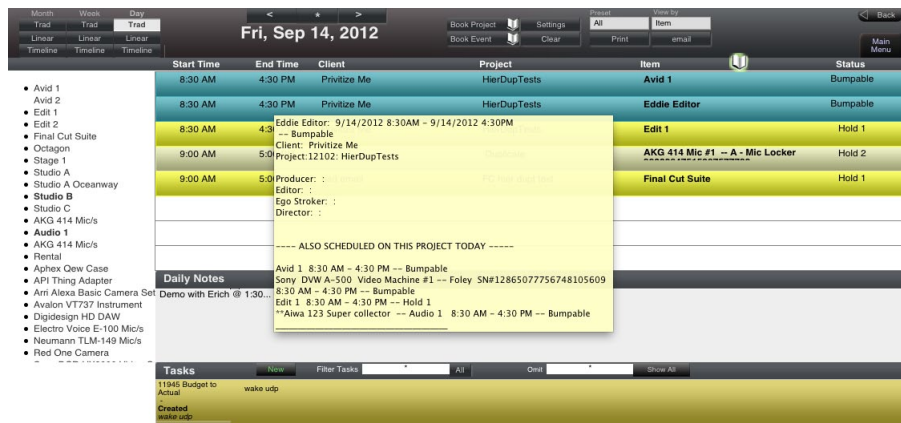
Traditional Month



Traditional Week



Traditional Day



Traditional views

Traditional Month view

The **Traditional Month** view shows you everything booked for a particular month in one screen.

How to navigate in Traditional Month view:

- Click the date in the upper left corner of each calendar day to go to the **Traditional Day** view.
- Click the highlighted text within a particular **Day** to open the **Edit Event** window. You can view and edit the main details of that event. When you are finished, click *Save Changes* to return to the **Calendar**.
- Shift+Click on the highlighted item to go to the **Projects** module. In **Projects**, all events are related to the highlighted event you clicked.

*NOTE: for “Continuous” events (that span multiple days), the start and end times indicated in **Traditional** views will reflect the **Event’s** start time and end time, not necessarily the start and end time on that given day.*

Traditional Week view

The **Traditional Week** view shows you everything booked for a particular week in one screen.

How to navigate in the Traditional Week view:

- Click the date in the upper left corner of each calendar day to go to the **Traditional Day** view.
- Click on an event within a particular **Day** to open the **Edit Event** window. You can view and edit the main details of that event. When you are finished, click *Save Changes* to save your changes or *Cancel* to return to the **Calendar**.
- Shift+Click an event to go to the **Projects** module, showing the entire **Project** and all events related to the one that you clicked.

*NOTE: for “Continuous” events (that span multiple days), the start and end times indicated in **Traditional** views will reflect the **Event’s** start time and end time, not necessarily the start and end time on that given day.*

Traditional View: Drag and drop

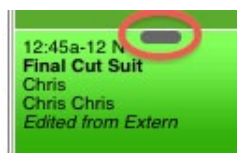
The **Calendar** module gives you the option of dragging items from one area (**Day**) of the calendar to another. This only applies to **Month** and **Week Calendar** views.

How to drag items in your Calendar:

1. In the **Traditional Month** view, you will notice a gray “handle” to the right of each item in your **Calendar**.



2. In the **Traditional Week** view, this icon will be displayed at the top of each event.



3. Click + hold and drag this gray icon to another day in the **Calendar**, releasing it on the red ‘target’ icon in the upper right hand corner.
4. If the project has more than one event on same (original) day, the **Multiple Event Handler** window will appear, saying: ‘This Project has multiple items scheduled on this day’. It will list each item, then present you with the options ‘Yes’ (moves all selected events) or ‘No’ (moves the single event you dragged). You can also specify which items will be moved to match by selecting/deselecting the check boxes for the appropriate item(s).

Traditional Day view

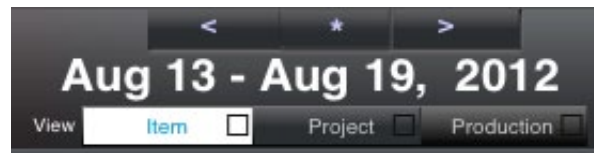
The **Traditional Day** view shows you everything booked for that one day in one screen.

- Click on the highlighted event to open the **Edit Event** window, allowing you to view and edit details.
- Shift+Click on the highlighted event will take you to the **Projects** module, showing the **Project** and all **Events** related to the highlighted event you selected.
- Note: for “Continuous” events (that span multiple days), the start and end times indicated in **Traditional** views will reflect the **Event’s** start time and end time, not necessarily the start and end time on that given day.

This completes the navigation and general use of the **Traditional** views in the **Calendar** module. Next, we will cover the navigation and use of the **Linear** views.

Now that you have seen an overview of the nine different views from the *Navigation* buttons, you will learn how to move within these views from the tools above the date.

Calendar Navigation

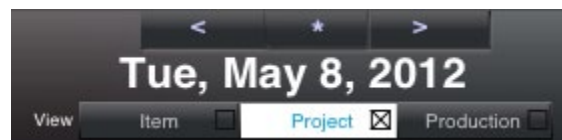


The navigation tools above the date appear at the top of all **Calendar** views.

How to navigate in the Calendar:

- Click the *Arrow* buttons (< >) to move forward and backward a **Day**, **Week**, or **Month**, depending upon the view.
- Click the center *Diamond* button (between the arrows). It shows a pop-up **Calendar** window, allowing you to navigate to any date (in any view) very quickly.
- While in the **Month** view modes, click the **Month** name (in white text, below the *Arrow* buttons) to drop down a list of months to choose from. Click on the **Year** (in white text, below the *Arrow* buttons) to drop down a list of **Years** from which to choose.
- While in **Week** or **Day** view modes, click the white date display text to bring you to the **Current Week** or **Day**.

New Feature: Item, Project, Production Sort Options

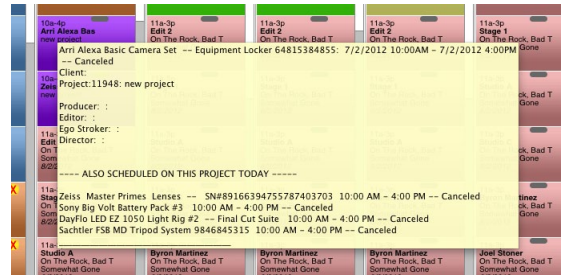


Another great way to customize your calendar view is to sort it by Item, Project or Production. Just click an X in the box next to your sorting preference.

Now that you have learned the basic navigation within the nine views of the **Calendar** module, let's discuss them in greater detail. Again, they are the **Traditional** views by **Month**, **Week**, and **Day**, the **Linear** views by **Month**, **Week**, and **Day**, and **Timeline**.

Rollovers

By now, you may have noticed small pop-ups that appear when you hover your mouse over an item in the **Calendar**. These are called rollovers, and they display additional detailed information that wouldn't fit in the normal calendar event view.



Daily Notes

The **Daily Notes** area can be used to record general notes for any particular day. These notes will appear on the **Main Menu** Dashboard area for the date selected there.

| Daily Notes | | | |
|--|--|--|--|
| 5/27/2012 3:32:46 PM by Molly: Order Pizza for lunch. | | 5/30/2012 3:56:30 PM by Molly: Order pizza for Elisabeth's birthday. | 5/31/2012 10:53:59 AM by Alex: Set up Sony tasks. |
| | | 5/30/2012 11:47:45 AM by Alex: Reschedule grips when the client comes in. | |

Tasks

Viewable scheduled tasks are located on many of the **Calendar** views. **Tasks** can be found at the bottom of the page within **Traditional Week**, **Traditional Day**, **Linear Week**, **Linear Day**, **Timeline** views.

| Tasks | New | Filter Tasks | All | Omit | Show All |
|--|-----|--------------|---|--|----------|
| 11697 Double up Molly Marc - 4p Accepted Don't forget to shut the windows in the studio. 22% | | | Joel Stone - 4p Assigned Testing fallback HTML version... 72% | Molly Marc - 4p Completed Reload all of the trucks. 39% | |
| 11703 Booking For One Please Molly Marc - 7p Accepted File all of the extra | | | | Joel Stone - 5:30p Approved Ask me your questions about writing. | |

To edit any task, click on the item which will then open the task in the **Tasks** Module. In the **Tasks** Module, you can also 'find all' tasks, update the 'percentage of completion' view, and change the **Task** 'Status'.

- In the **Calendar** tasks views, you can add a task by clicking the black and green **New** button above each day.
- **Tasks** filtering options are available in all views. Filter tasks by two provided fields: **Filter Tasks** and **Omit**. **Filter Tasks** from the pop-up list by those who have created known tasks. **Omit** allows you to filter tasks by omitting certain 'status' tasks from your view.

Booking

Now that you understand the uses of the different views, we can explore the booking process from within the **Calendar** module. Here, there are two types of bookings: **Projects** and **Simple Events**.

A **Project** is the most common type of booking. When a **Project** is booked, it creates a new record in the **Projects** module and all details and (typically) multiple booked events are nested within that particular **Project**. Each event within a **Project** typically has a **Rate** and a **Price** and one or more invoices can be created from the **Project**. Further, a project must always have a **Client**.

A **Simple Event** booking is a standalone event that has no associated **Project**. It does not need to be tracked statistically or invoiced, and there is no client. **Simple Event** bookings would typically be used for meetings, tours, maintenance, non-session staff scheduling, birthdays or anniversaries, etc..

Book buttons



In the **Calendar** module, Booking can be performed in all of the **Traditional**, **Linear** and **Timeline** views. However, because information is displayed differently in these views, the booking processes are slightly different. You may find that you prefer one view more than the other. Each has its own personality and one may better suit the nature of your bookings.

In order to book an Item in the **Calendar** module, it must be set as **Bookable** and made “Visible” from its respective module.

If an Item is set as **Bookable**, but you cannot see it in the **Calendar** module, it is either “Hidden” or not assigned to the **Calendar Resources**. This process can be completed for **Items** in all modules, in one screen, or at one time from the *Settings* button which will be described later in this chapter under **Settings**.

Let's start by booking a **Project** in the **Linear Week** view.

Linear Week view: Booking a Project

In the **Linear Week** view, be sure the Items you want to book are listed on the left side of the screen. If you need to make some items **Bookable** and “Visible”, follow the steps described in the **Settings** portion of this chapter.

How to book a Project in Linear Week view:

1. Simply click the book icon in the upper right corner of each item/day (a check mark symbol appears to confirm the selection). If you need to select multiple days for an item, click an item on the first day, then shift-click the book icon on the last day. The days in-between will be selected.
2. When you have one or more items selected, click the *Book Project* button in the top right area of the **Calendar** view.
3. A dialog appears asking "Do you want to create a New project, or add to an existing one?" For this example, click *New*.
4. The **Create New Project** entry screen will appear in the **Projects** module.
5. Proceed with filling in all information (as described below).
6. When you are finished filling in the required information (yellow fields), click the *Next* button, which will give you the option of retuning to **Calendar** or proceeding onto the new **Project**. For now, return to the **Calendar** so click "*Calendar*". The calendar should now display the bookings you created.

New Feature: Item List (on the Create New Projects screen)

A fun new short cut to added to the Create New Projects screen is the Item List. What does this have to do with the Calendar, you might be wondering.

When you book a Project from the Calendar, the Create New Project screen pops up and when it does you'll see a new box in the lower middle left of the screen called Item List. This is a list of the item selections that you just made in the Calendar, ta-da!

Another aspect of these items being included on the Create New screen is that you can add to the list before you close the screen and they will inherit the same time frame as the first item on the list.

| Project Name | Start Time | End Time | Event Status | Project Type |
|---------------------------|------------|----------|--------------|--------------|
| Studio Suite X Commercial | 9:00 AM | 5:00 PM | Confirmed | TV |

| People | Title Name | Filter Names | Phones |
|--------|------------|-------------------|----------------------|
| ← | Producer | John Wheeler | Office 818.888.8880 |
| ← | Director | Kenneth M. Miller | Office Phone 805.791 |
| ← | Editor | Andy Engineer | Office Phone 321.654 |

| Item List | Item | Date | Time | Action |
|-----------|------------------|-----------|---------|--------|
| + | Studio C | 7/20/2012 | 9:15 AM | + |
| + | Raymond J Givins | 7/20/2012 | 9:15 AM | + |

Notes: Preliminary commercial Campaign.

All views: New Project Entry screen

When you create a new project from any of the **Calendar** views, you will enter basic information about the project in the **Create New Project Entry** screen.

Projects **CREATE NEW PROJECT**

*Yellow fields are required.

Production 6 * **Curb your Excitement** Company Selector 2 - Super Bangin' Studios

Client 246 **AlterMedia, Inc., Joel Stoner** Office Phone 800-450-5740 Email joel@studiosuite.com Client PO# 050864

Balance Due 1,388.75 Overdue 31-60 Days Over 61-90 Days Over 91-120 Days Over 121 Days+ Over TOTAL Billed 1,388.75 Year To Date 1,388.75

Project Name Studio Suite X Commercial Episode 101 Language English Project # 12006

Start Time 9:00 AM End Time 5:00 PM Event Status Confirmed Project Type TV Project Status In Progress

People

| Add | Title Name | Filter Names | Phones | email | Add To Contacts | 1 | 2 | 3 | 4 |
|-----|----------------------------|--------------|---|-------------------------|-----------------|---|---|---|---|
| | Producer John Wheeler | | Office 818.888.8880 ex:520 I Cell 818.888.5555 I Boat | john@studiosuite.com | Add | | | | |
| | Director Kenneth M. Miller | | Office Phone 805.791.8273 ex:11 Office Fax | kmillerca@sbcglobal.net | Add | | | | |
| | Editor Andy Engineer | | Office Phone 321.654.9870 | andy@engineer.com | Add | | | | |

Item List

| | Studio C | 7/29/2012 | 9:15 AM | |
|--|-------------------|-----------|---------|--|
| | Raymond J. Givins | 7/29/2012 | 9:15 AM | |

Add Notes

Preliminary commercial launch of SSX, National Campaign.

Allow Release Of Client Material

☐ No ☒ Yes Cleared for materials release

After you have entered at least the yellow fields, click the NEXT >> button to view scheduled items. You can enter more client information later by clicking on the Client Info tab.

Cancel Project Creation **Create Budget** **Create Actual** **Next >>**

Client Terms, Tax, and Discount

Client Terms, Tax, and Discount values are locked up from the Contacts module. Changes made here will only affect THIS project.

Terms 30 days **Remaining Credit** 0.00 **Over Limit** -1,388.75

Tax Rates A LA County Tax 8.75% B **Discount Rate** 10 % Discount -10%

Rate Card 0 All **Insurance** The Hartford **Insurance Certificate** Mon, Jan 13, 2014

Created Thu, Jul 19, 2012 1:30:25 PM by Molly Modified Thu, Jul 19, 2012 3:42:35 PM by Molly

Production

A **Project** can be assigned to a **Production**, but it is not a requirement. A **Production** is a hierarchical level above a **Project**, allowing many **Projects** to be assigned to one **Production**. Click within the field to select an existing **Production** from the drop-down list. For more information about **Productions**, see that chapter of the User's Guide.

Client

A Project must have a **Client** of record associated with it to be tracked and invoiced.

How to assign a client to a project:

1. Click in the yellow **Client** field (to open the contact picker window).
2. Scroll through the list, or type the first few letters of the company or a person associated with the client in the provided field.
3. Click on your client choice (found in the list) one time to enter. Information specific to this client will automatically be entered on the Project page, and additionally in the Financial section below. If the Client does not appear in this window, they may not exist in the **Contacts** module, or they are in Contacts already, but not designated as a Client.

*If your client does not exist in the **Contacts** module:*

1. Click the *Create New Client* button. This will take you to a new record in the **Contacts** module.

2. Enter their information and be sure the **Client** check box is marked so they will appear in the client selector window. Click the *Return to Project* button.

If you think your client may be in the **Contacts** module already, but they are not appearing in the list, you can search for them:

1. Click the Client *Go To* button. The **Contacts** module will appear.
2. Click Find in the *Function Bar* and enter their name. Then, press RETURN or ENTER or click the other *Find* button in the Status Area to search for their record.
4. If you find them, be sure they have **Client** checked, then click the blue *Back to Projects* button.
5. If you do not find them, you can click *New* on the Function Bar (in **Contacts**) to create a new record, enter their information (and again, mark them as a **Client**). Click the blue *Back to Projects* tab to return to the **New Project Entry** screen.

*Note: The default name for this information field is set up in the **Main Menu > Settings** area. Although commonly named 'Client', this default word can be changed to another name or a better related identification for your specific type of work. To change this word for an individual **Project**, click the red text default name next to the yellow field. From the provided pop-up menu, access options such as **Client, Account, Division, Agency, Network, and Student**. The list can also be edited to add a name of your preference. Select **Edit** and follow the prompt to add to the existing list of names.*

To complete the client information area, enter the client's **email** address (if they do not already have one entered) and a **Client PO #** if one is provided (this can always be added later). Click the "Required" check-box if applicable to the particular client (doing so saves this status in the client's record in the **Contacts** module).

Project

Give the project a name in the **Project** field, (this could be the name of the show, service type, or artist, etc). Add any **Episode** information and **Language**, if relevant. The **Start Time, End Time, Booking Status**, and **Project Type** are automatically looked up from your Times & Numbers preferences set in the **Main Menu** Setup and may be changed here to suit this project.

*NOTE: Some **Calendar** views allow items that are selected-to-book to have different Start and End Times and Booking Statuses. In those cases, these time and status fields will say "Multiple". Selecting a new time or status from the pop-up will set all items (that are currently being booked) to the same value.*

Add your **Project Type** and **Project Status** information from the field provided pop-up lists of selectable and editable options. These drop-down menus are editable to include options suitable for your workflow.

If applicable, select the checkbox item **Show In Calendar** to have the **Project** appear in the **Calendar**.

Continuous Events are events that go "around the clock" for the duration of the event. For example, if you rent a piece of equipment on Monday, and it will be out until Friday, that is a *Continuous Event*,

because it's continually gone (unavailable for another booking) during that period. By comparison, if you book a studio room Monday through Friday from 9am to 5pm, and the room was available from 5pm to 9am, that would not be a Continuous Event, because there is a break between each day. This determination affects the **Quantity** and **Rate** calculation, which may be based on the number of hours, days, etc. Check the **Continuous Events** checkbox if the events you are booking are "Continuous".

People

Each new project will auto-enter your default group of **Titles** for people working on the project, but who are not necessarily scheduled, such as the Artist, Producer, Editor, Assistant Engineer, etc., as defined in the *Main Menu Setup / Titles* tab.

Depending upon the setting of the **Filter Names** field, clicking (or tabbing) into the **Name** field will display a pop-up list of either all names in the **Contacts** module, or only those with the same title.

How to add additional people to a Project:

1. Click the black and green *Add* button.
2. Select a title, then their name from the menu; their phone numbers will auto-fill. The names in the menu are derived from people in the **Contacts** module that have the same title.
3. If the person does not exist in **Contacts**, click in the **Name** field again and simply type their name. This does not add them to **Contacts**.
4. Click the black and green *Add to Contacts* button in the row (far right) to add this person to the **Contacts** module. If you do so, click the blue *Return to Project* button to return. For each person, you can choose to have their phone number **not** be printed on **Project** and Session printouts by deselecting the **'Include phone on print Outs'** checkbox (to avoid celebrity numbers getting into the wrong hands).
6. Define who's name gets assigned to which of the four available positions (1-4) on media label created from this project (from the **Library** module). This can always be adjusted later.
7. Delete a person by clicking the *Trash Can* icon in their respective row.

Financial

When the **Client** is selected, their financial information is displayed in two areas of the window. At the top (beneath the client account information) you will see fields for the client's financial aging (i.e. **Balance Due** date, amount **Overdue**, **Days Over** date ranges, **TOTAL Billed**, **Year to Date**, etc.). This information is displayed from **Contacts** module, based in the total of their Invoices.

At the bottom of the window, you will notice fields for the client's **Remaining Credit** limit and **Over Limit**.

| | | | | | | | | | | | |
|--|--|-------------------------|--|--|--|--|--|---|--|---------------------------|--|
| <small>Client Terms, Tax, and Discount values are looked up from the Contacts module. Changes made here will only affect THIS project.</small> | | Terms 60 days | | Tax Rates A LA County Tax 8.75% B San Diego Tax 7.75% | | Rate 8.75% 7.75% | | Exempt <input type="checkbox"/> | | Rate Card 0 All | |
| Remaining Credit | | Over Limit | | Discount Rate 10 % Discount -10% | | Insurance The Hartford On File Expires Insurance Certificate <input checked="" type="checkbox"/> Fri, Oct 10, 2014 | | | | | |
| Sales Person Janet Jones | | | | | | | | | | | |

To the bottom right of the view are **Tax Rates** and the **Discount Rate** for this project. This data is looked up from the Client record in **Contacts**, but may be changed here to reflect only this project, if needed.

NOTE: For a detailed description about financial information, see the Contacts module chapter under the Financial tab section in this Users Guide.

Finish Booking detail

The yellow fields must be filled in before proceeding. Other fields can be filled in later. When you have entered all details, click the green *Next >>* button on the bottom right of the screen. This does several things:

- Books all of the items you have selected (if any).
- Checks for conflicts.
- Looks up the appropriate Rates (rates) for the items you have booked.
- Creates records in the Sessions/Events module for each item/day that is booked.

If you started in the **Projects** module, you will be returned to the *Projects - Event tab* for review of the **Project** scheduled. If you started in the **Calendar** module, you will have the option of either returning to the **Calendar** module, or proceeding onto the **Projects** module. For now, let's return to the **Calendar** module, (click **Calendar**).

Linear Month view: Booking a Project

As in the Linear Week view, be sure the Items you want to book are listed on the left side of the screen. If you need to make some items **Bookable** and "Visible", follow the steps described in the *Settings* portion of this chapter.

How to book a Project in the Linear Month view:

1. Click in the box (the open field) at the intersection of the **Date** and the **Item** that you want to book, and a check mark will appear to indicate that the Item has been booked for that day. If you need to select multiple days for an item, click on an item on the first day. Then, shift-click the book icon on the last day and the days in-between will be selected.
2. Once you have marked all Items to be booked, click the *Book Project* button in the Book buttons.
3. A dialog box will appear, asking if you want to "Add to an existing Project or create a New One?"
4. For this example, click *New*.
5. The **Create New Project** entry screen will appear in the **Projects** module.
6. Follow the directions as above to enter information.

Linear Day view: Booking a Project

Booking **Linear Day** works a little differently. The additional space allows you to specify specific start end times for each item.

How to book a Project in the Linear Day view:

1. Navigate to the **Linear Day** view by clicking on its button in the upper left corner of any **Calendar** screen.
2. For the item you want to book, click a time to select a start time.
3. The next time that you click will become the end time, (selecting all of the area between the two areas clicked in pink).
4. If you need to change the times, click the *Clear* button and start over.
5. Once you have made all of your selections, click the *Book Project* button. This time, for variety, select "Existing" from the subsequent dialog box which will then provide a list of recent projects.
6. Click the *Go To* button for the desired project. This will add the selected items to that project, and present the now familiar "Review Project or Return to Calendar" option.
7. Again, select "**Calendar**" to continue learning other booking processes.

Timeline Day view: Booking a Project

To book in the **Timeline Day** view, make sure the Items you want to book are listed on the left side of the screen (click the *Settings* button to adjust the items). Near the top of the screen and below the date range display, select the **Items** view tab for this view. To begin a booking, complete all as follows.

How to book a Project in Timeline Day view:

1. Drag and zoom to get the timeline to display the appropriate date range for the booking you want to create.
2. Double-click at the intersection of the **Time** and **Item** that you want to book. A **New Event** bar will mark your booking (the default length of each booking is definable in the **Calendar Settings** area on the *General* tab).
3. Click and drag the beginning or end of the bar to adjust the time or, click and drag near the middle of the bar to slide it in either direction. As you edit, you will see the current begin/end times in the yellow pop-up tooltip.
4. Repeat the process for other items and times as needed.
5. To clear all selections and start over, click the *Clear* button .
6. Once you have made all of your Item selections for this event, click the *Book Project* button. A dialog box will appear; "Do you want to create a New project, or add to an Existing one?" Choose **Existing** and it will then provide a list of recent projects. **Cancel** will delete the item(s) and return you to the **Calendar**.
7. Click the *Go To* button for the desired existing project. This will add the selected items to that project, and present the now familiar "Review Project or Return to Calendar" option.
8. Again, select "**Calendar**" to continue with other booking processes.

NOTE: You can copy any **Event** booking and drag it to include to any additional Item that you desire. Select Option-Click (Mac) or Control-Click (PC) and hold the specific **Event/Item**. Drag the **Event/Item** copy to the new Item and release.

Note: Events having scheduling conflicts are shown with a red border encompassing the **Event** on the **Calendar** view.

Linear View: Simple Event Booking

When you need to book something in the **Calendar** that is not part of a **Project**, additionally does not have a “**Client**” requirement and/or does not need to have financial details or statistical reporting (e.g. meetings, a tour, unbilled maintenance, etc.) you can book this as a **Simple Event**.

How to book Simple Events the Linear views:

1. Select the item(s) using any method previously described
2. Then click the *Book Event* button. This presents the **Create Simple Event** booking window, where you can adjust times, status, and enter notes for one or more **Simple Events**.
 - The **Notes** text field is located directly adjacent to **Notes**, click to access.
 - Make individual changes to any event item by clicking in the appropriate field for time, date, or status changes required.
 - To make all scheduled event items consistent in event time, status and with same notes, select any or all yellow buttons at the top of the view to “Copy First To All”. Make a change to your first listed item then click the yellow related button to change to all below it.

The screenshot shows a window titled "Create Simple Event". At the top, there are tabs for "Copy First To All", "Notes", "Start", "End", and "Status". Below these is a table with columns: Item, Start, End, and Status. The first row shows "Final Cut Suite" with a start time of 9/9/2012, 3:00 PM, and an end time of 6:00 PM, with a status of "Confirmed". The second row shows "Electro Voice E-100 Mics #1" with the same date and times, also with a status of "Confirmed". Below the table are several empty rows for additional items. At the bottom of the window are "Cancel" and "Save" buttons.

| Item | Start | End | Status |
|-----------------------------|------------------|---------|-----------|
| Final Cut Suite | 9/9/2012 3:00 PM | 6:00 PM | Confirmed |
| Electro Voice E-100 Mics #1 | 9/9/2012 3:00 PM | 6:00 PM | Confirmed |
| | | | |
| | | | |
| | | | |
| | | | |

3. When finished with all, click either *Save* (to complete the scheduling of the Simple Events) or *Cancel*.

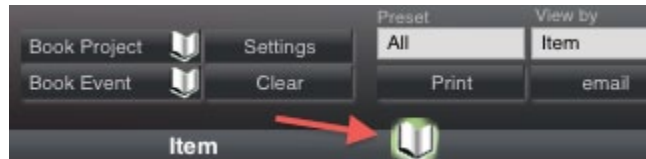
Traditional views: Booking a Project

Booking from the **Traditional** views is different from the **Linear** views, yet all of the **Traditional** views book in a very similar way (to each other).

How to book a Project in Traditional view:

1. Click the *Traditional Month* button in the **Calendar** module. In the upper right-hand corner of each **Date** box, you will notice a small icon that looks like an open book.
2. Clicking the *Traditional Week* button in the **Calendar** module will provide the same small book icon. But in this “weekly view” it is located in the upper right of the date “column”.

3. Clicking the *Traditional Day* button in the **Calendar** module will provide the same small book icon. It is located in the header at the top of the screen view.
4. Clicking the book icon in all views described above will take you to the **Add Item Event** window.



5. The date fields at the top will be set to the date on which you clicked the *Book* button.
6. You can use the *Start Date* and *End Date* arrow buttons to scroll forward or backward, or click in the **Date** fields to edit them. Please see below for information about the **Continuous** checkbox.
7. Once you have chosen a date, select the **Start** and **End** times for the **Event** and set the booking **Status**. Additionally, there are default start & end time ranges within the 4 selectable buttons (1,2,3,4) above the time fields (see more on **Quick-Entry Times** below). These values are preset within the **Main Menu/Setup/Modules/Projects** area.
8. At the top of each column you can use the **Category** (menu), **Sub-Category** (menu), and **Item** (text) filter fields to narrow the item list to what you are searching for. Sort each column alphabetically by clicking the underlined column names.
9. You can also use the **Budget** field to filter for a specific **Budget Code** from the **Budgets** module, and the **Preset** field to view items within selected **Calendar Presets**.
10. When **Media Inventory** items are shown, their current **In Stock** and **Avail.** (Available) amounts are displayed.
11. To select an item to book, simply click its name. The **Item** will highlight and the **Times** and **Status** will automatically fill in (the row will turn to the status color selected).
12. Click additional items as needed, or edit the dates to add bookings on different days. Once you have all of your items selected, you have several buttons from which to choose
 - *Cancel* - deletes the selections and returns you to where you were.
 - *Keep*, and *Select More Days* – will return to the previous Calendar screen, where SHIFT+clicking on the *Book* icon will book the items on the new day(s).
 - *Book as Simple Event* – books the item(s) as a single event with no attached Project.
 - *Book as Project* – opens the **New Project Entry** screen, allowing you to book the item as a project (explained earlier in this chapter under **Linear Month-Booking a Project**).

Times

At the top of the Items list, you will see fields for times. These are used to auto-fill the start and end times of an item in the list below. Whenever an item is selected in the list, the times showing in the Auto-fill fields will be used.

How to change the Auto-fill times:

1. Click a **Time** field and select a time from the pop-up list.
2. You can fill in your own specific time by double clicking the field, then typing your desired time.
3. If you don't want the item to Auto-fill with times, click the gray 'C' button above each field to clear them.
4. Click one of the 1, 2, 3, 4 buttons to quick-set the times to your quick-set times as defined in **Main Menu/Setup/Module Prefs/Projects**.

The screenshot displays the Studio Suite X interface. At the top, there are fields for 'First Date of Project', 'Last Date of Project', and 'Last Date of Project +1'. Below these are 'Start Date' and 'End Date' fields, both set to 'Tue, May 8, 2012'. A 'Continuous' checkbox is checked. Below the date fields is a row of buttons: '1', '2', '3', '4', and 'C'. The 'Items' list is shown below, with columns for 'Filter Category', 'Filter Sub-Category', 'Find Item', 'Budget', 'Preset', 'Start', 'End', 'Status', 'Rate Card', 'Recall Previous Selections', and 'Save'. The 'Start' and 'End' columns show times like '9:00 AM' and '5:00 PM'. The 'Status' column shows 'Confirmed'. The 'Rate Card' column shows '12345 Studio B'. The 'Recall Previous Selections' column shows '8' and 'Remix'. The 'Save' column shows a 'Save' button. At the bottom, there is a 'Create New Item' button and a 'Click items above to book on the date/s above' message. Below this are three buttons: 'Cancel', 'Add To Project', and 'Add to Project (without dates)'. A legend at the bottom left shows icons for 'Potential Conflict', 'Conflict', and 'Touching another Event'.

Continuous checkbox

This checkbox, located between the **Start** and **End** date, governs how Studio Suite handles events that span multiple days.

For example, if you are renting a piece of equipment to be booked for a range spanning 5 days (from 9am on Monday, around the clock continuously to 5pm on Friday), you would select the **Continuous** checkbox. This would appear on a **Project** as a single line item, so it would not be possible to enter details about any particular day.

Alternatively, if you are booking a studio from 9am to 5pm on Mon., Tue., Wed., Thur., and Fri. you would NOT check the **Continuous** checkbox, as the studio is actually available starting at 5 PM each day, until 9am the next morning. This would appear in the **Project** as 5 separate Events, allowing you to document different details about each day.

Recall Previous Selections button

At the top right is a *Recall Previous Selections* button. This will recall the last items you selected, as indicated by the check marks on the right side of each item. Make sure to specify the date or time prior to clicking this button.

Create New Item button

If you need to *Create a New Item* (that's not a **Room**, **Equipment**, **Person**, or **Media**), click the black and green button at the bottom left. It will present you with a **Create New Item** screen, where you can create new items as needed.

Preset (back in the Calendar)

If you are a large company, you may have many rooms, people and equipment to schedule (more than would fit in one screen). To the right of the *Book Project* button, there is a **Preset** field. This field allows you to choose which items are displayed in the calendar. **Presets** are configured within the **Calendar Settings**, (explained later under 'Settings').

How to choose a preset:

1. Click the **Preset** field.
2. A drop-down list will appear with a number of different preset names.
3. Each of these will recall presets of certain items that you'd like to view.
4. Click on **Rooms**.
5. The **Calendar** will now display all **Rooms** that you have made Bookable via the *Settings* button, (explained next under **Settings**).

View by

In the **Traditional Month** and **Week** views (next to the **Preset** field) you will see a '**View by**' field. This menu allows you to determine what information will be displayed within the highlight of each day.

How to use the View by field:

1. Click the **View by** field.
2. A pop-menu will appear with choices to show the **Item**, **Client**, or **Project**.
3. Choosing any of these will highlight that text in the space of each highlight.

Settings

Before we begin, let's establish a few definitions for terms used in this section.

Terminology

- **Category:** This is the broadest, uppermost definition of an item. The purpose of **Categories** is to allow filtering, reporting, and sub-totaling "by Category" in the **Projects**, **Events**, and **Invoices** modules. It is helpful to think of two kinds of **Categories**;
 1. "**Asset**" Categories which are based are actual physical things such as bookable items or resources from the **Rooms**, **Equipment**, **Contacts**, **Media**, or **Library** modules, etc.

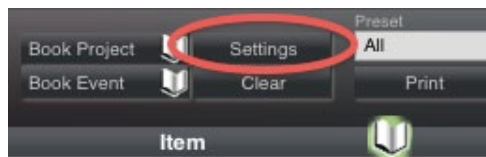
2. “**Subject**” Categories, which would include things such as Travel, Pre-Production, Post Production, Financial Credits, etc.

- **Items:** These are specific things such as a specific room, person, piece of equipment, etc. Each **Item** must be a member of one and only one **Category**. Although you will probably use these plain, basic items most of the time, you may also create a Parent/Child Hierarchy which allows items to be booked together. This will be explained later in the **Parent and Child Items** section and the **Headers** section.

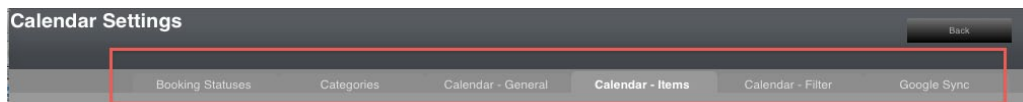
Before anything can be booked, it has to exist in either the **Rooms, Equipment, Media Inventory**, or **Contacts** modules. It must be identified as **Bookable**. Click the *Bookable* toggle button in that module. If you book things that do not fit into those categories (such as travel), these items can also be created as described later. For now, make sure you have already entered some of your rooms, equipment and people into their respective modules, and made them **Bookable**.

Considering there is the potential to have many bookable items, and limited space to display them in the **Calendar**, Studio Suite provides a way to edit which bookable items appear at any given time. Presets allow for quick re-configuration of visible items.

How to use the Settings button:



1. Click the *Settings* button next to the *Booking* buttons.
2. You will see the **Calendar Settings** screen with 5 tabs; **Booking Statuses**, **Categories**, **Categories-General**, **Calendar Items** and **Calendar Filter**.
3. Each tab has specific capabilities that aid with managing your **Calendar**.



To read “How to make a Bookable Item a Calendar Resource”, click [here](#).

Calendar Items tab

This default first-view tab is divided into a left and right side. The left side is a filterable list of all **Bookable Items**, and the right side is a filterable list of all **Calendar Resources**. What’s the difference? In short, you don’t need to see everything in the calendar that you need to book (e.g. media items, smaller equipment items, etc). So, **Calendar Resources** is a subset of all **Bookable Items** (items you need to see in **Calendar** form).

Bookable Items

Bookable Items (**Rooms, Equipment, Media**, etc.) is a list of all items that have been made **Bookable**. The **Category Filter** on the left side (below the “**Bookable Items**” label) allows you to view items within a specific category.

This tab holds preferences for filtering **Traditional** views of the calendar. Filter settings apply to a **Current Preset**. You can filter the **Calendar** by **Company**, **Sales Person**, **Project #**, **Project Name**, **Client**, **Event**, **Category** and **Status**. To view the details of a preset, choose one from the **Current Preset** drop down menu and click the *View* button.



Viewing Presets

How to view presets:

1. Click the **Current Preset** field and select **Equipment** from the drop-down list.
2. Click the **Company** field and select a company from the drop-down list.
3. Click the *Back* button above the **Calendar Items** tab.
4. This will take you to the **Calendar** view (notice the **Preset** field is set to **Equipment**).
5. Now, the **Calendar** will only display **Equipment** for the specific **Company**.

How to manage presets via the View button:

1. Click the *View* button.
2. The **Calendar Presets** window will appear, listing all presets (left) and their contents (right).
3. If needed you can change or modify the Preset Name.
4. Click the trash can icon next to a preset to permanently delete it.
5. When you are finished, choose *OK*.

How to use the Bookable Items Category Filter:

1. Click the **Category Filter** field (below Bookable Items).
2. Choose **Rooms** from the drop-down menu.
3. The list will now display all **Bookable Rooms** within your facility.
4. The Check for Conflicts shows which items the **Calendar** will check for possible booking conflicts for this item and it's Child items (explained below).
6. Click the blue *Go To* button to edit detailed information about this item in the Edit item window. This window is identical to the **Create New Item** window, explained next.
7. Click the *Trash Can* icon to delete the Bookable item from the list.

How to Create New Item / Edit Item:

1. If you want to create a new item, click the black and green *Create New Item* button.
2. If you want to edit an item, click the *Go To* button in the **Edit Item/Rates** column.
3. The **Create/Edit Item** window will appear.
4. Select a **Category**. If the **Category** selected is an “Asset” based category (such as **Rooms**, **Equipment**, **Contacts**, **Media**, or **Library**) the **Groups or Items** field will be a drop-down menu of the bookable items from those modules.
5. Select from the list of **Sub-Categories**, or type in a new value.
5. If it's a “Subject” **Category** (ie, the item doesn't exist in another module already), you may manually type in the **Item Name**.
6. Optional: Click the **Default Status** field and select a status from the drop-down menu. Select **Confirmed**, **Bumpable**, **Approved**, **Overdue**, **Canceled**, and **Complete** accordingly. Now, whenever this item is booked, it will be booked with this status. If you don't want this behavior, leave this field blank.
7. Optional: Type a **Barcode** into the **Barcode** field.

The ‘When Booking This Item, Also Book’ area allows you to specify (existing) items that are “also booked” when the parent item is booked. When viewing **Events** in hierarchy mode in the **Projects** module, these “also booked” items will appear underneath the parent in blue text and the Parent Items will have blue collapsing triangles. When not viewing in hierarchy sort, the “also book” items will appear in the sort order specified.

How to use ‘Also Book’:

1. Click the **Category** field and choose a category from the drop-down menu.
2. Click the **Item** field and choose an item from the drop-down menu. For instance, if you chose **Equipment** as your category, you would choose a piece of equipment from this list.
3. The item will then appear in the field below. Now, any time the main item is booked, this “Also Book” item will be booked as well.
4. Use the *Clear All* button to clear the field.

‘When Booking This Item, Also Book’ window preferences:

- **Check for Conflicts** - a check mark in this box will allow the **Calendar** to check for possible booking conflicts for this item and its Child items. You will most likely want this checked for your Asset items (**Rooms**, **Equipment**, **People**, etc), but you will probably NOT want this checked for **Media** items (since it's not booking specific pieces of media, but rather from a replenishing supply).
- **Auto Fill Times** – putting a check in this box will automatically allow this item to automatically fill in times established from the **Project** module. All items will use this feature except media items.

- **I am a Header** - creates a header from the pre-loaded information.
- **I am a Credit Item** - putting a check in this box makes this item a **Credit Item**, such as a deposit, payment, reimbursement or down-time or any other cost that your facility may be incurring.
- **Notes** - a blank text field area in which you can make extra notes about this **Bookable** item.
- **Also Booked By** - This will show any items that are parent items to this item; ie, if another item "Also Books" this item, that parent item will appear here.

Check In/Out Details tab

This is where you can do maintenance on the **Check In/Out** status of **Bookable** Items. This may become necessary if an item has been **Checked Out** on a **Project**, but never (or not properly) checked back in. In this case, you are not able to check the item OUT until you have checked it back-in. In other scenarios, someone may accidentally delete a **Project** with checked out items, thereby orphaning the items while they are still checked out; because the **Project** no longer exists, you cannot check them in.

To summarize, this tab allows you to override the status, and also see the last project that used the particular item.

When you are finished in the **Edit/Create** window, click the *Continue* button.

Calendar Resources

Once your items have been made **Bookable**, you can choose which items will appear in your **Calendar**. These items are listed under **Calendar Resources**. This is especially helpful if you have multiple (Bookable) items, but only need to see a select few in the **Calendar**.

How to make a Bookable Item a Calendar Resource:

1. **NEW** in Studio Suite X is the ability to Click and Drag an item name on the left to the **Calendar Resources** header on the right side, and it will appear at the bottom of the list. See steps 4-8 below.

You can still use the old method as well:

1. Click the double Arrow (>>) button next to an item under **Bookable Items**.
2. The double arrow will turn green, indicating it is selected.
3. To add the item to the list, click the bottom-most Plus (+) sign in the **Calendar Resources** list.
4. The item will appear at the bottom of the **Calendar Resource** list. However, this does NOT mean it will appear in the **Calendar**. **NEW** in SSX, the item that you added to the **Calendar Resource** list will now be "grayed out" on the **Bookable Items** list.

| | | | | | | | | | | |
|-------|--------------|---------------------|---------|------|---|-------------------|-------|---|----|---|
| Rooms | Stage | ← Stage 1 | ☒ R:1-2 | ☒ >> | + | Final Cut Suite | Rooms | ☒ | 7 | ☒ |
| Rooms | Stage | ← Stage 2 | ☒ R:1-4 | ☒ >> | + | Stage 1 | Rooms | ☒ | 8 | ☒ |
| Rooms | Graphics | ← Studio A | ☒ R:1 | ☒ >> | + | Studio A | Rooms | ☒ | 9 | ☒ |
| Rooms | Control Room | ← Studio A Oceanway | ☒ R:1-2 | ☒ >> | + | Studio A Oceanway | Rooms | ☒ | 10 | ☒ |
| Rooms | Control Room | ← Studio B | ☒ R:3 | ☒ >> | + | Studio B | Rooms | ☒ | 11 | ☒ |
| Rooms | Live Room | ← Studio C | ☒ R:2 | ☒ >> | + | Studio C | Rooms | ☒ | 12 | ☒ |

5. In order for the item to appear in the **Calendar**, you must click it. This will highlight the item (in yellow). This highlight method allows you to have multiple items selected for a preset, but only specifically selected items appearing in the **Calendar**.
6. You can adjust where the item appears in the **Calendar** by editing the **Display Order** field.
7. Click the *Select All* button to select all items in the list.
8. Click the *De-select All* button to de-select all items in the list.

Parent and Child Items

The **Calendar** Items tab allows you to build Parent/Child relationships between items. Below are descriptions for Parent and Child Items.

- **Parent Items** – A parent item is any item that has Child items assigned to it as part of a hierarchy. Parent items can be thought of as a sub-category, useful when you want an item to be a member of more than one Category. For example, a Control Room is a member of the Rooms category, but you also want it to be available for the Parent items “Pre-Production”, “Production”, and “Post-Production”. Another example of a Parent item would be a “package” that includes a control room, an engineer, a tape machine, and a piece of tape. Parent items have an expand/collapse functionality to show or hide their children.
- **Child Items** – Child items are Items that are assigned to parent items! They may also contain their own child items.

How to build a Parent/Child relationship:

1. Click the double *Arrow (>>)* button next to an item under **Bookable Items**.
2. The double arrow will turn green (indicating it is selected).
3. In the **Calendar Resources** list, click the Plus (+) sign next to an item already listed.
4. The item you added (Child) will appear underneath the item already listed (Parent).
5. You can hide/show the Child (in the list) by clicking the arrow next to the Parent.
6. If you want the Child to be visible in the **Calendar**, click to highlight it.

Expand/Collapse button

After you have made your Parent/Child relationship, the child items will appear underneath the Parent items in the **Calendar** view. This can greatly clutter your view, however you can choose to show or hide the Child items in the **Calendar** view with the *Expand/Collapse* button.

How to Expand/Collapse the Parent/Child view:

1. Click the *Linear Week* button in the **Calendar** View.
2. Look for your Parent/Child items on the date you booked them.
3. On the left of the Parent item, you will notice an arrow icon.
4. Click this to show or hide (Expand/Collapse) the Child items.

Current Preset

Directly underneath the **Calendar Resources** list is the **Current Preset** field. This field allows you to select a preset so you can configure it.

How to configure a Preset:

1. Click in the **Current Preset** field and select Rooms from the drop-down list.
2. In the **Calendar Resources** list, highlight only the Rooms that should be included in this preset, leaving other items un-highlighted.
3. Click the button labeled '*Update this Preset with selected Items*'.
4. The Rooms preset is now updated. Any time you select **Rooms** from the Preset menu in the main **Calendar**, only the rooms you highlighted in the **Calendar Resources** list will be visible.

Save current selection as New Preset

If you like, you can save **Calendar Resources** as a new preset.

How to save Calendar Resources as a new preset:

1. Highlight your desired **Calendar Resources**.
2. Click the button labeled '*Save current selection as New Preset*'.
3. The **Calendar Presets** window will appear, listing all presets (left) and their contents (right).
4. The first (highlighted) preset in the list will be blank, indicating it is new.
5. Type a name for your Preset in the Preset Name field and choose *OK*.
6. The new Preset will now appear in the Current Preset list as well as the Preset list in the main **Calendar**.

Booking Statuses tab

How to customize the colors and meanings for event statuses:

1. To edit the status names and orders, click the *Edit* button. Click *OK* when you have the names in the order you like.
2. Click a **Status Color** field and choose your desired color for the Status from the pop-up color palette.
3. The **HTML** code for the color will appear in the HTML column next to the color. The HTML values are used in the **Timeline** view, in web accessible versions of the calendar.
4. Click the *Trash Can* icon to delete the Status.

Some statuses are special and Studio Suite needs to know about them so it can automatically specify them as needed. On the right side of the screen, select your version of the status that most closely match the names listed.

Categories tab

Categories are a central component of Studio Suite. They allow you to sort, filter and subtotal by “like items”. This is where you can edit or define your **Categories**. It is also how items in each **Categories** will appear on the invoices, and how they will be exported to QuickBooks.

How to define Categories for invoices and QuickBooks:

1. To create a new **Category**, click the black and green *New* button.
2. To edit a **Category** name or to sort the order, click the blue button.
3. While you can name your categories anything in any language, some of them must correspond to specific modules in Studio Suite. Select an appropriate **Internal Category** that corresponds. Each **Internal Category** can only be used once.
 - **Account Codes** are used for linking/syncing exported invoices with QuickBooks or your accounting program. If you will be doing this, set default **Account Codes** for each **Category** as needed and each newly created Rate will auto-enter the **Account Code** defined here for its **Category**. Once each **Rate** is created, the **Account Code** may be edited per **Rate** as needed in the **Rates** module.
 - **Type** is the QuickBooks account “Type” that corresponds to the **Category** and **Account Code** you have entered. Make sure to match these exactly as you have them in your QuickBooks.
 - **Invoice Descriptions** are where you can define (per **Category**) how the default “description” on Invoice line items is initially calculated (in the **Events** module prior to exporting to the **Invoice** module). For example, some kinds of items do not need to have the **Time** included (such as **Media**, or daily **Equipment** rentals), but others, (such as Hourly Studio Time) need both a **Start** and **End Time** on the **Invoice Description**. The preferences for Invoice line items descriptions are defined here. They then flow to each newly created **Rate**, on to **Events** based on that **Rate**, and then finally to each **Invoice Line** item. The Descriptions can be edited at each of those locations, but the chain starts here.
 - **Share Calendar** is where you specify which **Categories** of items can be shared with external calendars (iCal on the Mac, Outlook on the PC). For example, you might want to share the calendars for **Room** and People events, but not for **Equipment** or **Media** events.

Calendar-General tab

The **First Day of the Week** field allows you to choose a day on which you would like the **Calendar** week to begin.

Viewing booked Items past midnight

When a booking crosses midnight (12:00 AM), you do not necessarily want it to appear on the **Calendar** for the next day, as it may deceive you into thinking there was an entire session on the second day. In other cases, you DO want it to appear, because it extends past a time when you would normally have a REAL session scheduled for that day.

Depending upon the nature of your business, a setting of 6 or 7am is suggested, as this will de-clutter these hangover sessions from the **Calendar** views (this applies only to **Traditional** and **Linear** views only, not **Timeline**).

Tips for using the Timeline view

At the top right of the screen, there are parameters to define how the **Timeline** works.

- **Quantize Selection** specifies the smallest time unit you would need to “round” to when making a selection. If you only book in whole hour increments, you would set this to 60 (minutes).
- **Default Duration** specifies the initial length of each new booking. Set this value to the number of minutes of your most commonly booked session length.
- Event **Load** time determines the number of days before and after today that load into each refresh of the **Timeline**. The larger your Load range, the longer the draw time.
- **Zoom** determines the initial magnification after each draw. If you load a 40-day range, you probably only want to see a day or so of history, and a few days into the future.
- **Day Zoom** allows you to specify the default initial zoom for each day.

Advanced View sub-tabs

The lower half of the *Calendar-General* tab consists of sub-tabs with advanced settings that can be used to adjust the appearance of the **Trad Month**, **Trad Week**, **Trad Day**, **Linear Month**, **Linear Week** and **Linear Day** views.

NOTE: You should know FileMaker calculation editing to use this area, however, you may contact AlterMedia technical support for assistance.

- The upper field contains the actual calculation used to display events in each of the calendar views.
- The lower field stores the code for the original settings of the view. If you make a mistake in editing code, you can enter **Layout** mode, copy the code from this lower field, then paste it in the upper field.

The *General* sub-tab contains three fields:

- **Your Menu High**- this is the number of future years the **Calendar** will show.
- **Your Menu Low**- this is the number of past years the **Calendar** will show
- **Items (Reference)** - This shows some coding (for reference only).

Print button

Below the **Present** field is the *Print* button. You can print the current view (although it is from a different layout).

Email button

This feature will create a .pdf document of the current view of the **Calendar**. It will then present an email window with the .pdf attached, which you can then send accordingly.

This covers all of the basics of the **Calendar** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

15

Categories & Items module

File Name: SSX_Projects.fmp12

Studio Suite was originally designed to be scheduling software primarily for Rooms, People, and Equipment, so the only place to define resources was the **Rooms** module, the **Contacts** module, **Equipment** module, and also the **Media Inventory** module. These items were defined as “Calendar Resources” by making items Bookable, which essentially made a clone of the items which would then appear in the Calendar.

It became clear that our users needed to book other things, like “Services”, “Packages”, “Meals”, “Dubs”, “Talent”, “Editing” etc. instead of specific physical resources. Naturally, these things came in different categories as well. We fit the ability to create these categories and items in the **Calendar** module, where the rest of the bookable “clones” where. Our users were always surprised to hear that to create the category “Dubs”, or the item “FedEx Delivery”, they had to go to the **Calendar** module. Not so intuitive...

The **Categories & Items** module provides a centrally accessible place where these kinds of items can be defined and managed, without having to go, of all places, to the **Calendar** module.

It should be noted that the functionality still exists in the **Calendar** module to do everything you can in this module, only this is a more obvious place for these features to be located. Further, this module now provides the **3rd** place (along with Main Menu > Setup, and Calendar) to define and manage Categories.

In this chapter you will read about how to:

- Use the category filter
- Create a new item/Edit item
- Use ‘Also Book’
- Add a Calendar Resource
- Build a Parent/Child relationship
- Use the Expand/Collapse button

- Create a preset
- Select (or change) a preset

Categories tab

Please refer to Categories section in the **Main Menu** chapter. You may also refer to the **Seven Things You Must Do** chapter and/or the Categories section of the **Calendar** chapter for a refined explanation of how to create and manage your Categories.

Items tab

This tab is divided into a left and right side. The left side is a filterable list of all Bookable items and the right side is a filterable list of all Calendar Resources. What's the difference? In short, you do not need to see everything in the calendar that you need to book (e.g. media items, smaller equipment items, etc). So, Calendar Resources is a subset of all Bookable items (items you need to see in Calendar form).

New Features: Sort A-Z, Category and Google Calendar

For convenience, a *Sort A-Z* button has been added to Studio Suite X. In the Calendar Resources list, the category is now visible. In addition to sharing the items with the Studio Suite Calendar, you can also choose what will be exported to your Google Calendar.

| Bookable Items | | | | Calendar Resources | | | |
|-----------------|--------------|-------------------------------------|-------|--------------------|---------------|-----------------|----------------|
| Category Filter | | Check for Conflicts | | Category Filter | Select All | Google Calendar | Share Calendar |
| All | Sub-Category | Auto Fill Times | ID | All | De-select All | | Display Order |
| Credit | ← deposit | <input checked="" type="checkbox"/> | V-192 | + Edit 1 | | Rooms | 1 |
| Discount | ← dis | <input type="checkbox"/> | V-557 | + Edit 2 | | Rooms | 2 |
| Dubs | ← DVD 1-10 | <input checked="" type="checkbox"/> | V-48 | + Studio A | | Rooms | 3 |
| Equipment | ← Aiwa | <input checked="" type="checkbox"/> | E-174 | + Studio B | | Rooms | 4 |

On the left side, Bookable Items (rooms, equipment, media, etc.) is a list of all items that have been made Bookable. The Category Filter on the left side (below the “Bookable Items” label) allows you to view items within a specific category.

Bookable Items

How to use the Category Filter:

1. Click the *Category Filter* field (below Bookable Items).
2. Choose Rooms from the drop-down menu.
3. The list will now display all Bookable Rooms within your facility.
4. The *Check for Conflicts* checkbox shows which items the Calendar will check for possible booking conflicts and it's Child items (explained below).
6. Click the *Go To* button to edit detailed information about this item in the **Edit Item** window. This window is identical to the **Create New Item** window. (explained next).
7. Click the *Trash Can* icon to delete the Bookable item from the list.

Create New / Edit Item

How to Create New Item / Edit Item:

IMPORTANT NOTE: *If an item is a room, person, company, piece of equipment, media or library item, it is best to create them in their respective modules and make them bookable from there.*

1. To create a new item, click the black and green *Create New Item* button,

Create New Item

or...

2. If you want to edit an item, click the *Go To* button in the Edit Item/Rates column.
3. The Create/Edit item window will appear.

4. Select a **Category**.
5. Select from the list of Sub-Categories, or type in a new value.
5. If it is a "Subject" Category (i.e., the item does not exist in another module already), you may manually type in the Item Name.
6. Optional: Click the **Default Status** field and select a status from the drop-down menu. Select one of your defined statuses. Now, whenever this item is booked, it will be booked with this status. If you do not want this behavior, leave this field blank.
7. Optional: Type a Barcode into the **Barcode** field.

The *When Booking this Item, "also Book"* area allows you to specify (existing) items that are "also booked" when the parent item is booked. When viewing **Events** in hierarchy mode in the **Projects** module, these "also booked" items will appear underneath the parent in blue text. The Parent Items will have blue collapsing triangles. When not viewing in hierarchy sort, the "also book" items will appear in

the sort order specified.

How to use 'Also Book':

1. Click the **Category** field and choose a category from the drop-down menu.
2. Click the Item field and choose an item from the drop-down menu. For instance, if you chose Equipment as your category, you would choose a piece of equipment from this list.
3. The item will then appear in the field below. Now, any time the main item is booked, this "Also Book" item will be booked as well.
4. Use the *Clear All* button to clear the field.
5. You may also re-select an item to remove it from the list of also book.

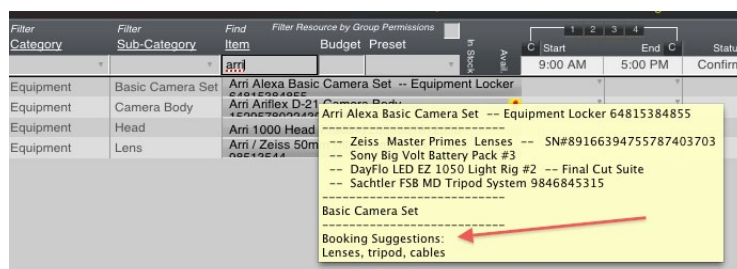
'When Booking This Item, Also Book' window preferences:

- **Check for Conflicts** - this tells the **Calendar** to check for booking conflicts for this item. You will most likely want this checked for your Asset items (**Rooms, Equipment, People**, etc), but you will probably NOT want this checked for **Media** items (since it's not booking specific pieces of media, but rather from a replenishing supply).
- **Auto Fill Times** – bookings for this item will automatically fill in times established from the **Project** module. All items will use this feature by default except media items.
- **I am a Credit Item** – makes this item a **Credit Item**, such as a deposit, payment, reimbursement or down-time or any other cost that your facility may be incurring.
- **Notes** - a blank text field area in which you can make extra notes about this **Bookable** item.
- **Also Booked By** - This will show any items that are parent items to this item; ie, if another item "Also Books" this item, that parent item will appear here.

NEW FEATURE: Booking suggestions

When you are creating a new item, or editing an existing one, you now have the option to add booking suggestions. Booking suggestions would be things that are technically optional on booking, but might commonly be booked with that item.

For example: when booking a camera on a project in the add items window in the Projects module, if you hover over the camera any booking suggestions (like a tripod, cables or lenses) that you entered into the Create New Items window will appear.



NEW FEATURE: Resource Permission Groups

A new feature in Studio Suite X is **Resource Permission Groups**. They are just like the Groups feature of previous versions, except that in addition to filtering like Contacts by activity, you can also set restrictions for them in reference to your facility.

For example, if you are running a college film department that allows only Juniors and Seniors to check out camera equipment, you would use a Resource Permission Group to keep your Freshmen and Sophomores from breaking this regulation.

Rates tab

You will also see a tab for *Rates*. This tab shows Rates for the item(s) you are booking. You can add an existing Rate for this Category or click the green and black *Create New Rate* button.

NOTE: If you are not familiar with creating a NEW rate, see the Create New Rate section of the Rates module chapter.

Check In/Out Details tab

This is where you can do maintenance on the Check In / Out status of Bookable Items. This may become necessary if an item has been Checked Out on a project, but never (or not properly) checked back in. In this case, you are not able to check the item OUT until you have checked it back in. In other scenarios, someone may accidentally delete a **Project** with checked out items, thereby orphaning the items while they are still checked out. If the **Project** no longer exists, you can't go there to check them in, so this area allows you to do that.

To summarize, this tab allows you to override the status, and also see the last project that used the particular item.


When you are finished in the **Create/Edit** window, click the *Continue* button.

Calendar Resources

Once your items have been made Bookable, you can choose which items will appear in your **Calendar**. These items are listed under **Calendar Resources**. This is especially helpful if you have multiple (Bookable) items, but only need to see a select few in the **Calendar**.

How to add a Calendar Resource (3 ways):

#1

1. New in SSX, drag an item name from the left onto the target  in a row on the right. Typically you'd drop it to the last blank row, but you can also drag it to another item which will make it a child of the item you dragged it to.

#2

1. Click and Drag an item name on the left to the **Calendar Resources** header on the right side, and it will appear at the bottom of the list. Jump to steps 4-8 below.

#3

1. Click the double arrow (>>) button next to an item under **Bookable Items**.
2. The double arrow will turn green, indicating it is selected.
3. To add the item to the list, click the bottom-most Plus (+) sign in the **Calendar Resources** list.
4. The item will appear at the bottom of the **Calendar Resource** list. However, this does NOT mean it will appear in the **Calendar**.
5. In order for the item to appear in the **Calendar**, you must click it, which will highlight it yellow and make it appear in the **Calendar**. This will highlight the item (in yellow). This highlight method allows you to have multiple items selected for a preset, but only specifically selected items appearing in the **Calendar**.
6. You can adjust where the item appears in the **Calendar** by editing the **Display Order** field.
7. Click the *Select All* button to select all items in the list.
8. Click the *De-select All* button to de-select all items in the list

Parent and Child Items

The *Calendar Items* tab allows you to build Parent/Child relationships between items. Below are descriptions for Parent and Child Items.

- **Parent Items** – A parent item is any item that has Child items assigned to it as part of a hierarchy. Parent items can be thought of as a sub-category. Another example of a Parent item would be a “package” that includes a control room, an engineer, and a microphone. Parent items have an expand/collapse functionality to show or hide their children.
- **Child Items** – Child items are Items that are assigned to parent items, they may also contain their own child items.

How to build a Parent/Child relationship:

1. Click the double arrow (>>) button next to an item under **Bookable Items**.
2. The double arrow will turn green (indicating it is selected).
3. In the **Calendar Resources** list, click the Plus (+) sign next to an item already listed.
4. The item you added (Child) will appear underneath the item already listed (Parent) or drag the Child item name to the Parent's target.
5. You can hide/show the Child (in the list) by clicking the arrow next to the Parent.
6. If you want the Child to be visible in the Calendar, click to highlight it.

Expand/Collapse button

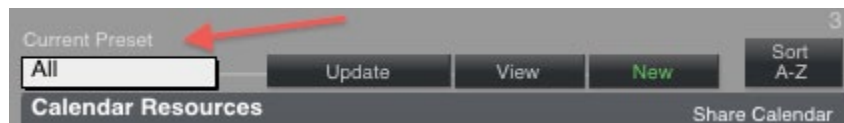
After you have made your Parent/Child relationship, the child items will appear underneath the Parent items in the **Calendar** view. You can choose to show or hide the Child items in the Calendar view with the *Expand/Collapse* button.

How to use the Expand/Collapse button:

1. Click the *Linear Week* button in the **Calendar** View.
2. Look for your Parent/Child items on the date you booked them.
3. On the left of the Parent item, you will notice an arrow icon.
4. Click this to show or hide (Expand/Collapse) the Child items.

Current Preset

Back in Calendar Settings, directly underneath the Calendar Resources list is the **Current Preset** field. This field allows you to select a preset so you can configure it.



How to create a Preset:

1. Click in the black and green *New* button.
2. In the field at the top type the name of your preset, click *OK*.
3. Chose the items in your preset by clicking on them in the **Calendar Resources**. Once clicked they will be highlighted in yellow.
4. Click the *Update* button. Any time you select this preset from the Preset menu in the main **Calendar**, only the items that you highlighted in the **Calendar Resources** list will be visible.

Save Current Selection as New Preset

How to select (or change) a Preset:

1. Click in the **Current Preset** field and select Rooms from the drop-down list.
2. In the **Calendar Resources** list, highlight only the Rooms that should be included in this preset, leave other items un-highlighted.
3. Click the *Update* button.
4. The Rooms preset is now updated. Any time you select Rooms from the Preset menu in the main Calendar, only the rooms you highlighted in the **Calendar Resources** list will be visible.

View Presets

All presets can be viewed and managed via the *View* button.

How to manage presets via View button:

1. Click the *View* button.
2. The Calendar Presets window will appear, listing all presets (left) and their contents (right).
3. If needed, you can change or modify the Preset Name.
4. Click the *trash can* icon next to a preset to permanently delete it.
5. When you are finished, choose *OK*.

This covers all of the basics of the **Categories & Items** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

16

Communications module

File Name: SSX_Projects.fmp12

The **Communications** module is for documenting your project and business communication, such as phone messages, email, letters, and attachments. The **Contacts** module is the main location that the majority of your communications will originate from, but the **Communications** module is a place to view and manage all of that data.

The **Main Menu** messages area references messages entered in the **Communications** module. It displays messages for the User currently logged in.

- A message highlighted in yellow indicates it is new.
- Click a message from the Dashboard to go to the *Messages* tab in the **Communications** module.

In this chapter you will read about how to:

- Create a new message
- Find a message
- Compose a letter
- Create a customized form letter
- Edit a form letter

Messages tab

Create sub-tab

The *Create* sub-tab provides the ability to create a message or search for existing messages. Messages that are created in the **Communications** module appear in the recipient's Dashboard - Messages area of the **Main Menu** view. A message created for a User will appear only to that User, when he or she is

logged into Studio Suite. You can assign a message to multiple people by selecting them on the left side.

Create New Message

Create New Message

How to create a new message:

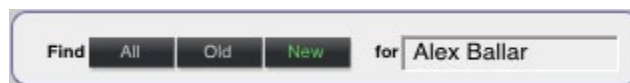
1. Click the black and green *Create New Message* button. The message composition area on the right will auto-fill with today's date and time. The cursor is automatically placed in the text field, so you can begin typing the text.
2. With the '*Quick Select*' list of available individuals as provided from the **Contacts** module, select who the message composed will be sent to. Select multiple names if necessary. When you click on a person from the list their name will transfer over and appear in the '*This Message Is For*' field.
3. Compose your message in the text field.
4. Finish the message by selecting any desired 'message types' from the items listed above. Click the checkbox to secure the item will be included in the message sent.
5. Click the "Record" button to record a message. When a message has been recorded, it will turn into a green "Play" button.

Find Messages (search)

With the provided search field on the left, Find: *All*, *Old*, or *New* messages for a particular individual.

How to find a message:

1. Click in the search field to locate an individual.
2. A pop-up menu of contacts will appear for you to select from.
3. Next, select *All*, *Old* or *New*. Messages will appear within the *List* sub-tab of the **Communications** module.



List sub-tab

The *List* tab shows a sortable list of all of the messages in the **Communications** module.

Tips for using the List sub-tab

- The **From** field is the person originating the message.
- The **To** field is the who the message was sent to.
- Click the *Go To* button to go to that record in the *Create* sub-tab of the **Communications** module.
- **Date** and **Time** stamps are included showing the date and time of the created message.
- **Status** allows for updating the status of the message from new to old.
- The **Message** information is shown on each associated line item.
- Any **Recorded Messages** saved can be accessed, played and reviewed.

New Call Entry tab

A *New Call Entry* record is best created from the *Calls and Notes* section of the **Contacts** module. Here though, you can input more details of a Call communication with a company and/or contact as listed. You can either type the conversation as text or record an audio description by clicking the *Record* button.

Compose Letter tab

Composing a letter is also best initiated from the **Contacts** module.

How to compose a letter:

1. Select the recipient in the **Contacts** module, then click the *New* button in the *Letters, Faxes and Emails* section. It will automatically fill in the date. The subject can be filled in from this location or it can be added back in the *Compose Letter* tab. Click the *Go To* button to be taken to the *Compose Letter* tab of the **Communications** module, where the letter can be completed.
2. The letter is pre-addressed, with a **Salutation**. The salutation is preset to be “**Dear First Name**”. If you want it to be something else, click on the salutation text and type whatever you desire it to be.
3. You can also click in the **Form Letter** text field to access a *Form Letter*. Form Letters can be created under the *Form Letters* tab in this module.
4. The **Subject** of the letter was created in the **Contacts** module initial letter setup. If you are using a form letter, the subject line was determined when you created your form letter. However, the subject line can be edited here if needed.
5. Place the cursor in the text body field, and begin typing.

Tips on composing a letter:

- The **Company Selector** lets you choose which of your company’s information will fill the return address, letterhead and logo.
- The **Sent By** field is used to keep track of how this particular letter was sent (Regular Mail, FedEx, Certified Mail, Return Receipt, UPS, Fax, etc.) You must then enter a **Subject**.
- If this letter was sent via a delivery service, then the **Tracking Number** field provides a place to record that number for your records.

Select Letter Type to Preview box

Within the *Select Letter Type Preview* box, there are many pre-formatted letter types to choose from; **Business**, which puts the return address information on the letter; **Casual**, which omits the return address information; and **Fax**, which is formatted as a fax cover sheet. You have your choice of two font sizes, a **10** point, and **12** point, for each letter type, as well as two paper sizes, **Full** and **Monarch**.

The *Automatic* radio button will automatically generate letterhead based on the information and logo you entered when you set up your company initially. If you entered specific letterhead when you set up the company, the *Custom* button will allow it to be used here.

To see a preview of your letter, click on the button with the *Select Letter Type to Preview* box that has all of the elements that you desire. It will take you to a Page Setup dialog box, if you click OK it will take you to a preview of the formatted letter. You can either Click *Continue* to print it or *Cancel* to go back to the letter.

You also may send the same text via email by clicking on the *Email* tab. Click the *Send Email* button, you will have an option to send it directly out of Studio Suite or thru your email.

NOTE: If you use web mail (gmail, yahoo, etc.) you will need to send these emails directly out of Studio Suite.

Email tab

Also linked to the **Contacts** module, the *Email* tab allows you to compose an **Email** to a selected *Contact ID*. First, find the recipient in the **Contacts** module, then begin to compose a *New* letter. After your initial text setup entries for the date and subject, click the *Go To* button and you will be automatically be taken to the *Compose Letter* tab. Click on the *Email* tab and all of the same information is available for you to complete your email.

Response & Enclosures tab

The *Response & Enclosures* tab of the **Communications** module is where you can enter the **Status** of the communication, what type of communication their **Response Was** (e.g. email, phone call, etc. from the drop down menu), the actual response in the box below **Response Was** and a description of any enclosed material. If their response contained any **Enclosed materials**, enter the details here. Click on the red text *Contacts* tab in the upper right to return to go to the **Contacts** module if needed.

Form Letters tab

Detail sub-tab

The *Detail* sub-tab of the *Form Letters* tab are where you can create customized form letters.

How to create customized form letters:

1. Click the black and green New button at the top.
2. In the *Subject* text field create a subject for reference.
3. Add a *Form Letter Name* that is recognizable and related to the referenced letter material. This name is for your reference only, the recipient will not see it.
4. Type your form letter body material in the large text field provided. Upon completion the letter will be added to the list of **Communications** module form letters.

List sub-tab

The *List* sub-tab provides a list of the Form Letters. When you click a single entry the Record number shows in white in the upper right of the screen. The view is sortable by **Record #**, **Form Letter Name**, **Subject**, and **Text**.

How to edit a Form Letter:

1. Click the *Go To* button next to the *Form Letter* name.
2. The *Detail* sub-tab window will appear, allowing you to edit the specific *Form Letter* information.

Audit Log sub-tab

The *Audit Log* sub-tab under the *Form Letters* tab reflects the activity on the *Form Letters* tab only, not the entire **Communications** module. For more information about the new Audit Log feature, read the Audit Log Chapter in this manual.

Attach & FTP tab

The *Attach & FTP* tab is used for attaching (recording, linking and/or embedding) external files, sounds, pictures or movies to an individual communication. When you are on the record for this communication, a red dot appears on the *Attach & FTP* tab to let you know that it has something attached, linked or embedded to it. For a detailed explanation of this tab, see the **Attach & FTP tab** chapter of this User's Guide.

This covers all of the basics of the **Communications** module in Studio Suite. To return to the **Main Menu**, click on the *Main Menu* tab in the upper right of the screen.

17

Contacts module

File Name: SSX_Contacts.fmp12

In this chapter you will read about how to:

- Create a new Contact
- Include a billing address (in addition to a main address)
- Use the Unlink This Address button
- Change the name of sub-tabs Custom 1 and Custom 2
- Create a new Callbacks record
- Create a new Calls & Notes record
- Compose a letter, fax or email
- Enter phone number and use Skype
- Choose a title
- Add the Contact to a group
- Create a new group
- Create and use a Resource Permission Group
- Use Flags in searches
- Add a birthday to a Contact record
- Find a record from the Detail tab
- Import a vCard from an address book
- Export a Contact as a vCard
- Find Contacts by group
- Add/Remove a single Contact to/from an additional group
- Add all Contacts to a specific group
- Remove all Contacts from a specific group
- Insert a client logo
- Enter an Employee as a Contact
- Create a Prowl API
- Create a new Rate

- Add an existing Rate
- Create a new message from the messages sub-tab screen
- Create new “Task” items for each record
- Set default Tasks
- Set up billing and tax information for a Contact
- Edit a client tax Rate
- Navigate client Invoices
- Add an existing Rate
- Edit client media
- Choose a printing option
- Use the Audit Log to view the data from a deleted record
- Use the *Print This* button

Overview

The **Contacts** module is a full-featured contact management system. The main advantage it has over other contact managers is that it has connections to other modules in Studio Suite, allowing you to see and jump to every communication, project, invoice, library “media asset”, or title.

It keeps track of separate addresses for Main, Billing, Shipping and two user-customizable address fields for each of your Client, Vendor, Employee, Personal and Prospect contacts. It also tracks different personnel associated with that contact, as well as unlimited phone numbers per contact, and four multi-purpose and searchable Flag fields.

From the *Financial Info* tab, you can see a window into the **Invoices** module to view every invoice for that Client. From the *Media Asset* tab, you can see all of the media belonging to that Client. From the **Library** module (on the **Main Menu**), you can see every piece of media that belongs to that Client and the titles they contain. The related **Communications** module keeps track of every call, letter (with built-in response tracking), shipment, email, and “to-do” related to that contact.

The **Contacts** module will automatically fill in the U.S. City and State when you enter a **Zip (Postal) Code** as well as keep track of **email, Web Site, FTP, SMS** information, account numbers (for credit cards and shipping) and union affiliations. It also organizes for companies and people by customized categories and talent and automatically shows what Projects each contact has been involved with and what each contact owes you, not to mention the different defined Groups, and Resource Permission Groups a contact is a member of.

Additionally, the **Contacts** module keeps track of holiday mailings and prints custom holiday envelopes (most envelope and letter sizes) and four different standard size address/phone books. You can select (via menu) which of your companies you are sending from, and Studio Suite will auto-generate a letterhead with your custom logo, or your own custom letterhead.

Upon entering the **Contacts** module, you should be on the *Detail* tab, viewing the contact's *Main* sub-tab information.

NEW FEATURE: Importing/exporting Contacts from/to Address Book, Outlook, Google Contacts and Active Directory.

Contacts can now be imported from Address Book (with a purchased plug-in), Outlook (with a purchased plug-in), Google Contacts and Active Directory.

Detail tab

The *Detail* tab is the beginning point of entering all of your contacts into Studio Suite. The *Detail* tab has five sub-tabs: *Main*, *Billing*, *Shipping*, *Custom 1*, and *Custom 2*.

Main sub-tab

The *Main* sub-tab of the *Detail* tab keeps track of information about the main location of a contact. (The *Billing* and *Shipping* sub tabs are explained later in the Chapter).

How to create a new contact:

1. Click on the *New* button in the *Function Bar* or press Cntrl-N (PC) or ⌘-N (Mac).
2. Depending on the User preference you have established (in the Main Menu/Setup/User Accounts/Account Preferences), the contact will be marked either a **Client**, **Vendor**, **Employee**, **Personal**, **Prospect** or a **Location**. You can override this by checking the appropriate box.

NOTE: It is important to mark all applicable checkboxes because any contacts marked will appear throughout Studio Suite in value lists for Clients, Vendors, Employees, Locations, etc.

3. After you enter the **Name**, **Company** and **Address**, tab into the **Zip** field.
4. Entering a **Zip Code** automatically fills-in the **City** and **State** from the **Postal Codes** table (ships with U.S.A. data only). Since postal data is under constant change, a city or state may enter incorrectly.
5. Clicking in the **City** field will present you with a list of cities associated with that **Zip Code**. Click on the correct city to choose it. If none of the cities are correct, you can manually type in the correct city.
6. Also enter the **County** and the **Country**.
7. If you see a red dot next to the **Name** or **Company Name**, this indicates that the same text has already been entered into this field on another record. Clicking the red dot will find all records that have the same entry, allowing you to quickly determine which record is correct, or to manually merge the data into one record if appropriate.

Billing sub-tab

If a Client has a Billing Address that is different than their Main Address, you can use this tab to link a related Billing Address to the current Main Address.

How to include a Billing address (in addition to a main address):

1. Click on the *Billing* sub-tab. Studio Suite will ask, "Do you want to create a NEW contact or pick from a list of existing contacts"?
2. If you are just getting started, click on the *New* button to create a new record and fill in this additional information in the same method as the *Main Detail* tab.
3. If their billing address information already exists in another contact record, click the *Existing* button. Rather than creating a new billing contact, you have the option to choose from a list of existing contacts if the address is already listed elsewhere in the **Contacts** module.
4. When you select the *Existing* button, a list of all of your contacts will appear and you can then *search* (within the open field above) by **Company Name**, **Last Name**, or **Category**.
5. When you locate the contact of choice, click anywhere within the client field on the selected listing. Studio Suite will then link the selected record as the address for "Billing".
6. When you are finished with the *Billing Detail* sub-tab, click on the *Main Detail* sub-tab.
7. You will notice that the *Billing* sub-tab now has a little, red dot, indicating that this **Main** contact has a different **Billing** address and information.

Unlink This Address button

The *Unlink This Address* button will remove the link between the two records, without deleting them.

How to use the Unlink This Address button:

1. It will give you a dialog box of "Are you sure you want to dis-associate this address from the Primary Contact"? Click *OK*. The change will begin the whole Billing entry process again.
2. For each billing address you enter, a new and separate contact record is created.
3. This gives you the most flexibility from each of these related addresses.
4. You will notice that the *Main Detail* sub-tab now has a little red dot on it.
5. This means that this Billing address is associated a Main address elsewhere. Clicking on the *Main Detail* tab will take you back to the original, associated contact.

Shipping sub-tab

The *Shipping* sub-tab contains an alternate Shipping address and related information. This tab is identical to the **Main** and **Shipping Detail** screens, so review those procedures as explained above.

Custom 1 & Custom 2 sub-tabs

Two additional contact **Detail** screens are provided so you can personally customize them to match that contact. The Detail procedure works identically to the *Billing* and *Shipping* sub-tabs explained above.

How to change the name of sub-tabs Custom 1 and Custom 2:

1. Click on the text “*Custom 1*” in the sub-tab label. This will allow you to edit the tab.
2. Retype your desired label. (Some examples of customizing include **Personal Home, Parents, Vacation Home**, etc.).
3. When you are finished with the *Custom 1* and *Custom 2 Detail* sub-tabs, click back on *Main Detail* sub-tab, to the original contact.
4. You will again notice a little, red dot on the *Custom* sub-tabs indicating that this contact has information in that *Custom* sub-tab.

Callbacks section

This is where you specify that you should call someone back on a certain date. Callbacks can be assigned to the person who should make the call, and the Main Menu Dashboard will show that person (when they're logged in) a list of the callbacks they need to make. They can be converted to the **Calls** area to show that the call was made (which removes it from the Callback list).

How to create a new Callbacks record:

1. Click the black and green *New* button next to **Callbacks**.
2. Select a date from the pop-up calendar, and the **Subject** field will be ready for you to type what the phone conversation discussed.
3. Click the **Time** field and type the time.
4. The **Who** field should automatically be filled in with your Account Name. If you would like someone else to make the Callback, click the Who field and select that person from the drop-down list.
5. If you need to view or enter more details, or would just like to work in a larger format, click on the *Go To* button, which will present a popup window.
6. In the popup window you can click *Delete* (to delete the Callback), *Close window* (to exit), or *Convert to Call* (which will move the Callback into the Calls area, and remove it from the Callback List).

Calls & Notes section

The **Calls & Notes** area is for keeping track of your communications, and phone calls for that particular contact.

How to create a new Calls & Notes record:

1. Click the black and green *New* button next to **Calls & Notes**, and select a type of note from the pop-up list. Choose Edit from the list to add a new preset type.
2. The **Date** will auto-fill, and the **Summary** field will be ready for you to type.
3. Click the **What** field and select a preset note from the pop-up list. Choose Edit from the list to add a new preset note.

4. If you need to view or enter more details, or would just like to work in a “full page” format, click on the *Go To* button, doing this will take you to the **Communications** module, where you can enter more details, as well as select a printing format if you choose to print.
5. Clicking the red *Record* button will open your operating systems recording application, allowing you to make a voice note. To begin recording, click the red circle. You can get fancy and hook your phone to the audio input of your computer (with a phone to audio connector) to record your calls. This may be illegal though, and would use up a large amount of disk space.
6. Click the *Trash Can* icon to delete the record.

Letters, Faxes & emails section

This section works like **Calls & Notes**, but is designed to track Letters, Faxes or Emails you may need to send to this contact.

How to compose a letter, fax or email:

1. Click the black and green *New* button next to the **Letters, Faxes & emails** fields.
2. The **Date** will auto-fill, and the **Subject** field will be ready for you to type.
3. Type a **Subject**. If you need to type more information, use the **Text** field.
4. If you would like this to be printed as a Letter, Fax or sent as an email, click the *Go To* button.
5. This takes you to the *Compose Letter* tab of the **Communications** module.
6. The cursor is placed in the text field, so you can begin typing the text.
7. The letter is pre-addressed, with a salutation.
8. The salutation is calculated to be “Dear **First Name**”; if you want it to be something else, click on the salutation text and type whatever you desire it to be.

Tips relating to letters, faxes and email:

- The **Sent By** field is used to keep track of how this particular letter was sent (Regular Mail, FedEx, Certified Mail, Return Receipt, UPS, Fax, etc.) You must then enter a **Subject**.
- The **Company Selector** lets you choose which of your company’s information will fill the return address, letterhead and logo.

Within the *Select Letter Type Preview* box, there are many pre-formatted letter types to choose from; **Business**, which puts the return address information on the letter; **Casual**, which omits the return address information; and **Fax**, which is formatted as a fax cover sheet. You have your choice of two font sizes, a **10** point, and **12** point, for each letter type, as well as two paper sizes, **Full** and **Monarch**.

The *Automatic* radio button icon will automatically generate letterhead based on the information and logo you entered in the *Setup* button at the **Main Menu**. **Custom** will put the letterhead graphic you entered about your company in the *Setup* button at the **Main Menu** about your company.

After you have finished writing the text of your letter, click on the button for the **Letter Type** you want to print, and it will take you to a preview of the formatted letter. Click *Continue* to print it or *Cancel*.

You also may send the same text via email by clicking on the *Email* tab. Click the *Send Email* button.

Send directly from Studio Suite or through your email client.

Message Status

The *Response & Enclosures* tab of the **Communications** module is where you can enter the **Status** of the communication, what their **Response Was:** from the pop-up menu, and type the details of the response below. If their response contained any **Enclosed materials**, enter the details here. Click on the Red Text *Contacts* tab in the upper right to return to the **Contacts** module.

Additional Personnel section

The *Additional Personnel* section works like the sections above it. It allows you to add more people to this contact and stores a new full record in the **Contacts** module, allowing you to keep more info about each related person. Clicking the *Go To* button will take you to that full record. To return to the Parent record, click the Blue button in the upper right of the portal.

Phones fields

In the upper right of the screen you can define a default phone number format for the numbers you type below. The field populated with (###.###.####) inherits its original value from the setting in the Main Menu Setup area, however, you can edit this number format per contact by clicking on this field. A prompt will appear allowing you to specify the phone number format that all eight phone numbers below should follow, where the # sign represents a number. Add text or symbols between the number groups (ex: hyphen, period, forward slash, plus sign, etc). Numbers that are entered with a different quantity of numbers will *not* adopt the defined style.

How to enter phone numbers and use Skype:

1. Enter phone numbers for each contact.
2. The labels may be changed by selecting a value from the pop-up menu.
3. You can also enter an **Extension** for each phone number in the field to the right of the phone number.
4. If you want a specific number to be the default number, click on the checkbox next to the phone type. You can pick more than one.
5. To delete a number, click the red *Trash Can*.
6. You can initiate a Skype call by clicking on the "S" button.

NOTE: When you are adding phone numbers for a contact, you can add an essentially infinite amount as well as edit the phone number tag (i.e. home, cell, work, etc.)

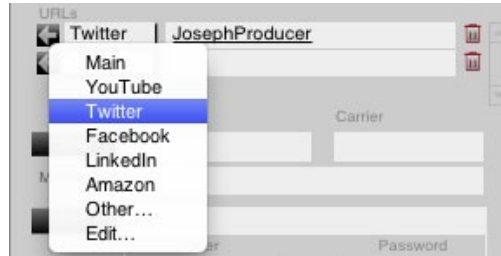
Type the contact's e-mail address in the **Email** field below. If you see a red dot next to the email address, this means this email address is already entered into another records in Studio Suite. Click the red dot to find all records containing this address.

To send an email to this contact, click the *EMail* button, which will open your e-mail program with the contact's e-mail address(es) already in the 'To' field. If you are using Entourage on a Mac, the new email will be located in the Drafts folder.

Type the contact's website in the **Web** field. If you then click the *Web* button, your default web browser will take you directly to the contact's website.

NEW FEATURE: Twitter

If you set up your company's Twitter account then you can send tweets and direct messages to every contact with a twitter account. Here is where you enter their Twitter user name without the @ symbol. To read about how to send a tweet or direct message through Twitter, read in the chapter in this Users Guide.



NEW FEATURE: SMS messaging

A new feature in Studio Suite X is SMS messaging. All you need is the recipient's cell phone number and the cell phone carrier that they are with.



How to set up SMS messaging:

1. Enter cell phone number for the contact.
2. Choose from the drop down list which cell phone carrier they are with.

FTP field

Assign your client FTP address in this field for any possible client server access requirements in order to exchange, view, or manipulate files. Add a **User** name and **Password** for log-in access required.

Title, Category, Talent, Styles, Unions & Affiliations fields

You can assign each contact a **Title** and **Category** as well as their **Talent** and what **Style** they play/use if applicable.

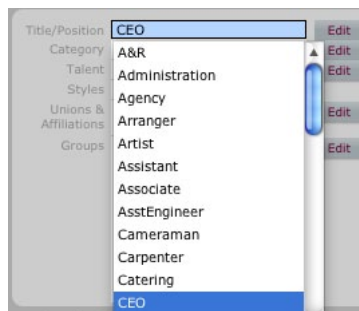
Definitions

- **Title** – is used to classify “people”, and makes them available as “Participants” on a Project.
- **Category** - is a broader description, mainly to describe “companies”.
- **Talent** - will be available to book as talent on Projects.
- **Styles** - allows you to further define that aspect of a Talent.
- **Unions & Affiliates** – Union and business affiliations this contact is associated with.

All fields behave identically, however for the purpose of this example we will use the **Title** field.

How to choose a Title:

1. Click the **Title** field and select '**Operations**' from the pop-up menu.
2. The **Title** field will now display Operations, however, lets say our contact is also an Editor. Click the **Title** field, hold down SHIFT and select '**Editor**' from the pop-up menu. The second choice will be barely visible in the field, indicating there are multiple selections made.



3. If you do not see a choice that fits your needs, click the *Pencil* icon next to the field.
4. This will display an editable list of choices in which you can type a new one. When finished, click *OK*. The new Title choice will be displayed in the **Title** pop-up menu.
5. You can also just manually type entries into this field.

Groups field

The **Groups** field assigns the contact to a certain group of your choice. For instance, if you send a monthly newsletter to certain contacts, they would be a part of the 'Newsletter' group. This enables you to send your Newsletter to as many contacts as you'd like with just one click.

How to add the contact to a Group:

1. Click the **Groups** field.
2. This opens the Groups window.
3. Click on the Group name you would like this contact to be a part of.
4. The name will be highlighted. (You can make multiple group selections by simply clicking on each group name).
5. The 'members' column shows how many people are in that group.

How to create a new group:

1. There are two blank fields at the top of the **Groups** window.
2. Enter the Group Name in the first blank field and a Comment in the second blank field.
3. Click the *Add* button. The new Group will be added to the list.

Once you have assigned this contact to a Group, they will be included in a Group search (find), explained later in this Chapter under the *List* sub-tab section.

NEW FEATURE: Resource Permission Groups

A new feature in Studio Suite X is **Resource Permission Groups**. They are just like the Groups feature of previous versions, except that in addition to filtering like Contacts by activity, you can also set restrictions for them in reference to your facility.

For example, if you are running a college film department that allows only Juniors and Seniors to check out camera equipment, you would use a Resource Permission Group to keep your Freshmen and Sophomores from breaking this regulation.

How to create and use a Resource Permission Group:

1. Create a Group for those who are allowed to use the Room, Equipment, etc. that you will be restricting on the contact page of someone who is going to be in this Resource Permission Group.
2. When creating future contacts who you would like be a part of this Resource Permission Group make sure to include this Group on their contact record.
3. Subsequently when you are on the record for the Room, Equipment, etc. that you would like to restrict, click on the Resource Permission Group sub-tab and the Group that you created should be there. Click the box for the Group that is allowed to use the Room or Equipment.

Flags

On the right side of the *Details* sub-tab window, there are four, searchable **Flag** fields you can use to group your contacts for mailings, promotional situations, etc.. You can search by any Flag to find that same group.

How to use Flags in searches:

(For example, if you're collecting a list of people to invite to a party)

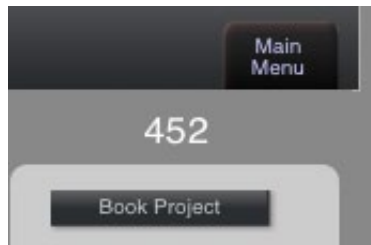
1. Enter the word 'party' in **Flag 1**.
2. Now, when you perform a find by "party" in the **Flag 1** field, it will locate contacts with the **Flag 1** field marked 'party' and present them in the List sub-tab (explained later in this chapter).

3. When a flag has served its purpose, you can clear the **Flag** field for that specific contact, or clear the field for all contacts. For instance, if you are not longer having 'parties', you can clear the 'party' Flag field for all marked contacts by using the Replace method (as explained in the **Studio Suite Basics** chapter of this User's guide).

IMPORTANT NOTE: BE VERY CAREFUL when performing a "Replace", as it cannot be undone and you may not be able to recover data if you replace the wrong field.

Below the flags you can document the dates of when the last **Letter** or **Fax** was sent, when they were last **Here**, and when you last **Spoke**. Just click on the associated button to automatically enter today's date into the fields.

Record # (number)



The large **Record #** seen in the upper right of the page is for visual reference only, and you cannot alter this field. Studio Suite keeps track of all of your contacts by this number, and many relationships to other modules are based on this number.

Find Mode will search for record numbers displaying the found record in the Details sub-tab window.

Bookable/Not Bookable button

Below the Record # (number) is the *Bookable/Not Bookable* button which toggles between those two statuses. Being Bookable means that a contact can appear and be booked in the **Calendar**-and **Projects** modules, and that **Rates** (rates) can be made for this contact. Prior to being made Bookable, a person must have one or more **Titles**. When making someone Bookable, you will be asked if you want this person to be immediately "Visible" in the **Calendar**. If you elect not to make them visible now, you can make them visible later in the **Calendar** module.

Bookable Category

Within the field provided you can select a bookable category from the provided drop down menu.

NEW FEATURE: People vs. Company

Just below the Bookable Category drop down menu there is a new pair of Automatic radio buttons titled Name and Company. This gives you the option to book the contact as an individual or as the company that they work for, or a company without a specific person.

Birthday

The **Birthday** fields allow you to select the birth month, day and year of your contact.

How to add a birthday to a Contact record:

1. Click the top (month) field under the word **Birthday** and select a month from the drop-down menu.
2. Click the **Day** field (left) and type the day of birth.
3. Click the **Year** field (right) and type the year of birth.

Finding Records

How to Find a record from the Detail tab:

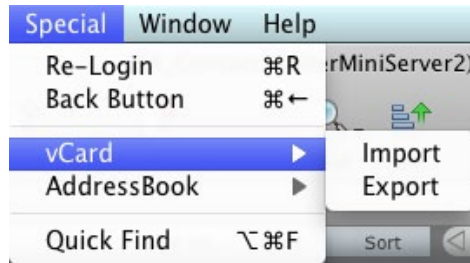
1. Click the *Find* button in the *Function Bar*.
2. The **Record Title** field (at the top of the page) will be blank with a cursor in it.
3. You can type the **Company Name, First Name, Last Name, City, State, Zip Code, Category, Instrument** or **email address** into this field.
4. If you want to find more specific information click on the specific field and type in your requested information. For example, finding “drums” in the first combination field will find all contacts that listed **Drums** as an **Instrument**, any **Company Name** with drums in the title, like **Drums R Us**, a city like **Drumsville**, or a person’s **Name** like Steve **Drumstein**.
5. Alternatively, you can perform the search in the actual field. Remember that you can narrowly define a Find by specifying more criteria, for example; to include a specific Talent in a specific city.
6. Once you’ve entered your search criteria, click on the *Continue* button in the Status Area or hit RETURN on the keyboard, and Studio Suite will show the total found set (if there are more than one) in the *Lists* tab.
7. To see more detail, click on the *Go To* button to see the *Main Detail* tab for the found records.
8. If only one record is found with your criteria, Studio Suite will automatically go to the **Main Detail** screen.

Special Menu: vCard

The easiest way to send your contact information is by using a **vCard**. vCards are the standard for creating and sharing virtual business cards. vCards are sent as attachments and can be imported and exported within Studio Suite. The **Contacts** module in Studio Suite is the placeholder for receipt and transfer of vCard information.

Importing / Exporting vCards

To Import or Export **vCard** files within Studio Suite please review the following. In the Filemaker program, the top task bar contains a feature called *Special*. When you are working within the **Contacts** module this *Special* feature has a pop-up menu that includes steps to Import and Export vCard information.



Special Menu: Importing vCards

Import an existing vCard file from your MS Outlook (mail client) address book, or from a saved vCard file in your computer's operating system document files.

How to import a vCard from an address book:

1. In the **Contacts** module *Detail* tab, create a contact by accessing "new" from the *function bar*. A new **Contact** page with new **Contact** number will open.
2. Proceed to click the *Special* feature at the top of the screen.
3. Select vCard from the pop-up menu and then click *Import*. Your standard operating system dialog will open to your folder sourcing area.
4. Find the existing vCard contact you desire to Export and open the file. The vCard information will transfer into Studio Suite as a new **Contact** in the **Contacts** module.

List tab

The *List* tab contains five different sub-tabs: *Company/Name*, *Group Management*, *Holiday*, *Activity/Flags*, and *Talent*. Within each sub-tab are *Find* buttons that will narrow the list down to display contacts by category; **Clients**, **Vendors**, **Employees**, **Personal**, **Prospect**, **Location** or **Find All**.

Company Name sub-tab

The *Company Name* sub-tab lists your contacts alphabetically by the **Company Name**. It can also list by the contact's last **Name**. Clicking on the *Go To* button will take you to the *Main Detail* sub-tab screen for that contact. There are also three available **Variable Field** columns to select and display contact category items of your choosing. Click-on *Variable Field* then the existing blue highlighted category item below it. View a drop down menu of selectable category items. Check-click the one that is appropriate for your purposes.

Group Management sub-tab

This tab is used to view the contacts that are in certain **Groups** (i.e. 'newsletter', etc.) This list will only display items assigned to a **Group**. If you want the list to display contacts in alphabetical order by Group, click the *Group sort* button at the top of the **Group** column.

How to find Contacts by Group:

1. Click the orange field below the *Find* button and select 'Newsletter' from the drop-down menu.
2. Click the *Find* button again, above this field.
3. The list will now display all contacts with the word 'Newsletter'.

How to add/remove a single contact to/from an additional group:

1. Click the orange field below the *Find* button and select another group from the drop-down menu.
2. Now click the *Add* button next to a contact.
3. The new group will be assigned to this contact (while keeping the original group), meaning this contact is assigned to two groups.
4. To remove a contact from a group, follow the instructions above, but click the *Remove* button in the row of the contact.
5. If you have added a contact to multiple groups, you may need to use the orange scroll buttons (up and down arrows) to scroll down and see all groups this contact is a part of.

**How to add all contacts to a specific group:**

1. Click the orange field below the *Find* button and select the group from the drop-down menu.
2. Click the *Add* button above the far right column.
3. A dialogue will appear stating 'This is not UnDo-able!'
4. If you are sure you want to add ALL contacts in the list to this group, choose *OK*.
5. All contacts in the list will be added to your selected group.

How to remove all contacts from a specific group:

1. Click the orange field below the *Find* button and select the group from the drop-down menu.
2. Click the *Remove* button above the far right column.
3. A dialogue will appear stating 'This is not UnDo-able!'
4. If you are sure you want to remove ALL contacts in the list from this group, choose *YES*.
5. All contacts displaying this group will be removed from the group.

Holiday sub-tab

The *Holiday* sub-tab shows a list of all of your contacts and notations of those you have sent holiday mailings to. This list is sortable by **Company Name**, and last **Name** alphabetically. There are fields for each **Year** as XXX0 to XXX9. This can be interpreted as 2000 to 2009 or the following decade 2010 to 2019 etc.

The fields below each year are pop-up menus that display Yes, No, and Card, Gift, and Party as to whether or not you sent a holiday mailing/card etc. To select multiple holiday items, press and hold control-shift (windows) or ⌘-shift (Mac) and click-check your desired items. A check will be seen next your selected additional items shown on the drop down menu.

The **Holiday Label** field shows what would print on the Holiday Labels for envelopes if you choose it from the *Print Menu* tab. Below the light green **Year** fields is a field with a pop-up menu that determines to whom those labels will be addressed (Family, Person, Company, Both). If you select Family, Studio Suite will take the contact's **Last Name** and attach "Family" to the end, i.e.: The Smith Family. If you choose Person, it will be addressed to that individual specifically. If you choose Company, it will go to the company in general, not to a specific person. If you select Both, you will see the person's name and the company name. If none of these choices are appropriate, you can click in the **Mailing/Card To** field and type whatever you want, i.e.: "Bob and Sally Jones and little Scruffy".

Activity/Flags sub-tab

The *Activity/Flags* sub-tab shows a list of all of your contacts and what flags you have attached to the four different **Flag** fields (via the *Detail* tab/*Main* sub-tab), and a list of the activity dates of **Letter**, **Fax**, **Here** and **Spoke**. You can sort alphabetically by any of the column headers.

Talent sub-tab

The *Talent* sub-tab finds a list of all of your contacts with information in the **Talent** field assigned to them (via the *Detail* tab/*Main* sub-tab). It shows their **Name**, **Home Phone**, **Cell Phone** number, their **Talent**, **Styles**, and **Projects**. The **Project** field shows the most recent Project this person has been involved with as a Talent.

More Info tab

The *More Info* tab allows you to keep track of more specific, detailed information on each contact. The **History & Details** area shows all of the projects that this contact has been associated with. Clicking on the *Go To* button within the **Projects** will take you to that specific record in the **Projects** module. Add **Comments** about this person, any **Food** or **Other Preferences** (perhaps they prefer a certain post room setup or working with certain people), **Multi-Track Alignments** and **Mix Alignments**, up to **12 Aux Sends** an engineer may use regularly, and specific **Mics**. preferences.

The **Phone Book Notes** and **Directions to Location** show up on all of the phone book printouts.

Publishing section

Select and add your *Publishing Company* contact and *Publishing Administration* person. Clicking the *Go To* button in each field will take you to the full record for this contact.

Client Media Label Setup section

The **Library** module allows you to determine whether your logo or the client logo info appears on label prints. This is where you can define a client's label & logo information.

At the bottom of the *More Info* tab window is an area for **Client Media Label Setup**.

How to insert a Client Logo:

1. Click once in the **Client Logo** field.
2. Click '*Insert*' from the application menu at the top of the Studio Suite window.
3. Select '**Picture**' from the drop-down menu.
4. A standard operating system dialog will appear. Use this to browse your computer for the client logo. Deselect the 'Store only a reference to a file' checkbox, then click *OK*.
5. The logo should then appear in the **Client Logo** field.

Client Address / Client Phone fields

Text that you type in these fields will appear on labels printed from the **Library & Labels** module. When printing from that module, you'll have the choice of printing your own logo, or the Client's, which will come from here. These fields are also conveniently available on the *Media Asset* tab within this (**Contacts**) module.

Web Viewer tab

This tab allows you to easily perform searches on the contact via several portals: Google, Google Maps, IMDb, YouTube, allmusic, LinkedIn, and three loadable tabs.

Employee Tab

The *Employee* tab manages your employee records and information. It has five sub-tabs; *Info*, *Rates*, *Messages*, *Tasks*, and *Events*. User access to this tab can be blocked from the Permissions tab in the user accounts setup.

Find All button

Clicking on the Find All button (just below the Employee tab) will find all the contacts you have designated as an Employee. These contacts (employees) will then be listed in the List tab.

Info sub-tab

How to enter an Employee as a Contact:

1. A check mark in the **Employee** checkbox indicates this person is an employee.
2. Select their **Birthday** month and enter their birth day and year. This will calculate their current **Age Now**),
3. Enter their **Emergency Contact** information, any particular **Health Issues**, any regular **Schedule**, **Special Talents** they may have, who their **Dependents** are and how many, the **Reason Left** if they no longer work for you, and any other **Notes** you may desire to include about that employee.
4. Determine their **Employee Status** (Full Time, Part Time, On Call, Independent Contractor, etc.) by clicking this field and choosing a status from the drop-down menu.
5. The *Not Bookable* toggle button must display *Bookable* (green) if you need to schedule them in **Calendar** or charge for their time of services.
6. Keep track of when they were **Hired** and when they **Left**, and Studio Suite will calculate their **Length Employed** automatically.
7. You can enter their **Salary**, their **Tax I.D. Number** (or Social Security number), and it keeps track of their **Sick Days** or **Personal Days**, any **Vacation Preference** and when they actually did take a vacation in the **Vacation Actual** field, **Commission Percent** if a salesperson, and **QB Sales Rep Code**, if applicable.
8. Add **Performance Review** information whether to retain, release, or counsel the employee on parameters of their performance.
9. If you have a scanned or digital picture of your employee, paste or Insert it into the **Picture/Photo** field.

New Feature: Prowl Notifications

Prowl notifications are sent through **Events, Projects, Tasks, Calendar** and **Production** modules, but they are set up in the **Contacts** module. Although you can add Prowl notification capability to any contact record, it is created under the *Employee* tab because it will most often be used with employees. If you create a Prowl notification API for a contact that is not an employee, you still create it here. Doing so will not mark the contact as an employee.

Read "How to create a Prowl API" to learn more about how to set up your contacts to receive Prowl notifications.

How to create a Prowl API:

1. Go to the Employee tab in the Contacts module, it should default to the Info sub-tab.
2. On the upper right side of the screen you will see a box that looks like the image below. Click on the button that says, Prowl API Key.

The screenshot shows the 'Employee Info' sub-tab. At the top right, there is a green 'Bookable' button and an orange 'Create User Account' button. Below these, there are several input fields for employee information: 'Employee Status' (set to 'Full Time'), 'Title/Position' (set to 'Arranger Artist'), 'Hired', 'Left', 'Commission Percent', 'Sick Days', 'Pers Days', 'Length Employed', 'Salary', 'Tax I.D. Number' (set to 'LA County Tax'), 'QB Sales Rep Code', 'Vacation Preference', and 'Vacation Actual'. At the bottom, there is a 'Prowl API Key' button, which is circled in blue.

3. You will be taken to the screen that looks something like the one see below, fill it out with the appropriate information.

The screenshot shows the Prowl Register page. At the top, there is a navigation bar with 'Home', 'Apps', 'Help', and 'API' links. Below the navigation bar, there is a 'Register' section. It includes a message: 'A free Prowl account is required to use Prowl.' Below this, there are two sections: 'Required' and 'Optional'. The 'Required' section has fields for 'Username:', 'Password:', and 'Password (Confirm):'. The 'Optional' section has an 'E-mail:' field. Below the 'E-mail' field, there is a note: 'If you provide an e-mail address your password can be reset if you forget it. Your e-mail won't be shared with anyone.' At the bottom of the 'Optional' section, there is a 'Register' button. At the very bottom of the page, there is a link to the 'Privacy Policy'.

Rates sub-tab

In the *Rates* sub-tab, enter in the Rates (rates) that you charge your Clients for your Employee's time. A person must be Bookable before you can make Rates for them. This tab shows the **Item, Rate Name, Type, Unit of Measure**, the **Charge** for that unit of time, the **(Daily) Hours Before OT** (Overtime), **OT Rate** (Overtime), rate **Charge Per-Hour** of overtime, **Taxes** that apply, and if this rate applies to a specific **Client**. As explained elsewhere, Overtime is calculated using a separate Overtime Rate.

How to create a new rate:

1. Go to the **Rates** module.
2. Click the black and green *Create New Rate* button. Follow the prompts and instruction.

*NOTE: If you are not familiar with Creating New Rates, see the **Rates** module chapter of this User's Guide.*

How to add an existing Rate:

1. Under **All Rates in this Category**, you will see a list of Rates that already exist. For instance, if your item falls under the Category of Rooms, you will see a list of Room Rates.
2. Click the blue arrow button (to the right of the rate).



3. This rate will now appear in the **Items Using This Rate** list above.
4. Repeat this step for as many rates as you would like.
5. Clicking on the 'D' button will define that row as the *default* Rate for that item and Client. There may be one (and only one) default for each different item. The default Rate will automatically be selected when ever this item is used by this Client.
6. If you need to make changes to a Rate, click on the *Go To* button to go to that Rates record.

Messages sub-tab

When messages are created for an employee from the main screen of the **Communications** module, they will be visible in the tab in each employees own record. Each message may be marked as **New** (appears in yellow) or **Old** (appears in no color-white), with a **Date, Time, Action** and **Message**. Clicking on a message will make it appear in fields below, where it may be edited.

How to create a new message from the Messages sub-tab screen:

1. Click the black and green *New* button.
2. This will open the **Communications** module with a new record created, pre-addressed to this employee.
3. Add text to the message, and also add other people to the **This Message Is For** field.
4. From this screen, click the orange *Contacts* tab (next to *Main Menu* tab) to return.

Tasks sub-tab

This *Tasks* sub-tab allows you to create tasks for employees. You can create task groups, such as Edit session or 'Joel's Tasks', and load them quickly into the task list.

How to create new “Task” items for each record:

1. Click the black and green *New* button just below the Tasks sub-tab.
2. Click the **Priority** field and enter a priority (i.e., 1, 2, 3, etc.)
3. Click the **Status** field and select a status from the drop-down menu (i.e. Incomplete, In Progress, etc.)
4. Enter the **Task** that the employee is to complete.
5. Click the **Due Date** field and select a date from the pop-up calendar.
6. Click the **Time** field and select a time this task should be completed by.
7. Click the *trash can* icon to permanently delete this **Task** record.
8. Your list of task statuses and related colors can be edited in the **Tasks** module.

Set Default Tasks sub-tab

The *Set Default Tasks* sub-sub tab allows you to create default task groups that you can assign quickly in the *Tasks* sub-sub tab.

How to set default Tasks:

1. In the *Set Default Tasks* sub-tab, click the black and green *New* button next to **Groups**.
2. A record number will automatically be generated.
3. Enter the name of the task, such as ‘Edit Session’.
4. Then, use the black and green *New* button next to **Priority Task** to enter the priorities of this main task, such as ‘Load from tapes’, then ‘Log shots’, etc.
5. Now go back to the *Tasks* sub-sub tab.
6. Click the field next to **Load Task Group**. A drop down menu will appear listing your default Task groups.
7. Choose ‘Edit Session’ from the drop-down menu.
8. Click the *Load Task Group* button.
9. Each priority task will be listed (in-order) in the list below.
10. If you only want ONE of these priority tasks to appear, click the field next to *Add This Task*, select a Task then click the *Add This Task* button.

Events sub-tab

This *Events* sub-tab provides a view-only list of all of the events that an employee has worked on, with *Go To* buttons that jump directly to each event in the **Events** module.

Financial tab

The *Financial* tab shows you the contact’s financial information. There are three sub-tabs: *Invoices*, *Rates*, and *Vendor PO's*.

Invoices sub-tab

The *Invoices* sub-tab shows billing and tax information for this Contact.

How to set up billing and tax information for a Contact:

1. The top right selectable check-box indicates whether the contact is a Client, Vendor, Employee, Personal, Prospect, or Location.
2. Click the **Billing Terms** field and choose a 10, 15, 30 or 60 day term (originally looked up from the preference set in Main Menu),
3. Type a **Credit Limit** and Studio Suite will automatically calculate how much **Remaining Credit** they have based on existing invoices in the **Invoices** module, and how far **Over Limit** they may be on their credit. If a Booking exceeds their limit, you will be notified just after the item is booked (having this alert before booking is not possible because it doesn't know how much you'll be charging yet).
4. As you review how much money a client owes, you can adjust the **Allow Release of Client Materials** (media) field if they are over-extended on credit. If this field is set to "No", when printing a Release Form from the **Library & Labels** module, you will be notified. This exact same field is visible in the **Projects** and **Library** modules. Changing it in one place changes it everywhere, meaning that this status is specific to the Client as a whole, and not to a single Project or piece of media. The **Release Notes** field is also visible everywhere. Use this field if you need to be more specific about releasing Client Material.
5. In the upper-right, you can document up to six different **Account Numbers** - Credit Cards, FedEx, Frequent Flyers, etc.

Client Tax Rates fields

Each Client can have up to three different **Tax Rates; A, B, and C**. When new Client records are created, the **Tax Rates** look up from the default settings on the *Main Menu/Setup/Taxes* tab. If their tax requirements are different than the given default(s) (i.e. if you need to ship their materials to a region with different tax requirements) the tax rate may be edited.

| Client Tax Rates | | Exempt--Number | Tax I.D. Number |
|------------------|---------------|---------------------------------|----------------------------|
| A | LA County Tax | 10.00% <input type="checkbox"/> | |
| B | LA County Tax | <input type="checkbox"/> | |
| C | San Diego Tax | <input type="checkbox"/> | |
| | | | Name For QuickBooks Export |
| | | | Staten Inc, Jason Staten |

How to edit a client tax rate:

1. Click on the **Rate** field and select a different tax rate from the drop-down menu.
2. Each **Tax Rate** will display it's percentage.
3. Select if any of the three taxes are **Exempt** for this client, and type the exemption **Number** for each.
4. Below the **Client Tax Rates** area, select a **Discount Rate** for this client (discount rates must be defined in the **Rates** module).
5. Enter the Tax I.D. number for this contact in the **Tax I.D. Number** field.
6. Below this is the **Name for QuickBooks Export** field, which is the name that will be used to link to a client when Studio Suite Invoices are imported into **QuickBooks**. This is automatically calculated based on the Studio Suite Client's Name and Company Name, but you may type in a different value to override the calculation if it doesn't match with your pre-existing QuickBooks accounts.

When a new Project is booked for each client, their client specific discount and tax rates are looked up by that Project (where they may be edited per project if needed). Each Item/Event within that Project will use only the matching Taxes that exist in both the Projects Tax settings (which came from the Client) and the Tax settings for Rate that each Event/Item is using. The per-Project and per-Event tax settings are eventually transferred to the **Invoices** module.

Client Invoices section

Further down you'll see a view-only list of all invoices for this specific contact. The list displays their **Inv Date**, **Inv No.**, **Project #**, **Project Name**, **Client PO#**, the **Total** invoice amount, the **Balance Due**, **Due Date**, and the **Status** of whether it is PAID or not.

How to navigate client invoices:

1. If you want to view details of a specific invoice, click the *Go To* button on the left of the invoice. This will take you to that invoice record in the **Invoices** module.
2. To reduce the number of invoices showing, you can select to view ALL, PAID, OPEN, or CREDIT only.
3. When you click the *Print Statement* button, only the currently showing invoices will be included in the Statement (which actually prints from the **Invoices** module).
4. Below that is a standard aging summary line of all invoices for this client, and amounts that are overdue for each time period shown.
5. At the bottom of left the screen is a summary of recent **Payments Received** from this client.

At the bottom right of the screen, you can specify a **Default Sales Person** for this client. This sales person will be automatically applied to each project for this client.

Rates sub-tab

The *Rates* sub-tab displays two areas. The one on the bottom (**All Non-Client Specific Rates**) is not editable. The one on top (**Rates For:**) shows Rates that are specific to this Client and no one else. Client specific rates can be created from existing rates that appear in the bottom portal.

How to add an existing Rate:

1. Under **All Non-Client Specific Rates** you will see a list of Rates that already exist. You can filter the list using the **Category Filter** on the right. As an example, if your item falls under the drop down **Category Filter** of *Rooms*, you will see a complete list of Room Rates.
2. Click the blue arrow button on the right.
3. This rate will now appear in the **Rates For** list above.
4. Repeat this step for as many rates as you would like.
5. Clicking on the *D* button will define that row as the default Rate for that item for that Client. There may be only one default for each different item. The Default Rate will automatically be selected when ever this item is used by this Client.
6. If you need to make changes to a Rate, click on the *Go To* button to go to that Rates record; or to create a new Rate record. To return to the **Contacts** module, click on the red *Main Menu* tab, then click on the *Contacts* button from the **Main Menu**.

IMPORTANT NOTE: New Rates cannot be made from here, they must be made either in module for the item that the Rate is for (i.e. Rooms), or in the Rates module.

*NOTE: If you are not familiar with Rates, see the **Rates** module chapter of this User's Guide.*

Vendor POs sub-tab

The *Vendor POs* sub-tab displays view-only current vendor Purchase Order for your reference. Vendor PO's are created within the **Purchase Orders** module. Clicking on a *Go To* button will take you to that PO in the *Purchase Orders* module.

Media Asset tab

In the *Media Asset* tab you can see all of a Client's media (from the **Library & Labels** module), as long as they are defined by the Client on each media asset. The main large portal shows information about each media asset. Clicking on a row of a particular media asset will highlight (make yellow) that media asset and show additional information in the yellow detail box at the bottom. Details include the **Asset Title, Project #, Project, Current Location, Date Removed**, who **Authorized**, and **Taken By**. Also shown is the current in/out **Status** of the media.

How to edit Client media:

1. Click on the *Go To* button for a **Asset Title**.
2. This will take you directly to that record in the **Library** module. The 'found set' will be all of the records for that client.
3. Clicking in the *Go To* for a particular song **Title** will take you to directly to that record in the **Titles** module.

Client Media & Label Setup section

How to insert a Client Logo:

1. Click once in the **Client Logo** field.
2. Click Insert from the application menu at the top of the Studio Suite window.
3. Select 'Picture' from the drop-down menu.
4. A standard operating system dialog will appear. Use this to browse your computer for the client logo, then click *OK*.
5. The logo should then appear in the **Client Logo** field. See "Client Logo" notes on 12-13.

Client Address / Client Phone fields

Text in these fields will appear on labels printed from the **Library** module. When printing from that module, you'll have the choice of printing your own logo, or the Client's, which will come from here. These fields are also conveniently available on the *Media Asset* tab within this (**Contacts**) module.

Attach & FTP tab

The *Attach & FTP* tab is used for attaching (recording, linking and/or embedding) external files, sounds, pictures or movies, URLs, and FTPs to an individual **Contacts** record. The *Attach & FTP* tab is the where all of these attached files are stored. For a detailed explanation of this tab, see the **Attach & FTP tab** chapter in this User's Guide.

Reports tab

The *Reports* tab, formerly the *Print* tab, has two sub-tabs: *Print Options* and *Audit Log*.

Print Options sub-tab

The Print Options sub-tab gives you 24 different buttons that allow you to run reports and print many styles and types of lists, labels, letters, envelopes, and different sized phone books, as well as an Invoice Statement for the current record.

How to choose a printing option:

1. Before you print, perform a *Find* to isolate the record(s) that you wish to print.
2. Sort the records according to your goal i.e.: by **Company Name**, then **Last Name** and **First Name**, or if you are sending bulk mailings, you may get a postage discount by sorting your envelopes by **Zip** (Postal) Code.
3. Use the **Company Selector** to choose a company that will appear as your letterheads, logos and return addresses.
4. If you are printing 2x4 and 3x4 labels, use the 'Label Position' selectors area (on bottom left) to choose which label positions to print on accordingly.
5. Click the buttons below and/or check the individual boxes for your desired print label quantities.
6. Click the *Continue* button in the status area (on the far left).
7. If you want to print, click *Yes*, otherwise click *Cancel*.

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

Print This button

The *Print This* button will print a detailed page of information for the record that shows on the screen.

How to use the Print This button:

1. Once you click the *Print This* button, the standard operating system **Page Setup** dialog will appear. Make your selections and choose *OK*.
2. The page will then be displayed.
3. Click the *Continue* button in the Status Area to the right.
4. Another print dialog will appear.
5. In the **Print** dialog box, print the single record you are currently viewing on-screen. Choose copy amounts. Check printer source selected for correct printer.
6. Click *Print* to print.

This covers all of the basics of the **Contacts** module in Studio Suite. To return to the **Main Menu**, click on the *Main Menu* tab in the upper right of the screen.

18

Customizations module

File Name: SSX_Tech.fmp12

When you upgrade to the next version of Studio Suite, any customizing that you have done to your files will not automatically be included, so the **Customizations** module is a place where you can keep track of any customizations you have made.

In this chapter you will read about how to:

- Document a customization

Detail tab

This tab is where you document customizations that you have made in Studio Suite, one ch-ch-ch-change at a time, (“time may change me, but I can’t trace time...”).

How to document a customization:

1. To get blank record, click the *New* button.
2. In the grey field at the top of the section type a title for the customization.
3. Click in the **Priority** field and chose a number from the drop down menu.
4. In the **Requisitioner** field, type the name of the person making the request.
5. Below that is a place specify the **Module** and **Layout** the requested customization occurred.
6. The fields on the right are:
 - **Products**, for the version of Studio Suite that will be customized
 - **Fixed By** for whoever makes the requested customization
 - **Status**, i.e. completed, in progress, etc.
 - **Completed** for the date that it was completed
 - **Description** is for the details about the customization

List tab

The *List* tab shows all of the records of customizations requests that have been created and includes all of the same fields as the *Details* tab. The two crucial differences between the *Details* tab and *List* tab are that you can not modify any data except the Priority level on the *List* tab and that you can only create new requests from the *Details* tab.

Attach & FTP tab

The *Attach and FTP* tab allows you to attach other files to each customization request. A red dot will appear on the *Attach and FTP* tab if anything is attached to the record you are viewing.

For a detailed “how to” use the *Attach and FTP tab* see the **Attach and FTP tab** chapter in this User’s Guide.

19

Employee Schedules module

File Name: SSX_Tech.fmp12

The **Employee Schedules** module is designed to keep track of employee hours. It tracks the hours employees are scheduled versus hours that they actually work, calculating the difference. It also calculates the percentage of an employee's time that is spent on Events in relation to total hours worked.

In this chapter you will read about how to:

- Create a new schedule for an employee
- Print or export a schedule

Create New Schedule

How to create a new schedule for an employee:

1. Click *New*.
2. In the resulting screen, click in the **Who** field and choose a name from the drop down list.

*NOTE: The **Who** field contains a drop down menu with records from the **Contacts** module that are flagged as Employees. Thus, you must enter and flag them there before you can create their schedule here.*

*NOTE: Even Contacts that are technically “contractors” or “free-lance” should be flagged as “Employees” so that they may be available for the **Employee Schedule** module as well as many other modules. This is not a legal designation, just a designation for functionality within Studio Suite.*

3. Select a start date and end date for the schedule that you are creating.
4. Select start and end times. Although a drop down menu with times pops up, you can type a specific time by double clicking in the field. You can create schedules for any time period. Once a schedule is created, it can only be modified one record at a time.
5. The **Types** field is not required, but it allows you to designate a schedule as “regular” hours or “vacation” hours and so on.
6. To include break time that should be subtracted from the total hours, like a lunch break, click in the **Break Minutes** field to enter the length of the break in minutes.
7. The **Total Time** for each day will be calculated.
8. On the right are checkboxes for each day of the week. Select the days that are applicable for this schedule. You cannot create a schedule without at least one day selected.
9. If you have an employee that works, for example, 10:00 am to 5:00 pm on Monday, Wednesday and Friday, and works 9:00 am to 4:00 pm on Tuesday and Thursday you would have to enter two Employee Schedules: one that sets up the Monday, Wednesday and Friday schedule and on that sets up the Tuesday and Thursday schedule. Later, when you go to the *List* tab and search that employee’s schedule for the time frame that you chose, those two schedules will be integrated into one schedule.
10. In the **Comments** field, you can enter anything that is applicable to this particular schedule.

List tab

Scheduled, Actual and List sub-tabs

Once you have created a new schedule you are automatically taken to the *List* sub-tab within the *List* tab, showing you the schedule you just created. For each entry, you will see two lines for every scheduled date for that Employee; **Scheduled** hours and **Actual** hours. Until modified, these will be identical. To modify either **Scheduled** or **Actual** click in the field you wish to modify and change the data, (you will only be able to input numbers and an alert will pop up if you try entering anything else). Once modified, the Difference column calculates the difference between **Scheduled** and **Actual**.

There are also sub-tabs called *Scheduled* and *Actual*, allowing you view the two types of schedules separately or integrated, depending on preference or need.

You will see the employee’s name in the Name field and the ID number of their record in the **Contacts** module. Below Name are the type of hours on that day: **Regular**, **Paid Sick Time**, **Vacation**, **Paid Holiday**, etc.

Near the top of the page you can search for any date range for any schedule that has been created. Click in the **Find** field and you will get the same drop down menu of employees. Choose one and a date range to get a complete schedule for that employee during the date range chosen. The grey “C” button

to the right of the **Find** field will clear your selections. Click in the field after the date range to set the **Type** of hours for your search.

Break

Lunch breaks or any other breaks can be entered (in minutes) into the **Breaks** field. This can only be one number, so if several breaks were taken that need to be accounted for they will have to be added together and logged as total minutes.

Deleting a schedule

To delete a schedule, click on each entry and click the *Delete* button at the top of the page. You could also click the *Detail* tab while you have the entry selected. Once there you can click the *Delete* button at the top of the screen.

Detail tab

If you click on the *Detail* tab you are shown the details of the record you are currently viewing. Here you can see Projects that the Employee is scheduled for that day including **Event, Start Time, End Time, Total Time, Types** and whatever notes there are for the employee for that day's work. This is where you can see any comments made when the schedule was created (or later) and Tasks that have been scheduled.

NOTE: It is not necessary to have an employee's schedule created before you book them on a project or vice versa.

Types tab

The *Types* tab shows you as list of the different types of hours that you can track as well as set their color. Clicking the green *Edit* button allows you to edit your *Types* of hours. To modify the color, click on the box in the Status Color column and chose from a color wheel. To clear a color, hold SHIFT while clicking on the color.

Conflicts

If an employee is double scheduled for the same time, a red x with a yellow circle around it will show up to indicate a Conflict. To eliminate this, delete one of the duplicate entries. If you click the orange *Find Conflicts* button, it will do a search and retrieve any and all conflicts.

Print This & Export buttons

How to print or export a schedule:

1. Perform a find for the schedule that you want to print.
2. Click grey *Print This* and follow the prompts.
3. The grey *Export* button allows the schedule to be exported to Excel or to a payroll program like QuickBooks.

Report tab

Print Options sub-tab

Although there is a *Print This* button on the *List* tab, there is also an *Employee Schedule List* print button on the *Print Options* sub-tab. It's simply another way to print an **Employee Schedule**.

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

Payroll

Because there are a multitude of payroll programs, Studio Suite is not set up to export to any one of them out of the box, however a Quickbooks plug-in is available for purchase for Studio Suite from AlterMedia, Inc. To integrate your payroll program with Studio Suite please contact AlterMedia, Inc. for customizing options. Please note, this is not a service included in Annual Support and the cost is based on the size of the project.

20

Equipment module

File Name: SSX_Tech.fmp12

SSX

The **Equipment** module allows you to keep track of all of the equipment that your various companies and even external companies own. It creates a separate record for each item that shows when and how much you purchased it for, where (which room) it is located in, its serial numbers, how much it is worth, etc. This is great for inventory and insurance purposes.

The **Equipment** module also lists how many and what kind of connectors and cables are attached to each piece of equipment, and what is on the other end. Studio Suite can print a summary report showing total Maintenance cost, parts cost and dollar value of all equipment you own.

Each piece of equipment listed within the **Equipment** module has the following functions:

- It is selectable as Bookable for use in the **Calendar** module.
- It has a direct link to the **Maintenance Log** module per device.
- It utilizes **Barcodes** to track location, movement and maintenance of your equipment.

In this chapter you will read about how to:

- Make an item bookable
- Enter a new piece of Equipment
- Build a package (two different ways)
- Deconstruct a package (two different ways)
- Create a new Rate
- Add detailed Rate information
- Edit/change the information of a specific Rate
- Permanently delete a Rates record
- Create a new Maintenance report

- Set up an maintenance schedule
- Choose a printing option

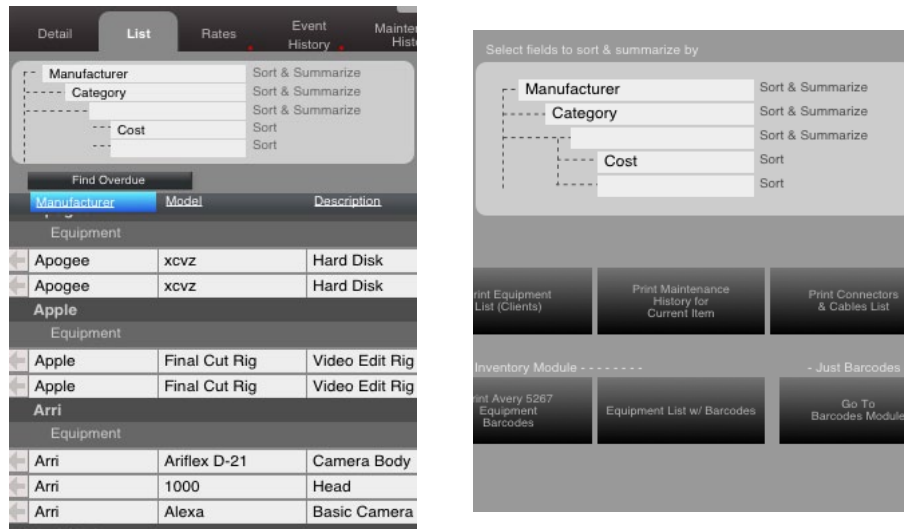
List tab

New Feature: Sort & Summary Options

In Studio Suite 9, you could sort the List of Equipment, by **Manufacturer**, **Model**, **Description**, **#**, **Type**, **Room Location**, what it's **Listed With**, **Cost**, **This Item Is** (Bookable/Not Bookable), a **Smart Sort**, or **Record #**, but not a combination of any of these categories.

In Studio Suite X, you can Sort and Summarize by three hierarchal categories as well as sort by an additional two, if you so choose. Each field is a drop down menu of all of the sort options and can also be left blank.

The same feature is also available on the *Reports* tab under the *Print* sub-tab.



The *List* tab view displays the following list of information about your equipment:

- **Manufacturer** - displays the manufacturer of your device.
- **Model** - displays the model of your device.
- **Description** - displays what type of equipment the device is.
- **# (Number)** - If you own more than 1 of a certain item, this field allows you to give each one a unique serialized number. Don't confuse this with entering how many you have. For example, if you have 3 microphones of the same type, there should be 3 equipment records, labeled 1, 2, and 3 in this field. Creating just one record and entering the number 3 does not specify that you have 3 of them, only that it's the 3rd one.
- **Pool** - Indicates that this item is in a Pool.
- **Quantity** - Shows the number of items in The Pool.
- **Type** - displays a second classification of equipment types such as Studio, Office, Rental, etc.
- **Room Location** - displays the room in which the device is physically located.

- **List With?** - if a piece of equipment is located in a Machine Room or a Live Room but comes with "the Control Room", the control room should be specified here.
- **Cost** - displays the amount you originally paid for the unit.
- **This Items is:** - Bookable or Non-Bookable.
- **Smart Sort field** - when you define a Description, the **Smart Sort** field is calculated by order of importance, i.e. a Mixing Console is calculated as 1, Digital Effects and Delays - 2, Speakers - 3, Amplifiers - 4, Videotape Machines - 5, CD or DVD recorder/player devices - 6, Compressors or Dynamics Units - 7, Content File Server - 8, Misc. components like Dolby encoders and decoders - 9, Headphone Boxes - 10, etc. If you want to override the **Smart Sort** field, you can click into the field and type in a new number value.
- **Record Number** - displays the Record Number that is automatically generated upon creating a new equipment record.

Most of these fields can be sorted in Ascending order (A-Z and 1-9), or Descending order (Z-A and 9-1) by clicking on the actual name of the field, i.e. **Manufacturer**. This is called the *Sort* button.

Currently Found Equipment Record Summary

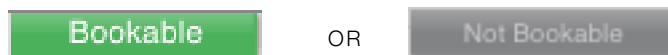
| | | | |
|---------|---------------------|---------------|-------------|
| 21 | Maintenance Hours | 2,718,530.55 | Total Cost |
| 834.00 | + Total Labor | 10,708,102.00 | Total Value |
| 479.39 | + Total Parts | | |
| 1313.39 | = Total Maintenance | | |

At the top of the **List** view, you will see the **Total Maintenance** hours, **Total Labor** cost, **Total Parts** cost and **Total Repair** cost of all equipment records displayed in the **List** view. Studio Suite automatically calculates this information and displays the actual **Total Cost** and the **Total Value** of this set of equipment. The total value is a summary of the value field, and is not necessarily related to depreciation value.

To view the Record Summary of a certain set of equipment, click on the *Find* button in the *Function bar* (top of the **Equipment** module) and select your equipment Manufacturer, Type, etc.

To view the Record Summary of your entire equipment stock, click on the *Find All* button in the *Function bar* (top of the **Equipment** module).

Bookable / Not Bookable



On the far right, the **List** view shows if the piece of equipment is *Bookable* (green) or *Not Bookable* (gray). Just click on the button to change it from one to the other. If you charge for the usage of this piece of equipment, it is important that you define it as *Bookable*. Upon doing so, you will be given the option to make it visible in the **Calendar**.

NOTE: Each new piece of equipment is automatically assigned a *Not Bookable* status when created.

How to make an item Bookable:

1. Click the *Not Bookable* button.
2. A dialog will appear giving you the choice of making the item visible in the **Calendar**.
3. Keep in mind that you don't want every item visible in **Calendar**, only those pieces of equipment that you book regularly from the **Calendar** module.
4. Which ever you choose, it can be easily changed later in the **Calendar** Settings.
5. By default, Equipment is made bookable in the category "Equipment". On the *Detail* tab, you can specify what Category you want a piece of Bookable Equipment to be a member of.

*NOTE: Most Equipment installed in your studio facility will be Not Bookable; however, if you charge extra for a particular piece or you rent the equipment separately, give it a Bookable status. This will allow you to add the item to Projects as well as view it in the **Calendar** module.*

Go To button



To the left of the Manufacturer field is the *Go To* button. Clicking on the *Go To* button will take you directly to the *Detail* tab and the record for that piece of Equipment. Here, you can enter all information pertaining to your Equipment device (explained in the next section).

NEW FEATURE: Go To button Audit Log tool tip

Audit Log is a new feature in Studio Suite X and one of the ways it can be accessed is by hovering over the *Go To* button in the **Projects**, **Productions**, **Equipment**, **Invoices** (on line items), **Events** (on line items), and **Library** (on the *Titles* sub-tab) modules.

When you hover your cursor over the *Go To* button, a log of who made a change to the record belonging to the record next to the *Go To* button along with the change they made and when they made it. This is a great way to maintain accountability and monitor the history of the record.

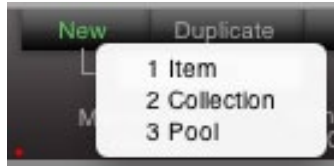
Detail tab

The *Detail* tab is the area in which you can enter detailed information about your piece of equipment, such as the **Manufacturer**, **Model**, **Description**, **# (number)**, **Location**, and **List With Rooms** information.

The following section in red has not been edited, some of the information may be inaccurate. It will be updated in the next edition.

NEW FEATURE: Item, Collection or Pool

When you are creating a new Equipment record you have the option of creating an item, a collection or a pool. So the new feature is that there are three choices now, instead of always just being an item.



A Collection is much like an art collection in the way that it represents a common grouping of precious commodities. Let's say that you have 8 Red One cameras and you want to keep track of each and every one in a precise manner. A Collection allows you to have all of them as part of the same record (because they have most of the same basic identifying details), but each with their own private serial number. This is done so when someone checks out a specific camera, that exact camera is checked back in.

A Pool is similar but opposite. It's still a grouping of Equipment that have the same basic identifying details on the same record, but with a pool the pieces are less precious and more generic, like cables or microphones.

Read on to find out how to use Collections and Pools.

How to enter a new piece of Equipment:

1. Choose *Item* from the drop down list and click the *New* button on the *Function Bar*.
2. Click the **Manufacturer** list field and select a manufacturer from the drop-down menu. Repeat this step for **Model**, **Description**, **#**, **Type**, etc.
3. Enter all information in the pertinent fields such as; the **Serial #**, **Barcode #**, **Purchase Date**, whether you **Lease/Own** it, where you purchased it **From**, the **Version**, which of your multiple companies it is **Owned By**, when the **Warranty Expires**, and the **Smart Sort Priority**, etc.

How to create a Collection or Pool of Equipment:

1. Choose *Collection* or *Pool* from the drop down list and click the *New* button on the *Function Bar*.
2. Click the **Manufacturer** list field and select a manufacturer from the drop-down menu. Repeat this step for **Model**, **Description**, **#**, **Type**, etc.
3. Click the box under the heading **Collection**.
4. Enter all information in the pertinent fields such as; the **Serial #**, **Barcode #**, **Purchase Date**, whether you **Lease/Own** it, where you purchased it **From**, the **Version**, which of your multiple companies it is **Owned By**, when the **Warranty Expires**, and the **Smart Sort Priority**, etc.

Most of these fields are self-explanatory, however there are some fields which you may not understand upon first glance. They are listed below.

Equipment fields

- **Serial #** - If you own more than 1 of a certain item, this field allows you to give each one a unique serialized number. Don't confuse this with entering how many you have. For example, if you have 3 microphones of the same type, there should be 3 equipment records, labeled 1, 2, and 3 in this field. Creating just one record and entering the number 3 does not specify that you have 3 of them, only that it's the 3rd one.
- **Barcode #** -
- **Purchase Date** -
- **Lease/Own** -
- **From** - the vendor you originally purchased the equipment from.
- **Version** -
- **Warranty Exp.** -
- **Smart Sort** - when you define a **Description**, the **Smart Sort** field is calculated by order of importance, i.e. a Mixing Console is calculated as 1, Switchers - 2, Amplifiers - 3, Videotape Machines - 4, Cassette Decks and DAT Machines - 5, Digital Effects and Delays - 6, Compressor or Dynamics Units - 7, Microphones - 8, Misc. like Direct Boxes and Stands - 9, Headphone Boxes - 10, etc. If you want to override the **Smart Sort** field, you can click into the field and type in a new value.
- **Promo List** - defines whether or not it should be included on your **Promotional List?** of equipment, which will show clients what kind of large equipment you have in your facility, excluding the small items.
- **Weight** - the amount your equipment weighs for shipping purposes.
- **Dimensions** -
- **Out of Service** -
- **Cost** -
- **Value** -
- **Down Payment** -
- **Month Payment** -
- **Earnings** -
- **Lease Number** -
- **Lease Expires** -
- **Owned Int./Owned Ext. NEW** - both of these options have drop down lists to chose from. Owned Int. gives you a list of your internal companies to chose from and Owned Ext. gives you a list of your external vendors to chose from.
- Insured By -
- **IP Address** and **SubNetmask** - for storing static addresses of networked devices (i.e. computers, printers, SAN's, etc).
- **SubNet Mask** -
- **Origin** - This is for the original country of manufacture, useful when shipping equipment across country lines.

Total Maintenance

The *Total Maintenance* section displays a maintenance summary for this piece of equipment generated from information in the **Maintenance Log** module.

Comments, Flags, Pictures

You can enter **Comments** about the item, like its buy/sell history or repair notes. On the right are 4 Flag checkboxes, that you can use to mark different sets of equipment as needed, for example, Flag 1 could mean “sell”, etc.

The **Picture** field holds a graphic image of the piece of equipment for visual reference. For picture details, see the Using Graphics in Studio Suite section of the **Studio Suite Basics** chapter in the User's Guide.

The upper-right corner of the **Details** window displays the automatically generated Record # (number) and the *Bookable* or Not *Bookable* status of this piece of equipment.

Package sub-tab

The *Package* sub-tab is used to define the various components of an equipment package, such as a rack containing multiple pieces of equipment, a computer with multiple cards, etc.

How to build a package:

1. Make sure all the package items are bookable first.
2. If the device you are currently viewing is a Child of the package, click in the field under **This Device Is A Component Of** and select the Parent item from the drop-down list.
3. If the device you are currently viewing is the Parent device, click the black and green *Add* button to select a child item from the drop-down list. Child items will be displayed below the *Add* button.
4. If you want the Child items to also be Bookable with this package, toggle the *Bookable/Not Bookable* button and Choose Yes from the pop-up dialog that reads: ‘This item has child items in a Package. Do you want these child items to Also Book when this parent item is booked?’.

How to deconstruct a package:

1. If you no longer want the device you are currently viewing to be a Child, click the black *Unlink* button.
- OR
2. If you no longer want the device you are currently viewing to contain a specific Child item, click the *Unlink* button next to the Child item. (This does not delete the equipment record for the Child item, it only disassociates itself from the package).

The total Weight of the entire package (including the Parent and Child items) is displayed in the upper right corner of this section.

Collection sub-tab

This section will be written in the next edition.

Library Hard Disk sub-tab

The *Library Hard Disk* sub-tab allows you to indicate whether your equipment piece is a hard drive or RAID. Checking the field next to **Library Hard Disk** makes this drive available in the **Library** module as a piece of media. If it is a RAID, you can enter what it was **Striped For**, the **RAID** level, the **Last Striped Date**, and the **Formatted** capacity.

When this drive is used in the **Library** module, the Library media assets contained on this drive will be displayed in the portal in this sub-tab. The *Go To* button will jump directly to the media asset in the **Library** module.

Depreciation sub-tab

NEW FEATURE: Depreciation Schedule

The **Equipment** module now has the capability to create a depreciation schedule for your equipment. You can also create Reports for all Equipment Depreciation within a certain date range.

Depreciation Schedule

Residual Value

Years

End Of Life

200

3

10/6/2011

Create Depreciation Schedule

Monthly

| Month | Year | Date | Value | Accumulated Depreciation |
|-------|------|---------|-------|--------------------------|
| 0 | 0 | 11/2/10 | 1,200 | |
| 1 | | 12/2/10 | 1,172 | 28 |
| 2 | | 1/2/11 | 1,144 | 56 |
| 3 | | 2/2/11 | 1,117 | 83 |
| 4 | | 3/2/11 | 1,089 | 111 |
| 5 | | 4/2/11 | 1,061 | 139 |
| 6 | | 5/2/11 | 1,033 | 167 |
| 7 | | 6/2/11 | 1,006 | 194 |
| 8 | | 7/2/11 | 978 | 222 |

Annually

| Month | Year | Date | Value | Accumulated Depreciation |
|-------|------|---------|-------|--------------------------|
| 0 | 0 | 11/2/10 | 1,200 | |
| 12 | 1 | 11/2/11 | 867 | 333 |
| 24 | 2 | 11/2/12 | 533 | 667 |
| 36 | 3 | 11/2/13 | 200 | 1,000 |

How to create a depreciation schedule:

1. Create a new equipment record.
2. Fill in the **Purchase Date**.
3. Fill in the **Cost** of the Equipment.
4. Fill in the **Residual Value** of the piece of Equipment.
5. Fill in the number of years the Depreciation will span.
6. Click the black and green *Create Depreciation Schedule* button.

The schedule is displayed by month on the left, and by year on the right.

The End of Life filed is a simple date filed that must be manually set, it is not driven by the Depreciation

schedule. It's intended to allow users to specify a searchable and sortable End of Life Apart from Depreciation, however you can of course set it to be the same as the end of Depreciation.

The following section in red has not been edited, some of the information may be inaccurate. It will be updated in the next edition.

Resource Permission Groups sub-tab

NEW FEATURE: Resource Permission Groups

A new feature in Studio Suite X is **Resource Permission Groups**. They are just like the Groups feature of previous versions, except that in addition to filtering like Contacts by activity, you can also set restrictions for them in reference to your facility.

For example, if you are running a college film department that allows only Juniors and Seniors to check out camera equipment, you would use a Resource Permission Group to keep your Freshmen and Sophomores from breaking this regulation.

How to create and use a Resource Permission Group:

1. Create a Group for those who are allowed to use the Room, Equipment, etc. that you will be restricting on the contact page of someone who is going to be in this Resource Permission Group.
2. When creating future contacts who you would like be a part of this Resource Permission Group make sure to include this Group on their contact record.
3. Subsequently when you are on the record for the Room, Equipment, etc. that you would like to restrict, click on the Resource Permission Group sub-tab and the Group that you created should be there. Click the box for the Group that is allowed to use the Room or Equipment.

Rates tab

The *Rates* tab is where all of the various rates associated with the rental of each piece of Equipment are created and displayed through a portal to the **Rates** module. Each item can have multiple rates to accommodate all the different ways that it might be booked.

NOTE: Before an equipment resource can have Rates, it must be made Bookable.

Creating a New Rate

How to create a new rate:

1. Click the *Rates* tab for the device you are creating a Rate for.
2. Click the black and green *Create New Rate* button.
3. If the item has already been made Bookable, skip to step 8.
4. If the item has not been made Bookable, a message will pop up: 'Items must be Bookable before they can have Rates. Do you want to make this item Bookable?'
5. In order to create a new Rate, you must choose Yes.

6. If the item is a part of a package and has child items attached to it, a message will appear: "This item has child items in a Package. Do you want these child items to Also Book when this parent item is booked?" Choose **Yes** or **No** to continue.
7. The message "Do you want this new Bookable item to be displayed in the Calendar now?" will appear. Choose **Yes** to add this item to the **Calendar** or **No** to continue without adding it to the **Calendar**. The item can be added to the **Calendar** later.
8. Next, the message "What kind of Standard Rate do you want to create?" will appear. For now, choose *Regular*.
9. The **Create New Rate** window will appear, displaying the details for this Rate. Follow the next instructions to add detailed Rate information.

How to add detailed Rate information:

1. In the top row, the **Category**, **Sub-Category**, **Item** (Resource Name), **Rate Name**, **Client Action**, and **Rate Card** will be entered. Enter a description for the rate in the **Rate Name** field (i.e. 'Hourly Room Rate', etc).

NOTE: Rate Names must be unique, so upon creation, each Rate Name is appended with a sequential number after the auto-entered text. You can delete this number as long as the Rate Name remains unique.

2. On the right of the screen there are fields for External Accounting Details. The fields are labeled appropriately for the 3rd party accounting software you may be using in conjunction with Studio Suite. If you are not using 3rd party accounting software these fields are optional, but can be utilized if needed. These fields are described in more detail in the **Rates** chapter.
3. Select or change the rate **Type** (Regular, Overtime, Credit) as needed. **Regular** and **Overtime** are self-explanatory. **Credit Rates** are those which have a negative value on the total charge for a project. Examples of Credit Rates include "Deposit", "Payment", and "Credit Memo". These would be used when the client gives you money to decrease their balance on a Project. You can also create a Credit Rate for downtime.
 - The **Unit of Measure** field determines what factors are used to calculate this Rate. There are several choices for **Unit of Measure**:
 - **Hour(s)** - This will calculate a rate's quantity based on the difference between the end time and the start time of an event.
 - **Days(s)** - This will calculate a rate's quantity based on the number of days an Event spans, ie, each time an Event crosses midnight, Studio Suite adds a day. As such, you may need to watch & override these calculations, depending on your definition of a "day".

*NOTE: When the selected unit is "Days" you will see options to specify the number of days that are calculated for each week and month above the **Overtime Rate Specs** fields. For example, if you're doing rentals, and only bill 4 days when a customer rents something for a week, you would enter "4" in the **Bill Days Per Week** field. If you bill for 12 days when a customer rents something for a month, you would enter "12" in the **Bill Days Per Month** field.*

- **Week(s)** Because different users will have different definitions of what a “week” is, this unit allows the user to specify how many weeks to charge for manually. The calculation will enter a 1 by default in the quantity field, no matter what the actual time range is. The user must change this value if they want something different.
 - **Lockout** This unit behaves exactly as Week(s) above, but just uses a different word.
 - **Each** and **One Time** These two options behave the same way, and are intended for items such as media, frame counts, or anything where the quantity is not something relative to time, requiring the user to enter the number of units manually.
4. There is a separate **Unit of Measure** for both **Charge** and **Expense**, allowing you to (for example) charge by the day, but pay the expense to you by the hour.
 5. Below the **Unit of Measure** fields you’ll see the **Quantity, Charge, Expense, Profit, and Market** fields. Quantity allows you to specify a **From** and **To** range, ideal for setting up “Split” pricing for different quantities. These default to 0 and 999 respectively, however you can define pricing such as 1-10 = a charge of \$5.00, 11-19 = \$4.50, etc. You can enter different Expense pricing at each quantity as well, with each line showing your dollar and percent profit per unit.

*NOTE: The **Expense** column is the amount that each item costs you, either in labor cost, materials cost (for media), or utilities (electricity, heat, etc).*

NOTE: To accommodate 3rd party accounting programs, Overtime in Studio Suite must be it’s own separate Rate. The Rates for the Overtime Rates will be visible but not editable on the O.T. Rates-field.

6. Enter the number of **Hours Before Overtime** (begins). Click the **Uses OT Rate** field and select which overtime Rate from the drop-down list. The **Charges Per** field will display the dollar amount of the overtime rate chosen. If you have not yet created any overtime rates, nothing will appear in the list, so you may need to do that first then come back and specify which overtime Rate to use.
7. If the Rate is taxable, select which taxes apply in the **Taxes** field. To use more than one tax, hold down Command (MAC) or Control (PC) and click on your desired tax types. To use all taxes, click the *All* button. (See *Selecting Multiple Taxes* in the **Rates module** Chapter of this User’s Guide).
8. If this specific Rate is to be associated with a particular Client, click the **Client** field and choose their name from the pop up window. To assign more than one contact, hold the SHIFT while clicking the **Client** field in Rates. The window displays each contact you have checked as a Client in the **Contacts** module.

9. The 'C' button next to the Client name will Clear any client(s) selected in that field.
10. Select whether this Rate: is to be **Included In Rates Sheet, Is Normally Invoiced**, is **Commissionable**, you will **Use Item as "Child Item" Rate**, is **Exempt From Client Discount**, if you want to **Exclude From Un-Invoiced Item Reports**, or if it is **Retired**. (See *Standard Rate Checkbox options* under the *Details* sub-tab section in the **Rates** module chapter of this User's Guide).
 - Change how the **Invoice Line Item** information (bottom row) will appear. This is the order in which the item information will appear on an invoice. (See *Invoice Line Items* under the *Details* sub-tab section in the **Rates module** chapter of this User's Guide).
 - Enter any **Additional Invoice Text** that you would like to appear on the invoice for this item.
 - Click the *Continue* button to confirm your new Room Rate.

NOTE: The Rates-Create New window cannot be closed or cancelled. You **MUST** click the *Continue* button. If you want to cancel the creation, click *Continue*, then delete the Rate.

The new Rate will now appear at the bottom of the Rates List. You may need to use the scroll bar (on the right) to view items at the bottom of the list.

Edit a Rates Record

How to edit/change the information of a specific rate:

1. Click the *Go To* button on the left.
2. The **Rates-Edit** window will appear, allowing you to change information about this specific Rate.
3. Make your changes and click *Continue*.
4. Your changes will now be reflected in the Rates list.

Delete a Rates Record

How to permanently delete a Rates record:

1. Click the *Trash Can* icon next to the Rate you want to delete.
3. The following message will appear; 'Are you sure you want to delete this Rate? It is not un-do-able.'
4. If you are sure, Choose '**DELETE**'.

CAUTION: you **CANNOT** undo this. If you Delete a Rates Record, it will **permanently** be deleted.

NOTE: For more specific information about Rates, including Client Specific Rates, Multiple Client Rates, Default Rates, Taxes etc., read the **Rates Module** chapter of this User's Guide.

The following section in red has not been edited, some of the information may be inaccurate. It will be updated in the next edition.

Event History tab

The *Event History* tab shows the history of scan logging in the top portal, and all scheduled Events for the current equipment device in the bottom portal. The Scan Manager and the Scan Log are equipment inventory management tools that allow you to document the presence of equipment at specific dates, times, and locations.

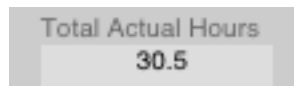
Status section

The Status section does just what it promises, gives you the status of the piece of equipment that you are viewing the record for. It displays the **Checked In** and **Checked Out** status as well as the **Date** and **Time** for when it was checked in or out. You can also see who it was checked it in or out **by** and when it is **Due** back.

Events sub-tab

The *Events* section below, a list is shown of events scheduled from the **Calendar** or **Projects** modules (and held in the **Events** module) where the equipment device was last utilized by Start Date, Start Time, End Date, End Time, Status, when it was Checked Out, or Checked Back In, and what Project number and Project name it was associated with.

- Total actual usage hours are calculated from all event items on the found list and are shown on the field on the bottom of the screen.



Scan Manager sub-tab

The *Scan Manager* allows you to specify the name and location for multiple equipment scan events to be performed in one pass or session. In the blue text fields enter Who will be scanning, and then add the Location of where the scan will be performed (click to see the drop down list for all *Locations*). Placing your cursor into the orange **Bar Code** field allows you to scan each piece of equipment (requires a barcode scanner).

CHECKBOX

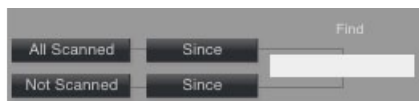
If you are on the Mac platform, click the **Speak** checkbox, and Studio Suite will speak the result status of each scan, useful if you are scanning many items from across the room.

Upon the scan of a known barcode, you will jump to the Equipment record for the item you have scanned, and a new row of data will be entered into the Scan Log for that device.

Scan Log section

In the section shown as *Scan Log for:*, the equipment scan history for the current device is listed by **Date**, **Time** of scan, **Account Name**, **Who** made the scan, the **Location** of where the equipment device was scanned. A **Comment** can be added providing the status or updated condition of the device. You can use the *Find* buttons listed above in the Scan Manager to find different sets of equipment.

Find Buttons



The image shows a search interface with two rows of buttons. The top row has a button labeled 'All Scanned', a button labeled 'Since', and a text input field. The bottom row has a button labeled 'Not Scanned', a button labeled 'Since', and a text input field. Above the top row of buttons is the word 'Find'.

This section allows you to search for all equipment that either has or has not been scanned ever, or since a specified date. This is useful to quickly locate equipment records that have not been scanned in some time, and may therefore be missing.

The button labeled *Find > All Scanned* will find all pieces of equipment that have already been scanned into your inventory. All Scanned items will be displayed directly in the **Equipment** module List tab. Clicking the top *Since* button will find all records scanned since the date entered in the white field to the right of that button.

The button labeled *Find > Not Scanned* will find all pieces of equipment that have not been scanned into your inventory. All Not Scanned items will be displayed in the *Equipment List* tab. Clicking the bottom *Since* button will find all records not scanned since the date entered in the white field to the right of that button.

Maintenance History tab

The *Maintenance History* tab shows the history of all the maintenance reports associated with this device. This information is viewed from the **Maintenance Log** module. These maintenance records are for viewing purposes only. If you need more details about an existing maintenance report, click on the *Go To* button (on the left) to view that item's Full Report view in the **Maintenance Log** module.

How to create a new maintenance report:

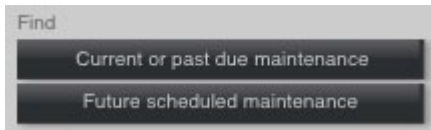
1. Click on the black and green *Create New Maintenance Report* button. It will take you to the Maintenance module.
2. Fill out the report with as much information as you can. For more information about filling out the **Maintenance Log**, read the **Maintenance module** chapter in the User's Guide.
3. Click the *Go To* button (to the left of the item name) to return to the **Equipment** module, then Click the *Maintenance History* tab (or just click the *Back* button).

The *Maintenance History* tab is where you will schedule the next maintenance date for a piece of equipment. By setting a preference in their User Account, specified users can be notified of maintenance due date upon startup.

How to set up a Maintenance Schedule:

1. Click on the date in the **Next Maintenance Due** field.
2. Select a due date.
3. Enter what kind of maintenance this item will undergo in the **What** field.

Find Buttons



The button labeled *Find > Current or past due maintenance* will find any pieces of equipment that are due or overdue for maintenance by today's date and display them in the *List* tab.

The button labeled '*Find*' > '*Future scheduled maintenance*' will find any impending or future maintenance schedules and display them in the *List* tab.

Connectors & Cables tab

The *Connectors and Cables* tab allows you to define all of the cables and connectors attached to this equipment device.

Click in the fields and enter the Quantity of a certain Type of connector, What, the Name and Length of the connected cable. Then enter the Destination, the Quantity and the Type of connectors on the other end of the device.

Click on the *Create New Connection* button to create a new cable connector definition.

Web Viewer tab

The *Web Viewer* tab provides pre-formatted Internet searches for the current equipment record. This allows you to find instant equipment costs for a similar product and model, if you need to buy more, or sell the one you've got.

Web Viewer sub-tabs

- *Manufacturer*
- *ebay*
- *Google (default)*
- *Craigslist*
- *B&H*
- *Guitar Center*
- *Sweetwater*
- *Sam Ash*

NOTE: The Manufacturer tab constructs a “best guess” URL as “manufacturer name.com”, but you can of course override this in the URL field if they have a different address.

Attach & FTP tab

The *Attach & FTP* tab is used for attaching (recording, linking and/or embedding) external files, sounds, pictures or movies, URLs, and FTPs to an individual **Equipment** record. The *Attach & FTP* tab is the where all of these attached files are stored. Examples of use in this module would be purchase receipts, schematics, user guides, etc.

For a detailed explanation of this tab, see the **Attach & FTP tab** chapter of this User's Guide.

Report tab

The *Report* tab, formerly the *Print* tab, offers many report and barcode label printing options. It also contains a button to take you directly to the **Barcodes** module.

How to choose a printing option:

1. Under *Select Company* choose which of your companies you want to print from.
2. *Select Letterhead Style* you desire (Automatic or Custom) and the logo desired.
3. Then *Select the room you want to print* an equipment list for (from the pop-up menu). If you want all of the rooms in your facility, click on the *All* button.
4. Use the “Sort and Summarize” section to specify how you want the report to sort and summarize.

Print buttons

- The *Print Equipment List (Internal)* button generates a list of all of your equipment in a particular room, or all rooms. Be sure to click on the desired *Sort* button before clicking on this *print* button.
- The *Print Equipment List (Insurance)* button generates a list of all of your equipment along with its Location it's Cost, it's current Value, the Serial Number and Purchase Date. Be sure to click on the desired *Sort* button before clicking on this *print* button.
- The *Print Equipment List (Clients)* button prints an equipment list in a presentation format, that you will give Clients, showing what equipment is in your rooms. Select a particular room, or all rooms, and it will automatically sort your equipment in the Smart Sort order and also show the equipment that is Listed With the room. For example, the equipment in the Machine Room is Listed With the Control Room, and will be included in a Control Room equipment list.
- The *Print Maintenance History (Current Item)* button will print a summary of the maintenance history from the **Maintenance Log** module for the current device.
- The *Print Connectors & Cables List* button prints the list of connectors and cables for the current item or the items selected in the **Select Rooms** field.

Barcode Labels

Use the four buttons under the “From Equipment Inventory module” heading to print Avery and Dymo Barcode labels. They include your own Barcode # (in regular text and Barcode font), the equipment’s Name and Serial #. Make sure you have the correct found set before printing, if you are printing more than one label. Studio Suite installs the Barcode fonts to print the Barcodes, but you may need to go into FileMaker’s Layout mode to assign the Barcode font to the field on the print layout. As always, these label layouts may need some tweaking to accommodate your particular printer. If you are printing from a Dymo printer, make sure to go to the Page Setup to select the proper setup for that printer before making any changes.

The button under the “From Barcodes module” heading takes you to the **Barcodes** module where you can generate and print generic sheets of Barcode labels.

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

Click the *Rooms* tab to go to that module.

Click the *Maintenance Log* tab to go to that module.

This covers all of the basics of the **Equipment** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

21

Events module

File Name: SSX_Projects.fmp12

The **Events** module stores and processes the dates and times of every single session or event that you have scheduled from the **Calendar** module or the **Projects** module. This includes Room events, Media events, Equipment events, and People events, etc. This module also stores alarms and “simple events”, which are events without Projects. Detailed financial information about each event, such as budget charge, budget expense, actual charge, actual expense, budget/actual difference, profit/loss, and taxes for each event are also held in this module. Technical and creative details, and the talent involved, are managed here as well. Much of this information is looked up from the Project that each event is a member of (if applicable). When you click on an event in the **Calendar** module, the resulting window is from the **Events** module.

***NOTE:** You can not create an Event in the Events module. Events are created exclusively in the Calendar and Project modules.*

This module prints Session Reports, Summary Reports, Invoiced Status Reports, Action Summary Reports, Employee time sheets, Client Reports, and Production Reports.

In this chapter you will read about how to:

- Edit an Event
- Use find in the Events module
- Use the Plug-in sub-tab
- Add notes/creative directions to Events & Parent Projects
- Add a new Talent to this Project
- Create a new (media asset) record in Library & Labels that's associated to this Project and Event
- Print from the Session Reports tab
- Print Project or Event list totals

- Print item reports
- Print a report of Invoiced status
- Print a report sorted by Action
- Print employee reports
- Print a Production report

Think of each Event as having several dimensions, referred to here as “sides”. Each event has two main sides -the Budget side and the Actual side. However, there is also the Difference side (Budget vs Actual), and the Profit/Loss side (Charge vs Expense). To summarize, there are not separate Budget events and Actual events, rather, each event contains every “side”, which can be utilized or not. Perhaps a better way to explain it is to say that there are separate fields for each of these aspects in each and every event record.

NOTE: Be aware that the application of discounts, taxes, and exemptions is the same for both sides, and cannot be different. Therefore if you change it on one side, it will change on the other.

Detail tab

The *Detail* tab lists the general information about each Event. Since the events are created through the **Calendar** and **Projects** module, this view is used only to view and edit the information.

How to edit an Event:

1. You may edit the **Project** and **Client** detail attached to an event by clicking the *Go To* button on the left for either item. The **Project Go To** will take you to the **Projects** module where you can make appropriate changes or add event items. The **Client Go To** button will send you to the **Contacts** module for contact information verification or changes necessary.
2. To edit the **Category**, **Item**, **Status**, **Start Time**, **End Time**, or **Date**, you must use the **Edit Event** window. Clicking on any of these fields will bring you to the **Edit Event** window prompt. Use this window to note any changes to the Event.

Note: you can not close this window, you must Save Changes or Cancel any changes made.

3. Edit the **Event Type** and **Action** fields from the Detail page. Clicking either field will open a drop-down list with selectable or editable options for these fields.
4. In the **Holdover** field you may enter how much time to hold over the event (0:30, 1:00, 2:00, 4:00). The field directly below that will display the new holdover end time.

The fields in this grouping appear on a colored background which is the highlight color associated with the **Status** (as defined in the *Main Menu/Setup/Value Lists/Status* tab) of the event. Changing the **Status** will change the color of the background.

NOTE: Previous versions of Studio Suite required you to click a Confirm button for each change made. Now these changes are automatically saved when you close the edit window.

Breaks accountability

To the right, there is an area to account for **Break Description**, time **Out**, time **Back**, and total break **Duration**. Clicking the *Out* or *Back* buttons will enter the current time wherever your cursor is placed, in

most fields on the Event detail page. You can also determine for each break time whether or not it will be included in the rate charge calculation, by checking the box to the right of each line item (**Include Breaks In Charge**).

NOTE: Note that if you are using Overtime Rates, all break time deductions will be taken from the Standard time portion of the event, even if they occur during (or cross over into) Overtime.

Below is a general **Notes** text field for the Detail page. You will also find a field for any **Client PO#** (Purchase Order or "PO Number") requirement. This will default to show the PO of the associated Project but is also able to be edited.

Provided fields are also included on the right for Event **Setup** and **Due** dates and times.

Event contacts

The bottom half of this page is dedicated to the contact information for the people involved with this event. These participants were assigned to the Event when it was booked. For Events associated with a particular Project, the participants were retrieved from the Project record.

This area is designed to hold people that are associated with the Client, and not necessarily your employees working on the Project. However, if you book some of your people from the **Calendar** module who have titles that correspond to your default titles, they will appear here as well. These titles and associated people come from the **Projects** module, and the **Projects** module gets the default titles from your *Main Menu/Setup/Titles* tab.

The green fields show the Client **Title Function**, **Name** and their **Main Phone**. Below that, additional people working on the Project will be listed. You can add more people to the event by clicking the black and green **+Add** button, which will create a new blank row. Click in the **Title** field to select a title from the popup list, then tab into the **Name** field.

If the **Filter Names By Title** field is checked, the names that appear will only be those that have matching titles in the **Contacts** module. Un-checking this field will show *every* name in the **Contacts** module. You may also double-click in the name field and type a name.

If you have selected someone from the **Contacts** module (via menu), their **Main Phone** number will appear. You can determine whether or not the phone numbers will appear on Session Reports by deselecting the **Include Phone on Printouts** checkbox. Clicking on the *Go To* button for each person will jump to their record in the **Contacts** module.

NEW FEATURE: Go To button Audit Log tool tip

Audit Log is a new feature in Studio Suite X and one of the ways it can be accessed is by hovering over the *Go To* button in the **Projects**, **Productions**, **Equipment**, **Invoices** (on line items), **Events** (on line items), and **Library** (on the *Titles* sub-tab) modules.

When you hover your cursor over the *Go To* button, a log of who made a change to the record belonging to the *Go To* button along with what change they made and when they made it. This is a great way to maintain accountability as well as a handy short cut helping you know where to direct your questions about the record.

Since the personnel listed here comes from the **Projects** module, changing the participants here will also change the participants attached to the Project record. Special attention must be paid to change the personnel without affecting the overall Project's information. You must delete the person who is no longer associated with this Event then click the black and green *Add* button. This process will add the person to this Event and the associated Project but will leave the original personnel attached to all other Events.

To the left you will see the *Reload People from Project* button. This will call upon the Project to place all personnel attached to the Project to be listed on the current Event. This is also helpful if you accidentally delete someone.

Since media assets in the **Library** module that are created from this Event or Project will likely need to display these people on printed labels, you can define the order in which they are transferred to the **Library** by checking the corresponding **Position On Library Labels** priority check boxes. The order is displayed in the field below that section on the bottom of the page.

Deleting Items

Click the *Trash Can* icon on the far right of each line item to delete it.

Find Mode

Performing a 'Find' in the *Detail* tab of the **Events** module is different than in other modules.

How to use Find in the Events module:

1. Click the *Find* button in the *Function bar*.
2. Then TAB to the information field you wish to search in.
3. Type the word you want to search for and hit ENTER.

New Feature: Sending Notifications

Notifications, such as an SMS, Prowl or Twitter message, can be sent from the Detail tab in this module. Just click on any of the locations highlighted in the screen shot below and it will launch the Edit Events window with the Notification button at the top. To read more about notifications, read “How to send notifications” in the Projects module chapter in this Users guide on page 32.20.

The screenshot shows a mobile application interface for editing an event. The background is green. At the top, there are several fields with left-pointing arrows: 'Project' (Coke Spot), 'Client' (NBC Television, Adam Adamson), 'Category' (Rooms), and 'Item' (Edit 2, with 'R-12' to its right). Below these are 'Status' (Confirmed), 'Event Type' (Record), 'Action', and 'Operator'. At the bottom, there is a table with three columns: 'Start', 'End', and 'Hold Over'. The 'Date' row shows '4/16/2012' under 'End'. The 'Time' row shows '9:00 AM' under 'End' and '9:00 AM' under 'Hold Over'. Below the table are two checkboxes: 'Budget' (unchecked) and 'Actual' (checked).

New Feature: Work Order tab

Description coming soon!

Work Order tab

Work Order sub-tab

Coming soon!

Work Order sub-tab

Coming soon!

Related Events sub-sub-tab

Coming soon!

Related Project Tasks sub-sub-tab

Coming soon!

Related Event Task sub-sub-tab

Coming soon!

Usage sub-tab

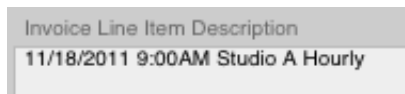
Coming soon!

Related Events section

Coming soon!

Financial Info tab

This tab is divided into two halves (top and bottom). Most of the top half is a repetition of the *Detail* tab, with the exception of the **Invoice Line Item Description** field. This is the field that is exported to the Invoice for this item. It's a calculated text field, based on preferences specified in the Rate being used for the event. The field Relates to items such as the date of event, time duration, and the specific scheduled item. Clicking in this field will allow you to type over and override the text calculation before it goes to the **Invoices** module.



The bottom half of the *Financial Info* tab contains three sub-tabs: *Budget*, *Actual*, and *Difference*, each one showing detailed financial information for each of those sides. This layout defaults to show the *Actual* sub-tab.

Actual sub-tab

In the *Actual* sub-tab you can source the fine details of all event actual financial aspects, most of which are also editable from the **Projects** module. This view, however, lets you see all of these details in one screen.

- You may adjust the **Rate** on this page.
- From the **Filter Rates By** field, a pop-up menu provides the option to filter by Item, Category, Client, or All.
- Click the **Rate** field to the left and select a rate item from the pop-up menu. When creating an Event, Studio Suite will automatically attach its default rate. The rate will be left blank if there is no default rate. You may of course override the default rate by selecting a different rate.
- You can jump to the **Rates** module by clicking on the *Go To* button to the left of the field.
- Apply all of the Budget data to the **Actual** fields, press the *Move Budget to Actual* button (on the far right). This is a useful tool when a quoted Event Budget becomes and actual booking.
- Below that button are the *Start/End* dates and times, as well as the **Holdover** field option. Similar to the *Detail* tab, clicking on these fields will prompt the **Edit Event** window and the ability to correct or change the described event details.
- Below are the rate calculations, showing both Regular Time and Overtime calculations for both Charge (what you're charging the client) and Expense (what the event is costing you).
- Also displayed is the *Event Profit/Loss*, which will appear in red if it is a loss. In this area, only the fields with black colored text can be edited, as the rest are calculations based on the Rate definition.
- Each Rate has a set amount of "units" (hours, days, or one-time). Therefore the amount of hours in Regular versus Overtime is a calculation and can not be edited. You can

however edit the Quantity (**Qty.**) amounts on the far left. The time will then be broken down automatically based on the Rate's definitions. If you would like to change these settings, you may use the orange *Go To Rates* button located on the *Budget* and/or *Difference* sub-tab pages. Clicking the *Go To Rates* button will send you to the **Rates** module.

Taxes and Discounts section

| Apply | Discount Rate | Rate | Amounts |
|-------------------------------------|---------------|------|---------|
| <input checked="" type="checkbox"/> | | | 0.00 |
| <input type="checkbox"/> | | | 0.00 |
| <input type="checkbox"/> | | | 0.00 |
| <input type="checkbox"/> | | | 0.00 |

Only red checkboxes are editable per event. All others must be set from the Project.

Beneath these calculations is the Tax and Discount area. The actual **Tax Rates** and **Discount Rate** can only be defined in the **Projects** module (as all Events in a Project can only have taxes that first exist for the Project). However, here you can turn the pre-defined taxes and discount on or off (for each event) by checking the designated red **Apply** or **Exempt** check boxes. There is no difference between a tax NOT being applied, and a tax being exempted. Exemption status only applies to companies that are tax exempt. If an item is normally taxed, but the client is an exempt company, you would check both boxes. That way, the taxes they would pay are still calculated, however they are not added to the total. You may need to report this "uncollected tax due to exemption" information to your local tax authorities.

If you have specified in your *Main Menu/Setup/Taxes* tab that you are in a region in which some taxes are charged after other taxes (such as in some parts of Canada), you will see another group of gray check boxes. These boxes show the current settings but can not be changed from this page. These settings are Project wide and can only be changed from the Project Tax and Discount page.

Finally, beginning on the bottom left you can see the date, time, and person information for when this event was created and modified.

Budget sub-tab

This tab is basically the same as the *Actual* sub-tab, except that of course it contains Budget information instead of Actual information. Again, be aware that the application of discounts, taxes, and exemptions is the same for both sides, and cannot be different. Therefore if you change this information in the *Budget* sub-tab, it will change the information in the *Actual* sub-tab, and vice-versa.

Difference sub-tab

The *Difference* sub-tab is basically the same as the *Budget* and *Actual* tabs, however it shows the difference between the two. All of these fields are calculations and therefore can not be edited. If the Rate is different, that field will display ****Rate Difference** to help indicate why there may be a difference in the other values.

At risk of being redundant, remember that this tab does not show you a profit or loss, but rather the difference between the budgeted charges and expenses (what was planned) and the actual charges and expenses (what actually happened).

The bottom part of this screen shows the tax and discounts and applications for reference (remember they are the same for both Budget and Actual sides).

Setup Info tab

The *Setup Info* tab is comprised of four sub-tabs: *General*, *Plug In*, *Video/Film/Graphics*, and *User Fields*. These tabs are exactly the same as the tabs of the same name in the **Projects** module. In fact, after data is entered in the *Setup Info* tab in that module, each new Event will contain the data from the same fields in Projects. There is also the option to *Load from Project* on each sub-tab for each event. This will reload all of the data from the Project *Setup Info* tab.

General sub-tab

In the *General* sub-tab you can list the Formats and Machines that will be used for this session. Up to eight machines can be listed with fields for the following:

- **Purpose** – purpose for each machine (Master, Clone, Safety, Production, etc.)
- **Format** – Video or Audio format types, standard, and calibration settings
- **Size** - size of the media and type
- **Frames** - select the frame rate of the media
- **Tracks** – recording tracks to be utilized in the session
- **Format** – audio output stream, i.e. Stereo, Dolby 5.1, etc.
- **Dolby** – types of audio output, i.e. Dolby A, AC3, 5.1 etc., and choices for turning Emphasis on or off.

All of these lists can be edited to suit your needs.

Then, check the following boxes that apply:

- **Src** – Source Media asset
- **Rec** – Recording Media asset
- **Master** - Master Media asset
- **Chase** – Chase Media asset

Additionally, in the fields below, enter when the **Tones Arrive**, whether or not you are locking to **Picture** or doing a **Layback**, and any **Copies Needed**. You may then enter any necessary notes in the **Setup Notes** field as well as listing the titles for this event.

Plug In sub-tab

The *Plug In* sub-tab is for documenting mic or other recording device plug-ins.

How to use the Plug In sub-tab:

1. Click the *Set Input* button at the top of the first column.
2. This will automatically enter 1-24 in the **Input** column the first time you click it, 25-48 the second time you click it, and 49-72 the third time you click it, then you start the cycle over again.
3. Click the **Qty.** (quantity) field and enter the number of instruments or devices used.
4. Enter the instrument you will be using in the **Instrument** field.
5. Enter the # of **Mic's** (microphones), which type of **Mic** used, **Insert**, **Buss**, and **Cue** assignments, and the **Talent's** name.

**To the right of this are more fields.
Use them to:**

- Indicate whether to **Tune Piano** (Yes or No).
- Enter the quantities needed of Mono Phones, Stereo Phones, Music Stands, Stand Lights, Chairs, Stools, and Video Monitors.
- Whether you need a **Digital Metronome** (Yes or No).

Below this are **Aux Sends** fields. Use these fields to document where the Aux Sends are to be patched or routed. They are labeled as **S-1** through **S-12**.

Video/Film/Graphics sub-tab

This area contains details associated with visual production. There are fields for **Cameras, Lens, Filters, Film/Tape, Props, Special Effects, Sets, Permits Needed, Transportation**, as well as a set of selectable **Locations** (as defined in the **Contacts** module).

If these fields don't quite fit your needs, you can always grab a field from the *User Fields* sub-tab, explained next.

User Fields sub-tab

This contains all of the **User** Fields in the **Events** module, as described in the **Studio Suite Basics** chapter of this User's Guide. We have provided many **User** fields in each module that you can customize to accommodate specific information. To use a user field, you may go into the *Layout* mode (within any module) and drag out one of these fields to store your specific data.

The data in these fields are sourced from the **Project** module when a new event is created, but can be changed per event without affecting the Project data.

Notes/Creative tab

The *Notes/Creative* sub-tab allows you to add **Notes** and **Creative Direction** for both the Event and the parent Project.

How to add notes/creative directions to Events & Parent Projects:

1. Click the black and green *Add* button to add a date and time stamp.
2. Type your notes in the field.

Projects:

| Add | Notes | Creative Direction |
|-----------------------|------------------------------|--------------------|
| 5/1/2012 2:43pm Joel | Editor will be one hour late | |
| 5/1/2012 3:17pm Joel | Editor will be rescheduled | |
| 5/1/2012 3:17pm Sandy | Rescheduled Editor | |

Events:

| Add | Notes | Creative Direction |
|-----------------------|------------------------------|--------------------|
| 5/1/2012 2:43pm Joel | Editor will be one hour late | |
| 5/1/2012 3:17pm Joel | Editor will be rescheduled | |
| 5/1/2012 3:17pm Sandy | Rescheduled Editor | |

Creative Direction

5/11/2012 12:51pm Molly

Director Comeau asks lead actress Jessica to make an entrance as the Technocrane 20 pushes in for a reveal.

Talent tab

The *Talent* tab is similar to the *Talent* tab in the **Projects** module, except here it shows the Talent for this single **Event** as well as the entire **Project**.

Talent on this Project sub-tab

Talent that is added in the **Projects** module is added generically to the Project, but not to any specific event. You can use this sub-tab to add a new talent to this single Event. A Talent must be listed on the Project before they can be listed on a specific Event.

How to add a new Talent to this Project:

1. Click on the black and green *Add* button to add a talent line item.
2. Click in the **Talent** field and it will display a drop-down list of Talent types. Make a selection from this list.
3. With the cursor now moved into the **Name** field, displaying a list of all people in the **Contacts** module that have matching contents in the **Talent** field. If the Talent is not in the **Contacts** module, you may simply type their name into this field (this does not create a contact record for the talent).
4. When the **Talent Name** is entered, their main phone number will be automatically entered, and the **Date** and **Time** should be auto-filled to reflect the first date and start time of the Project.
5. Enter in the **Role** of the talent (if applicable) and the talent's **Status** (Confirmed, On Hold, Not Available, Left Message, etc.).
6. To delete talent from this Project, click on the *Trash Can* button.
7. You may choose not to include their phone # on any printouts by deselecting the **Include Phone on Printouts** checkbox.
8. Clicking on the *Go To* button for each talent will take you to their record in the **Contacts**.

Then, to add a Talent to an event, simply press the black and green *Add This Talent to Event* button.

Notes about Talent on a project

- To delete Talent from this Project, click the *Trash Can* icon.
- You may choose not to include their phone # on any printouts by deselecting the **Include Phone on Print Outs** checkbox.
- Click the *Go To* button for each talent to take you to their record in the **Contacts** module.

Show Notes / Hide Notes sub-tabs

By now you have noticed the two sub-tabs *Show Notes* and *Hide Notes*. Switching between these simply shows or hides the **Notes** field.

Talent on this Event sub-tab

All talent assigned to this Event will appear here. The data is identical to the Project talent view. Once again, you may view the list with or without the notes field. From this page you may edit the talents information or delete a Talent from this specific Event (they will remain listed on this Project). You will also find a *Print This* button which can be used to print a list of all Talent for the Event.

Media Asset tab

The *Media Asset* tab contains two sections: **Library records on this Event** and **Library records on this Project**.

Library records for this Event

This shows all of the media from the **Library & Labels** module that is associated with this Event. The main, large portal shows information about each media asset. Clicking on a row of a particular media asset will highlight that media asset and show additional information at the bottom of the screen, including the **Current Location**, people involved, and all **Titles** on that media asset.

Clicking on the *Go To* button for each media asset will take you directly to that record in the **Library** module.

This screen is view only; changes to media must be done in the **Library & Labels** or the **Titles & Tracks** modules.

How to create a new media asset (record) in Library & Labels that's associated to this Project and Event:

1. Click the black and green button to the right labeled "*Create NEW related Media Asset/s in Library.*"
2. This will take you to a new record in that module, pre-filled with all the necessary information.

Library Records for this Project

This area displays the media for the entire Project, not just this Event. Here, you can assign media from the project to this specific event by clicking the Blue arrow button labeled *Link to this Event* (to the right

of a listed media asset). The media asset will then be displayed in the Library records for this Event list.

Clicking the *Go To* button for a particular **Title** will take you to directly to that record in the **Titles & Tracks** module.

Attach & FTP tab

The *Attach & FTP* tab is used for attaching (recording, linking and/or embedding) external files, sounds, pictures or movies, URLs, and FTPs to an individual **Events** record. The *Attach & FTP* tab is the where all of these attached files are stored. For a detailed explanation of this tab, see the **Attach & FTP tab** chapter of this User's Guide.

List tab

The *Lists* tab provides a list of the different events. Clicking on the *Go To* button will take you to the *Detail* tab for more information about that Event.

Report tab

The *Report* tab, formerly the *Print* tab, now has two sub-tabs. The *Print* sub-tab and the *Audit Log* sub-tab.

Print sub-tab

The *Print* sub-tab allows you to run extensive reports on all the events that have occurred in your studio within defined time periods. These reports can, but don't have to be printed. There are multiple buttons for different types of reports:

- *Session Reports* - provides printouts for preparing and documenting daily sessions. Included are print tabs for Audio Plug-in, Video/Film, and Talent session activities.
- *Items* – provides detailed summaries on how often items are used, along with financial details.
- *Item List Sums* - List printouts for Project summaries, sorted by Category or Item.
- *Invoiced Status* - Invoiced, Un-Invoiced, or both status reports for Invoicing.
- *By Action* - printouts focusing on the actions or tasks of events or tasks.
- *Employee* - provides time sheet printouts to document hours worked as well as payments made to employees.
- *Clients* - provides summaries on Client activity by Productions, quantity and dates.
- *Productions* - provides time sheet printouts to document employee hours, Project and Event Item usage and related Profit/Loss.



NOTE: A step-by-step instruction for printing is provided in each button/tab.

NOTE: All of these printed reports may be customized in FileMaker's Layout mode to suit your needs.

How to print from the Session Reports button:

1. Select a **Company** to appear on the letterhead,
2. Select a letterhead type (**Auto** or **Custom**).
3. You may want to click the *Find only this Session/Event*, to make sure you have the correct "found set".
4. Click the button for the report you want to print.

The screenshot shows the 'Session Reports' interface. On the left is a sidebar with a 'Session Reports' header and a list of report types: Item List Sums, Items, Invoiced Status, By Action, Employee, Clients, Productions, Project Type, and Operator. The main area contains two report sections. The first section, titled 'Work Order', has a 'Report Name' field and a 'One Event Per Sheet' section with buttons for 'Only This Singular Session', 'All Today's Sessions', '...Tomorrow's', and 'On Date'. Below this is a 'Many Events Per Sheet' section with buttons for 'All Sessions/Events on This Project on The Same Day', 'All Today's Sessions', '...Tomorrow's', and 'On Date'. The second section, titled 'Pre-Invoice', has a 'Report Name' field and a 'Many Events Per Sheet' section with buttons for '...with Prices', 'All Today's Sessions', '...Tomorrow's', and 'On Date'. At the bottom of the interface are four buttons: 'Video/Film', 'Talent', 'Audio Plug-in', and 'Find This Event Only!'.

Session Report Print buttons - Functions and Actions:

- *Only this Singular Session* - will print a general report containing all of the pertinent information about the current event. If there are related events (for example, equipment and people scheduled to work on the session), they will appear on the printout as well, as long as they are scheduled for the same day. This report will not contain any financial information. To the right are more buttons to print similar reports for *All Today's Sessions*, *Tomorrows*, and *On Date*, which will print session reports for sessions occurring on the date in the field above.
- *All Sessions/Events on This Project on the Same Day* - will print a general report containing all of the pertinent information about the Events that occur on the same day.
- *With Prices* - will print a general report containing all of the same pertinent information about the current event, except these will include financial information.
- *Audio Plug in* - prints all of the Format and Machines information from the *Setup Info* tab, along with an overview of what is scheduled, where it will be utilized, and who is ordering.
- *Video/Film* - prints the field text information from the *Setup Info*, *Video/Film/Graphics* sub-tab, along with an overview of ordering and location information.
- *Talent* - prints all of the Talent listed on the *Talent* tab.

Items List Sums button

Reports on this tab provide detailed summaries on how often items are used, relative percentage of usage, and all financial details.

IMPORTANT NOTE: *These reports are based on data in the Events module, and not from the Invoices module (which has it's own reporting), so this financial information is "pre-invoice". Any editing, adding or deleting of items in the Invoices module will not be reflected here.*

Each of the activity reports is based on a specific number of **Hours Per Day**. In other words, if you typically are busy 12 hours a day, you should base it on "12" **Hours Per Day**, so the report doesn't say that you are only booked half of the available time (24 hours).

How to print Project or Event list:

1. Select a **Company** to appear on the letterhead, then a letterhead type (**Auto** or **Custom**).
2. Selecting just a **Category** will report on all items in that Category.
3. Selecting a specific Item within a Category will of course print a report on just that item.
4. To print for all items, clear both the **Category** and **Item** fields.
5. Click a button for the desired date range, or enter your own.

Items button

How to print Item reports:

1. Select a sort order and **Sort By** either Project or Day.
2. Select a **Category** or **Item** to report on from the drop-down menu list.
3. Selecting a specific Item within a Category will print a report on just that item.
4. To print for all items, clear both the **Category** and **Item** fields.
5. Click a button for the desired date range, year, or fiscal quarter period from the button selections on the right, or enter your own.

Invoiced Status button

The *Invoiced Status* sub-tab provides a reporting of Projects and Events for the client specified on the desired view for Invoiced, Un-Invoiced, or both.

How to print a report of Invoiced Status:

1. Select a **Company** to appear on the letterhead, then a letterhead type (**Auto** or **Custom**).
2. Select an **Invoiced Status** from the checkbox.
3. Choose a **Category** or **Item** to report on from the drop-down menu list.
4. Selecting a specific Item within a Category will print a report on just that item.
5. To print for all items, clear both the **Category** and **Item** fields.
6. Click a button for the desired date range, year, or fiscal quarter period from the button selections on the right, or enter in your own.

By Action button

The actions or tasks printout is showing the time of event, rate, expense, charge, and P/L action summary.

How to print a report sorted by Action:

1. Select a **Company** to appear on the letterhead, then a letterhead type (**Auto** or **Custom**).
2. Select the **Action** to report on from the pop-up menu. Items include: Mixing, Lighting, Editing-Video etc.
3. Select a **Category** or **Item** to report on from the drop-down menu list.
4. Selecting just a **Category** will report on all items in that Category.
5. Selecting a specific Item within a Category will of course print a report on just that item.
6. To print for all items, clear both the **Category** and **Item** fields.
7. Click a button for the desired date range, or enter in your own in the date range fields.

Employee button

The page is used to generate time sheets for people that work for you. The printed sheets are summarized by person and by project. They break hourly and daily pay Rates into separate sections to accommodate paying the same person both ways within the same pay period.

The time sheets are based on values that are entered in the **Projects** and/or **Events** module (same data both places), so their hours must be kept accurate in those modules.

NOTE: You must select "People" from the category field to print employee reports. Selecting another Category item (other than People) conveniently offers other ways of viewing work event details and accrual.

How to print employee reports:

1. Select the Paid Status desired (*Find Paid, Find Unpaid, Find All*) from the checkbox.
2. Select **People** in the Category field and the specific Employee (from the pop-up menu) for whom you want to print a report for, or leave it blank to include all people.
3. If you need a specific date range, enter the **Report Start Date** and **Report End Date** in their fields.
4. Clicking one of the desired report buttons will bring you to a layout where you can view and manipulate the records you have found. Here, you can verify that only the correct records are showing (you can hide any extra ones by clicking the *Omit* button on the right).
5. After confirming the list of records to print, press the *Continue* button at the bottom of your screen. A dialog will appear asking you to set a paid date. This will mark the current set of record Paid.
6. After you set the date, hit the return key or click *OK*, and the currently unpaid items from this found set will be marked as paid on the date you entered. If you do not wish to mark the items paid, press cancel to continue the print function without marking them paid.
7. You will then see a screen preview of the report. Press continue on the left side of the screen to print the report.

Clients button

The *Client* sub-tab is similar in setup to the *Employee* sub-tab. Here you can print reports providing summaries on Client activity. Pick a Client for the report, or leave the field empty to include all clients, and then click the date range you're looking for.

Productions button

The *Productions* sub-tab reporting generates a view of associated Projects and Events hours, totals, expenses and profit/loss. Includes individual personnel payroll hours and related items.

How to print a Production report:

1. At the top of the page, select a **Company** to appear on the letterhead, then a letterhead type (**Auto** or **Custom**).
2. Select a **Production** to report on from the pop-up menu.
3. Selecting a specific Production will of course print a report on just that item.
4. To print all Production items, clear the Production field of text, no entry.
5. Click a button for the desired date range, or enter in your own in the date range fields.

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

Click the *Productions* tab to go to the **Productions** module showing only the events associated with that Project.

Click the *Projects* tab to go to the **Events** module showing only the details associated with that Project.

This covers the functionality of the **Events** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

22

FTP module

File Name: SSX_Library.fmp12

SSX

The **FTP** (File Transfer Protocol) module is linked to every module that has an *Attach & FTP* tab and interaction with this module is typically indicated from the *Attach & FTP* tab of other modules. In the **FTP** module directly however, you can initiate an upload or download that isn't part of any other specific record or module.

List tab

The *List* tab shows you the options that you have in regard to FTP. Clicking on any of the *Go To* buttons takes you directly to the *Transfer* tab.

Transfer tab

The *Transfer* tab is where you would make your uploads or downloads that are unrelated to any module or record. The **Favorites** field gives you a drop down menu of any FTP location that you've saved as a favorite. To save a location as a favorite, click the *Save* button after you've entered all of the pertinent information.

The **Server Address** is where you enter the IP address of either the destination or the origination of the files to be transferred. Below that is the **User Name** and **Password**.

Attached Files sub-tab

This is a place where you can choose to transfer files that are already linked to the record in Studio Suite.

Local Files sub-tab

This is where you can choose from files that are on your hard drive (or any hard drive networked to Studio Suite) for transfer.

Remote Files section

This is where you will see the display of files that you can download from another location.

Favorites tab

The *Favorites* tab shows you a list of your saved Favorites. You can delete an entry by clicking on the trash can.

Log tab

The *Log* tab is a log of all of the file transfers that have happened in Studio Suite. This log is printable.

Rates tab

If you are charging for the time and effort that it takes to perform a file transfer, this tab is where you would create and edit the Rates for those tasks. See the **Rates** Chapter for more general information on Rates.

This covers all of the basics of the **FTP** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

23

Invoices module

File Name: SSX_Invoicing.fmp12

SSX

The **Invoices** module is the final destination of financial data for a project. The data on each invoice typically would have a long lineage, as it is based on data that has come from many other modules.

In this chapter you will read about how to:

- Use the Invoices sub-tab
- Filter a found set by Client name
- Use the Advanced Find feature
- Read the QuickBooks Export List
- Make an Invoice from a Project
- Use the Invoice Detail tab
- Edit line items on an Invoice
- Add a new tax item to an Invoice
- Add a Discount rate
- Add a late fee to an Invoice
- receive a payment on an Invoice
- Create a simple Invoice
- View current Invoice
- Find a payment
- Run a sales tax report
- Edit the default letter text
- Send a letter
- Send an email
- Use the Automatic Date Range
- Register QuickBooks Plug-in (PC)
- Register QuickBooks Plug-in (MAC)

A recap of the Studio Suite flow:

1. Bookable Items are first created in the respective **Rooms, Equipment, Media, Library** and **Contacts** modules.
2. Each of those items has at least one or more related Rates, held in the **Rates** module.
3. Every Client has specific Tax, Discount, and Terms applied to them in the **Contacts** module (Taxes and Discounts are also held as rates in the **Rates** module).
4. When a Client books a Project, their respective Tax, Discount and Terms are “looked up” (where they may be edited uniquely for that project) in the **Projects** module.
5. Each Item/Event added to that Project will bring in it's associated default Service, along with the Client-specific Tax and Discount specifications (which may be applied or not, per event). These Item/Events are held in the **Events** module, where they may be edited uniquely for each Event.
6. When a Project is Invoiced, the main Project info (Project Name, Client, Terms, etc) is imported to the **Invoices** module, and Project Event/Items become Invoice line items
7. Invoices that are not specifically related to a Project can also be made from within the **Invoices** module. These are called “Simple Invoices”, and are explained later in this chapter.

NOTE: If any of the above (aside from #5 - #7) is new to you, it would be best to read the appropriate chapters of the User's Guide to establish that foundation before continuing on with this Invoices chapter.

Invoice List tab

Invoice sub-tab

This tab shows you a list of all invoices and their payments status.

How to use the Invoices sub-tab:

1. You can sort many of the fields by clicking the label name for each column.
2. There are three buttons along the top that let you quickly find only the *Paid*, *Open*, or *Overdue* invoices.
3. Clicking on the *Go To* button for a particular invoice takes you to the *Invoice Detail* tab for that invoice.

Advanced Find sub-tab

The *Advanced Find* sub-tab allows you to specify a narrower invoice search.

Invoice Find

- **Any** – searches for any invoice.
- **Paid** – searches for Paid invoices only.
- **Open** – searches for invoices that are open (but not overdue).
- **Overdue** – searches for invoices that are past due/overdue. You can choose the amount of days they are overdue from the pop-up menu when clicking the *Overdue Days* field.
- **Less than** – searches for invoices that are overdue less than the *Overdue Days*.
- **Between** – searches for invoices that are between a specific number of days. For instance, choose 30 from the first **Days** field and 60 from the second **Days** field. This will search for invoices between 30 and 60 days.

Date Range Find

- **Any** – searches for all date ranges.
- **Before** – searches for invoices with a date range before a specific date. Click the **Date Range** field and enter a date or select from the pop-up calendar provided.
- **After** – searches for invoices with a date range after a specific date. Click the **Date Range** field and enter a date or select from the pop-up calendar provided.
- **Between** – searches for invoices within a certain date range, specified by typing in the **Date Range** field or by selecting from the pop-up calendar.
- There are multiple buttons below to quick-set typical date ranges. *Last Year* and *This Year* (current) sets a date range for the entire year you select. The range can also be filtered by common fiscal *Quarters 1 (Q1)*, *2 (Q2)*, *3 (Q3)*, and *4 (Q4)*. Additionally, *This Month* (current month), and *Last Month* are available to refine your search criteria.

Sort By

- **Invoice Date** (Inv Date) - sorts the found set by Invoice Date
- **Due Date** - sorts the found set by payment Due Date.
- **Client** - sorts the found set by Client name.

Client

How to filter a found set by Client name:

1. If you do NOT wish to filter the found set by a Client name, click the *Any* button.
2. To filter the list by a client name, click the field below the *Any* button and select a Client from the drop-down list.

Find button

Once you understand the function of each *Advanced Find* feature, you can use them in conjunction with each other in order to narrow your search.

How to use the Advanced Find feature:

1. Click the *Paid* button in the **Invoice** section.
2. Click the *Before* button in the **Date Range** section.
3. Type 01/01/09 in the upper **Date Range field**.
4. Click the **Client field** and choose a client from the list.
5. In the **Sort By** section select the *Due Date* button.
6. Click the *Find* button seen below.
7. The **Invoices sub-tab** will then display all *Paid* invoices before *January 1, 2012* for the *Client* you chose. The list of invoices will be *Sorted By* the *Due Date* you specified.

Export List sub-tab

This tab displays a list of all found invoices and their “export” status.

How to read the Export List:

1. Click the *Ready to Export* button to display only items that are ready for exporting.
2. Click the *Already Exported* button to display items that have been exported.
3. Click the *Exported No Payments* button to display items that have already been exported but have received no payment.
4. Click the *Not Marked* button to display invoices that have not been marked for export (explained below).

Notes

- Within *Last Export* (shown at the top of the list) you can view the **Date** and **Time** of the last export overall, as well as for each individual invoice.
- The red **Export** column check boxes allow you to specify which invoices are **Ready To Export**.
- Clicking the *Export Marked Invoices* button on the right will export all marked invoices collectively as a group.
- The red text *Clear All* and *Mark All* buttons located on the far right of the list will clear or mark all of the red **Export** check boxes on the current found set of records.

There is more information about exporting to **QuickBooks** at the end of this Chapter.

Invoice Detail tab

Before explaining this tab in detail, it's important to understand how data is input here. Since it's the last thing performed from the **Projects** module, it's a good idea to have read that chapter first. To refresh, here's an excerpt from the **Projects** chapter of the User's Guide that explains how to make an Invoice from the **Projects** module:

How to make an Invoice from a Project:

1. In the **Projects** module- *Events* tab, Actual/Item view, on the far right side next to the *Hide* button is the **Selected/Invoiced** checkbox. Clicking each project invoice box will place an "X" in it to signify that it is ready to be invoiced. Click individual items again to deselect them.
2. Clicking the *Select All for Invoice* button will select all visible items listed. Shift-clicking this button will de-select all selected items. This can be used effectively with the filtering and hide functions described earlier.
3. Note that in the Rate definition (in Rates) you can specify that a Rate is "Not Normally Invoiced", which means that when you click the *Select All for Invoice* button, items using such Rates will not be selected for invoice. This function is useful when you have people or equipment that come with a room booking which need to be scheduled, but you do not bill for them. You can override this "not" selection by manually selecting these items. Also, Items that don't have Rates applied are not selected either, on the assumption that if there is no Rate, the item will not be invoiced.
4. Clicking the *Invoice Selected Items* button will ask if this is a Partial or Final invoice for the Project. Studio Suite will then proceed to export the data to Studio Suite's **Invoice** module. Items in each Project that have been invoiced will now appear with red X's in the *Project/Events* tab.

Your response to the Final/Partial question will be indicated in the **Invoiced Status** field within Projects (which you may also override). You can do a Find in this field (by clicking the *Find* button in the Status Bar) to find all "Not Invoiced" or "Partially Invoiced" projects.

Once a line item is invoiced, the **Events** data is transferred to the **Invoices** module and no longer relates to the data in the **Projects** module.

*NOTE: If you make any changes to a line item in either module after it has been invoiced, these changes will not be reflected in the other module. Further, if you change the **Quantity** of a media item that has been reconciled in your **Media Inventory** module, changing the quantity here will not change it in your inventory. Make certain that before you make an invoice, you have the correct **Quantity** of media reconciled in the Project.*

How to use the Invoice Detail tab:

1. Returning focus now to the *Invoice Detail* tab, you will see the **Production #**, **Production name**, **Project #**, **Project Name**, **Client** and the **Billing Address** information.

2. The **Client** is sourced from the **Project**, and the subsequent **Billing Address** is from that Client's related information in the **Contacts** module. If the Client has changed, select another one by clicking the green **Client** field. This will bring up a drop-down list of everyone in the **Contacts** module identified as a Client. Choose a new Client, then click *Continue*. Studio Suite will lookup the new default Tax and Discount information based on their Client #.
3. The **Due In** terms of this invoice will import from the **Project** (15 Days, 30 Days, 0 Days COD, No Terms, etc.) which is sourced from the Client's **Contacts** module record. You can manually change the terms of this invoice, but changes will not be reflected in the **Project** or the Client's **Contacts** module record settings.
4. The **Paid Status** field will say "Open" until the Invoice is paid in full, at which point it will be automatically marked as "Paid".
5. The **Invoice Date** and **Invoice No.** are automatically generated by Studio Suite.
6. The **Invoiced By** field is auto-filled from the current user's **Account Name**. The **Client PO #** is automatically transferred from the **Project**, based on the Client PO of the first visible Event in Projects.
7. The **Company Selector** field is populated from the same field in the Projects module upon creation. If you have more than one company, the *Print* tab allows you to generate reports based on each of your companies invoices. Printed Invoices will have the associated logo and company information.

Export buttons

Just below the fields described above is a group of buttons that will output the current invoice in a number of ways.

Ways to Export Invoices

- *Export to QuickBooks* - will transfer this invoice to QuickBooks. Learn more about transferring to **QuickBooks** at the end of this Chapter.
- *Send Via Email* - will prepare a PDF file attachment of the printed invoice, and insert it into an email. This requires that you have the (included) SMPTit email plug-in installed and registered. Invoices emailed from within Studio Suite are linked to the **Communications** module, automatically creating a new record there so you can track this correspondence in your client's **Contacts** record.
- *Print Alt. Invoice* - prints the invoice from a secondary layout, allowing you to have a second invoice in a different language or design/format if needed.
- *Print This Invoice* - will print this invoice, sorted in the displayed sort.
- *View Extended* – (on the far right of the screen) extends the view of Line Items to show more items in the list.

Each of the *Export To QuickBooks*, *Send Via Email* and both *Print* buttons have a field below them. Clicking this field displays a complete history of every time that specific action was performed, with the most recent occurrence on top of the list.

Line Items and Credits section

In the middle of this window, there is an area that displays all of the individual line items for this invoice. Note that this is where you would also enter Credit items, Refunds, Discounts, or Pre-Payments.

| Line Items and Credits | | | | | | | | | | |
|------------------------|-----------------------|----------------------|---|-----|------|------------|----------|---|---|-------|
| Ready To Export | | | | | | | | | | |
| Sort by Category | | | | | | | | | | |
| Tax/Disc | | | | | | | | | | |
| View Extended | | | | | | | | | | |
| Date | Item | Rate | Description | M/L | Qty. | Unit Price | Subtotal | 1 | 2 | 3 D C |
| 5/9/12 | Zeiss Master Primes | Alwa 1 | | 1 | 1 | 50.00 | 50.00 | | | |
| 5/8/12 | Joseph Producer | Byron F Martinez 1 | 5/8/2012 9:00AM - 5/8/2012 - 5:00PM Byron F | 1 | 1 | 250.00 | 250.00 | T | T | |
| 5/8/12 | Sony 90 Min. DVCAM | Sony 90 Min. DVCAM 1 | Sony 90 Min. DVCAM 1 | 1 | 1 | 50.00 | 50.00 | T | T | |
| 5/9/12 | Alan Assistant | Steve Jill per song | | 1 | 10 | 60.00 | 600.00 | | | |
| 5/8/12 | Andy Engineer | Andy's Hourly | | 1.5 | 6 | 50.00 | 450.00 | | | |
| 5/8/12 | Red One Camera #1 -- | Red One Camera Daily | 5/8/2012 | 1 | 1 | 1,000.00 | 1,000.00 | T | | |
| 5/8/12 | - Zeiss Master Primes | | | 1 | 1 | 0.00 | 0.00 | | | |
| 5/8/12 | - Arri 1000 Head | | | 1 | 1 | 0.00 | 0.00 | | | |

How to add items to an Invoice:

1. Click the black and green **New** button above the Line Item list.
2. The **Edit Invoice** window will appear with empty fields for the line item's data.
3. Click the **Date** field and select a date from the pop-up calendar.
4. Click in the yellow highlighted fields and enter the **Category**, **Item**, and associated **Rate Name** by making your choices from the drop-down menus located within each field.
5. The **Filter Rates By** field allows you to filter the **Rate Name** drop-down menu to display only **Items**, **Category**, **Client** or **ALL**.
6. Make sure all yellow fields have data, when you are finished, click *Continue*.

NEW FEATURE: Go To button Audit Log tool tip

Audit Log is a new feature in Studio Suite X and one of the ways it can be accessed is by hovering over the **Go To** button in the **Projects**, **Productions**, **Equipment**, **Invoices** (on line items), **Events** (on line items), and **Library** (on the *Titles* sub-tab) modules.

When you hover your cursor over the **Go To** button, a log of who made a change to the record belonging to the **Go To** button along with what change they made and when they made it. This is a great way to maintain accountability as well as a handy short cut helping you know where to direct your questions about the record.

How to edit a line item:

1. Click on the **Go To** button on the left of the row.
2. The **Edit Invoice - Edit Item** window will appear with fields of the line item's data, where it may be edited. The item's original values are shown for reference are in gray text located below those fields. Clicking the *Cancel* button will reinstate the original values.

- Note: Tax, Discount, and any Commission can also be individually applied to any Line Item without going to the Edit screen by shift-clicking in the appropriate Tax, Disc, Com (1,2,3,D,C) buttons on the right side of the Line Items display area. Shift-click to select, repeat the same Shift-click to deselect the item. Shift-Clicking on the heading labels for each parameter will toggle the value for all line items.*

The Line Items list will default to the Sort Order of the Project that created the Invoice unless you click the **Sort By Category** checkbox. Checking this box will sort the list by Category. The printed version of the invoice will include subtotals by Category. The global preference for this option is located at **Main Menu / Setup / Module Prefs/Invoices**.

Putting a check mark in this box will make it ready to export to Quickbooks.

In addition to being able to choose what currency symbol your Studio Suite monetary references default to in the Main Menu, you can now adjust the currency symbol per invoice. Keep in mind that this does not do a currency conversion calculation for you, it just changes the currency symbol for display purposes.

| | | | |
|-----------|--------|-------|------------|
| 250.00 | 500.00 | D | 350.00 |
| 55.00 | 165.00 | T | 115.50 |
| 503.89 | 503.89 | T T C | 554.28 |
| Subtotal | | | £ 5,678.89 |
| Tax Total | | | \$ 61.89 |
| Total | | | £ 40.78 |
| Payments | | | € 16.00 |
| Balance | | | ¥ 24.78 |
| CHF | | | |
| Edit... | | | |

The **Taxes** area contains up to three Tax Rates that have either been transferred from the **Projects** module or (if this is a “Simple” invoice, i.e. not related to a Project) directly from the Client’s record in the **Contacts** module. Although all of the correct Taxes should be displaying in that portal, you may add, edit, or delete **Tax Rates** in the same manner as Line Items explained above under Line Item Editing.

Each Tax Service row shows the designated **Rate**, and the **Total** amount for that tax. If the tax is marked as **Exempt**, the exempted tax amount will show next to the checkbox. The **Slot** determines which column of the *Tax* buttons in the portal it will be assigned to, and the **Symbol**-field specifies the character that will be displayed in the designated slot (as originally specified in the **Rates** module). Taxes cannot be applied to a line item unless they first exist here.

NOTE: If your business is in an area of the world that requires some taxes to be taxed after others, and you have enabled the Reveal Tax after Tax Options in the Main Menu Setup area, you will see the fields that allow you to define or edit which taxes come after which.

How to add a new Tax to an Invoice:

1. Click the black and green *New* button.
2. The **Create Tax** window will appear.
3. Click the *Tax Rate* field and select a tax from the pop-up menu.
4. Choose whether the tax is **Exempt**.
5. Choose which slot (order) the tax should appear in (1,2 or 3).
6. If you are using QuickBooks or 3rd party accounting software, click the **Account Code** field and select a corresponding Account Code from the drop down menu, or type a new one.
7. Choose your tax **After Taxes** if appropriate.
8. When you are done, click *Continue*.
9. The new tax will then appear in the Taxes list in the sort order you chose.

Discount section

On the far right side of the **Invoice Detail** window is the **Discount** area, where you can define the one discount rate that can be applied to the any Line Item.

| Discount | | |
|----------------|------|----------------|
| Discount Rate | Rate | Discount Total |
| ← New Rate 215 | 10% | \$ |

How to add a Discount rate:

1. Click the black and green *New* button.
2. The Create Discount widow will appear.
3. Click the **Discount Rate** field and choose a rate from the pop-up list. This list comes from Discount rates as defined in the **Rates** module.
4. Click the *Continue* button.

- You will notice the black and green *New* button will then disappear. This is because invoices can only have ONE discount rate (a requirement for exporting to many 3rd party accounting software packages, including QuickBooks).

NOTE: Discounts cannot be applied to a line item unless the discount exists first here.

NOTE: If you need to have more than one discount percentage applied to different line items (i.e., this item has a 10% discount, another has a 15% discount), each additional discount must be manually calculated into the line item amount, or added as separate line item with a negative value. This limitation is required to allow export to QuickBooks, which can only accommodate one discount percentage per invoice.

Late Fee section

In this area, a Late Fee is automatically calculated based on the date of the invoice and the Terms, and can be added to an invoice (as a line item).

How to add a late fee to an Invoice:

- Click the **Start** and **End** date fields to select a **Start** and **End** date from the pop-up calendars.
- Enter an **A.P.R.** (annual percentage rate).
- The Amount will automatically be filled in.
- Click the black and green *Add* button.
- The late fee will appear as a line item on the invoice.

*NOTE: late fees are only calculated when the number of days specified in the **Due In** field have passed.*

Payments section

Below **Taxes** is an area for **Payments**. When you receive a payment for an invoice, it can be entered in the **Payments** area.

NOTE: If you need to create a Credit item on an invoice (such as a refund, special discounts, or pre-payment to an Invoice), they should entered as Line Items, not Payments.

| | | | | | | | | | |
|--------|-------------|----------|---------|------------|------|---|-------------------------------------|---|--|
| New | | Payments | | | | <input type="checkbox"/> Print Payments | | <input type="checkbox"/> Export Marked Payments | |
| Date | Entered by: | Method | Check # | \$ Amounts | Memo | Account Name | Export | Exported On | |
| 5/1/12 | Joel | check | | 2,450.00 | | Fees | <input checked="" type="checkbox"/> | | |

How to receive a payment on an Invoice:

1. Click the black and green *New* button.
2. The **Create Payment** window will appear. Enter applicable data in the provided fields.

| Date | Method | Check # | Amount | Memo | Account Name |
|---------|--------|---------|--------|------------------------|-------------------|
| 5/12/12 | check | 50864 | 500.00 | Deposit on ProjectFees | Undeposited Funds |

No Credit Balance available to apply

Cancel

3. If you are using QuickBooks, you may specify a **Account Code** (Account) that this payment will be assigned to when it is exported to QuickBooks.
4. The button at the top is labeled *Use Inv. Balance*. Clicking this button will automatically fill in the **Amount** field with the amount from the invoice, saving you from having to type this number in.
5. Enter all information and click *Continue*.
6. QuickBooks users will be prompted if they want to export this new payment immediately. If not, newly created payment records will have the **Export** checkbox marked as ready to be exported to QuickBooks, and will be included in the next export.
7. If you receive a payment after an invoice has already been exported, you won't want to export the whole invoice again, just the new Payments. You can do this by clicking the *Export Marked Payments* button. When a payment has been exported that checkbox will be cleared.
8. To edit a **Payment & Credit** item, click the *Go To* button on the left of the row.

Payments from Credit Balances

If a client has a credit balance, the invoices that contain credit balances will appear on the Payments screen. You may apply credit from 1 invoice per payment by clicking on *Credit Balance* for that invoice.

Comments section

This field on the bottom right will contain the default comment as defined in the **Main Menu/Setup/Service/Invoices** tab. If you click on this field, you may enter an alternate comment.

Client Aging section

At the bottom of the *Invoice Detail* tab window is an area for **Client Aging**. This area displays a complete history of this client's financial record of payment. From right to left view the **Total Billed, Year to Date** total, any **Balance Due**, and **Days Over** regarding how many days they are overdue on payment.

Aging can be based on either the Invoice Date or the Due Date, depending on the preference setting at **Main Menu/Setup/Module Prefs/Invoices**.

Creating Simple Invoices

If you want to create an invoice that is unrelated to any Project (a “Simple Invoice”) you can create a new one from the *Invoice Detail* tab.

How to create a simple Invoice:

1. Click on the black and green *New* button in the *Function* bar, and a **Create Client** window pops up.
2. Click the **Client** field and select a **Client** from the drop-down list.
3. Click *Continue* and proceed to add line items (as explained above under **Line Item Edit**).

NOTE: Although creating invoices this way is certainly possible, it does not take advantage of the features built into Studio Suite that make invoices easy to create based on Project line items.

Line Items tab

This tab allows you to see the detail for a group of line items in one screen. Your options are All Invoices, Current Invoice and Open Invoices (or invoices that are still ‘open’).

How to view current Invoices:

1. Under **Find Line Items**, click the *Current Invoice* button.
2. The *Line Items* tab window will then display only invoices that are current.
3. If you want to display all invoices, click the *All Invoices* button.
4. This is a view only layout. To edit a line, press the *Go To* button to the left to view the Invoice details.

You can also click the *Find* button in the *Function Bar*, and find line items by any field.

Payments tab

This tab is similar to the *Line Items* tab, in that it allows you to see all (or a set of) Payments in one screen. You can also find by any field data.

How to find a payment:

1. Under **Find Payment**, click the button labeled *Date Range*. This will present quick-set buttons for typical date ranges, or you can enter your own range.
2. All invoices for the range selected will then be displayed in the list.
3. The total sum of all payments listed will be displayed in the **Payment Total** field.
4. You can mark a line item for export to QuickBooks by checking the checkbox labeled **Marked for Export**.
5. This is a view only layout. To view and edit details about a line item, click its *Go To* button on the left.

Tax Summary tab

Clicking the *Tax Summary* tab will perform a find and return for each Tax (type) on each Invoice.

How to run a sales tax report:

1. Under **Find**, use the buttons to find *All Tax Line Items*, *All PAID Items*, *All UNPAID Taxes* and *Current Invoice*. Clicking the *Date Range* button will present the quick-set options for typical date ranges.
2. Once you have found the correct set of taxes, click the *Print Summary* button on the upper right to print a summary (totals only for each tax). Clicking the *Print Detail Summary* button will print all currently displayed Tax Line Items, summarized by Tax Service.
3. With the correct found set, clicking the *Mark All* button on the right will mark all as Paid, auto filling today's date, indicating that these collected sales taxes have been paid to the government. To unmark all, click the *Clear All* button.

IMPORTANT NOTE: Be careful when using this button as it will change the entire found set, and is not undo-able.

Letter Entry tab

The *Letter Entry* tab allows you to create letters or emails regarding overdue invoices. The Notice 1, 2 and 3 Sent text areas are global fields, which means that their content is the same template for every invoice record, with the exception of the <<merge>> fields (**Invoice Number**, **Invoice Date**, **Project Name**, and **Balance due**), which are specific to each invoice.

You can automatically insert merge fields (shown as the field name with 2 angle brackets <<Field>> on either side), which adds the current invoice's specific field information into the body of a letter, with a blank space before and after the field. If you end a sentence with a merge field, be sure to delete the space following the field so your period or question mark will be next to the merged text. If you want to re-write the letter templates, any changes will become the new template for all future letters.

How to edit the default letter text:

1. Edit your letter in to the **Notice 1, 2 or 3** fields as needed
2. To add the merge field, click the appropriate buttons next to **Paste Into Selected Letter**. For instance, clicking the *Paste Invoice Date* button will insert <<Invoice Date>> where your cursor is in the text field. When this letter is printed or email, the actual invoice date will appear.

How to send a letter:

1. First find the invoice/s you would like to send a letter to.
2. Click the button labeled *Transfer to Comm to Print Letter 1, 2, or 3*.
3. It will copy this text and transfer you to the **Communications** module, where you can edit a personal version of the letter for this use.
4. From there, you can use any of the option printouts to print the letter and mail or email it to the client. The letter will now be linked to the Client record in the **Contacts** module.
5. To return to the **Invoices** module, click the *Back* button, where you'll see that today's date has been entered in the field next to the button.

How to send an email:

1. First find the invoice/s you would like to send a letter to.
2. Click the button labeled *email* containing the default text you'd like to send.
3. This will open a new email window containing the default text which you can edit the text for this use, and add additional addresses as needed. There will also be a .pdf version of the invoice attached.
4. The letter will now be linked to the Client record in the **Contacts** module.
5. Clicking *Send* will send the email and return you to the **Invoices** module.

Default Text when sending an Invoice via email

At the bottom right of this screen is where you can specify the default text for the body of an email when you send an Invoice via email. You can use the same *Merge* buttons at the top of the screen to enter Invoice specific information into the body of the email.

Report tab

The *Report* tab, formerly the *Print* tab now has two sub-tabs: *Print* and *Audit Log*.

Print sub-tab

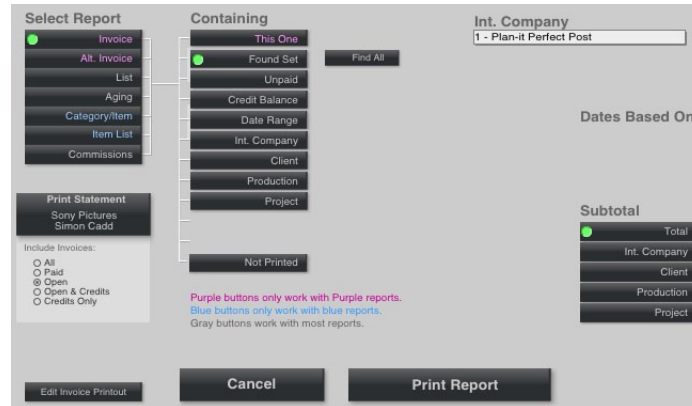
The Print sub-tab has a very flexible report generator. It allows you to specify which report you want to print (under the **Select Report** heading) and the range of it's contents (under the **Containing** heading).

Report button colors and their meanings:

- **Magenta** text buttons are for printing invoices (only).
- **Light blue** text buttons are for printing reports based on line item usage.
- **Gray** text buttons will work with all reports.

Containing section: Multiple Selections

The **Containing** section will allow you to select multiple buttons simultaneously to further define the search result. For example you can select **Unpaid** for a specific **Client** within a **Date Range** for a specific **Project**. Usually you won't need to get this specific, but you can if you want to. Your selection is marked by a green dot on the left hand side of the button.



Automatic Date Range section

Clicking the *Date Range* button will display range fields. Above these fields are buttons that automatically enter common date ranges (*This Year*, *This Month*, etc).

How to use the Automatic Date Range:

1. Click the button labeled *This Year*.
2. The Date Range fields will automatically fill in with 1/1/XXXX (your current year).
3. Now click the *Month* and *Week* buttons to automatically fill in the 1/1 with the current month and week day.

NOTE: When using the week button, use the Sunday/Monday toggle button to determine whether your week begins on a Sunday or Monday (this does not affect displays or settings in the **Calendar** module, just invoice report date settings).

Dates Based On buttons

Because Invoices are not always made on the same date the charge was incurred, you may determine if the report's range will be determined by the date of the Invoice, or the date of the Line Items. For example; if you want a report on how much a particular studio generated last month, even though the invoices were made this month, you would click Line Item Date rather than the Invoice Date.

This is a very powerful report generator that can be best learned by experimenting.

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

NEW FEATURE: QuickBooks Online plug-in (PC only)

Since Studio Suite is linkable to QuickBooks for Mac, QuickBooks for PC, QuickBooks Enterprise, why not include QuickBooks Online?! Our plug-in only works with QuickBooks Online for PC, but we looking into the MAC version.

Registering the QuickBooks plug-in (PC and Enterprise)

For PC, the plug-in file is included in your Studio Suite installation, but you'll need the additional registration number to enable this functionality. You will be prompted to enter the number when you click the *Register* button in the **Main Menu/Setup/Module Prefs/Invoices** screen, which will be followed by further instructions. Your registration number is provided for you on your invoice when you purchase the plug-in.

How to register the QuickBooks plug-in (for PC and Enterprise):

1. Make sure your QuickBooks company file is already open with "admin" credentials, and that it has been set up with at least one user (go to "Company/Set up users...")
2. Choose a company file, which may be located at **C:\Program Files\Intuit\QuickBooks 20xx\YourFileName**. A hosted QuickBooks file is OK but each user must have QuickBooks installed on their computer.
3. Once you have selected a file, you will get the message "A connection has been established".
4. In QuickBooks, choose "Yes, always..." then under "login as:" choose a user name.
"IMPORTANT: DO NOT CHOOSE "Admin" SINCE THIS WILL LOCK OUT OTHER USERS!"
5. Specify a QuickBooks Deposit Account (the accounts that Payments will default to).
6. Specify a QuickBooks Expense Account.
7. Specify a QuickBooks COGS Account
8. Specify a QuickBooks Asset Account
9. Specify if Studio Suite invoices sent to QuickBooks should require a PO or not.

Registering the QuickBooks functionality (Mac)

On the Mac, there is no plug-in needed, but you will need an additional registration number to enable this functionality. When you purchase the plug-in the registration number is provided for you on your invoice.

How to register the QuickBooks plug-in (for MAC):

1. Go to the **Main Menu/Setup/Module Prefs/Invoices** screen, and click the blue “*Register*” text on the right side of the screen. You’ll get a pop-up window asking for the registration number, which you can type in or copy/paste. After the successful registration, the “*Register*” text will change to “Registered”
2. Specify a QuickBooks Deposit Account (the accounts that Payments will default to).
3. Specify a QuickBooks Expense Account.
4. Specify a QuickBooks COGS Account
5. Specify a QuickBooks Asset Account
6. Specify if Studio Suite invoices sent to QuickBooks should require a PO or not.

Registering the QuickBooks Online plug-in (PC)

For PC, the plug-in file is included in your Studio Suite installation, but you’ll need the additional registration number to enable this functionality. You will be prompted to enter the number when you click the *Register* button in the **Main Menu/Setup/Module Prefs/Invoices** screen, which will be followed by further instructions. Your registration number is provided for you on your invoice when you purchase the plug-in.

How to register the QuickBooks Online plug-in (for PC):

1. Make sure your QuickBooks company file is already open with “admin” credentials, and that it has been set up with at least one user (go to “Company/Set up users...”)
2. Choose a company file, which may be located at **C:\Program Files\Intuit\QuickBooks 20xx\YourFileName**. A hosted QuickBooks file is OK but each user must have QuickBooks installed on their computer.
3. Once you have selected a file, you will get the message “A connection has been established”.
4. In QuickBooks, choose “Yes, always...” then under “login as:” choose a user name.
“IMPORTANT: DO NOT CHOOSE “Admin” SINCE THIS WILL LOCK OUT OTHER USERS!”
5. Specify a QuickBooks Deposit Account (the accounts that Payments will default to).
6. Specify a QuickBooks Expense Account.
7. Specify a QuickBooks COGS Account
8. Specify a QuickBooks Asset Account
9. Specify if Studio Suite invoices sent to QuickBooks should require a PO or not.

Exporting Invoices to QuickBooks (PC & Mac)

As noted in earlier sections, clicking any button labeled *Export to QuickBooks* will transfer an invoice to your QuickBooks program. In order for Studio Suite to talk to QuickBooks, you need to purchase an additional registration number from AlterMedia for a Quickbooks plug-in.

If you are on PC, this feature is handled by a 3rd party plug-in called FileBooks Link. This plug-in uses a technology called “XML Interchange” to talk to QuickBooks, allowing data to move from directly Studio Suite to QuickBooks without any involvement of the user (other than clicking the button).

If you are on a Mac, clicking this button generates an export file in the IIF (Intuit Interchange File) format, then using AppleScript, calls QuickBooks to initiate an Import process. The default location for where these export files are saved is specified at: **Main Menu / Setup / Misc.** as either your Documents, Applications/ FileMaker, Desktop, or Temporary folder (see the **Main Menu** chapter for more on these options). You'll need to locate the Export file for QuickBooks after the initial export (per session), and QuickBooks will remember it after the initial discovery.

How Studio Suite Rates sync with QuickBooks

When you define your Rates in the Studio Suite **Rates** module, there is a group of fields that allow you to specify matching account data in QuickBooks. When an item (i.e. room, person, equipment, service) appears on a Studio Suite invoice line item with a Rate specified, that invoice line item will lookup the appropriate linkage data from the applied Rate. This link data is what is sent to QuickBooks upon export.

It is critical that all of your Rates are setup properly in Studio Suite before attempting to create invoices, or export to QuickBooks. It is possible however, to edit the QuickBooks account data per Studio Suite invoice line item, however, that can get labor intensive, and it's best to get the Rates setup properly first.

General Info on exporting to QuickBooks

- Make sure that the **QuickBooks Export Name** field in the *Financial Info* tab of the Studio Suite **Contacts** module is exactly the same as the Customer name in QuickBooks. If you import an invoice with customer or Items that don't exist yet in QuickBooks, they will be created there.
- Studio Suite “qualifies” all of the data on each invoice before exporting, making sure that all the data and accounts are appropriate. If an export fails for any reason, you will be notified via dialog, and an “X” will appear on invoice line items that have problems. Hovering over the “X” will present a tool tip explaining what the problem was, so you can correct the problem.
- Because we are exporting to QuickBooks via different methods, there is a consequential difference in how Invoice Numbers are handled.

Invoice numbering on PC, using the plug-in:

- Since it's likely that you'll have two sets of Invoice Numbers- the ones from Studio Suite, and ones QuickBooks generates when you create an invoice directly within QuickBooks, the Studio Suite Invoice Number gets placed into the **Memo** field in QuickBooks for reference there. The QuickBooks Invoice number is documented in the field under the *Export to QuickBooks* button.

Explaining the above, it is possible to create and delete invoices independently in both

Studio Suite and QuickBooks. For example, you may create an invoice in QuickBooks for a service or product that wasn't entered in Studio Suite, or, you may create and delete one or more invoices in Studio Suite before achieving a good candidate for export to QuickBooks. Therefore, it is not reasonable to expect (or require) the invoice numbers to remain in unison. As such, it is normal and expected that they will *not* be the same, which is why the Studio Suite Invoice number is referenced on the QuickBooks invoice, and vice-versa.

Invoice numbering on Mac, using file-based export/import:

- On a Mac, we don't have the advantage of using a plug-in that can communicate back and forth from Studio Suite to QuickBooks, we can only "push" out of Studio Suite and into QuickBooks. Also, when importing an invoice, QuickBooks on the Mac does not have the ability to create its own invoice number, it depends on the supplied data to provide an Invoice number. Despite the good logic that's used for invoice numbering on the PC side, it simply isn't an option on the Mac side. As such, when importing an invoice from Studio Suite to QuickBooks, the resulting QuickBooks invoice number will be the same as the Studio Suite invoice number.

IMPORTANT NOTE: *Forgot to purchase a QuickBooks or MYOB plug-in with your initial order? Never fear! Call or email AlterMedia, Inc. right now and we'll take care of you. 1.800.450.5740, 1.818.955.9550 or sales@studiosuite.com.*

NEW FEATURE: MYOB plug-in

The MYOB plug-in is just like the QuickBooks plug-in, but for MYOB.

Registering the MYOB plug-in (PC)

For PC, the plug-in file is included in your Studio Suite installation, but you'll need the additional registration number to enable this functionality. You will be prompted to enter the number when you click the *Register* button in the **Main Menu/Setup/Module Prefs/Invoices** screen, which will be followed by further instructions. Your registration number is provided for you on your invoice when you purchase the plug-in.

How to register the MYOB plug-in:

1. Make sure your MYOB company file is already open with "admin" credentials, and that it has been set up with at least one user (go to "Company/Set up users...")
2. Choose a company file, which may be located at **C:\Program Files\Intuit\QuickBooks 20xx\YourFileName**. A hosted QuickBooks file is OK but each user must have QuickBooks installed on their computer.
3. Once you have selected a file, you will get the message "A connection has been established".

4. In QuickBooks, choose "Yes, always..." then under "login as:" choose a user name.
"IMPORTANT: DO NOT CHOOSE "Admin" SINCE THIS WILL LOCK OUT OTHER USERS!"
5. Specify a QuickBooks Deposit Account (the accounts that Payments will default to).
6. Specify a QuickBooks Expense Account.
7. Specify a QuickBooks COGS Account
8. Specify a QuickBooks Asset Account
9. Specify if Studio Suite invoices sent to QuickBooks should require a PO or not.

Registering the MYOB (Mac)

On the Mac, there is no plug-in needed, but you will need an additional registration number to enable this functionality. When you purchase the plug-in the registration number is provided for you on your invoice.

How to register the MYOB plug-in (for MAC):

1. Go to the **Main Menu/Setup/Module Prefs/Invoices** screen, and click the blue "Register" text on the right side of the screen. You'll get a pop-up window asking for the registration number, which you can type in or copy/paste. After the successful registration, the "Register" text will change to "Registered"
2. Specify a QuickBooks Deposit Account (the accounts that Payments will default to).
3. Specify a QuickBooks Expense Account.
4. Specify a QuickBooks COGS Account
5. Specify a QuickBooks Asset Account
6. Specify if Studio Suite invoices sent to QuickBooks should require a PO or not.

Click the *Rates* tab to go to that module.

Click the *Projects* tab to go to that module.

This covers all of the basics of the **Invoices** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

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Library & Labels module

File Name: SSX_Library.fmp12

The **Library & Labels** module tracks all of the media you have in your library (Tapes, CD's, DVD's, Disks, etc.).

IMPORTANT NOTE: Studio Suite refers to ANY and ALL media as a "Media asset", whether it is a Hard Drive, a Folder on a Drive, A CD, DVD, Cassette, Cartridge or old fashioned reel.

Every title (song, cut, spot, cue, etc.) that you create in the **Library & Labels** module for a particular media asset becomes a new record in the **Titles & Tracks** module.

Studio Suite prints labels for all formats (Digi Beta, Mini DV, DA-88, DAT, cassette, video and disk formats), complete with your contact information and the logo for your selected company, or the client's information. It prints Tape Release Forms, so you always have a record of when, where, and to whom a media asset goes when it leaves your facility, storing each movement in the *Asset History* tab. It also accommodates the use of Barcodes for quick entry and tracking of media assets.

Each Media asset will also appear in the **Contacts** and **Projects** modules having been associated with certain records.

In this chapter you will read about how to:

- Create a new media asset

- Assign a media asset to a Production
- Attach a file to a media asset
- Log Media OUT
- Log Media IN
- Enter a new Title
- Create a new QC Report
- Create a new media asset Rate
- Edit/change the information of a specific rate
- Permanently delete a Rates record
- Choose one copy for printing
- Choose multiple copies for printing
- Modify label layouts
- Use the Audit Log to view data from a deleted record

Detail tab

The *Detail* tab is where you enter all of the information about a piece of media. The top portion contains basic information about the media asset (or disk), divided up into 4 boxes. The first box holds project and people names, the second box holds format information, the third box holds numbering and other statuses, and the fourth box holds data about various locations of the media asset. The bottom half of the screen shows all of the individual Titles on a media asset, as well as the Disk Log, Purchase Info, Related Media assets and Comments.

The best way to create a new media asset is from the **Projects** or **Events** module, so the Library record will be associated with that project or event. (For information on how to create new media assets, see the *Media Asset* tab section for the above modules in this User's Guide). However, at any time you can create a new record in the **Library & Labels** module and associate it with a project.

Create New Media Asset

How to create a new media asset:

1. Click the *New* button in the *Function bar*.
2. The **Create New Media Asset** screen will appear with a '1' in the **Quantity** field, indicating there is only ONE new media asset you wish to create for this project.
3. If you would like to create multiple media assets, enter the number of media assets you want to create in the **Quantity to Create** field. Keep in mind that the Media assets should all be in the same format and for the same project. If you have multiple formats to enter, do it in stages for each format. When you click the *Done* button, you will be asked to fill out the information unique to each media asset.
4. Click the *Basic* tab and follow the instructions in the next box.

Create New Media Asset window

Basic tab

How to assign a media asset to a production:

1. Under the *Basic* tab, new to the Library function in Studio Suite is the ability to assign a media asset to a Production. Click in the small open field next to **Production** to view a drop-down list of existing Productions available for this media asset to be appropriately assigned to.
2. Next, click the small field next to **Project**.
3. A drop-down list of all Projects will appear. These are Projects that you have created via the **Project** module.
4. Select a Project from this list. Most information fields will be automatically filled in with information from the **Project** module.
5. Type a title for this Media asset in the **Media Asset Title** field.
6. If you do not have a Barcode for this media asset, you can click the *Barcode* button. This will fill in the **Barcode** field with the same number as the Library # field. Also, if you put a check in the box labeled '**Auto Create Barcode from Library number**', each subsequent Media Asset will auto-fill the Barcode field with the Library number.
7. Click the **Acquired From** field and choose whether this media asset is from your Stock, from your Client, or other entity (editable).
8. The **Date Acquired** and **Time Acquired** fields will automatically be filled in with your computer's current time and date, however you may change this by clicking in the fields and typing a different time and date.
9. Click the **To Location** field and select a location (room) in your studio that this media asset will be sent.
10. Enter optional Notes regarding this media asset in the **Notes** field.
11. Click the *Detailed* tab and fill out the information fields listed below.

Detailed tab

- **Media type** - default list of media types you have made available in the **Media Inventory** module. Selecting a type will automatically fill in the **Brand**, **Length/Size** and **Format** fields. If you don't know what the codes are, you can select the **Brand**, **Length/Size** and **Format** individually from their pop-up lists.
- **Brand** - default list of media brands.
- **Length/Size** - default list of minute length and megabyte size.
- **Format** - list of all formats you have made available in the **Media Inventory** module.
- **Speed/Rate** - the (audio) sample rate and bit rate of this media asset.
- **Emph/Dolby** - turn Emphasis On or Off, choose Dolby A, B, C or SR, dBx or No Dolby, choose NTSC or Pal.
- **A Dolby** - select a Dolby A type.
- **B Dolby** - select a Dolby B type. (This is for 2 sided media such as audio cassettes)
- **Timecode Format** - the (video) frame rate of this media asset. Make a selection then put a check in one of the boxes below, either NTSC, PAL, Visual or VITC (vertical interval time code).
- **Alignment** - default list of analog and digital alignment types
- **General Media** - select a General type of media.
- **Content Type** - selections for what type of content is on the media asset.

Tracks tab

This tab is used only when there are eight tracks on your media asset, such as a DA-88 or ADAT tape. Use the fields to enter what is recorded on each track. This label can then be easily printed from the Print Menu of the **Library** module. For detailed information about printing, see the Print Menu section at the end of this chapter.

- When everything is completed, click the *Done* button. If you have entered a number greater than 1, you will be prompted to enter a Media asset # and Name for each new media asset. You will then be returned to the *Detail* tab for this Media asset.
- The title of the media asset will appear (in blue) at the top of the *Detail* tab window.
- All of the information you entered in the **Create New Media Asset** window will now appear in the 4 boxes located in the upper portion of the *Detail* tab window, explained next.

Box 1

| | | |
|-------------|-----------------|---------------------------|
| Production | 67 | Travis video, "Driftwood" |
| Project | 11821 | Rain Scene |
| | Ethan Alexander | |
| Producer | Susan Jones | |
| Editor | Joel Stoner | |
| Ego Stroker | Marty Smith | |
| Director | Alex Ballar | |
| Reel Date | 5/14/2012 | |
| Language | English | |
| Comments | | |

This area can be used to view or enter the basic information about a media asset.

- When the **Project #** is entered (either manually or automatically when creating a media asset from another module).
- Studio Suite will automatically lookup the **Project** name, **Client**, and up to four participants in order as defined in the related Project (by using the 1,2,3,4 check boxes there).
- If there is no Project, it will automatically lookup from the Main Menu defaults.
- If a media asset is involved with more than one Project over its lifetime, a dialog box will appear explaining how to type each new number below the next. You can then click or tab out of the field. This allows the media asset to appear in the *Media Asset* tab of every associated Project in the **Projects** module.
- All of the lookups are based on the first number entered into the **Project #** field.
- Select a language for this media asset.

Notice this portal displays the Project number, name and Client and date with extra fields for even more detailed information about the media asset.

- The *Go To* button next to Project will take you to that Project in the **Project** module.
- The *Go To* button next to Client label will take you to the Client Contact information in the **Contacts** module.
- Select titles for personnel involved with the media assets such as **Assistant, Engineer, Producer** then type the name of the person(s) in the field to the right.

Box 2

These fields should display the same information you used when filling out the **Create New Media Asset** window. However, you can modify any of these fields at any time.

| | | |
|---------------|--|---|
| Media Type | CDR | General Media <input type="radio"/> Disk <input type="radio"/> Tape <input type="radio"/> Film <input type="radio"/> Mag |
| Brand | Fuji | |
| Length/Size | 650 meg | |
| Format | CD-R | |
| Speed/Rate | 96k/16 | Content Type <input type="radio"/> Audio <input type="radio"/> Video <input type="radio"/> Image <input checked="" type="radio"/> Data <input type="radio"/> File <input type="radio"/> Multi |
| Emph/Dolby | | |
| A Dolby | Dolby A | |
| B Dolby | Dolby B | |
| Set TC Format | 30 NDF | |
| | <input type="checkbox"/> NTSC <input type="checkbox"/> PAL <input type="checkbox"/> Visual <input type="checkbox"/> VITC | |
| Alignment | Logic | |

- **Media type** - default list of media types you have made available in the **Media Inventory** module. Selecting a type will automatically fill in the **Brand**, **Length/Size** and **Format** fields. If you don't know what the codes are, you can select the **Brand**, **Length/Size** and **Format** individually from their pop-up lists, and the corresponding **Media Type** should fill in automatically.
- **Brand** - default list of media brands.
- **Length/Size** - default list of minute length and megabyte size.
- **Format** - list of all formats you have made available in the Media Inventory module.

- **Speed/Rate** – the (audio) sample rate and bit rate of this media asset.
- **Emph/Dolby** – turn Emphasis On or Off, choose Dolby A, B, C or SR, dBx or No Dolby, choose NTSC or Pal.
- **A Dolby** – select a Dolby A type.
- **B Dolby** – select a Dolby B type. (This is for 2 sided media such as audio cassettes)
- **Timecode Format** – the (video) frame rate of this media asset. Make a selection then put a check in one of the boxes below, either NTSC, PAL, Visual or VITC (vertical interval time code).
- **Alignment** – default list of analog and digital alignment types
- **General** – select a General type of media.
- **Content Type** – selections for what type of content is on the media asset.

Box 3

| | |
|-----------------|----------------------------|
| Record # | 380 |
| Library # | SS380-1 |
| Bar Code # | SS380 |
| Clients Lib # | TV-7 |
| Client Bar Code | TS22972 |
| Proj. Reel # | 1 |
| Series | Master |
| Archived To | The Bell Tower |
| Drive | LaCie 500 gig Hard Disk #1 |
| Bookable | Not Bookable |
| Category | Productions |

- **Record Number** - this field displays each new record, which will have a sequential record number (in red) that should not be changed. Project Media asset numbers always advance media assets sequentially.
- There will also be a new sequential **Library #** (based on the starting number defined in the **Main Menu Setup - Preferences** tab).
- If you want your **Barcode #** to be the same as the **Library #**, click on the *Barcode #* button between those two fields.
- **Client's Lib. #** - If a media asset comes to your studio with a pre-existing media asset number, you can enter that in this field, so that you can keep track of their number while maintaining a serial numbering scheme for your own **Library #'s**. You can also store the **Client's Barcode**.
- **Proj. Media Asset #** - If there are multiple media assets on a single project, you can use this field to keep track of which one is which, along with the...
- **Series** – use this field to keep track of Master/Slave/Clone status, or in the case of MDMs, which media asset is which.
- **Archived To** – this field allows you to document what media asset this media asset was archived to. You can put the date of the archive in this field as well.
- **Drive** – clicking this field will display a drop-down menu (taken from the **Equipment** module), showing only those records that have been identified as **Hard Drives**. This allows you to define this “media asset” as being located on a specific hard drive. Clicking on the *Go To* button will take you to that record in the **Equipment** module

so you can see everything else that's on the drive.

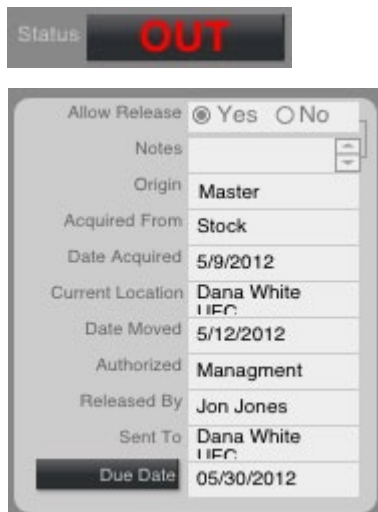
- **Bookable** - pressing this button will toggle the status of this media asset as 'Bookable' or 'Not Bookable'. This is useful If you use the **Library** module as a "check in/check out" type of library, meaning it can be scheduled from the **Projects** or **Calendar** module. This would allow for conflict checking, etc. Each Bookable item must have a **Category**, explained next.
- **Category** – clicking this field will display a drop-down menu from which you can select a Category that this media asset falls under. If the media asset falls outside of any of the default categories given, you can choose 'Other', then type a Category name in the following dialog box.

Above Box 3 you will find the red *Record* button. This button allows you to attach a related file to this particular Media asset.

How to attach a file to a media asset:

1. Click on the red *Record* button. You will be asked for the type of file to be attached and taken to a screen for you to select the file to be attached.
2. The red *Record* button will change to either a speaker icon (for sound), a thumbnail (if it's a picture), or the first frame of video (if it is a movie file).
3. Clicking on the speaker or thumbnail will "play" the media file.
4. Click the *Clear* button to clear it.

Box 4



The image shows a 'Status' button with the word 'OUT' in red. Below it is a form with the following fields:

| | |
|------------------|---|
| Allow Release | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| Notes | <input type="text"/> |
| Origin | Master |
| Acquired From | Stock |
| Date Acquired | 5/9/2012 |
| Current Location | Dana White HFC |
| Date Moved | 5/12/2012 |
| Authorized | Managment |
| Released By | Jon Jones |
| Sent To | Dana White HFC |
| Due Date | 05/30/2012 |

- **Status button-** Above this boxed area you will see a large *Status* button. This button is used to define whether a media asset has been checked IN or OUT of your Library. Clicking on the *IN/OUT* button will also present you with an **Incoming or Outgoing Media Asset** screen, where details are entered to document the move in the *Asset History* tab. You will also have the option to print a Release or Receipt Form with any additional notes pertaining to the move.
- **Allow Release** - The contents of these fields come from the Client's record in the **Contacts** module. Since this kind of thing is usually relative to the client and not to a

specific media asset, this allows you to globally affect all of the client's media assets at the same time. Clicking on this field will display a dialog that warns you of the global effect of this setting. You can choose *Ok* to accept the change or *Cancel* to cancel the change. Below the **Yes/No** field, you can view some comments relative to this status.

- **Origin** - this field lets you specify where the content of this media asset came from (not the physical media asset).
- **Acquired From** - this field shows where the physical media asset came from. This field shows the location most recently listed in the *Asset History* tab.
- **Date Acquired** - this field shows when the media asset came in. This field also shows the most recent date listed in the *Asset History* tab.
- **Current Location** - this field gives you the choice of Moving it internally, Releasing it, or Canceling. Select the appropriate choice. If you are Moving or Releasing, you will come to a Move Media Asset or an Outgoing Media Asset screen, where you enter all pertinent details about the move (**Moved From, To Location, Logged By, Notes, Date Moved, and Time Moved**) then click *Done*. This move or release of the media asset will be documented in the *Asset History* tab. It also stores the **Date Moved**, who it was **Authorized By**, who it was **Taken By**, and where it was **Sent To**.
- **Due Date** - this new field finds media sourced for arrival that is 'due' according to the date entered. Select a due date desired (IN status) from the pop-up calendar. The Due Date function also provides a large prompt reminder on the scheduled Due Date. *Due Today* will appear across your screen in red text. Also searches for everything overdue within the found set of records and displays all on the *Search List* tab page.

How to Log Media OUT:

1. Set the **Allow Release** check field to NO.
2. Click the *IN* button (in order to set it to OUT).
3. A dialog will appear stating: Sorry, the 'Allow Release' settings for all media assets belonging to this Client are set to 'NO'.
4. You can choose *OK*, then go to the Client's record in the **Contact** module to change the Status, or you can choose *Override*, which will override the warning and allow you to set the status to OUT.
5. Next, the following dialog will appear: 'Do you want to release just this media asset or Multiple media assets (including this one)?'
6. Choosing '*This*' will present the Incoming/Outgoing information screen in which you can enter details about the Outgoing media.
7. Choosing '*Multiple*' will present you with another dialog from which you can choose to *Print* the found set or *Go Find* another set of media records.
8. Choosing *Go Find* will present a dialog giving you the option to *Pick* from a List of media records or *Enter (or Scan)* Barcodes, Library Numbers, Projects or Clients.
9. Once you have found and chosen the record(s), the Outgoing screen will appear. Enter all information about the Outgoing transaction. Fields with asterisks(*) are required.

10. When you are finished, choose *Done*.
11. You will be asked if you want to Print a Release form for these media assets.
12. Choosing *OK* will display the form to be Printed.
13. To proceed with printing, click *Continue* in the Status area to the left.

How to Log Media IN:

1. Click the existing *OUT* status button.
2. The following dialog will appear: 'Do you want to Log IN just the current Media asset, or the Found Set of Media assets?'
3. Choosing *Current* will Log in only the current record. Choosing *Found Set* will Log in all found records.
4. The Incoming screen will appear. Enter all information about the Incoming transaction. Fields with asterisks (*) are required.
5. When you are finished, choose *Done*.
6. You will be asked if you want to Print a Receipt form for these media assets.
7. Choosing *OK* will display the form to be Printed.
8. To proceed with printing, click *Continue* in the Status area to the left.

Titles sub-tab

The *Titles* sub-tab is where all of the Titles contained on this media asset are entered.

NEW FEATURE: Go To button Audit Log tool tip

Audit Log is a new feature in Studio Suite X and one of the ways it can be accessed is by hovering over the *Go To* button in the **Projects**, **Productions**, **Invoices** (on line items), **Events** (on line items), and **Library** (on the *Titles* sub-tab) modules.

When you hover your cursor over the *Go To* button, a log of who made a change to the record belonging to the *Go To* button along with what change they made and when they made it. This is a great way to maintain accountability as well as a handy short cut helping you know where to direct your questions about the record.

How to enter in a new Title:

1. Type a name in the **Title** field.
2. To the left of the **Title** field is a **# (Number)** field which will auto-enter serial numbers (which can of course be changed), determining the order in which the **Titles** appear. They will automatically appear in **Creation** order unless you type in a different number in the **#** field, then sort by title **#** from the *Title # Sort* button, or click on the *Creation Sort* button to put them back in creation order.

3. You can enter a **Title Comment**, such as 'Master', 'Do Not Use', 'Out Take', etc.
4. The small field to the right of the Title Comment allows you to attach audio/video to that specific Title (as above).
5. The + button will duplicate that Title on the next line.
6. Since most media is one-sided, the *Side* field/button defaults to **A**. If you are entering titles for a two sided medium (like a cassette, CD, or DVD), and the title belongs on side B, click on the *Side* field/button to toggle it to **B**. All side B **Titles** will slide to the bottom of the list, below all A **Titles**. After toggling the *Side* field/button, you may need to re-sort the **Titles** by one of the three sort buttons described above. Although side A **Titles** and side B **Titles** appear in one portal on screen (to save screen space), they will appear in the correct place on the printed J-cards. Don't forget that side B title #'s should probably start with "1".
7. Enter time codes in the **TC Start** and **TC End** fields, which will calculate a duration time. The *TC Start Sort* button will sort the list by that field. Durations are calculated based on the **TC Start** and **TC End** fields but this may be overridden. Overridden durations are shown in blue to help differentiate them.
8. Finally, type the File Size of the media (if it is a digital file.)
9. Clicking on the *Go To* button next to the Title on the left will take you to that Title's record in the **Titles** module. To return to the **Library** module, click on the red text *Library & Labels* tab on the upper right or click the *Back* button in the *Function Bar*.

Comments sub-tab

The *Comments* sub-tab provides an area in which you can leave any additional comments about the particular piece of media.

Tracks sub-tab

If your media has eight tracks, such as DA-88 / ADAT tape, use the *Tracks* sub-tab to enter what is recorded on each track. This label can then be easily printed from the *Print Menu* of the **Library** module.

For detailed information about printing, see the *Print Menu* section at the end of this chapter.

Related Media Assets sub-tab

In some cases, there may be several media assets associated with a project. For instance, if you are working on a film or TV project that has multiple cues, all cues associated with this project will be listed in the *Related Media Assets* sub-tab. To view Details about a related media asset, click the *Go To* button next to the media asset.

Package sub-tab

In some cases, you may receive a box of media or media assets, all related to a specific project. Instead of logging each piece of media in and out (individually) you can manage all of it as a Package. If for instance you have 6 pieces of media, Studio Suite will log in all the components of this package

simultaneously, creating 6 records in the database. You can then log them all in and out by logging the single package.

This module also displays all items in the package under '**This Package contains:**'.

Disk Log sub-tab

This tab allows you to document ("Log") all files that are on a given disk, or just a specific folder, in association with a specific Media Asset, Project, and Client. More than one log can be attached to each record.

Tips for Using the Disk Log

- Clicking the *Log a Directory* button will open a standard operating system dialog where you can select the Hard Drive or Folder you would like to log.
- When adding Hard Drive to a Disk Log you have the option to filter the meta data or to log the entire contents of a folder (or multiple folders).
- If you log a Hard Drive, you can type the Hard Drive size in the **Capacity** field.
- The list will then display a new line item record for each file and folder within the drive or folder you selected.
- The **Viewing Log** field will display the log number you are viewing, i.e. 'Viewing Log 1 of 1'.
- Each log has 7 columns all with drop down options for what will be displayed. The display options range from **Image Description**, **Created Date**, **File Type** to **File Size**, **JPEG Comment** and **GPS**, and many more, all taken from the file information.
- Clicking the arrow next to a folder will expand or collapse it,
- Clicking ON the folder name will display a message asking if you want to 'Open this folder?'. In the future, you can bypass this message by SHIFT+Clicking on the folder.
- Clicking on a file name will display a message asking if you want to 'Open this file?'. Choosing Yes will launch it in it's native application. In the future, you can bypass this message by SHIFT+Clicking on the file.
- Clicking on the file or folder icon will select it. You can then delete the single file or folder from the log by pressing the *Delete* button in the *Function Bar*.
- To Delete the entire log, click the *Delete Current Log* button above the log list.

NEW FEATURE: More Disk Log Meta-data options

This is more of an “additional” feature than a new one. Disk Log now gathers more meta-data types, including: Timecode Beginning, Ending and Current, Movie Duration, Movie Description, IPTC, Image Description, GPS, ImageURL, JPEG, RawExif, Exif, and XMP. When logging a hard drive, all of these options will be presented as filters.

Capture the following METADATA where applicable:
(Shift + Click the 'All' option to clear selections)

| | | | |
|-------------------|--------------------------|--------------------------|-------------------|
| All | <input type="checkbox"/> | <input type="checkbox"/> | Image Description |
| Timecode Begin | <input type="checkbox"/> | <input type="checkbox"/> | GPS |
| Timecode End | <input type="checkbox"/> | <input type="checkbox"/> | ImageURL |
| Timecode Current | <input type="checkbox"/> | <input type="checkbox"/> | JPEG |
| Movie Duration | <input type="checkbox"/> | <input type="checkbox"/> | RawExif |
| Movie Description | <input type="checkbox"/> | <input type="checkbox"/> | Exif |
| IPTC | <input type="checkbox"/> | <input type="checkbox"/> | XMP |

NEW FEATURE: Drop down display options for Disk Log Meta Data file types

Where once there were five columns of static Meta Date file types on display, now there are seven ever changeable options for Meta Date file types to be displayed. The blue text headings in the Disk Log sub-tabs are actually drop down menus with such diverse filters as Creation Date, Image Description and GPS. Take ‘em out for a spin and find the combination that works best for you!

| Created Date | Created Time | Created Date | Modified Time | | File Size |
|---------------------------|--------------|--------------|---------------|-------------------|-----------|
| | | | | IPTC | |
| 5/10/2011 | 17:43:33 | 5/10/2011 | 17:43:34 | XMP | |
| 2/3/2012 | 12:33:29 | 2/3/2012 | 12:33:29 | Exif | |
| 1/4/2012 | 14:56:27 | 1/4/2012 | 15:50:40 | RawExif | |
| 1/4/2012 | 13:44:51 | 1/4/2012 | 14:18:30 | GPS | |
| 2/3/2012 | 12:32:48 | 2/3/2012 | 12:32:48 | JPEG Comment | |
| 2/3/2012 | 11:33:48 | 2/3/2012 | 12:33:08 | Image Uri | |
| 12/6/2011 | 13:19:12 | 12/6/2011 | 13:19:12 | Image Description | |
| 5/10/2011 | 17:30:37 | 5/10/2011 | 17:30:37 | Movie Description | |
| 12/6/2011 | 13:26:15 | 12/6/2011 | 13:26:15 | Movie Duration | |
| All archives on this reel | | | | Timecode Begin | |
| | | | | Timecode End | |

At this time the Troi File plug-in we’re using to accomplish this doesn’t have the ability to get the icons for each file.

You can store multiple logs per media asset, allowing you to document the contents of a project drive over time. For example, log the contents of a media asset after each days work before you make an actual backup. The **Viewing Log** popup shows a list of logs to choose from. Selecting one will show that log and the date and time it was made.

Detail List tab

The *Detail List* tab shows a list view of your library. You can sort by the **Library #**, **Project**, **Media Asset Title**, **Media**, or **People** fields.

- To view all media assets in your Library, click the *Find All* button in the *Function bar*.
- To view Details about a media asset, click the *Go To* button, which will take you to the *Detail* tab for that record.
- To delete a record, click to select it, then click the *Delete* button in the *Function Bar*.
- Click the *IN/OUT* button to check a media asset in or out.



Search List tab

The *Search List* tab has less information than the *Detailed List tab* so you can see more media assets to search through at one time.

- You can sort by the **Library #**, **Project**, **Media Asset Title**, **Format**, **Media Asset #**, **Client**, **Media Asset Date**, **Bar Code**, **Record**, or **Bookable Status** fields.
- The **Select for Release** check box is provided primarily as a utility used while in the process of checking multiple Media assets In or Out of the **Library**.
- In the **Status** column, you can view current media asset status, or schedule a media item or media asset IN or OUT of the system. Use the same procedure utilized and described **Log Media OUT**, and **Log Media IN** instructions above.
- Clicking on the *Go To* button will take you to the *Detail* tab for that record.

QC Report tab

The *QC Report* tab page is used to create Quality Check (QC) Reports.

The upper portion of this page displays data from the **Details** tab. The bottom portion allows you to create and view Quality Check reports for the current media asset. You may make several reports for a single media asset to track the quality of a media asset over time.

How to create a new QC Report:

1. Press the black and green *New Report* button. A dialog will appear asking you to name the new report.
2. The **Date** and **QC Tech** fields will automatically list today's date and the user logged into Studio Suite. These may also be edited as needed.
3. Space is also provided to list applicable **Time Code Offset** and any general notes regarding the QC report.

4. Use the check boxes provided to denote the types of checks performed during this report.
5. At the end of the Quality Check, list a QC Grade in the top right corner QC window.

Itemizing Errors found in the QC Report

- Enter the time code for an error in the **TC** field. The Feet|Frames field will be auto-calculated from this entry.
- Enter the type of error into the **Description** field (i.e. pop, clip, distortion, etc.)
- If a particular character or role is affected, list their title in the **Character/Role** field.
- Use the **Duration, Channel #, and Severity** fields to list the appropriate information.
- Use the check boxes to list whether the error is in the source material and eventually to note that it has been fixed.
- Any comments regarding a particular issue can be listed in the **Comments** field on the far right of the entry.

You may view old QC Reports by selecting them from the drop-down menu labeled 'Select Report.' You may of course print any QC report using the *Print* button in the QC information box.

Keywords tab

The *Keywords* tab allows you to enter keywords that make the media asset or media item more easily searchable. Once keywords are entered you can search for any keyword for any media asset.

- **Calculated Summary of all Keywords for Titles on this Media Asset** – on the bottom left this field lists all keywords attached to each **Title** listed on this media asset. To edit this field you must edit the keywords listed for each title in the **Titles** module.
- **Keywords for this Media Asset** – use this field to enter keywords that apply to this media asset. You may enter keywords in two ways; by simply typing them in, or by checking words in the field to the right. This list of keywords can be edited to suit your needs by pressing the *Edit Keywords* button on the right.

Once keywords are entered you can search for any keyword for any media asset using the *Find* function.

Asset History tab

Whenever a media asset is logged in or out of your system, that transaction is automatically documented in the *Asset History* tab.

Ways to view the Media Asset History

- For those of you familiar with past versions of Studio Suite, the *Log* sub-tab gives you a familiar view of the movement history of a media asset.
- The *In/Out Batches* sub-tab gives you an updated view of the media assets movement history. Under this sub-tab you'll find the *Recall Batch* and *Reprint Form* buttons, as well as *Track Package* which is described in detail below.
- The *Recall Batch* button is a convenient way to re-log a batch of media assets that were previously logged together. Pushing this button will place the entire list of related media assets in the Found Set. For example, if you sent 10 media assets out, you could log them back in together by pressing the *Recall Batch* button for any one media asset and proceed to check them in as a found set.
- The *Reprint Form* button simply allows you to reprint a **Release** or **Receipt** form. Useful if the physical document must be reprinted at a later date.
- Both the *Recall Batch* and *Reprint Form* buttons will list the associated media assets if you hover over them with your mouse cursor.

In/Out Batches sub-tab

Track Package button

In the *Asset History* tab you can track the shipping progress of your media or other material movement. Clicking the *Track Package* button links your item to the shipping vendor outlet, previously setup in the *Detail* tab (IN-OUT status). If you did not previously perform the shipping setup detail when checking an item OUT while in the *Library Detail* tab, you can now input that information here directly.

- Locate the transaction you wish to update accordingly from the list.
- Above every media line item movement transaction, on the far right (above buttons: *Recall Batch*, *Reprint Form*, *Track Package*) is a small blind text field. Click in this area (Shipping column) and enter the shipping company of record in standard abbreviated form (Re: FedEx, UPS, USPS).
- Directly adjacent to the shipping company information (Track # ID column) is a similar text field to enter your shipping company's provided tracking number of record.
- Now completed, you can at anytime simply click the *Track Package* button and view the progress of your shipped media.

Use Per Event sub-tab

The *Use Per Event* sub-tab lists each Event that has been associated with a particular Media asset. This allows you to see when and where a media asset was used. Clicking the blue *Go To* will take you to the *Detail* tab for that event.

Attach & FTP tab

The *Attach & FTP* tab is used for attaching (recording, linking and/or embedding) external files, sounds, pictures or movies, URLs, and FTPs to an individual **Library** record. The *Attach & FTP* tab is the where all of these attached files are stored. For a detailed explanation of this tab, see the **Attach & FTP tab** chapter of this User's Guide.

Rates tab

The *Rates* tab is where all of the various rates associated with the rental of each Media asset are stored. Displayed by way of the **Rates** module, which contains price information for all the different ways that a Media asset (equipment, room, or personnel) might be booked.

NOTE: Before a Media Asset can have Rates, it must be made Bookable.

How to create a new Media Asset rate:

1. Click the black and green *Create New Rate* button.
2. If the Media asset has already been made Bookable, skip to step 7.
3. If the Media asset has not been made Bookable, a message will pop up: 'Items must be Bookable before they can have Rates. Do you want to make this item Bookable?'
4. In order to create a new Rate, you must choose *Yes*.
5. If the Media asset is a part of a package and has child items attached, a message will appear: "This item has child items in a Package. Do you want these child items to Also Book when this parent item is booked?" Choose *Yes* or *No* to continue.
6. The message "Do you want this new Bookable item to be displayed in the Calendar now?" will appear. Choose *Yes* to add this item to the Calendar or *No* to continue without adding it. It can be added to the Calendar later.
7. The **Create New Rate** window will appear, displaying the details for this Rate.
8. In the top row, select the item **Category**, a drop-down list is available for commonly utilized resource items.
9. Select an associated resource from the SS **Item** field drop down menu. The field has a drop-down menu showing all of the Bookable Items within each Category. If you choose the **Room** Category in the first step, the only items available will be the rooms marked as bookable in the **Rooms** module. If the item for which you wish to create a rate is not listed, make sure it is marked as bookable within its own module.

IMPORTANT NOTE: *You cannot type text into the Category or Item fields. Use the options that are listed in the drop-down menu for each field.*

10. Enter a description for the rate in the SS **Rate Name** field (i.e. 'ProTools Rig#1', or 'Studio A Hourly Rate', etc).

NOTE: the Rate Name is followed by a number and is pre-entered for you upon the creation of a new rate (the number is used to make sure the name is unique, as all Rate Names must be unique).

11. Select the rate **Client** in the next field. If this specific Rate is to be a "Client-Specific" rate, click the **Client** field and choose their name from the drop-down list. This list displays each contact you have checked as a Client in the **Contacts** module. The 'C' button next to the Client name will Clear any client(s) selected in that field. You may choose to list multiple clients for a single Rate (see below).
12. Below the client and account detail are fields for QuickBooks accounting purposes. The **QB** fields are not required fields of information, but can be utilized and designated accordingly for accounting.

*NOTE: previous versions of Studio Suite required one Studio Suite Item name to be linked to one QB Item name. New in Studio Suite X, the QB Item name allows multiple Studio Suite Item names to be associated with one QB Item. See more on **QuickBooks** detail below.*

13. To the right, click the correct rate **Type** (Regular, Overtime, Credit). **Regular** and **Overtime** are self-explanatory. **Credit Rates** are those which have a negative value on the total charge for a project. Examples of Credit Rates include "Deposit", "Payment", and "Credit Memo". These would be used when the client gives you money to decrease their balance on a Project.
14. The Charge and Expense section is where associated amounts you are charging the client, and the expense of the item are listed. Click the **Unit of Measure** fields and select a unit of time for **Charge** and **Expense** from the pop-up menu. Then type the amount you are charging the client and your expense (for the specified unit of time) in the fields below. **Profit** is automatically calculated by the mark-up percentage used. **Market** value is included in this section. Market pricing is a tool to prove worth of a project by internally comparing all to actual estimated market value.
15. The Charge and Expense section also includes fields to enter a resource quantity (**Qty**) amount range. You can charge your pricing fixed by bulk amounts from a quantity of 1 to 999.
16. The **Expense** field is the amount that each Rate costs you, either in labor cost, material cost (for media), or other overhead (electricity, heat, etc). Enter the amount this item is costing you (for the specified unit of time).
17. Next, within the Overtime Rate Specs area, enter the number of **Hours Before Overtime** (begins) for the **Charge** and **Expense** associated with the device. Then click the **Uses OT Rate** field and select which overtime rate from the drop-down list. The **Charges Per** field will display the dollar amount of the overtime rate chosen.

NOTE: For 3rd party accounting programs, Overtime in Studio Suite must be a separate Rate. The Overtime Rates can be viewed, but not edited on the O.T. Rates-field.

18. If the Rate is taxable, select (to the right) which taxes apply to the Rate in the **Tax Settings** field.
19. To use more than one tax, press SHIFT and click on your desired tax types. To use all taxes, click the *All* button. (See *Selecting Multiple Taxes* later in this section).
20. Select and check if you want to **Include In Rate Card**, whether the Rate **Is Normally Invoiced**, if you desire to **Exclude from Un-Invoiced Item Reports**, **Commissionable**, or if it is **Exempt From Client Discount** (See **Standard Rates Checkbox options** below).
21. Change how the **Invoice Line Item** information (bottom row) will appear. This is the order in which the item information will appear on an invoice. (See *Invoice Line Items* below).
22. Enter any **Additional Invoice Text** that you would like to appear on the invoice for this item in the text field below.
23. Click the *Continue* button to confirm your new Rate.

NOTE: The *Rates-Create New* window cannot be closed. You **MUST** click the *Continue* button.

The new Rate will now appear at the bottom of the Rates List. You may need to use the scroll bar (on the right) to view items at the bottom of the **Rates For: This Media asset** portal and at the bottom of the **All Rates for this Category** portal.

Edit the Rates Record

How to edit/change the information of a specific rate:

1. Click the *Go To* button on the left of the rate you would like to edit.
2. The **Rates-Edit** window will appear, allowing you to change information about this specific Rate.
3. Make your changes and click *Continue*.
4. Your changes will now be reflected in the Rates list.

Delete the Rates Record

How to permanently delete a Rates record:

1. Click to select the Rate in the Rates For: portal..
2. Click the red *Trash Can* button to delete the rate. This will remove the rate from this Media asset AND delete the Rate from the **Rates** module.
3. The following message will appear; 'Are you sure you want to delete this Rate? It is not undo-able.'

4. If you are sure, Choose *Delete*.

CAUTION: you **CANNOT** undo this. If you **Delete a Rates Record**, it will **permanently be deleted**.

NOTE: For more specific information about Rates, including Client Specific Rates, Multiple Client Rates, Default Rates, Taxes etc., read the **Rates module** chapter of this User's Guide.

Report tab

The *Report* tab, formerly the *Print* tab, offers many choices for printing labels and stickers for use in your tape library.

Print sub-tab

Label printing options:

- **Print With Barcodes** (it will always print your **Barcode #**, not the **Client's Barcode**),
- **Print With Time Codes** – there are layouts with and without Time Codes.
- **Which Company/Logo** – use the drop-down list to choose which company's logo and return address will appear on each printout, or you can select
- **Use Client Logo Instead** - check this box to print the logo and phone/address info for the specified client (assuming their record in the **Contacts** module contains a logo).

You have a choice of many formats: D-2, Mini DV, Betacam, DAT labels and stickers, Compact Disc/DVD labels and stickers as examples.

NOTE: Depending on the style of the label, clicking a print button will bring you to a setup page on which you may see several choices.

You may find a toggle button which allows you to specify that you are making "One Copy Each of the Found Set of Media assets" or "One or More Copies of the Current Media asset." You may also see a field on the upper right that allows you to select the print-position for the label (for labels that fit 2 or more per page).

How to choose one copy for printing:

1. Select the option labeled 'One Copy Each of Found Set of Media assets'. This will print the label as it appears.
2. If you like, you can click on the label field directly and type your own information within.

How to choose multiple copies for printing:

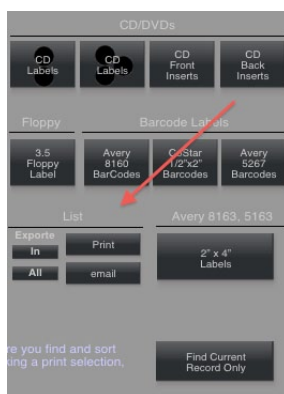
1. Select the option labeled 'One or More Copies of Current'.
2. This will display selections for Automatic and Custom.
3. Selecting **Automatic** will then display a set of check boxes labeled **Select Positions** (label type dependant). These boxes are used to choose the position on the label on the print paper. For instance, if you have a Spine label print paper with 10 spines per page, you will see 10 boxes. Use them to choose which Positions to print.
4. Selecting Custom will display a column of buttons (*Client*, *Project name*, *Media Asset Title*, etc.). Use these button to auto-fill in the Print label. For instance, clicking *Client* will put the client name in the print label field. Clicking *Project Name* will put the name of the project below the client, and so on.
5. You can also click in the field and type any information you would like.
6. Once you have chosen your print copy(s) and layout, click the large *Print* button.
7. This will open a standard operating system print dialog.
8. Make the appropriate selections and choose *OK* to print.

Many of these screens have a *Find Current Record Only* button that helps to minimize a common error of printing labels for the entire found set. If you're just printing one label, it's a good idea to click this button.

NOTE: These are not the layouts that are printed, so don't make the mistake of modifying these layouts if you want to make layout changes. You need to make changes on the actual printing layouts, described below in 'Modifications to Print Layouts'

Printing Forms

In the bottom right there is also the option to print several **Forms** including a current *Library List* showing all of the items which are currently "IN" your tape library (excluding those which are "OUT" of your library) and a *Historical Library List* showing all items that have ever been in your library, including those items that have been released.



Modifications to Print Layouts

Because the printing of labels involves a precise alignment of the label sheets to your particular printer, it is likely that you may need to do some print layout adjustments to the header and body size.

You may also want to modify the layouts by adding or deleting fields and field labels to suite your preferences. This is a little tricky, because there are several print layouts for each type of label.

How to modify label layouts:

1. From the View menu in the tool bar, select Layout.⁷⁸
2. Then click the *Layout* button just above the Book icon in the Status area (this is far left side of the Filemaker window).
3. Select the Library Label you want to modify.
4. When you are done with your modifications, select Browse Mode from the View menu in the tool bar.

NOTE: For best results, any layout modifications should be done by someone with some experience in FileMaker. As there are many versions of each label, it may take a few experiments to make sure you are modifying the correct label layout. Use regular paper to test print, so you don't waste your expensive label sheets.

Beware of Mask Fields when Editing Layouts!

Several of the printing layouts have “mask” fields that hide the labels that should NOT be printed (on multi-label sheets). These mask fields are grouped together with big red squares to make them visible, and also to make them movable as a group. If you need to edit layouts that have these mask fields, note the exact location of the red group, move it off to the side, make the edits, and then move back to the original location.

Before tackling any modifications, be sure to make a backup of the file first!

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

Click the *Titles & Tracks* tab to go to that module.

Click the *Media Inventory* tab to go to that module.

This covers all of the basics of the **Library & Labels** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

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Maintenance module

File Name: SSX_Tech.fmp12

The **Maintenance** module keeps track of parts ordered and used for repairs to your equipment. Additionally, it tracks when the next maintenance is due. Each maintenance report is associated with a particular piece of equipment (as listed in the **Equipment** module). Studio Suite develops a history of what and how much each repair costs and auto-calculates the total repair cost over the lifetime of a piece of equipment.

In this chapter you will read about how to:

- Create a new maintenance report
- Create a new equipment *Status* names or edit existing repair *Statuses*

How to create a new maintenance report:

1. Click the *Equipment* tab module located in the upper right of the screen. This will take you to the **Equipment** module.
2. Click the *List* tab. Then click to select the item for which you want a report.
3. Click the *Maintenance History* tab. The Maintenance History for that device should appear.
4. Click the black and green *Create New Maintenance Report* button.
5. This will bring you to the **Maintenance** module with the *Detail* tab for that device already selected.
6. The **Status** field will automatically be labeled as "Broken".
7. On the right side, enter the **Order Date**, or click on the *Order Date* button to enter today's date.
8. Select a **Priority** from the open field below. Make your selection from an editable, pop-up menu field.

9. Back to the left side section, enter a **Description** of the current status from the drop down menu, add the current **Location** of the device, what the **Barcode** is, how it was **Patched From/To** when the problem occurred, and what the **Problem** is in the provided fields.
10. Enter **Parts Ordered** for the device and the **Parts Used** to repair it.
11. Then on the right, below the Priority setting, enter who the problem was **Reported by**, who the **User** was when the problem occurred, who it was **Serviced by**, and the **Project Name** and **Project #**.
12. The **Report Date** and **Report Time** are automatically entered when you create a new record or you can manually change them. Enter the **Serviced Date** or click on the *Serviced Date* button to enter today's date.
13. In the **Action Taken** field, type what was performed to fix the problem.
14. Fill out the number of **Hours** spent working on it and the (cost/per) **\$/Hr**. This will then automatically calculate the **Labor Cost**.
15. Type in the cost of **Parts** beneath the *Labor Cost* sub-total. This will calculate the total **Repair Cost**.
17. Exiting this screen by using any of the provided buttons will also automatically confirm the changes.

Detail tab

The *Detail* tab displays a detailed report about a particular problem with a specific piece of equipment. All information in the *Detail* tab window is editable. For more information on this tab, see the above description for "To create a new maintenance report" and "Out Of Service".

Out Of Service

The *Out of Service* area on the bottom provides a tool for you to *Block Out* this item from internal use for a specified period of time. Add a **Comment**, then select your **From** date within the field's drop-down calendar provided. Next, in the field just below, select the preferred *block* start time from the drop-down "times" menu. Repeat the same procedure for the **To** fields just to the right. This completes the date/time period setup for determining when the equipment is out of service. When the time frame selection is completed, click the large *Block Out* button. Selecting the *Block Out* button adds this device as a "service block" occurrence (shown on the Studio Suite **Calendar**).

List tab

The *List* tab shows all of the existing maintenance reports for your equipment. Use this view to quickly scan down and see which items are in need of service. Clicking the *Go To* button to the left of your selected item will take you to the *Detail* tab for that Device.

Attach & FTP tab

The *Attach & FTP* tab is used for attaching (recording, linking and/or embedding) external files, sounds, pictures or movies to an individual **Maintenance** record. The *Attach & FTP* tab is the where all of these attached files are stored. For a detailed explanation of this tab, see the **Attach & FTP tab** chapter of this User's Guide.

Status Colors tab

How to create a new equipment *Status* names or edit existing repair *Statuses*:

1. Click the *Edit* button above the column of **Task Status** names.
2. Edit the resulting list so that it reflects your desired set of equipment *Statuses*, click *OK*.
3. After returning to the the *Status Colors* tab, click the **Color** field for each status and choose a color from the color picker.

Report tab

The *Report tab*, formerly the *Print* tab, allows you to select your **Company Name**, confirm your **Letterhead Style**, and to verify that the correct **Logo** is shown for your report-printing purposes.

Print sub-tab

Your print options include a *Print Simple List* button, a *Print Maintenance History for Current Item* button and a *Print Full Report of Current Record* button.

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

Click the *Go To* button to go to the *Maintenance History* tab (for that device) in the **Equipment** module. Click the *Equipment* tab to got to the **Equipment** module.

This covers all of the basics of the **Maintenance** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

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Media Inventory module

File Name: SSX_Library.fmp12

The **Media Inventory** module shows all inventories of blank/virgin media (tapes, discs, drives, etc.) available for use. It also displays minimum stock levels, 'on-order' amounts, costs, vendors, etc. It automatically alerts you (upon start-up) when you are below a minimum quantity for a certain item. You can select from up to three different vendors (linked from the **Contacts** module), with price information for each item, and automatically create Purchase Orders for low stock Items.

This module interacts with the **Projects** module and whenever a quantity of media is assigned to a Project, that quantity is put on reserve. When that piece of media is reconciled (by clicking the *Reconcile* button in the **Projects** module), the reservation is counted to usage and that quantity is subtracted.

Prices for media are held as Rates, allowing you to sell the same media at different pricing structures (blank, pre-formatted, as dubs, used, to different clients, in quantity, etc.).

Studio Suite ships with several popular types of media already listed in this module.

In this chapter you will read about how to:

- Edit information about your media
- Print the record on the screen
- Create a new Media Record
- Create a new Media Rate
- Edit/change the information of a specific rate
- Permanently delete a Rates record

List tab

The *List* tab provides an overview of all of the media resources you have in stock.

How to edit information about your media:

1. Click the *Go To* button next to an item in the list.
2. This will display the *Detail* tab for that specific media item.
3. Within the *Detail* tab, Edit any information you need such as the **Brand**, **Size**, **Format**, Item **Description**, or any **Media Code** and **UPC Barcode** information.

NOTE: The Print This button at the end of the sub-tab row will print the found list in the order by which it is currently sorted.

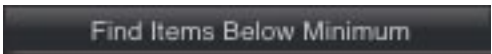
Print This button

The *Print This* button will print a detailed page of information for the record that shows on the screen.

How to print the record on the screen:

1. The standard operating system **Page Setup** dialog will appear. Make your selections and choose *OK*.
2. The page will then be displayed.
3. Click the *Continue* button in the Status Area to the top right.
4. Another print dialog will appear.
5. In the **Print** dialog box, print the single record you are currently viewing on-screen. Choose copy amounts. Check printer source selected for correct printer to be utilized.
6. Click *Print* to print.

Find Items Below Minimum button

A rectangular button with a dark background and light-colored text that reads "Find Items Below Minimum".

The *Find Items Below Minimum* button provides a one-step process to sort the Media Inventory list. By clicking the button located next to the *Print This* button, Media that are at or below their previously specified inventory amounts will be listed. Check *Quantity (Qty.) In Stock vs. Minimum* for your restocking purposes. To return the original found list select *Find All* on the *Function Bar*. Media items at or below the minimum inventory will remain in a yellow -colored highlight mode.

Detail tab

In this *Detail* tab, and at the top section (just under your selected media item name), you will enter the detailed information for each type of media. Information held here includes **Brand**, **Size**, **Format**, and **Full Description**, as well as the *Bookable* status at the top of the screen.

Any item that has a Rate must first be made Bookable. Clicking the *Bookable* button will prompt you with the following message: 'Do you want the new bookable item to be displayed in the calender now? Click "Yes" to make Bookable. Select the appropriate Category under Media from the drop down list.

In the middle of the page, there is a section showing a table for **Expense**, **Sale Price**, and **Profit**. By clicking and entering your media cost in the **Expense** field, and then entering your Sale Price in the next field, the table will automatically calculate the Profit for you in the Profit field.

Other Field Descriptions

- **Media Code** - Either the model number or a "made-up" code that you can remember. The Media Code is used on the **Library** module to quickly enter what kind of media is associated with that media asset.
- **UPC Barcode** - If you enter (or scan in) the Barcode for each type of media, you will be able to book media from within the **Project** module by scanning it in.
- **Quantity in Stock** - The amount you have in stock.
- **Available for Use** - The Quantity you have in Stock minus Reserved Quantity.
- **Minimum Alert** - The quantity that will trigger a "below minimum" alert message upon start up. Items that are below the minimum will also have a yellow highlight making it easy to find which one needs to be re-stocked.
- **Typical Order Qty** - The item quantity you commonly would secure for this media product item based upon the known frequency of it's use.
- **On Order** - The item quantity listing you presently have on order.

Create a new Media record

How to create a new Media Record:

1. Click the *New* button in the *Function bar*.
2. Enter the **Brand**, **Size**, **Format**, and **Full Description** of the media type.
3. In the next table, enter the **Quantity number In Stock** and the **Minimum Alert** you desire. (You can receive a warning when the stock of this item drops below the minimum).
4. Then enter the vendor information below by clicking on the **Vendor (1, 2, or 3)** field and selecting the vendor's contact information from the drop-down menu. All contacts in the **Contacts** module that are marked as vendors will appear in this menu.
5. Finally, clicking the **Sale Price** field will bring up the **New Rate** window, allowing you to apply a Rate to the new media.
6. A new feature in Studio Suite is the ability to create immediate Purchase Orders for Media Re-Ordering. Selecting the *Create Purchase Orders* button to the left of the Vendor information fields will produce a printable form showing the normal re-order amount totals for the listed media item.

Rates tab

The *Rates* tab is where the various rates associated with the use of Media are stored, by way of the **Rates** module, which contains price information for all of the different ways that Media might be booked.

NOTE: Before media can have Rates, it must be made Bookable.

Create new Media Rate

How to create a new Media Rate:

1. Go to the **Rates** tab for the item in question.
2. Click the black and green *Create New Rate* button.
3. If the Media has already been made Bookable, skip to step 8.
4. If the Media has not been made Bookable, the following message will pop up: 'Items must be Bookable before they can have Rates. Do you want to make this item Bookable?'
5. In order to create a new Rate, you must choose *Yes*.
6. If the Media is a part of a package and has child items attached to it, the following message will appear: "This item has child items in a Package. Do you want these child items to Also Book when this parent item is booked?" Choose *Yes* or *No* to continue.
7. The message "Do you want this new Bookable item to be displayed in the Calendar now?" will appear. Choose *Yes* to add this item to the Calendar or *No* to continue without adding it to the Calendar. The item can be added to the Calendar later if you change your mind.
8. The **Create New Rate** window will appear, displaying the details for this Rate. Follow the instructions below to add detailed Rate information.

Create New Rate window

- In the top row, the **Category** and **Media Item name** will be entered, as well as a description for the rate in the **Rate Name** field (i.e. 'CDs, Each', etc).
- The Rate **Type** of 'Regular' will be pre-selected, since Overtime and Credit usually do not apply to media billing.
- The **Charge** column is the amount you are charging the client. The **Unit of Time** field will be pre-selected to 'One Time' for this **Charge**, since it is typical to bill for media "once per item", rather than by the hour or day. Now, type the amount you are charging the client (per unit) in the **Price/Unit** field.
- The **Expense** column is the amount that each Rate costs you. The **Unit of Time** field will also be pre-selected to 'One Time' for the Expense. Type the amount this expense costs you (per unit) in the **Price/Unit** field.
- Overtime does not apply to Media, so leave **Hours Before Overtime** and **Expense** empty.
- If the Rate is taxable, select which taxes apply in the **Taxes** field.
- To use more than one tax, press and hold the SHIFT key and click on your desired tax types. To use all taxes, click the *All* button. (See *Selecting Multiple Taxes* in the **Rates** module chapter of this User's Guide).
- If this specific Rate is to be associated with a particular Client, click the **Client** field and

choose their name from the drop-down list. This list displays each contact you have checked as a Client in the **Contacts** module. The C button next to the Client name will clear any client(s) selected in that field. To remove just one of many Clients from the list, select their name while pressing and holding SHIFT.

- Select whether this Rate **Is Normally Invoiced**, if it is **Exempt From Client Discount**, if it is **Commissionable** or if you want to **Include In Rate Card**. (See *Standard Rate Checkbox options* under the *Details sub-tab* section in the **Rates module** chapter of this User's Guide).
- Change how the **Invoice Line Item** information (bottom row) will appear. This is the order in which the item information will appear on an invoice. (See *Invoice Line Items* under the *Details sub-tab* section in the **Rates module** chapter of this User's Guide). For example, in the case of Media, you probably don't need to include the Start Time or End time that it's used on the invoice.
- Enter any **Additional Invoice Text** that you would like to appear on the invoice for this item.
- Click the *Continue* button to confirm your new Media Rate.

NOTE: The Rates-Create New window cannot be closed or canceled. You **MUST** click the *Continue* button.

The new Rate will now appear at the bottom of the Rates List. You may need to use the scroll bar (on the right) to view items at the bottom of the list.

If you have multiple Rates, you will need to specify which one is the Default Rate, by clicking on the *D* button for that Rate.

NEW FEATURE: Special Child Item Rates

This handy new feature is set up to allow you to create discounted packages of commonly grouped items (Camera, case, lenses, and tripod) as well as have rates for them individually.

For example, you may rent your camera by itself for \$500/day, the camera case for \$50/day, the set of lenses for \$150/day and the tripod for \$50/day. If you were to rent all of these items individually, you'd charge \$750. You can use a Special Child Item Rate to charge \$600/day for the package, if you'd like. If someone just wanted the lenses, it would still cost them \$150/day. Essentially, the Special Child Item Rate allows you more flexibility in your business structure.

Edit the Rates Record

How to edit/change the information of a specific rate:

1. Click the *Go To* button on the left of the Media **Item** name.
2. The **Rates-Edit** window will appear, allowing you to change information about this specific Rate.
3. Make your changes and click *Continue*.
4. Your changes will now be reflected in the Rates list.

Delete the Rates Record

How to permanently delete a Rates record:

1. Click the *Trash Can* icon to the far right of the Media item.
2. The following message will appear; 'Are you sure you want to delete this Rate? It is not un-do-able'.
3. If you are sure, Choose *Delete*.

CAUTION: You **CANNOT** undo this. If you Delete a Rates Record, it will be permanently deleted.

NOTE: For more specific information about Rates, including Client Specific Rates, Multiple Client Rates, Default Rates, Taxes etc., read the 'Rates Module' chapter of this User's Guide.

NEW FEATURE: Go To button Audit Log tool tip

Audit Log is a new feature in Studio Suite X and one of the ways it can be accessed is by hovering over the *Go To* button in the **Projects**, **Productions**, **Invoices** (on line items), **Events** (on line items), **Library** (on the *Titles* sub-tab), **Media Inventory** (on the *List* tab) modules.

When you hover your cursor over the *Go To* button, a log of who made a change to the record belonging to the *Go To* button along with what change they made and when they made it. This is a great way to maintain accountability as well as a handy short cut helping you know where to direct your questions about the record.

Report tab

Print Options sub-tab

Although there is a *Print This* button on the *List* tab, there is also a *Print List* button on the *Print Options* sub-tab. It's simply another way to print the list of **Media Inventory**.

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

Click the *Rates* tab to go to that module.

Click the *Library & Labels* tab to go to that module.

Click the *Projects* tab to go to that module.

This covers all of the basics of the **Media Inventory** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

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Mobile Devices


This chapter has not been updated for SSX. It will be updated in the next edition.

Mobile communication requirements in managing aspects of business operations has lead AlterMedia, Inc. to create a Studio Suite application for the iPhone. The iPhone combines the features of a mobile phone and wireless Internet device. The Studio Suite **iPhone** application is a read-only resource for three major areas of monitoring business activities. **Contacts**, **Calendar**, and **Tasks** can be accessed for event review, service updates, and general accuracy.

Access

The iPhone option is available with the **Network** and **Internet** versions of Studio Suite only. You must first load the **iPhone** package from the Studio Suite program CD on to your server. Once installed, access to the Studio Suite application occurs via the Internet.

There are a set of iPhone files on the Installation CD which you add to the "*Sites*" folder within a Mac or in the "*Webroot*" folder on a PC based system. Your specific IP address (for your iPhone application) will be dependant upon where you store your files. The Internet portal opens the view and page for Login.

 <http://XX.XX.XX.XX/studiosuite/iphone/public/login.php>

- Login with your Username and Password information.

Login view:



Home Page view

When you are at the *Home* page, select from **Contacts**, **Calendar**, and **Tasks**. Choose from the available functions and read-only items.



Contacts button

The *Contacts* button is used to find contacts saved within your **Contacts** module.

Contacts

Perform an individual search, scroll, and move within page groups of **Contacts**.

How to Find All:

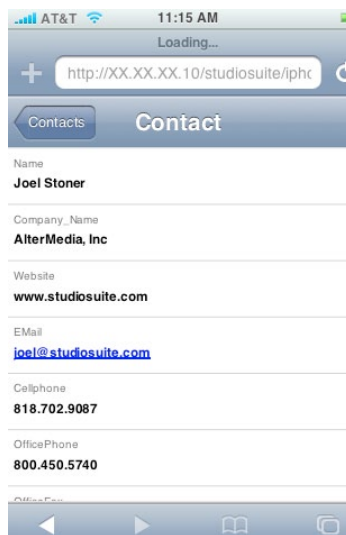
1. To *Find All*, type an asterisk (*) in the *People* search field. **Contacts** will be in alphabetical order. Scroll down to view all contacts on the page (1-20).
2. With the access keys at the top and bottom of each page, click the *Forward Arrow* key (shown below) to navigate to the next page of grouped contacts (20-40). Additionally, you can click the double arrow key to go to the last available contact, do just the opposite to return to the first contact in the found set of Contacts.



How to Find One:

1. Use the search field at the top of the view to locate a specific Contact. Type and enter a first or last name to find a known individual.
2. From the search results list, click the desired individual name for a complete view of contact details, such as: **Company Name**, **Address**, **Phone**, **Email** etc. (example below).
3. At any time, you can return to the Home Page by selecting the *Home* button at the top left of the screen view.

Contact detail view:



Calendar button

The **Calendar** module is used to view scheduled events and sessions. Calendar **Events** in the iPhone application are readable and sourced from a selected date.

How to use the Calendar button:

1. From the Home page view, click the *Calendar* button. The **Events** page appears with a selectable date tool at the top of the screen.
2. Select a date within the **Event** page that pertains to the date of the event you desire to read.
3. In the search results list, click the desired individual name for a complete view of contact details, such as: **Company Name, Address, Phone, Email** etc.
4. At any time, you can return to the **Home Page** by selecting the *Home* button at the top left of the screen view.

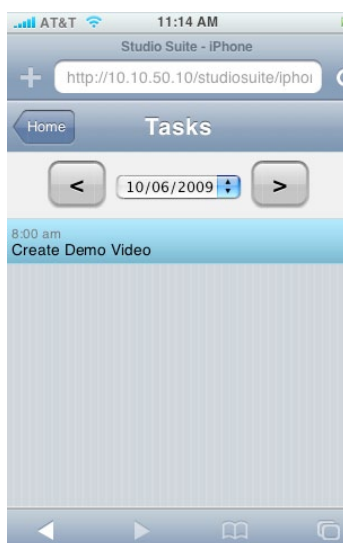
Events view:**Tasks button**

This module in Studio Suite provides a central place where Tasks are held and managed. The *Tasks* button in the iPhone application is used to find **Tasks** scheduled within this module.

How to use the Task button:

- From the Home page view, click the **Tasks** button. The **Tasks** page appears with a selectable date tool at the top of the screen.
- Select a date within the **Tasks** page that pertains to the date of the event you desire to read and review.
- From the search results list, click the desired **Task** for a detailed view of the Task's **Priority** listing, **Due Date**, who the Task is **Assigned To**, and the **Description**.

Tasks view:



Task detail view:



This covers all of the basics of the Studio Suite **iPhone application**.

This covers all of the basics of the **Parts** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

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Parts module

File name: SSX_Tech.fmp12

The **Parts** module is where you keep track of spare and extra parts for equipment. A part can be an individual item such as hard drives, adapters, transformers, connectors, chip sets, etc. or it can contain another part (the **Contains:** area is on the right side of the *Detail* tab). A part can also be a sub-part of another item (the **Used By:** area is on the left side of the *Detail* tab).

In this chapter you will read about how to:

- Find a Part
- Add sub-parts to a Part
- Modify the Used By section
- Add a Vendor ID to a Part
- Print a detailed Part record

List tab

The *List* tab shows your parts inventory in a list view. You can sort by the **Part Name**, **Part #**, **Brand/Manufacturer**, **Quantity (Qty) In Stock**, or **Record #**. It also shows the **Model #** of the part and the **Minimum Quantity** you need in stock. A **Notes** field is included for any purpose. Clicking the *Go To* button for each part will take you to that part's *Detail* tab.

How to find a Part:

1. Click the *Find* button in the *Function Bar*.
2. Type the Part Name in the **Part Name** field.
3. Hit ENTER/RETURN on your keyboard or click the *Find* button on *Function Bar*.
4. If the Part Name exists, the part will be displayed in the list.
5. Click the *Go To* button to view the *Detail* tab for that part.
6. You can also click the *Find All* button in the *Function Bar* to display a list of all Parts.

The *Print This* button will print out a list of all parts in the current found set, in the current sorted order.

Detail tab

Clicking the *Detail* tab will show the detailed layout of the part that is selected in the *List* tab window.

You can enter specific details about this part, like the **Quantity in Stock**, **Purchase Date**, the **Minimum Quantity** you want in stock, where it was **Purchased From**, the **Location** of the part, and the **Cost** of the item. On the right, there is a Notes field for your purposes. There are no alarms to alert you if you go below the **Minimum Quantity** you set. This is for reference purposes only.

The **Part #** field is a text field (not a number field) which allows you to intermingle letters and numbers to identify a part. When you sort by **Part #**, all numbers appear before letters and the numbers will sort in alphabetical order ("1,293" will appear before "75" because it begins with a "1").

NOTE: It is impossible to explain this section without using the word "parts" a hilarious number of times, so bear with us.

Understanding the relationship between 'Contains' and 'Used By'

To understand the **Used By** section, you must first know how the **Contains** section works. These sections only show what pieces of equipment use the spare parts. The **Used By** section is not modifiable, and only shows information if the current part has been chosen in the **Contains** section of another part (or if it is a sub-part of a master part).

IMPORTANT NOTE: The Parts module is not linked to your Equipment module, so you may need to create a new record in your Parts module for a piece of equipment that uses parts. That way you can select the spare parts it uses in the 'Contains' section.

Contains section

For each part, you can identify a number of sub-parts that the item **Contains**. For example, an Avid Media Composer Video Editor will contain a sub-set of storage drives, codecs, and display monitors. We will refer to the Editor as the master part and the additional items the system **Contains** as its sub-parts.

If a part **Contains** another part (sub-part), that sub-part item must have its own record in the **Parts** module before it can be associated with the master part. It is best if you first create new records for all your master and sub-parts individually, then make the associations.

How to add sub-parts to a Part:

1. From the **Contains** side – click on the **Part #** field.
2. A drop-down list will appear displaying ALL of your parts with names and part numbers from which to select.
3. When you choose one, the **Part Name** will automatically fill in.
4. This item will now appear as a sub-part of the current item's record.
5. You can click the *Go To* button of the sub-part, and it will take you to the *Detail* tab for that item, showing that it is **Used By** that master part.

Used By section

Since the **Used By** section only shows a master part that uses this (sub-)part, it is not modifiable. You can only make adjustments to the **Used By** section from the master part that uses it.

How to modify the Used By section:

1. Click the *Go To* button next to a part in the **Used By** section.
2. This takes you to the master part's **Detail** screen.
3. The other parts of this master part will be listed in the **Contains** section.
4. Click the trash can icon next to the part you wish to delete.

Vendor ID section

You can store three different **Vendor IDs** for each part and the **Price/Unit** that a vendor may charge you.

How to add a Vendor ID to a Part:

1. Click once on the **Vendor (1, 2 or 3) ID** field and a pop-up list will display all of the people in the **Contacts** module that you identified as a **Vendor**.
2. Click one time on your selection and their **Name**, **Company**, **Address** information, **Office** phone, **Fax**, and **Extensions** will appear in the text fields.
3. If your desired vendor isn't in this list, they may not exist in the **Contacts** module, or they do but they are not marked as a **Vendor**. Find them in Contacts and check the Vendor box.
4. If your vendor doesn't appear in the list, click the black and green *New Vendor* button, which will take you to the **Contacts** module.
5. Create a new record, and enter their information (be sure the **Vendor** checkbox is checked).
6. To return to the **Parts** module, click on the *Main Menu* tab, then click the *Parts* button from the **Main Menu**.

Attach & FTP tab

The *Attach & FTP* tab is used for attaching (recording, linking and/or embedding) external files, sounds, pictures or movies, URLs, and FTPs to an individual **Parts** record. The *Attach & FTP* tab is the where all of these attached files are stored. For a detailed explanation of this tab, see the **Attach & FTP tab** chapter of this User's Guide.

Print This button

The *Print This* button will print a detailed page of information for the part record that shows in the *Detail* tab.

How to print a detailed Part record:

1. Click the *Find* button in the *Function Bar* to perform a search to locate the records you would like to print.
2. You can also click the *Go To* button next to a part in the *List* tab.
3. When your desired record is displayed in the *Detail* tab, click on the *Print* tab.
4. The standard operating system **Print Setup** dialog will appear. Make your selections and choose *OK*.
5. The page will then be displayed.
6. Click the *Continue* button in the Status Area to the left.
7. Another print dialog will appear.
8. In the print dialog box, from the **Print** field, choose *Current record* in the print dialog box to print **the** single record you are currently viewing on-screen.
9. Choose "Records being browsed" to print all of the records in the found set.
10. Choose *OK* to print.

This covers all of the basics of the **Parts** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

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Patchbay Labels module

File Name: SSX_Tech.fmp12

The **Patchbay Labels** module prints pre-sized patchbay label strips for the most common patchbays (TT, TRS, 1/4, RCA, and Trident TT). All labels allow for two rows of text on each label except for the 32 Point 1/4 & RCA and both 48 Point 1/4 bays. Printouts include edge guides for easy cutting.

In this chapter you will read about how to:

- Choose an existing default Patchbay label
- Create a new label row
- Enlarge the on screen font (printing size, stays the same)
- Change the text color
- Find a created patchbay label
- Delete a patchbay label
- Duplicate a patchbay label
- Print a detailed patchbay record

Studio Suite default Patchbay labels:

- SwitchCraft 96 TT (SSL, Neve)
- SSL 56 Point
- Trident
- 32 Point 1/4
- 48 Point Generic 1/4
- 48 Point dBx 1/4
- 52 Point TRS

Patchbays tab

The *Patchbays* tab is where you can choose between default Patchbay labels and Patchbay label types (*Pairs* or *Continuous* sub-tabs) as well as create new Patchbay labels.

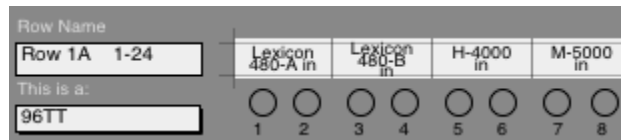
How to choose an existing default Patchbay label:

1. Start with the *Pairs* sub-tab selected.
2. Click in the field labeled **Select Patchbay**.
3. A drop-down list will appear with default patchbay choices. You will notice that the choices have either 'Pairs' or 'Cont' (Continuous) appended to them. For information on the differences between these, read the *Pairs* sub-tab and the *Continuous* sub-tab sections of this chapter.
4. Select 'SwitchCraft96_TT_Cont.' from the menu.
5. The **Patchbay** window will switch from the *Pairs* sub-tab to the *Continuous* sub-tab, which will display a diagram of the SwitchCraft96_TT.

Pairs sub-tab

The *Pairs* sub-tab format is the most common and easily used label format. It has one text field for each pair of jacks, with the text center-aligned. Use this format unless your patchbay has "3 holed" items that do not fit into this format. The Pairs format works well on Mac and Windows.

Continuous sub-tab



The Continuous format should only be used when your patch points are not configured in even pairs. To allow for flexible spacing, this label has one large text field across the entire patch row, with the text left-aligned. If you need two rows of text, type and align the entire first line of text. At the end of that text, press ENTER/RETURN and type the second row (beginning with the first patch point). Use the SPACE BAR to visually align and center the text with the two circles representing the holes of the patchbay.

NOTE: The Continuous format should be used on Macs only; this label format cannot be used reliably on Windows as their screen to print font spacing is not as consistent as with Macintosh.

General data entry instructions

How to create a new label row:

1. In the **Patchbays** tab, click in the patch bay type field labeled 'Select Patchbay'. A drop-down list will appear with default patchbay choices.
2. Select the appropriate patchbay type of your choice.
3. Click the black and green *New* button in the *Function Bar*. The cursor will automatically locate in the new label **Row Name** text field.
4. Enter a **Row Name**, such as A, B, Inserts, Buss Out, etc.
5. Next, in the **This is a:** text field, identify and confirm the particular patchbay type.
6. Enter your patch bay text (as directed in the sub-tab instructions above).
7. You can also click the *Find* button in the *Function Bar* to locate specific records.

Zoom in / Zoom out buttons



The small font size used for the text fields is the actual printing size and may be difficult to read on screen.

How to enlarge the on screen font (printing size, stays the same):

1. Click the '+' Magnifying Glass button to zooms in to details.
2. The '-' Magnifying Glass button zooms out.
3. The '=' button in-between returns to the original size.

Text Color

If you have a color printer, you may find it helpful to use different colors for the text.

How to change the text color:

1. Simply select (highlight) the text with your mouse.
2. Click **Format** in the main menu bar at the top of your screen and choose "Text Color".
3. Select a desired color from the menu palette.

Search for a patchbay label

Once you have created a patchbay label, you can recall it later by searching for its row name.

How to find a created patchbay label:

1. From the *Patchbay* tab, click the *Find* button in the *Function Bar*.
2. A blank patchbay label will appear.
3. Type the **Row Name** in the text field.
4. Hit ENTER on your keyboard or click the *Find* button on the Left.
5. The **Patchbay** module will display that specific patchbay label.

Delete a patchbay label

If you no longer need a patchbay label that you have created, you can delete it.

How to delete a patchbay label:

1. Search for the patchbay label by using the method above.
2. When the patchbay is found and displayed, click the *Delete* button in the *Function Bar*.
3. The following message will appear: 'Permanently delete this ENTIRE record?'
4. If you are sure, choose *Delete*.

Duplicate a patchbay label

If you would like to use a similar patchbay label with a slightly different scheme, you can duplicate a label, then make changes to the duplicate.

How to duplicate a patchbay label:

1. Search for the patchbay label you would like to duplicate.
2. When the patchbay is found, click the *Duplicate* button in the *Function Bar*.
3. The duplicate copy will appear underneath the original with the Row Name of 'Duplicate'.
4. Change the **Row Name** and/or any other information for your application.

Help tab

The *Help* tab is simply an on-screen reminder of how to use the *Pairs* and *Continuous* sub-tabs in each *Patchbay* tab.

Print This button

The *Print This* button will print the detailed page of information for the patchbay record showing in the *Patchbays* tab.

How to print a detailed Patchbay record:

1. Click the *Find* button in the *Function Bar* to perform a search to locate the records you would like to print.
2. When your desired record is displayed in the *Detail* tab, click on the *Print This* tab.
3. The standard operating system **Page Setup** dialog will appear. Make your selections and choose *OK*.
4. The page preview will then be displayed.
5. The standard operating system **Print** setup will now be displayed. Make your selections and click *Print*.

Printout Information

As some types of row labels are too large to fit on a regular sized piece of paper, they are split into two sections. To accommodate overlaps from one section to the next, the patch point at the end of the first strip is ghosted. For example, if you are using the 16 and 17 holes as a stereo pair, and the label splits at the 17 hole, type your text between the 16 hole and the ghosted 17 on the top strip, then start the second strip at 18. When the labels are printed, overlap the 17 from the first strip to align with the 17 on the second strip.

This covers all of the basics of the **Patchbays** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

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Petty Cash module

File Name: SSX_Invoicing.fmp12

SSX

The **Petty Cash** module acts like a checkbook register for your petty cash drawer. It tracks each transaction and allows expenditures to be assigned to Projects (along with a markup).

In this chapter you will read about how to:

- Create a new transaction
- Assign a transaction to a specific project
- Edit a transaction
- Choose a report printing option

List tab

This tab provides a 'view-only' list of each petty cash transaction. To view the details of or edit a transaction click on the Go To button. A window will pop up for that transaction, allowing you to modify the data.

How to create a new transaction:

1. Click the black and green *New* button in the *Function Bar*.
2. The **Create/Edit Transaction** window will appear.

| Date | Time | Description | Deposit | Withdrawal |
|-----------|------------|--------------|----------------------------------|-------------------|
| 5/12/2012 | 3:48:10 PM | Postage | 0.00 | 20.00 |
| | | Category | Assign To Project | Default Markup |
| | | Postage | Crouch and Stay Still | 0.00 |
| | | by Jon Jones | (enter as decimal, ie, 8% = .08) | Billed Amt. 20.00 |

Cancel Save Changes

3. Enter a **Date** and **Time** the petty cash was logged or allow the system default to auto fill. You can change the date field by selecting from the pop-up calendar provided.
4. Provide brief transaction information in the **Description** text field.
5. Clicking within the **Assign to Project** field will display a pop-up menu listing projects from the **Projects** module. Choose a project from the list, if desired. More information on assigning to a project is shown below.
6. Add a contact related to the transaction within the **by** field.
7. Click the **Category** field and select a category type from the editable list. Note: these categories are not the same as the main Categories used throughout the rest of Studio Suite.
8. Enter the correct amount in either the **Deposit** or **Withdraw** fields.
9. If this petty cash was billed, enter the **Billed Amount**.
10. When you are finished, click *Save Changes*.
11. Your entry will appear in the list with a Current balance total below.

Create/Edit Transaction window: Assign to Project

You may assign this transaction to a specific project when creating a new transaction or editing an existing one.

How to assign a transaction to a specific project:

1. Within the *Create/Edit Transaction* window, click the **Assign to Project** field.
2. This will display a pop-up menu of recent projects.
3. Select a project from the found list below or use the *Quick Find by* search field-filter.
4. This will enter a line item into that Project.
5. A mark-up percentage fee field is available for re-billing purposes.

Click the *Save Changes* button to return to the *List* tab with the new transaction and associated balance showing. If you assigned the transaction to a Project, it will appear on that Project as a *Petty Cash* line item.

*NOTE: An additional Go To button is to the left of the **Assign To Project** column. If a transaction has an assigned Project, click the Go To button to go directly to that Project.*

Edit Transaction

Once the transaction is entered, you can edit its details.

How to edit a transaction:

1. Click the *Go To* button adjacent to the individual transaction line item.
2. The **Create/Edit Transaction** window will appear.
3. Edit the details and click *Save Changes* when you are finished.

NOTE: When you edit an "existing" transaction, it will add another Petty Cash line item to the Project. If necessary, you can delete one or both Petty Cash transactions from the Project. Within Projects, click on the line item. From the Event Edit prompt, select the Delete button.

Attach & FTP tab

The *Attach & FTP* tab is used for attaching (recording, linking and/or embedding) external files, sounds, pictures or movies, URLs, and FTPs to an individual **Petty Cash** record. The *Attach & FTP* tab is the where all of these attached files are stored. For a detailed explanation of this tab, see the **Attach & FTP tab** chapter of this User's Guide.

Report tab

The *Report* tab, formerly the *Print* tab, has two sub-tabs.

Print sub-tab

The *Print* sub-tab lists all petty cash transactions for the found set of records. Your report printing options include the following:

How to choose a report printing option:

1. *Register List (Found Set)* button prints the complete general list of the found set by date order.
2. *Category Report (Found Set)* button allows you the option to filter and print the Subtotal by *Date* or *Category* grouping order. Category allows you to sort and organize items together for printing such as; Food, Beverage, Postage, etc. The print by category includes available cash accounting items; Beginning Balance and Deposit totals.
3. A third print option is to click a single Project line item transaction from the list. This prints a *Petty Cash Report By Project*. Prior to printing, you will see a pop-up prompt asking "Do You want to Hide or Show the markup amounts?". This option hides or allows cash markups on the printed report. Select your option to *Cancel* the entire report, print and return back to the print list, *Show* the markup on the print, or *Hide* any markup on the report print.

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

This covers all of the basics of the **Petty Cash** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

31

Productions module

File Name: SSX_Projects.fmp12

SSX

The **Productions** module adds a layer of hierarchy, reporting, and control above Projects. How you build the hierarchies is up to you.

In this chapter you will read about how to:

- Associate a client with a Production
- Add additional People to a Production
- Create new “Task” items for each record
- Assign a task group to a Project
- Add or delete status names
- Add notes and creative directions to a Project and the parent Production
- Add a new Talent to a Production
- Document audio mic plug-ins
- Add more titles
- Specify shipment details for each package sent
- Assign a commission to sales representative
- Create a new media asset (record) in **Library & Labels** that’s associated to a specific Production

A **Production** can be (for example) a season of a TV Series, where each episode is a Project. In a long form project, such as a feature film, or commercial music recording, a Project can be one phase of the work in the larger Production. The Project; a specific media asset’s worth of events, or one week’s worth of events can be assigned to a named **Production** as a “grouping” of Projects for ease of tracking and sorting all associated and related events.

Some example of its use would be the following:

Production 1: Survivor - Season 2012

Project 1: Episode 1

Project 2: Episode 2

Project 3: Episode 3

Production 2: Coke Commercial

Project 4: Shoot 1

Project 5: Shoot 2

Project 6: Edit

Project 7: Music

Project 8: Voice Over

Project 9: Mix

Production 3: Madonna Record

Project 10: Week 1

Project 11: Week 2

Project 12: Week 3

Project 13: Week 4

Project 14: Mix

Not all Projects will need a “parent” Production to keep them organized. If you have a one off Project that’s coming in for a day, or a couple days, you may not need to make a Production grouping.

Creating a new Production

Create a new Production directly within the **Productions** module by clicking the *New* button in the *Function Bar* at the top of the screen. This brings you to the **Create New Production** screen:

Create New Production

Company Selector: 2 - Plan-it Perfect Post

*Yellow fields are required.

Client 254 **Ethan Alexander** Cell Phone 310-922-25821 email alex@studios.com Client PO# Required Field 0508

Balance Due Overdue 31-60 Days Over 61-90 Days Over 91-120 Days Over 121 Days+ Over TOTAL Billed Year To Date

Production Travis video, "Driftwood" Production Type Film Project Status Setup

People

| Add | Title | Filter Names | Phones | email | Add To Contacts | Position On Library Labels |
|-----|-------------|--------------|--|----------------------|-----------------|----------------------------|
| + | Producer | Susan Jones | Office 310.770.4356 | joel@studiosuite.com | Add | 1 2 3 4 |
| + | Editor | Joel Stoner | Office Phone 800-450-5740 Office Fax 661-291-1709 | joel@studiosuite.com | Add | 1 2 3 4 |
| + | Ego Stroker | Marty Smith | Cell 818.613.6787 Office 818.752.3900 Office Toll Free | | Add | 1 2 3 4 |
| + | Director | Alex Ballar | | | Add | 1 2 3 4 |

Notes: Re shoot for Travis video for Song - "Driftwood"

Allow Release Of Client Material: No Yes Cleared for materials release

After you have entered at least the yellow fields, click the NEXT >> button to view scheduled items. You can enter more client information later by clicking on the Client Info tab.

Cancel Production Creation Next >>

Client Terms, Tax, and Discount values are looked up from the Contacts module. Changes made here will only affect THIS project.

SalesPerson: Raymond J Givins

Terms: 30 days Remaining Credit Over Limit

Rate Card: 7 Film Discount Rate: New Rate 215 10%

Account Numbers: Pre-Production Budget Code #1127 Production Budget Code #0113 Post-Production Budget Code #0114 Distribution Budget Code #1102

Molly Modified Sat, May 12, 2012 by Molly

NOTE: Clicking the red X to close the window will close Studio Suite. Use the Cancel Production

Creation button.

Create New Production screen

Enter basic information about the Production in the **Create New Production** screen.

Company Selector field

Select which of your internal companies this Production will be associated with. Click in the yellow field to view a pop-up menu of available companies.

NOTE: You can Set a default company in your User account screen.

Client field

A Production must have a Client associated with it to be tracked and invoiced.

How to assign a client to a Production:

1. Click in the yellow **Client** field (to open the Contact Picker window).
2. Scroll through the list, or type the first few letters of the company or a person associated with the client in the provided field.
3. Click on your client choice (found in the list) one time to enter. Information specific to this client will automatically be entered on the Production page, and additionally in the Financial section below. If the Client does not appear in this window, they may not exist in the **Contacts** module, or they are in Contacts already, but not designated as a Client.

*If your client does not exist in the **Contacts** module:*

1. Click the *Create New Client* button. This will take you to a new record in the **Contacts** module.
2. Enter their information and be sure the **Client** check box is marked so they will appear in the client selector window. Click the *Return to Production* button.

Production fields

Click within the yellow text field and name your **Production**. In the adjacent two fields add your **Project Type** and **Project Status** information. Use the provided drop-down lists of selectable and editable options suitable for your workflow.

People fields

Each new project will auto enter your defined group of **Titles** for people working on the Production, but who are not necessarily scheduled, such as the Artist, Producer, Editor, Assistant Engineer, etc., as defined in the **Main Menu Setup/Titles** tab.

Depending on the setting of the **Filter Names** field, clicking (or tabbing) into the **Name** field will show a pop-up list of either all names in the **Contacts** module, or only those that have the same title.

How to add additional People to a Production:

1. Click on the black and green *Add* button.
2. Select a title, then their name from the menu; their phone numbers will auto-fill. The names in the menu come from people in the **Contacts** module that have the same title.
3. If the person does not exist in **Contacts**, click again in the **Name** field and simply type their name. This does not add them to **Contacts**.
4. Click the black and green *Add to Contacts* button in the row to add this person to the **Contacts** module. If you do so, click the blue *Return to Productions* button to return to the *New Production* entry screen.
5. For each person, you can choose that their phone number not be printed on Project and Session printouts by deselecting the '**Include Phone On Print Outs**' checkbox (to avoid celebrity numbers getting into the wrong hands).
6. Define who's name gets assigned to which of the four available positions (1-4) on media labels created from this productions (from the **Library** module). This can always be adjusted later.
7. Delete a person by clicking the trash can icon in their respective row.

Financial fields

When the Client is selected, their financial information is displayed at the bottom of the window. Across the top you will see fields for the client's financial aging (i.e. **Balance Due** date, how many days **Overdue**, **TOTAL Billed**, **Year to Date**, etc.). This information is from **Contacts** module, based in the total of their Invoices.

Client Terms, Tax, and Discount values are looked up from the Contacts module. Changes made here will only affect THIS project.

| Terms | | Tax Rates | | Rate | Exempt | Rate Card |
|------------------|------------|---------------|---------------|---------------|--------------------------|-----------------|
| 30 days | | A | LA County Tax | 8.75% | <input type="checkbox"/> | 7 Film |
| Remaining Credit | | B | San Diego Tax | 7.75% | <input type="checkbox"/> | |
| Over Limit | | Discount Rate | | 10 % Discount | -10% | |
| SalesPerson | Joey Boots | | | | | Account Numbers |
| | | | | | | Production |

Below that are fields for the client's **Remaining** limit and **Over Limit**.

To the right are **Tax Rates** and the **Discount Rate** for this Production. This data is looked up from the Client record in **Contacts**, but may be changed here to reflect only this Production, if needed.

*NOTE: For a detailed description about financial information, see the **Contacts module** chapter under the **Financial** tab section in this Users Guide.*

Finish Booking

The yellow fields must be filled-in before proceeding. Other fields can be can be completed later. When you've entered everything you need, click the *NEXT >>* button on the bottom right of the screen. This will secure your Production in the *Detail* tab of the **Productions** module.

*Note: A Project with a Production parent will be viewed in the **Projects** module first by showing the **Production** name, followed then by two colon characters and finishing with the **Project** name, i.e. "Production:: Project".*

Travis video, "Driftwood": Rain Scene

Detail tab

The *Detail* tab is where you view all of the Production specifics and associated Projects. The Production name is shown at the top, and the assigned Production number is shown on the right side of the screen.

- **Client number** and **Client Name** selected appear on the screen.
- **Production Type**, **Production Status** and **Episode** fields appear here on the related record.
- The **Production Dates** shown are the beginning and end times of the **Production** period. Enter your period of work requested. See the green tracking bar above the view showing the Production date range. These are manual entries, not calculated ones.
- **Account Numbers** assigned for Invoice coding or other financial tracking purposes are included in the view.
- A **Notes** text field provides a place to add information about the Production.

NEW FEATURES: View Projects sub-tab & View Events sub-tab

you can now view Events in related Projects on the *View Events* sub-tab. This provides a more detailed perspective on the Production.

View Projects sub-tab

Under this sub-tab, you can view all of the **Projects** under a **Production** broken down by date range.

Date Range sub-sub-tabs

With the *Date Range* sub-tab groups you can track each **Project** event listed within the **Production**. Selectable ranges include; *1-Year*, *6-Months*, *1-Quarter*, and *1-Month*, viewing. Track workflow progress and status of the events. With the Gantt style graphing.

New Feature: Budget / Actual tab

This new tab shows Budget verses Actuals for all Projects in the Production, and for the Production as well.

Profit/Loss tab

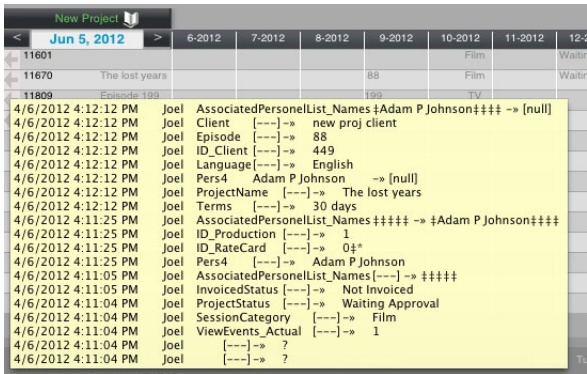
Previously called *Financials*, The Profit/Loss tab allows you to view totals of all Projects regarding *Expense, Charge, and Profit/Loss* cumulative totals.

For each Project shown, to the far left you will see the familiar *Go To* button. Clicking this button will take you to the *Events* tab of the **Projects** module. Here you will be able to see every detail of the specific Event. You will find the *Go To* button on every one of the views available in the **Projects** module.

NEW FEATURE: Go To button Audit Log tool tip

Audit Log is a new feature in Studio Suite X and one of the ways it can be accessed is by hovering over the *Go To* button in the **Projects, Productions, Invoices** (on line items), **Events** (on line items), and **Library** (on the *Titles* sub-tab) modules.

When you hover your cursor over the *Go To* button, a log of who made a change to the record belonging to the *Go To* button along with what change they made and when they made it. This is a great way to maintain accountability as well as a handy short cut helping you know where to direct your questions about the record.



View Events sub-tab

Under this sub-tab, you can view all of the Events that are part of the Projects that are part of the Production. The information is organized by financial aspects of the Events: **Quoted** amounts, **Actual** amounts and the **Difference** between the two.

Tasks tab

Tasks sub-tab

This tab allows you to create tasks for this Production. You can create task groups, such as 'Edit Session' or 'Joel's Tasks', and load them quickly into the task list.

How to create new Task items for each record:

1. Click the black and green *New* button just below the Tasks sub-tab.
2. Click the **Priority** field and enter a priority (i.e., 1, 2, 3, etc.)
3. Click the **Status** field and select a status from the drop-down menu (i.e. Incomplete, In Progress, etc.)
4. Enter the **Task** that is to be completed.
5. Click the **Due Date** field and select a date from the pop-up calendar.
6. Click the **Time** field and enter a time by which this task should be completed.

If you wish to permanently delete a task, click the *Trash Can* icon next to it.

Set Default Tasks sub-tab

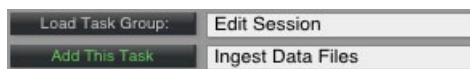
The *Set Default* Tasks sub-tab allows you to create default Task Groups that you can assign quickly in the *Tasks* sub-tab. This can save time if you regularly assign the same set of tasks to many Productions.

The left portion of this screen allows you to create, edit, and delete Task Groups. Click the *New* button to create a new Group, then name the Group; you can edit the name by shift-clicking the **Name** field. Delete Task Groups with the *Trash Can* icon.

Once you have created a Task Group you may edit the contents of the Group on the right side of the screen. With the Task Group selected on the left, use the *New* button on the right to create new Tasks within the selected Group. Just as with the *Tasks* sub-tab you may set names and priorities to each task.

How to assign a task group to a Production:

1. Return to the *Tasks* sub-tab.
2. Click the field next to **Load Task Group**. A pop-up menu will appear listing your Task Groups. Choose a Task group from the drop-down menu. Click the *Load Task Group* button. Each priority task will be listed (in-order) in the list below. If you only want ONE of these priority tasks to appear, click the field next to *Add This Task*, select a Task then click the *Add This Task* button.
3. Add the **Due Date** and **Time** to the new tasks.
4. Click the *Go To* button on any task line item will direct you to the **Tasks** module for more specific detail and Task management.



Status Colors sub-tab

The *Status Colors* sub-tab allows you to assign colors to your task Status Names. The sub-tab also has an edit function to add or delete Status names.

How to add or delete status names:

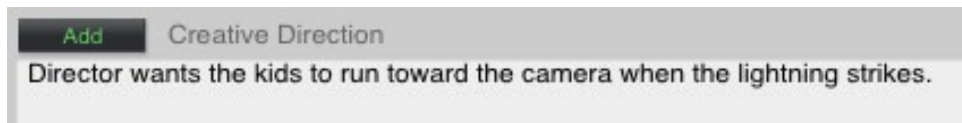
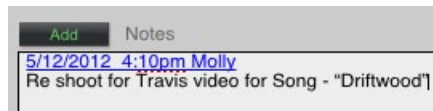
1. Click the *Edit* button on the left. In the new window, type a new *Status Name* at the bottom of the text field. Finish with *OK*.
2. Remove an existing Status by deleting its name from the user. Finish with *OK*.
3. In the *Status Colors* sub-tab, double-click within any color field to assign or change the color.

Notes / Creative tab

The *Notes/Creative* tab allows you to add **Notes** and **Creative Direction** for the Production.

How to add notes and creative directions to a Production:

1. Click the black and green *Add* button. This adds a date and time stamp to the field.
2. Type your notes in the field.



Talent tab

The *Talent* tab shows all of the Talent for each event in the entire Production. Actors, Musicians, Vocal performers, Voice-over, Production Stunt persons, etc. are in the Talent description to be included in the Production.

NOTE: In order to utilize the full functions of Studio Suite, you should create a new contact entry for all talent being booked.

Talent that is added in the **Productions** module is added generically to the Production, but not to any specific Project or Event.

How to add a new Talent to this Production:

1. Click the black and green *Add* button.
2. The **Talent** field will display a drop-down list of Talent types. Make a selection from this list.
3. With the cursor now moved into the **Name** field, displaying a list of all people in the **Contacts** module that have matching contents in the **Talent** field. If the Talent is not in the **Contacts** module, you may simply type their name into this field (this does not create a contact record for the talent).
4. When the talent **Name** is entered, their **Main Phone** number will be automatically entered in the appropriate field.
5. Enter the **Role** of the talent (if applicable).
6. Complete the talent's event **Status** (Confirmed, On Hold, Not Available, Left Message, etc.).
7. Click the **Date** field and select a date from the pop-up calendar.
8. Add a **Start Time** for the Event.
9. For your budget tracking purposes, complete the list by entering the **Cost** of each talent line item and subsequent billable **Charge**. The talent Cost and Charge grand total calculations are shown in the two fields at the bottom of the screen. Click in and then out of each field to refresh the totals, upon any changes made to the individual talent lines above.

| Add | Talent | Name | Role | Main Phone | Status | Date | Start Time |
|-----|---------|---------------|----------------|---------------------------------------|------------|------------|-----------------|
| | Actress | Lisa Merriman | School Teacher | <input type="checkbox"/> 310-555-0926 | Left Mess. | 05/07/2012 | 7:30 AM |
| | Notes | | | | Cost | 1,000.00 | Charge 2,500.00 |

Tips

- To delete Talent from this Production, click the *Trash Can* icon.
- You may choose not to include their phone # on printouts by deselecting the **Include Phone on Print Outs** checkbox.
- Click the *Go To* button for each talent to take you to their record in the **Contacts** module.

Show Notes / Hide Notes sub-tabs

By now you have noticed the two sub-tabs *Show Notes* and *Hide Notes*. Switching between these simply shows or hides the **Notes** field.

Setup Info tab

This layout displays detailed information important to the setup of each Production. Once data is entered here, it will appear in the setup of any new Projects and Events that are created under this Production.

Although the **Productions**, **Projects** and **Events** module **Setup** tabs appear identical, please keep in mind that it is possible to have different data in these places. This is useful for different types of Projects and Events on a single Production.

General sub-tab

In the *General* sub-tab, you can list the Formats and Machines that will be used for this Production. Up to eight machines can be listed with fields for the following:

- **Purpose** – purpose for each machine (Master, Clone, Safety, Production, etc.)
- **Format** – Video or Audio format types, standard, and calibration settings
- **Size** - size of the media and type
- **Speed** - recording speed of the associated media
- **Frames** - the frame rate of the media
- **Tracks** – recording tracks to be utilized in the session
- **Format** – the audio output stream, i.e. Stereo, Dolby 5.1, etc.
- **Dolby** – types of audio output, i.e. Dolby A, AC3, 5.1 etc., and choices for turning Emphasis On or Off.

All of these lists can be edited to suit your needs.

Check the boxes on the right that apply:

- **Src** – Source Media asset
- **Rec** – Recording Media asset
- **Master** - Master Media asset
- **Chase** – Chase Media asset

In the fields below, enter when the **Tones Arrive**, whether or not you are locking to **Picture** or doing a **Layback**, and any **Copies Needed**. You may then enter any necessary notes in the **Setup Notes** field as well as listing the **Titles** for the Production.

Plug In sub-tab

Use the *Plug In* sub-tab to document audio mic plug-ins.

How to document audio mic plug-ins:

1. Click the *Set Input* button on the top of the first column. This will automatically enter 1-24 in the **Input** column the first time you click it, 25-48 the second time you click it, and 49-72 the third time you click it, then the cycle starts over again.
2. Click the **Qty.** (Quantity) field and select the number of instruments or devices used.
3. Enter the instrument you will be using in the **Instrument** field.
4. Enter the # of **Mic's** (microphones), which type of **Mic** used, **Insert**, **Buss**, and **Cue** assignments, and the **Talent's** name.

Fields on the right

- Indicate whether to **Tune Piano** (Yes or No).
- Enter the quantities needed of Mono Phones, Stereo Phones, Music Stands, Stand Lights, Chairs, Stools, and Video Monitors.
- Specify whether you need a **Digital Metronome** (Yes or No).

Below, you will find the **Aux Sends** fields. Use these fields to document where the Aux Sends are to be patched. They are labeled **S-1** through **S-12**.

Video/Film/Graphics sub-tab

This area contains details associated with visual production. There are fields for **Cameras**, **Lens**, **Filters**, **Film/Tape**, **Props**, **Special Effects**, **Sets**, **Permits Needed**, **Transportation**, as well as a set of selectable **Locations** (as defined in the **Contacts** module).

If these fields don't quite fit your needs, you can always grab a field from the *User Fields* sub-tab (explained next).

User Fields sub-tab

This contains all of the User Fields for the **Productions** module as described in the **Studio Suite Basics** chapter of this User's Guide. We have provided many User fields in each module that you can customize to accommodate specific information. To use a user field, you may go into the Layout mode (within any module) and drag one of these fields in order to store your specific data.

Client Info tab

The *Client Info* tab is where you can view and manage all pertinent details about the client. It is best to enter as much information about the client as possible here.

Client and People sub-tab

When you created the Production, you specified a Client. This information now appears in the green text fields here.

Each new Productions looks up the default set of "working people titles" (Producer, Editor, etc) from the *Main Menu/Setup/Title* tab.

How to add more titles:

1. Click the black and green *Add* button.
2. Click the **Name** field next to a title to reveal a pop-up list of people from the **Contacts** module with matching titles.
3. Select a name to lookup their phone numbers.
4. The checkbox next to the phone number determines if the phone number will appear on printouts (useful for maintaining client privacy).

Tips

- The people who appear here will also appear on every related record in the **Projects** and **Events** modules.
- The people who appear here will also appear on labels generated from the **Library & Labels** module in the order specified by the check boxes on the right.
- Click the *Add To Contacts* button to add this person to your **Contacts**.

At the bottom left, you will find the **Allow Release Of Client Materials** field. This is the exact same field that appears in the clients record in the **Contacts** module, so changing it here will change it everywhere. You may also enter a **Materials Release Note**.

Shipping Info sub-tab

The **Delivery and Shipping Requirements** apply to the entire Production. All other fields apply to the specific shipment.

How to specify shipment details for each package sent:

1. Enter the **Delivery and Shipping Requirements**, what service it was **Sent By**, which account to **Charge**, the **Tracking Number**, and list the **Enclosed Materials**.
2. The To: field is a pop-up list of ALL of your contacts from the **Contacts** module.
3. Select a contact from the list. Today's Date and the current Time will automatically enter (you can manually change these if necessary).

Click the *Track Package* button in the center of the field to automatically track the package.

Financial sub-tab

This tab gives an overview of the clients financial history, showing a full aging history (i.e. **Balance Due** date, how many days **Overdue**, **TOTAL Billed**, **Year to Date**, etc.) as well as the client's **Remaining Limit** and **Over Limit**.

To the right are **Tax Rates** and the **Discount Rate** for this Production. This data is looked up from the Client record in **Contacts**, but may be changed here to reflect only this Production, if needed.

*NOTE: For a detailed description about financial information, see the **Contacts** module chapter under the **Financial** tab section in this Users Guide.*

Invoices From This Production section

Below the aging section, you will see a portal showing all invoices that have been made for this Production and their payment status.

Commission To section

This area is used to assign a commission amount to a certain person within your studio (or network of sales representatives) for bringing new clients and/or projects to the studio.

How to assign a commission to sales representative:

1. Click the **Commission To** field and select a person from the drop-down list. This list will show all records in the **Contacts** module marked as an employee.
2. Click the Commission Percent field to enter their commission percent. Enter the number as a decimal (8% = .08)

Media Asset tab

The *Media Asset* tab shows all of the media from the **Library & Labels** module that is associated with this Production.

- Click on a row of a particular media asset to highlight that media asset and show additional information at the bottom of the screen, including the **Current Location**, people involved, and all **Titles** on that media asset.

*NOTE: This screen is view only; changes to media must be done in the **Library & Labels** or the **Titles & Tracks** modules.*

- Click on the *Go To* button for each media asset to go directly to that record in the **Library & Labels** module.
- Click the *Go To* for a particular Media asset **Title** to go directly to that record in the **Titles & Tracks** module.

How to create a new media asset (record) in Library & Labels that's associated to a specific Production:

1. Click the black and green button labeled "Create NEW Related Media Asset In Library" (this will take you to the **Create New Media Asset** window in the **Library & Labels** module).
2. Fill out the information on all tabs and click *Done*.
3. For detailed description of this window, see Create New Media Asset section of the **Library & Labels** module.

Studio Suite allows each media asset to be associated with more than one Project, since it may return to your studio several times in the course of its life. Read about this in the **Library & Labels** chapter of the User's Guide.

Attach & FTP tab

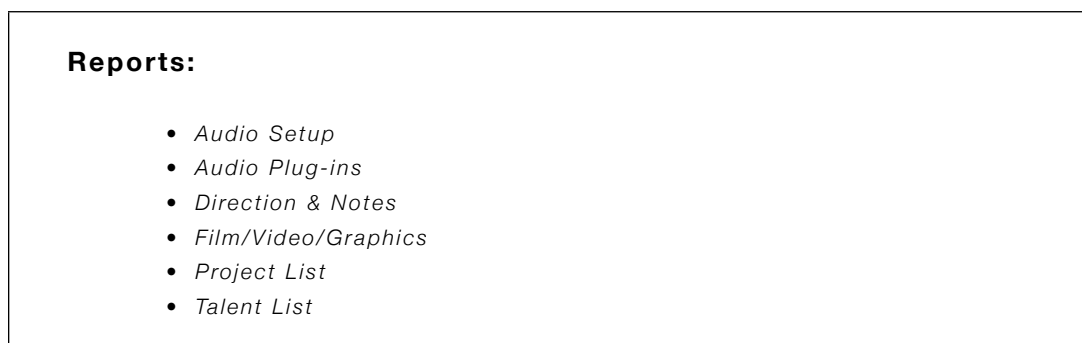
The *Attach & FTP* tab is used for attaching (recording, linking and/or embedding) external files, sounds, pictures or movies, URLs, and FTPs to an individual **Projects** record. The *Attach & FTP* tab is the where all of these attached files are referenced. For a detailed explanation of this tab, see the **Attach & FTP tab** chapter of this User's Guide.

List tab

The *List* tab shows a sortable list of all of the **Productions** in the module. Clicking the *Go To* button for any listed Production will take you to the *Detail* tab showing all Projects and Events related to the Production.

Report tab

The *Report* tab, formerly the *Print* tab, has a number of pre-set report options. First, select which of your companies you are running the report on via the pop-up menu in the **Company Name** field, and which letterhead you want to use if you print the report. The Letterhead is automatically generated from the information you entered about your company in the *Setup* button contained in the **Main Menu**. The custom Letterhead places the letterhead graphic you pasted/imported. To use your own stationery, choose a blank record from your **Company Name** selector.



These reports print for all of the found records, so the *Find Only This Record* button will put only the current record in the found set.

Click the button labeled *Other Report Options From Events* to go to the Print menu in the **Events** module. Read the Print section of the **Events** chapter to learn more about that module's printing options.

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

Click the *Projects* tab to go to the **Projects** module showing only the Projects associated with that Production. Click the text *Events* tab to go to the **Events** module showing only the details associated with that Project. Click the text *Calendar* tab to go to the **Calendar** module.

This covers all of the basics of the **Productions** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

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Projects module

File Name: SSX_Projects.fmp12

The **Projects** module coordinates all aspects of a project such as bookings, budget and actual costs, dates, times, statuses, people, media usage, equipment, technical details, etc. A Project typically contains many booked items (Sessions or Events) which are stored in the **Events** module. You can set these items in hierarchical (parent/child) relationships to each other, similar to grouping items in a folder.

A Project can also be a member of a Production, where the Production is (for example) a TV Series, and each Project is one episode. In a long form project, such as a feature film, a Project can be (for example) one phase of the work, a specific media asset's worth of events, or one week's worth of events.

In this chapter you will read about how to:

- Create a Project
- Assign a client to a Project
- Add People to a Project
- Print, email or SMS message a Project event record (with emphasis on one item)
- Email the current Project as a pdf
- View the Actual (vs. the Budget) information for all items
- Sort Events
- Add items via barcode
- Assign items to other items hierarchically
- Add a new item from the Project Events tab
- Send notifications
- Use the Multiple Event Handler window
- Make an Invoice from a Project
- Create new "Task" items
- Assign a task group to a Project
- Edit the color and/or rename Status name

- Add notes and creative directions to a Project
- Add a new Talent to a Project or Event
- Document audio recording mic plug-ins
- Add titles
- Specify shipment details for each package sent
- Assign a commission to sales representative
- Create a new media asset (record) in **Library & Labels** that's associated to a specific Project
- Sort Projects

Where to create a new Project:

There are four places where you can create a new project: the **Calendar** module, directly within the **Projects** module, from the **Productions** module and from the **Contacts** module.

1. From the Calendar, select the items to be Booked: click the *Book Project* button, then select *New Project*. This will take you to the **Create New Project** screen of the **Projects** module.
2. Create a new project directly within the **Projects** module by clicking the *New* button in the *Function Bar*. This takes you to the **Create New Project** screen.

*Note: You can also select a **Project Template** by clicking the *From Templates* button in the *Function Bar*. Templates are Projects you can save from past completed events, that may reoccur with the same client or Production. Selecting a Project Template affords you time savings for any newly required Project event by pre-loading the item/events from the template.*


3. From the **Productions** module, click the *New Project* button .
4. From **Contacts**, click the *Book Project* button in the upper right.

How to Create a Project:

New Project Entry screen

Projects **CREATE NEW PROJECT**

*Yellow fields are required.

Production **6** **Curb your Excitement** Company Selector **2 - Super Bangin' Studios** 

Client **246** **AlterMedia, Inc. Joel Stoner** Office Phone **800-450-5740** email **joel@studiosuite.com** Client PO# Required Field ☒ **050864**

Balance Due **1,388.75** Overdue 31-60 Days Over **1,388.75** 61-90 Days Over **1,388.75** 91-120 Days Over **1,388.75** 121 Days Over **1,388.75** TOTAL Billed **1,388.75** Year To Date **1,388.75**

Project Name **Studio Suite X Commercial** Episode **101** Language **English** Project # **12006**

Start Time **9:00 AM** End Time **5:00 PM** Event Status **Confirmed** Project Type **TV** Project Status **In Progress**

☒ Show in Calendar ☐ Continuous Events

People

| | Title Name | Filter Names | Phones | email | Add To Contacts | Position | 1 | 2 | 3 | 4 | Library Labels |
|----------|-------------------|--------------|---|--------------------------|-----------------|----------|---|---|---|---|----------------|
| Producer | John Wheeler | | Office 818.888.8880 ex:520 Cell 818.888.5555 Boat | john@studiosuite.com | Add | | | | | | |
| Director | Kenneth M. Miller | | Office Phone 805.791.8273 ex:11 Office Fax | kmmillerca@sbcglobal.net | Add | | | | | | |
| Editor | Andy Engineer | | Office Phone 321.654.9870 | andy@engineer.com | Add | | | | | | |

Item List

| | Studio C | 7/20/2012 | 9:15 AM | | Add | Notes |
|--|-------------------|-----------|---------|--|-----|--|
| | Raymond J. Givins | 7/20/2012 | 9:15 AM | | | Preliminary commercial launch of SSX, National Campaign. |

Allow Release Of Client Material ☐ No ☒ Yes ☐ Cleared for materials release

After you have entered at least the yellow fields, click the NEXT >> button to view scheduled items. You can enter more client information later by clicking on the Client Info tab.

Cancel Project Creation Create Budget ☒ Create Actual ☒ Next >>

Client Terms, Tax, and Discount values are looked up from the Contacts module. Changes made here will only affect THIS project.

SalesPerson **0.00** Over Limit **-1,388.75**

Terms **30 days** Tax Rates **A LA County Tax** **C** **8.75%** **B** **C** **10 % Discount** **C** **-10%**

Rate Card **0 All** Insurance **The Hartford** On File ☒ Insurance Certificate ☒ **Mon, Jan 13, 2014**

Created Thu, Jul 19, 2012 1:30:25 PM by Molly Modified Thu, Jul 19, 2012 3:42:35 PM by Molly

From whichever module you choose to book, you will enter basic information about the project in the **Create New Project** area.

If you create it from the **Production** module, it will inherit some of the basic info about the **Production**.

Production field

A Project can be assigned to a **Production**, but it is not a requirement. Assigning a Project to a Production allows for hierarchal organization, similar to a file folder grouping. Click within the field to select an existing **Production** from the pop-up Production Picker window. For more information about **Productions**, see that chapter of the User's Guide.

Client field

A Project must have a Client of record associated with it so that it can be tracked and invoiced.

How to assign a client to a Project:

1. Click in the yellow **Client** field (to open the contact picker window).
2. Scroll through the list, or type the first few letters of the company or a person associated with the client in the provided field.
3. Click on your client choice (found in the list) one time to enter. Information specific to this client will automatically be entered on the Project page, and additionally in the Financial section below. If the Client does not appear in this window, they may not exist in the **Contacts** module, or they are in Contacts already, but not designated as a Client.

*If your client does not exist in the **Contacts** module:*

1. Click the *Create New Client* button. This will take you to a new record in the **Contacts** module.
2. Enter their information and be sure the **Client** check box is marked so they will appear in the client selector window. Click the *Return to Project* button.

Although commonly named 'Client', this default word can be changed to something more appropriate for your specific type of work. To change this word for an individual Project, click the text default name (Client) next to the yellow field. From the provided pop-up menu, access options such as **Client**, **Account**, **Division**, **Agency**, **Network**, and **Student**. The list can also be edited to add a name of your preference. Select **Edit** and follow the prompt to add to the existing list of names.

NOTE: The default name for this information field is set up in the Main Menu > Settings area.

To complete the client information area, enter the client's **email** address (if they do not already have one entered) and a **Client PO #** if one is provided (this can always be added later). Click the *Required* check-box if applicable to the particular client- doing so saves this status in the client's record in the **Contacts** module.

Project field

Give the project a name in the **Project** field, (this could be the name of the show, service type, or artist, etc). Add any **Episode** information and **Language**, if relevant. The **Start Time**, **End Time**, **Booking Status**, and **Project Type** are automatically looked up from your *Times & Numbers* preferences set in

the **Main Menu Setup** and may be changed here to suit this project.

NOTE: Some Calendar views allow items that are selected to book to have different Start and End Times and Booking Statuses. In those cases, these time and status fields will say “Multiple”. Selecting a new time or status from the pop-up will set all items (that are currently being booked) to the same value.

Adjust the **Project Type** and **Project Status** information. These drop down menus are editable so you can include options suitable for your workflow. Click on the yellow pencil next to Project Status to edit that menu and associated colors.

If applicable, de-select the check-box item **Show In Calendar** to prevent the Project from appearing in the Calendar.

Continuous Events are events that go “around the clock” for the duration of the event. For example, if you rent a piece of equipment on Monday, and it will be out until Friday, that is a *Continuous Event*, because it’s continually gone (unavailable to another booking) during that period. By comparison, if you book a studio room Monday through Friday from 9am to 5pm, and the room was available from 5pm to 9am, that would not be a Continuous Event, because there is a break between each day. This determination affects the Rate calculation, which may be based on the number of hours. Check the **Continuous Events** checkbox if the events you are booking are “Continuous”.

New Feature: Project Name hashtags

When you create a project, a hashtag is automatically assigned to that project that includes the project name, along with the project number. This field is editable. We don’t recommend editing it once the project is created to keep all of the messages relating to this project consistent. Whenever you send a tweet or direct message through Twitter, the hashtag is automatically included. To read about how to send Tweets in Studio Suite, go to “How to send notifications” on page 32-20 in this chapter of the Users Guide.

The screenshot shows the 'Project Name' field with the value 'Everythings Coming up Roses'. A red box highlights this field. A red arrow points from this field to the 'Twitter Hashtag' field, which contains the value '#EverythingsComingUpRoses_12233'. The 'Project #' field also contains the value '12233'.

People fields

Each new project will auto enter your default group of **Titles** (or “rules”) for people working on (or attached to) the project, but who are not necessarily scheduled, such as the Artist, Producer, Editor, Director, Assistant Engineer, etc., as defined in the *Main Menu Setup / Titles* tab.

Depending upon the setting of the **Filter Names** field, clicking (or tabbing) into the **Name** field will show a pop-up list of either all names in the **Contacts** module, or only those with the same title.

How to add People to a Project:

1. Click the black and green *Add* button.
2. Select a title, then their name from the menu; their phone numbers will auto-fill. The names in the menu are derived from people in the **Contacts** module that have the same title.
3. If the person does not exist in **Contacts**, click the **Name** field again and simply type their name. This does not add them to **Contacts**.
4. Click the *Add to Contacts* button in the row (far right) to add this person to the **Contacts** module. If you do so, click the blue *Return to Projects* button to return. For each person, you can choose to have that their phone number **not** be printed on Project and Session print outs by deselecting the '**Include Phone On Print Outs**' checkbox (to avoid celebrity numbers getting into the wrong hands).
5. Define who's name gets assigned to which of the four available positions (1-4) on media label created from this project (from the **Library** module). This can always be adjusted later.
6. Delete a person by clicking the *Trash Can* icon in their respective row.

NEW FEATURE: Item List (on the Create New Projects screen)

This screen now includes the **Item List**, a new box in the lower middle left of the screen showing a list of item selections that you just made in the **Calendar**.

You can add to the list by clicking the + button. New Items will inherit the same time frame as the first item on the list. You can Add "Child" items by clicking on the + button in the row of the "Parent" item.

Financial Section

When the Client is selected, their financial information is displayed in two areas of the window. At the top beneath the client account information you will see fields for the client's financial aging (i.e. **Balance Due** date, amount **Overdue**, **Days Over** date ranges, **TOTAL Billed**, **Year to Date**, etc.). This information is displayed from the **Contacts** module, based in the total of their Invoices.

At the bottom of the window are fields for the client's **Remaining Credit** limit and **Over Limit**.

Client Terms, Tax, and Discount values are looked up from the Contacts module. Changes made here will only affect THIS project.

SalesPerson: Janet Jones

Terms: 60 days

Remaining Credit: [Field]

Over Limit: [Field]

Tax Rates:

| | Tax Rates | Rate | Exempt |
|---|---------------|-------|--------------------------|
| A | LA County Tax | 8.75% | <input type="checkbox"/> |
| B | San Diego Tax | 7.75% | <input type="checkbox"/> |

Discount Rate: 10 % Discount

Rate Card: 0 All

Insurance: The Hartford

On File: ☒ Fri, Oct 10, 2014

Insurance Certificate: ☐

To the bottom right are the **Tax Rates** and the **Discount Rate** for this project. This data is looked up from the Client record in **Contacts**, but may be changed here to reflect only this project, if needed.

*NOTE: For a detailed description about financial information, see the **Contacts** module chapter under the **Financial** tab section in this Users' Guide.*

NEW FEATURE: Create Project additional details

You can now use the **Create Project** screen to create a **Budget** for a Project, the **Actual** Project, or both. You also have the choice to add **Insurance** information for the client, including what company it is with, if it's **On File** and when it **Expires**.

These options are in the **Financial** section of the **Create Project** screen.

Create Budget ☐

Create Actual ☒

Next >>

Insurance

On File ☐

Expires

Insurance Certificate ☐

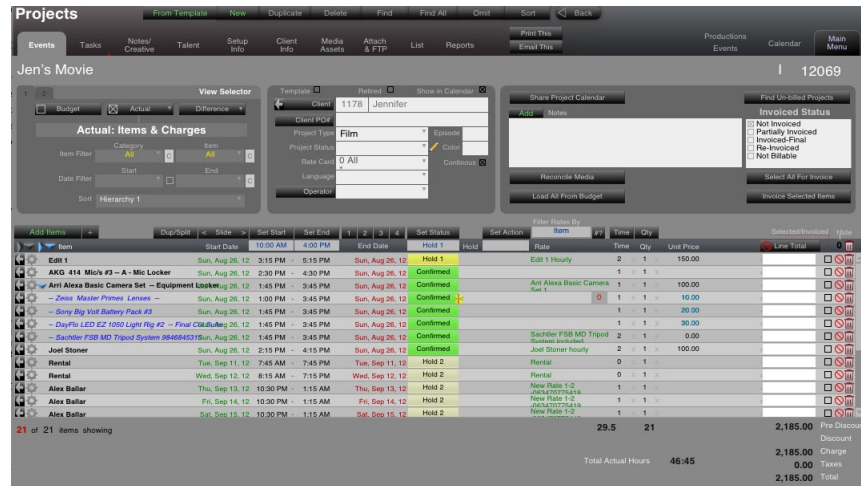
Finishing Booking detail

Only the yellow fields must be filled in before proceeding. Other fields can be filled in later. When you have entered all details, click the **NEXT>>** button on the bottom right of the screen. This does several things:

- Books all of the items you have selected (if any).
- Checks for conflicts.
- Looks up the appropriate Rates (rates) for the items you have booked.
- Creates records in the **Events** module for each item/day that is booked.
- Adds those items to the Calendar.

If you started in the **Projects** module, you will be returned to the **Projects - Events** tab for review of the Project scheduled. If you started in the **Calendar** module, you'll have the option of either returning to the **Calendar** module, or proceeding onto the **Projects** module. For now, let's proceed to the **Projects** module.

Events tab



The *Events* tab is where you view, edit and create all of the specifics about each Event related to a Project. Studio Suite tracks this information with incredible detail from three different perspectives; **Budget**, **Actual**, and the Difference (**Diff**) between them.

A matrix grid of buttons, called the **View Selector** (on the top left) accommodates these perspectives with buttons to reach all 19 views of a Project's events with a single click.

View Selector section

Remember that each item, room, person, or media booked on a Project is it's own Event. Each Event has a multitude of data. The View Selector allows the user to choose which set of data they would like to view for the Events listed on each Project. When choosing a view, keep in mind that you are not looking at different events in each view, but simply different perspectives of the same Events.

NEW FEATURE: Enhanced View Selector & Check Box Indicators

There are now two methods to navigate the different views of the Event data. Choose whichever you feel most comfortable with.

Tab 1 has a grid of "intersection" buttons similar to previous versions. We've added color coding to help alert you as to the view you're on.

Tab 2 provides drop down menus under Budget, Actual and Difference buttons. These buttons also have checkbox indicators that display an x if there is information in that view.

Blue text or buttons means **Budget**, white means **Actual**.

How to use the View Selector:

Tab 1

1. Under the *View 2* sub-tab, chose the button at the intersection that best describes the view that you are looking for.
2. You also have the drop down option to chose additional filters such as: **Item Filter** (by **Item** and/or by **Category**), **Date Filter** (**Start Date** and/or **End Date**) and **Sort** order.

Tab 2

1. Under the *View 1* sub-tab, choose from the drop down lists under '**Budget**', '**Actual**' or '**Difference**'. Note if the box is unchecked in the header for one of those drop down menus, there will be no information displayed.
2. You also have the drop down option to chose additional filters such as: **Item Filter** (by **Item** and/or by **Category**), **Date Filter** (**Start Date** and/or **End Date**) and **Sort** order.

NOTE: More detailed explanations of Budget, Actual and Difference views are described later in this section.

Filtering and Sorting Events

Within each view, you may wish to see only a certain set of events. For example, you may want to change the start time of only people events within a date range.

Below the View Selector, you will find the filtering and sorting functions.

Filtering and Sorting Events: Filtering Events

The **Category Filter** field (on the far left) allows you to view only the events under a certain Category. Click this field to display a pop-up menu containing categories (as defined in the **Main Menu** setup). Select any category to view only those items. For example, selecting the "Room" category will show only the rooms.

NOTE: The Category Filter defaults to ALL when you click the 'C' clear button. This allows a view

of all scheduled resource items in the Project list view.

The **Item Filter** sources individual resource items associated with the previously selected category. For the purpose of an exercise, choose “Rooms” in the category filter then “Avid 1” (or a room of your choice) in the Item filter to view. This would make it easy to apply a global time, date, or status change to a weeks worth of events for the selected item only.

NOTE: *The Items Filter defaults to ALL when you click the ‘C’ clear button.*

You will also find the **Date Range** filter. Click in the start and end fields to choose a date from the pop-up calendar. This lets you show events only within a specified date range. Click the ‘C’ button to clear the date range fields.

You may also use the *Hide* button to remove an individual item from your view. The *Hide* button (a red circle with a line through it) can be found on any view (on the far-right) next to the trash can symbol. To reinstate the hidden items, click the number in the *Hide* box at the top of the column of hide buttons.

Using these three methods to filter your view will allow you to quickly make changes to specific sub-sets of items using the *Dupe/Split*, *Set Start/End*, *Set Status*, *Set Action*, and *Slide*, features, among others (explained later in this chapter).

To reveal all hidden items, press the red number at the top of the Hide function and clear the Category and Date Filters.

Filtering and Sorting Events: Sorting Events

There are a number of ways to sort Events. When sorted by Category, the sort order is derived from the Category Value List as defined in the *Main Menu/Setup/Value List/Categories* tab.

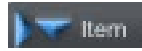
How to sort Events:

1. Click the **Sort** field and select a sort option from the pop-up menu. Sort by *Creation Order*, *Date and Category*, *Category/Item/Date*, or *3 Hierarchies*.
2. You can additionally setup a *Custom Sort* feature in the **Sort** field on the Notes view.
3. Alternatively, select your 1st priority from the Project event list. Click on that major item to access the *Edit Event* window. Within Edit Event, locate the ‘Custom Sort’ field on the right. The **Custom Sort** field is based upon a simple sequential number ordering system. For your 1st priority item, begin with entering 001. Repeat the same steps for your 2nd priority sort item (002), and 3rd priority (003) etc. successively thereafter. Click the *Save Changes* button after each step, and to return to the main Events list. Select ‘Custom’ in the sort field to now show your list items in the prescribed order.

The screenshot shows the 'Edit Event' window with the following details:

- Status:** Confirmed
- Item:** Final Cut Suite
- Event Type:** Record
- Action:** (empty)
- Operator:** (empty)
- Time / Rate:** 1 Final Cut Suite 1
- Custom Sort:** 0001
- Options:** Budget (unchecked), Actual (checked), Continuous (unchecked)
- Qty:** (empty)

4. For items in a hierarchy, there are master expand and master collapse buttons at the top of the portal (expanding or collapsing everything in the portal) as well as individual buttons on each line item to expand/collapse each line item individually.



5. If you have selected one of the hierarchy choices, the black triangles will expand/collapse all listed item's hierarchies and the blue triangles (below) will expand/collapse the 'Also Book' items for each individual item.

The following section in red has not been updated for SSX, some of the information may be inaccurate. It will be updated in the next edition.

Budget and Actual Item views

When an item is booked, it is added to both the Budget and Actual views simultaneously. It's actually the exact same Event "record" with different sets of fields for Budget and Actual. The Actual view is where you make changes to reflect what actually happened.

This view lists general information for each event. The left side of the portal displays the **Item** name, **Start Date**, **Start Time**, **End Time**, and the **End Date**. Next, are the **Set Status**, **Hold**, and **Set Action** fields.

The **Status** refers to the confirmation status of each event. The choice of these statuses and their associated colors are defined in the *Main Menu/Setup/Value Lists/Booking Statuses* tab.

The **Hold** field lists the amount of time that should be held for the item beyond the actual scheduled time. For example, a room may be booked until 5pm, but you may choose to hold the room for an extra three hours to account for tear-down or to leave room for client over-time. Select the amount of Hold time by clicking beneath 'Hold' on the item line. Select the time amount to hold from the pop-up menu (0:30, 01:00, 02:00 or Edit).

The **Action** field allows you to note the basic purpose for each event item, such as Prep, Lighting, Voice Over, or Edit-Off Line.

To the far left, you will see the familiar *Go To* button. Click this button to go to the *Detail* tab of the **Events** module. Here, you will be able to see every detail of a specific Event. You will find the *Go To* button on every one of the Views available in the **Projects** module.

Item - Budget, Actual, Difference views

This view includes factoring of all standard Project monetary events and their subsequent comparison. It includes a new view for *Market* pricing. Market pricing is a tool to prove worth of a project by internally comparing all to actual estimated market value. To view *Market* column, be sure to expand your screen size to make it visible. Place your cursor in the lower right screen corner, click once and drag to appropriate screen-sizing.

Tax/Discount - Budget, Actual, and Difference views

Using the *View Selector*, you can view and edit Tax and Discount Rates as well as their application to a Project and all of its items. The initial Tax and Discount Rates are looked up from the Client's record in the **Contacts** module. They may be edited for this Project at the top of the screen, and per item within

the Items portal.

There are 3 taxes (A, B, and C), each with an Exempt and Apply checkbox as well as a Discount with an Apply checkbox. Pre-Tax totals for each appear on each line item and totals for all items appear at the bottom of the screen. You may hover over each line's total to see a tool-tip which displays the total of the item including taxes.

If you have specified **Reveal Tax after Tax** in the *Main Menu/Setup/Taxes* tab, you will also see (at the top right of the screen) all of the tax-after-tax settings. This is primarily for Canadian users and does not apply in the U.S.

The **Difference** view shows the difference between the Budgeted and Actual Taxes and Discounts.

Expense - Budget, Actual, and Difference views

You can view and edit detailed expense information about each item. This information is pulled from the Rate definition in the **Rates** module, but may be edited here. The auto-entered dollar amounts and quantities can be overridden and turn blue to indicate their values have been modified. Budget and Actual views operate the same way.

Profit/Loss (P/L) - Budget, Actual and Difference views

This is where you can view detailed, calculated Profit/Loss information per line item and per project, presenting the difference between your Expenses and your Charges. Remember, the Difference layout shows the difference between the profitability of the Budget versus the Actual events, not the overall Profit or Loss.

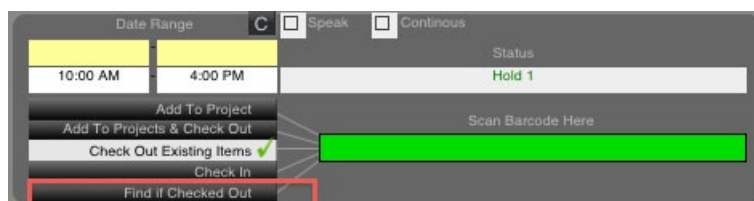
These are “view only” layouts, any editing would be done on the **Budget** or **Actual** views.

Barcode - Budget, Actual views

This view functions as the “Rental Management” area of Studio Suite, and allows you to add, check-out, and check-back-in items to a Project via Barcode. For this to work, the items (equipment, media, etc) must have a Barcode assigned to them *before* they are made Bookable. If the Barcode has been assigned *after* it has been made bookable, you must reset the status within the **Media Inventory** module. Simply toggle the Bookable status off and back on again for each item.

How to add items via barcode:

1. On the view selector click *Barcode* and *Actual*. Notice the **Barcode** control section is on the right, below the **Notes** field.
2. Enter a calendar **Date Range** in the fields provided.
3. Enter a **Start** and **End time** in the fields below the Date Range.
4. Select and click one of the key functions: *Add to Project*, *Add to Projects & Check Out*, *Check Out Existing Items*, *Check In*, or (New button - highlighted in the screen shot below) *Find If Checked Out* in order to complete and determine your direction for the Item entered.



5. Check the Speak checkbox if you want to have the computer speak the details of the item you scan. This is useful if you are standing across the room from the computer and can't see the screen after each scan (Mac only).
6. Specify if the items being scanned are to be booked as Continuous Events (meaning they span several days with no breaks).
7. Scan your barcode Item or manually enter the Item barcode number in the green colored field.
8. Additional barcode item functions include to *Check Out Existing Items* and *Check In*.

NOTE: *your Barcode reader must be set-up to "tab" after it scans each item, which will trigger the booking process. Keep in mind that unlike a retail store scanning system, Studio Suite has to check for conflicts and availability on each scanned item (or for availability of Media). Please be patient.*

When Items are added to a Project via either the *Add to Projects & Check Out* or the *Check Out Existing Items* options, the **Status** is changed to your default version of "Checked Out", (as defined in the *Booking Statuses* area of Calendar). Items with this status will automatically monitor their **End Date**, which essentially becomes their expected **Return Date**. Items which have not been checked back in by the **End Date** will automatically be flagged as (your default version of) "Overdue" Status, and will be included in log in notifications, and searches for Overdue Items. These items (and Projects that contain them) will also have red "Overdue" or "Due Today" text indicators.

The *Print This* button at the in the header of this view prints a rental pull sheet, including barcodes, serial numbers, weights, and replacement values (as specified in the **Equipment** module).

Assigns View

This view displays the *Assign* button in the portal, allowing you to hierarchically assign certain resource or equipment items to others in a parent/child style relationship. This can be useful in a number of scenarios:

- A single project has two or more rooms booked in your facility at the same time and you need to assign people and equipment to specific rooms.
- You have given a "3-day package" rate to a client that includes the Room, Person, and a piece of Equipment. They are all booked for 3 days in a row, totaling 9 separate events (and maybe more), but you want the invoice to only have one item - the Package Rate. By assigning all of the separate items to the Package Rate item, you can collapse that "parent" item and all the separate "children" items will temporarily disappear from view. The Package Rate item will display the sum of all of the individual item charges. This value can also be overridden by entering a different **Unit Price** for the Package Rate.

How to assign items to other items:

1. Click the *Select* button for an item you would like to make the "child" item. You may select multiple items by holding Command (⌘) while clicking the second item on a Mac computer or CTRL + click on a PC.

- Click the *Assigns to Me* button for the parent item of which you would like to assign the selection. This will put the child items underneath the parent item and indent them.
- The parent item will then have an expand/collapse triangle next to it, allowing you to expand or collapse those related items.



- De-assign a child by clicking the *De-assign* button, which will put it back in it's natural sort order.

NOTE: You can not create hierarchies for items imported from Studio Suite 5

Media view (or Reconcile Media)

Although media can be booked or added to a project in the same way as any other kind of item, it is handled slightly differently in the background. Since "media" is a replenishing resource and not a single item, there is not a conflict check. However, you do need to make sure that there is enough in stock to fill your booking. You will get a dialog box message telling you so if you ever book more than you have in stock.

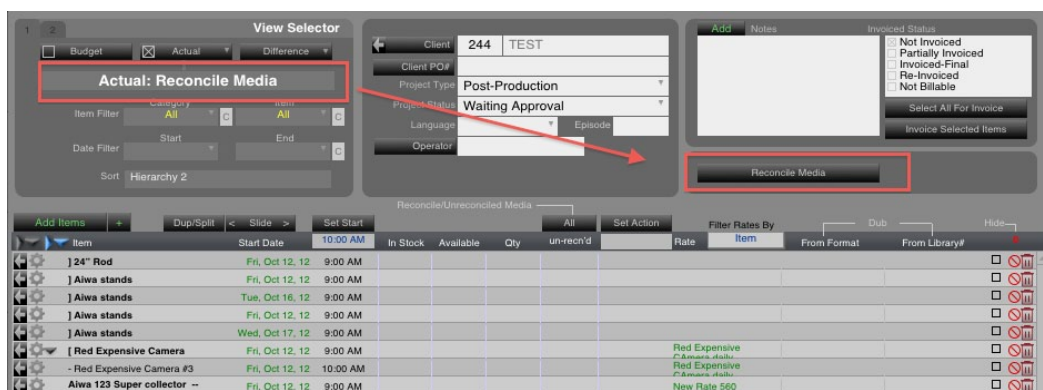
When one or more pieces of Media are added to a Project, they are put on reserve in the **Media Inventory** module and become unavailable for other projects. The media is on reserve until it has been reconciled, Media cannot be invoiced until it has been reconciled, unless you have de-selected the reconcile media checkbox in **Main Menu / Setup / Module Prefs / Media Inventory**.

When one or more pieces of Media are added to a Project, they are put on reserve in the **Media Inventory** module and become unavailable for other projects. The media is on reserve until it has been reconciled, Media cannot be invoiced until it has been reconciled, unless you have de-selected the reconcile media checkbox in **Main Menu / Setup / Module Prefs / Media Inventory**.

The Media view allows you to manage this entire process. For each kind of media booked, it shows the current quantity **In Stock**, how many are **Available** (not reserved), the **Quantity** to be used on this project, and the **Reconciled** status of each (red numbers are un-reconciled). Reconcile each item by clicking the red number, or reconcile all un-reconciled media by clicking the *All* button at the top. The number will disappear once the media is reconciled.

Media view: Reconcile Media button

In the Media view you have the option to collectively reconcile all Media contained within the list in one function step.



Notes view

This view displays item notes. You may enter notes about an item directly within the notes field of the list. This view also allows you to view and edit the client PO # for each item, as well as the custom sort.

Modify view (or History view)

This view displays information about when and by whom an item was created/edited.

NEW FEATURE: Go To button Audit Log tool tip

Audit Log is a new feature in Studio Suite X and one of the ways it can be accessed is by hovering over the *Go To* button in the **Projects**, **Productions**, **Invoices** (on line items), **Events** (on line items), and **Library** (on the *Titles* sub-tab) modules.

When you hover your cursor over the *Go To* button, a log of who made a change to the record belonging to the *Go To* button along with what change they made and when they made it. This is a great way to maintain accountability as well as a handy short cut helping you know where to direct your questions about the record.

Client/Project detail section

To the right of the view selector, there are some Client/Project detail items:

The *Client PO#* button can be used to apply the listed PO only to the visible events. This can be helpful when a single Project has multiple PO numbers. Tip: Use the filtering features to apply a PO only to certain line items.

Adjust the **Project Type** and **Project Status** information as appropriate. Click the pencil icon to edit available preset statuses and associated colors.

Project colors are looked up based on the Project status, however you can also select a separate color if needed. From the pop-up palette, choose a color scheme to have the Project be easily identified in the **Productions** module view mapping.

Select the **Language** of choice related to the Project.

New: The **Operator** field lets you determine the default operator for new line items.

Template, **Retired** check boxes are provided to include the Project created in the *Template* list for future new projects. Check *Retired* if the order has been completed and is no longer of use. Retired projects are not deleted, they just can be easily removed from list views.

If applicable, select the check-box item *Show In Calendar* to have the Project appear in the Calendar.

New: The **Rate Card** field lets you select/adjust the Rate Card appropriate for this preset. See the **Rates** module Chapter for more on Rate Cards.

Adding Items

To add a new item from the *Project Events* tab in **Projects** module, the **Budget Items** or **Actual Items** view, select the black and *Add Item* button. This will take you to the Add Item window, where you can select which items you want to add to the project on what dates.

NEW FEATURE: Rate, Quantity, Time and Action fields on Add Items screen

New to the **Add Items** screen are options to specify **Rate**, **Quantity**, **Time** and **Action**. On this screen the rate card can also be changed. When you add an item, a default **Rate**, **Time**, **Quantity** and **Action** will fill into their respective fields. However they are editable, if you want different values. To see more about the crucial difference between **Time** and **Quantity**, visit page 31-22.

| Filter Category | Filter Sub-Category | Find Item / Barcode | Filter Resource by Group Permissions Budget Preset | Quantity | Rate | Start | End | Status | Rate Card | Recall Previous Selections | Save |
|-----------------|---------------------|---------------------------------------|--|----------|------|---------|---------|-----------|-----------|----------------------------|------|
| Equipment | Super collector | Alwa 123 Super collector #3 -- Audio | | | | 9:00 AM | 5:00 PM | Confirmed | 0 All | | |
| Equipment | Adapter | Alwa sdd Adapter #4 -- Foley | | | | | | | | | |
| Equipment | | Alwa stands | | 30 | 30 | 9:00 AM | 5:00 PM | Confirmed | | 1 | 5 |
| Equipment | Accessory | Alwa Super Cal Accessory | | | | | | | | | |
| Equipment | Mic/s | AKG 414 Mic/s #3 -- A - Mic Locker | | | | | | | | | |
| Equipment | Mic/s | AKG B 112 Mic/s #1 -- Managers Office | | | | | | | | | |

How to add a new item from the Project Events tab:

1. Click the **Add Items** button, to see the add items screen.

| Filter Category | Filter Sub-Category | Find Item / Barcode | Filter Resource by Group Permissions Budget Preset | Quantity | Rate | Start | End | Status | Rate Card | Recall Previous Selections | Save |
|-----------------|---------------------|---|--|----------|------|---------|---------|-----------|-----------|----------------------------|------|
| Equipment | Super collector | Alwa 123 Super collector #2 -- Audio 1 | | | | 9:00 AM | 5:00 PM | Confirmed | 0 All | | |
| Equipment | Super collector | Alwa 123 Super collector #3 -- Audio 1 | | | | | | | | | |
| Equipment | Adapter | Alwa sdd Adapter #4 -- Foley | | | | | | | | | |
| Equipment | | Alwa stands | | 30 | 30 | 9:00 AM | 5:00 PM | Confirmed | | 1 | 5 |
| Equipment | Accessory | Alwa Super Cal Accessory | | | | | | | | | |
| Equipment | Mic/s | AKG 414 Mic/s #3 -- A - Mic Locker | | | | | | | | | |
| Equipment | Mic/s | AKG B 112 Mic/s #1 -- Managers Office | | | | | | | | | |
| Equipment | different | Alwa something different | | | | | | | | | |
| Equipment | Collection | Alex Super Collection | | 6 | 6 | | | | | | |
| Equipment | Collection | Alex Super Collection #1 | | | | | | | | | |
| Equipment | Collection | Alex Super Collection #2 | | | | | | | | | |
| Equipment | Collection | Alex Super Collection #3 | | | | | | | | | |
| Equipment | Collection | Alex Super Collection #4 | | | | | | | | | |
| Equipment | Collection | Alex Super Collection #5 | | | | | | | | | |
| Equipment | Collection | Alex Super Collection #6 | | | | | | | | | |
| Equipment | Amplifier | Ampeg 7102 Amplifier digital | | | | | | | | | |
| Equipment | stereo/hydr | Aphex output stereo/hydr -- Truck 2 SNF | | | | | | | | | |
| Equipment | Case | Aphex Onw Case #1 -- Avid 2 SNF | | | | | | | | | |
| Equipment | Case | Aphex Onw Case #2 -- Avid 2 SNF | | | | | | | | | |
| Equipment | Case | Aphex Onw Case #3 -- Avid 2 SNF | | | | | | | | | |

2. The date fields at the top will be set to Today's date. You can use one of the three buttons on the top to set the date as they indicate: **First Date of Project**, **Last Date of Project**, and **Last Date of project +1**.
3. You can also use the *Start Date* and *End Date* arrow buttons to scroll forward or backward, or click in the **Date** fields to edit them. It is very important to select the start and end dates prior to selecting an item. Please see below for information about the **Continuous** checkbox.

4. Once you have chosen a date, select the **Start** and **End** times for the Event and set the booking **Status**. Additionally, there are default start & end time ranges within the 4 selectable buttons (1,2,3,4) above the time fields (see more on *Quick-Entry Time Buttons* below). These values are preset within the *Main Menu/Setup/Modules/Projects* area.
5. At the top of each column you can use the **Category** (menu), **Sub-Category** (menu), and **Item** (text) filter fields to narrow the item list to what you are looking for. Sort each column alphabetically by clicking the underlined column names.
6. You can also use the **Budget** field to filter for a specific **Budget Code** from the **Budgets** module, and the **Preset** field to view items within selected Calendar Presets.
7. When **Media Inventory** items are shown, their current **In Stock** and **Avail.** (Available) amounts are displayed.
8. To select an item to book, simply click its name. The **Item** will highlight and the **Times** and **Status** will automatically fill in (the row will turn to the status color selected).
9. Click additional items as needed, or edit the dates to add bookings on different days.
10. Once you have selected all of the items you wish to add, click either the *Add To Project* button, or the *Add To Project (without dates)* button. This will book the item on the Project you specified, and drop you off in the **Projects** module.

Information about how adding new items that are in Pools or Collections will be added in the next edition.

Continuous checkbox

This checkbox, located between the Start and End date, governs how Studio Suite handles event that span multiple days.

For example, if you are renting a piece of equipment to be booked for a range spanning 5 days (from 9am on Monday, around the clock continuously to 5pm on Friday), you would select the Continuous checkbox. This would appear on a Project as a single line item, so it would not be possible to enter details about any particular day.

Alternatively, if you are booking a studio from 9am to 5pm on Mon., Tue., Wed., Thur., and Fri. you would NOT check the Continuous checkbox, as the studio is actually available starting at 5 PM each day, until 9am the next morning. This would appear in the Project as 5 separate Events, allowing you to document different details about each day.

Recall Previous Selections button

At the top right is a *Recall Previous Selections* button. This will recall the last items you selected, as indicated by the check marks on the right side of each item. Make sure to specify the date or time prior to clicking this button.

Create New Item button

If you need to create a new item (that's not a Room, Equipment, Person, or Media), clicking this black and green button at the bottom left will present you with a **Create New Item** screen, where you can create new items as needed. If it's a Room, Equipment, person or Media Item, it should be created in those respective modules.

Edit Event Window

The Edit Event Window will appear in any of the above views when you click on the **Item**, **Dates**, **Time**, or **Status** field. This is the same window that appears when editing events from the **Events** and **Calendar** modules and The **Main Menu**. Use this window to note any changes to the Event. You can not close this window. You must *Save Changes* or *Cancel* the changes.

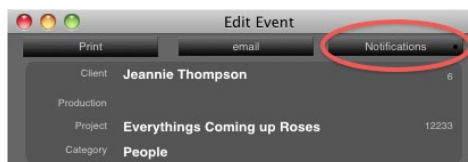
NOTE: If you change an item, the Rate that was previously assigned to that item, will remain until you intentionally change it (so as not to immediately change an existing price if you have to bump somebody into a different room).

| Title/Function | Name | Start | End | Budget | Actual |
|------------------------|-----------------|----------|----------|--------|--------|
| Producer | James P Johnson | | | | |
| Editor | Ego Stroker | | | | |
| Director | | | | | |
| Same Project, Same Day | | | | | |
| -- Eddie Editor | | 10:00 AM | 12:00 PM | | X |
| -- Lights | | 10:00 AM | 12:00 PM | | |
| Avid 2 | | 1:00 PM | 3:00 PM | | |
| -- Eddie Editor | | 1:00 PM | 3:00 PM | | X |
| -- Lights | | 1:00 PM | 3:00 PM | | |

The **Edit Event** window features Print, email, and Notification functions within the view. Click the provided buttons at the top of the screen to print a record of the event edit, email a pdf to the client if requested or send a notification to one or more people.

New Feature: Notification button

The *Notification* button is at the top of the **Edit Events** window. Once you click it, you can send SMS messages, Prowl notifications, tweets, and direct messages to twitter accounts, as long as you set up the recipient's pertinent information in the **Contacts** module. You can send notification from any place that you can open the **Edit Events** window from: **Main Menu Dashboard** (by clicking on an event in the *Events* section at the bottom of the *Today* tab), **Events** module, **Projects** module and also from a Task in the **Tasks** module.



How to send notifications:

1. Once you have clicked the *Notifications* button at the top of the **Edit Events** window, another window will pop up with C: The Client, P: The Project and T: The time already filled in. After that text, type your message. For Twitter messages, a hashtag for the Project will be included automatically. Also, if your message is over 140 characters, it will be split up to fit.
2. You can choose to either send immediately, by clicking the *Send Now* button or choose a time in relation to the Event, i.e. 10 minutes before, 1 hour before, 1 day before, etc.
3. On the tabs below, you choose which way your message will be sent, SMS, Prowl, or via Twitter (DM checked means direct message, to send as a tweet, unclick DM by each name). All eligible recipients will appear in a drop down menu. To choose which of your companies to send the message from click in the field **Twitter From**. The number of recipients will be reflected on the tab.
4. Click OK when you are finished. If you didn't pick a time (Send Now or When Before), you will be given an alert to remind you to choose when your message will be sent.

The screenshot shows the 'Notifications' window with the following elements:

- 1**: Points to the 'Event Name' field containing 'Studio B'.
- 2**: Points to the 'When Before' dropdown menu set to '10 Minutes'.
- 3**: Points to the 'Twitter' tab, which is selected and shows 3 recipients.
- 4**: Points to the 'OK' button at the bottom right.

Other visible text includes: 'Event Date: 10/17/2012', 'Start Time: 9:00 AM', 'Description: C: Jeannie Thompson, P: Everythings Coming up Roses, T: 9:00 AM - 5:00 PM, Don't forget to take off your shoes before entering the studio.', 'Send Now', 'Priority: 0', 'Send Message: 10/17/2012 8:50 AM', 'Twitter From: 2 - Super Bangin' Studios Studio_Suite', and a list of recipients: Mollylogic, AndrewEngineer, and joelstoner.

This screenshot shows the 'Notifications' window with the following elements:

- 'Event Date: 10/17/2012', 'Start Time: 9:00 AM'.
- 'Event Name: Studio B'.
- 'Description: C: Jeannie Thompson, P: Everythings Coming up Roses, T: 9:00 AM - 5:00 PM, Don't forget to take off your shoes before entering the studio.'.
- 'Send Now' button.
- 'When Before' dropdown set to '10 Minutes'.
- 'Priority' set to '0'.
- 'Send Message' field showing '10/17/2012 8:50 AM'.
- Three tabs: 'SMS' (2), 'Prowl', and 'Twitter' (3). The 'Twitter' tab is selected.
- Under the 'Twitter' tab, a list of recipients: 'Byron Martinez' and 'Paulmichael Contreras'.
- 'Delete' and 'OK' buttons at the bottom.

Edit Event window: bookable participants

At the bottom of the **Edit Event** window view is a section holding a group of available staff linked to the Project. To officially add one or all of the available people or positions to the Project click the *Book* button. Once Booked, the person/s will now appear on the updated Project event list on the same date and time as the Event being edited.

Editing Rates

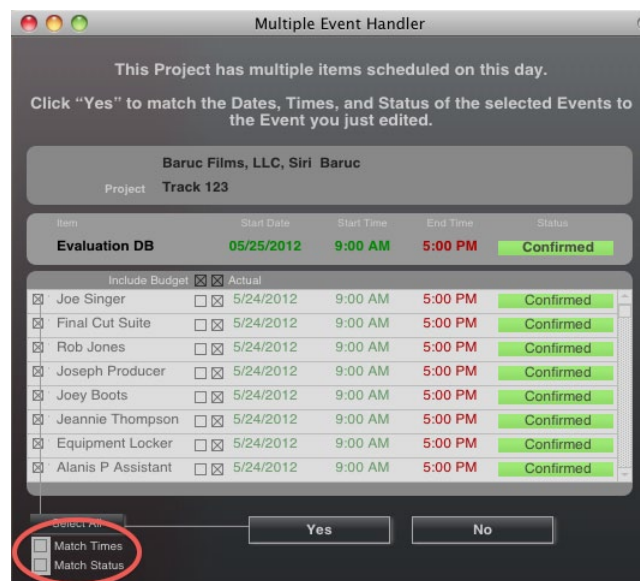
The **Rate** field displays the name of the rate that you are charging for each event. Rates are held in the **Rates** module, and can be created either there, or in the *Rates* tab in the **Rooms**, **Equipment**, **Contacts**, or **Media Inventory** modules. Each bookable item can have a Default Rate, which will automatically be used when an item is booked. See the **Rates** chapter for more information on creating Rates.

Multiple Event Handler window

If you change certain details (specifically, Date, Time, Item, or Status) of an Event for a Project that has other Events scheduled on the same day, you will be presented with the Multiple Event Handler window. This window allows you to match the change to other associated events on that Project, in one step.

How to use the Multiple Event Handler window:

1. By default, all items are selected. De-select them as needed, so only the items you want to match the change to are selected.
2. You can view only Budget or Actual items by checking the appropriate checkboxes.
3. You can specify to match only times or statuses with the checkboxes in the bottom left (See circle in the screen shot).
4. To match the change to the selected items, click the Yes button.
5. If you do NOT want to match the change to the other items, click the No button.



Send to Actual button/ Load All From Budget button

This button is actually the same button with appropriate labeling for each screen view. It will transfer all information from all currently visible items from the Budget side to all currently visible items on the Actual side (Item, Dates, Times, Quantity, Multiplier, Rate, Status, Action, Hold, Notes).

The following section in red has not been updated for SSX, some of the information may be inaccurate. It will be updated in the next edition.

Duplicate Item (Dup) button

Displayed on each view, you will find the *Duplicate (Dup) Item* button next to the black and green *Add Item* button. Use this button to duplicate any group of events listed. A dialog will appear asking if "You want to duplicate the visible items below starting on a new date". If you click "Yes", you are presented with a calendar to select a new date for the duplicated item/s. Click OK to complete the process.

NOTE: Duplicating a parent item will not automatically duplicate its children. You must select the children to be duplicated as well. Duplicated child items will need to be manually re-attached to the parent items using the Assigns screen.

Slide button

You will find the *Slide* button to the right of the *Dup* button. This button allows the user to change the date on a number of scheduled Events all at once. Just like the *Set-All* buttons, this will apply to all visible events. Pressing the slide button will summon a window presenting the options for the slide feature. You may move all dates earlier or later by a set number of days, or you may move the Start Date to a specified date. You may select certain days of the week to be skipped, such as Saturday or Sunday, by clicking their respective check-boxes.

Set buttons

On the top of the information portal for each View, you will find a number of *Set* buttons. Specifically, these are called the *Set Start*, *Set End*, *Set Status*, *Set Action* and the *Set Quantity* buttons.



Directly beneath each of these buttons, you will find a field allowing you to enter an appropriate setting. *Set Status* relates to the event status. *Set Action* applies what is being done on that event. Once entered, pressing the appropriate button will cause every event listed to change to the currently selected option. Doing so also simultaneously checks for conflicts. Be aware that this change will only affect currently visible Events showing. Use the *Category*, *Item*, and *Date Filters*, and *Hide* buttons to view only the events you wish to change. If you change the end time of events to cross midnight, Studio Suite will calculate the new end date automatically so you don't have to worry about changing the End Date unless it goes longer than 2 days.

If you are adjusting the times, you may need to set the end time first, to avoid the start time being later than the end time.

Quick-Entry Time buttons

In a number of places within the **Projects** module you will see a group of four gray, number buttons (1-4). These are the *Quick Entry Time* Buttons. Use these to quickly recall four different time settings that you most commonly use. The settings for these are found under **Main Menu/Setup/Module Prefs/Projects**.

Conflict flags

If an item is scheduled on more than one project at the same time, a scheduling conflict exists for the use of that item. See further description on conflicts next.

Conflict icons



This "Potential Conflict" icon only appears on the **Add Item** screen, and indicates that the item has

at least one other booking on that day. This icon will change to one of the previous two icons if selecting it creates an actual conflict or “touching” event.



A red **X** with a yellow background indicates that a hard conflict exists for the listed item.

To source the Project/s causing the conflict, “hover” your cursor over the conflict icon. A prompt will appear providing the Project number involved with the conflict. Clicking on the conflict icon in the Projects event screen will bring you to a found set of the Projects containing the conflicts, so you can sort and reschedule all accordingly.



This icon has 2 green arrows pointing to a red line. Two events are merely “touching”, but not overlapping.

Hold column

The **Hold** column allows you to schedule an extension of the line item time duration. A pop-up menu has selectable time increments of 0:30, 1:00, 2:00, 4:00 or it can be editable to your choice of time required.

Filter Rates By

To review as described earlier within Editing Rates, the pop-up menu of Rates may be filtered by Rate Card, Item, Category, Client or All using the *Filter Rates By* field at the top of the Projects list.

Time

In previous versions of Studio Suite, the field called **Qty** referred to start and end times that Studio Suite calculated based on the Rate used for the event. This field works the same way, it's just called **Time** now instead. There is still a field called Qty, however it has a different function and is described in the next section.

Some Rates, such as ‘lockout rates’, are ‘One Time’ or ‘daily rate’, meaning that even if someone works 10 hours for \$1000, it still counts as a quantity of 1 when it comes to calculating the price. The **Time** field will allow you to override the calculated time if you need to make adjustments.

When overriding a time, a dialog will appear asking you for the **Charge Time** and the **Expense Time**. This is useful when the cost to you is measured differently than what you charge your client (i.e. the engineer charges you for setup time but you do not charge the client, or you had to waste some media that you shouldn't charge the client for).

Clearing the override will reinstate the original **Time**.

Qty (Quantity) **New**

Because of the addition of Pools and Collections, **Qty** now refers to the quantity of that exact item that is being reserved for this project. Because a Pool will track how many generic items are available of a certain resource, when you are adding that item to a project, you can now see exactly how many will be available at that date and time, and then reserve them.

Example

You need three production assistants from 10:00 am to 3:00 pm, but don't need to schedule anyone specific. The **Time** field will automatically fill in 5, for five hours. To schedule multiple Production Assistants at that time you would modify the number in the **Qty** field for an item called "Production Assistant" (instead of scheduling three specific guys; Joe Shmoe, Bob Schwab and Tom Thumb).

| Item | Start Date | Set Start | Set End | End Date | Set Status | Set Action | Filter Rates By | Rate | Time | Qty | Unit Price | Line Total |
|--------------------------------|----------------|-----------|---------|----------------|------------|------------|-----------------|------|------|-----|------------|------------|
| DVD 1-10 | | 9:00 AM | 5:00 PM | | Hold 1 | | | | | 1 | | |
| -- Pinnacle Micro 650 meg DTRS | | 9:00 AM | 5:00 PM | | Hold 1 | | | | | 1 | 0.00 | |
|] Aiwa stands | Tue, May 8, 12 | 9:00 AM | 5:00 PM | Tue, May 8, 12 | Confirmed | Voice Over | | | | 1 | 5 | |
| Production Assistant | Tue, May 8, 12 | 10:00 AM | 3:00 PM | Tue, May 8, 12 | Confirmed | | | | | 5 | 3 | 20.00 |
| | | | | | | | | | | | | 300.00 |

Event Viewer section: Line Total button

The *Line Total* button allows you to hide or show the **Unit Price** and **Line Total** field from the project printout. This is useful if you want to create a printout for a client that only shows a total for the entire project, without revealing individual line item prices. Even when the **Line Total** is hidden, the **Unit Price** remains visible in the screen view so that you may edit it.

- To hide all line items prices as a group (entire column), click the *Line Total* button.
- Click the *Line Total* button once again to reinstate the totals group view.
- To remove or reinstate any single line total item, click on that field.
- Because some items may have no price specified, you can tell if the row is visible if the "=" sign is visible. If the = sign is hidden, the price is hidden.

NOTE: Only line items with Unit Prices entered will have viewable Line Totals.

Event Viewer section: Deleting Items

Click the trash can icon on the far right of each item to delete it. If you are deleting a Parent item (with sub-items), it will not delete those sub-items. Each item must be deleted individually.

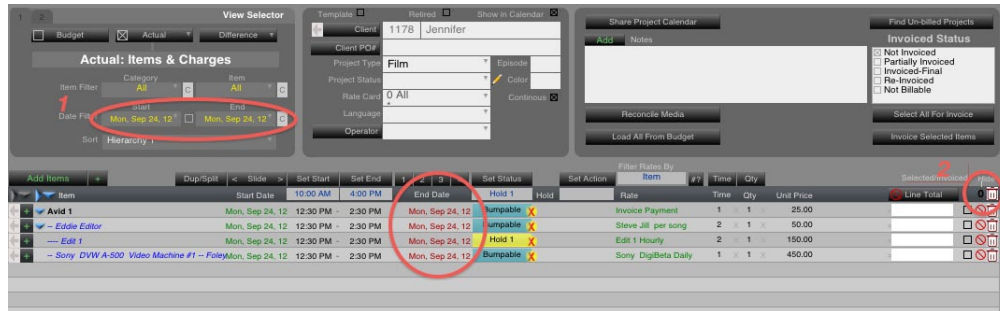
New Feature: Deleting Multiple Items

The far right column of the Add Items section shows a row of Trash Can buttons. Each button, when clicked will delete the item in that row. A warning will come up asking if you are sure that you want to delete that item. You can hold down the control key and click the trash can of a line item and it will delete without giving you the warning.

What is new about this is the Trash Can button at the top of the column - it will delete all the items.

| Item | Start Date | Set Start | Set End | End Date | Set Status | Set Action | Filter Rates By | Rate | Time | Qty | Unit Price | Line Total |
|-----------------------------|-----------------|-----------|---------|-----------------|------------|------------|-----------------|------|------|-----|------------|------------|
| Edit 1 | Sun, Aug 26, 12 | 3:15 PM | 5:15 PM | Sun, Aug 26, 12 | Hold 1 | | | | | 1 | 150.00 | |
| AKG 414 Mic/3 - A - Mic | Sun, Aug 26, 12 | 2:30 PM | 4:30 PM | Sun, Aug 26, 12 | Confirmed | | | | | 1 | | |
| Arri Alexa Basic Camera Set | Sun, Aug 26, 12 | 1:45 PM | 3:45 PM | Sun, Aug 26, 12 | Confirmed | | | | | 5 | 100.00 | 160.00 |
| Joel Stoner | Sun, Aug 26, 12 | 2:15 PM | 4:15 PM | Sun, Aug 26, 12 | Confirmed | | | | | 2 | 100.00 | 200.00 |
| Rental | Tue, Sep 11, 12 | 7:45 AM | 7:45 PM | Tue, Sep 11, 12 | Hold 2 | | | | | 0 | | |
| Rental | Wed, Sep 12, 12 | 8:15 AM | 7:15 PM | Wed, Sep 12, 12 | Hold 2 | | | | | 0 | | |
| Alex Ballar | Thu, Sep 13, 12 | 10:30 PM | 1:15 AM | Thu, Sep 13, 12 | Hold 2 | | | | | 1 | | |
| Alex Ballar | Fri, Sep 14, 12 | 10:30 PM | 1:15 AM | Fri, Sep 14, 12 | Hold 2 | | | | | 1 | | |
| Alex Ballar | Sat, Sep 15, 12 | 10:30 PM | 1:15 AM | Sat, Sep 15, 12 | Hold 2 | | | | | 1 | | |
| Alex Ballar | Sun, Sep 16, 12 | 10:30 PM | 1:15 AM | Mon, Sep 17, 12 | Hold 2 | | | | | 1 | | |
| Alex Ballar | Tue, Sep 18, 12 | 10:15 PM | 1:45 AM | Fri, Sep 21, 12 | Hold 2 | | | | | 1 | | |
| Avid 1 | Mon, Sep 24, 12 | 12:30 PM | 2:30 PM | Mon, Sep 24, 12 | Bumpable | | | | | 1 | 25.00 | 25.00 |
| Eddie Editor | Mon, Sep 24, 12 | 12:30 PM | 2:30 PM | Mon, Sep 24, 12 | Bumpable | | | | | 2 | 50.00 | 100.00 |
| Edit 1 | Mon, Sep 24, 12 | 12:30 PM | 2:30 PM | Mon, Sep 24, 12 | Hold 1 | | | | | 2 | 150.00 | 300.00 |
| Sony DWW A-500 Video | Mon, Sep 24, 12 | 12:30 PM | 2:30 PM | Mon, Sep 24, 12 | Bumpable | | | | | 1 | 450.00 | 450.00 |
| | | | | | | | | | | 6.5 | 100.00 | 650.00 |

Another convenient use of the new Trash Can button is when you are deleting all of the items for a specific day. You can do a date range filter and then use the delete all Trash can button.



How to make an Invoice from a Project:

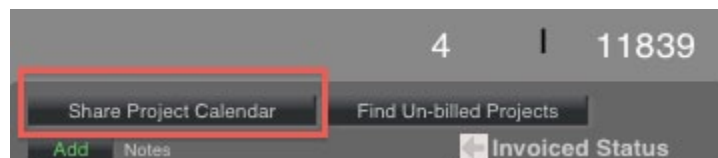
1. Click the *Select All for Invoice* button above to select all visible items. Shift-clicking on this button will de-select all previously selected items. This can be used effectively with the filtering and hide functions described earlier.
2. On the right side (next to the *Hide* button) is the **Selected/Invoiced** checkbox. Clicking each box will place an "X" in it to signify that it is ready to be invoiced. Click individual items again to deselect them.
3. Note: in the Rate definition (in Rates) you can specify that a Rate is "Not Normally Invoiced", which means that when you click the *Select All for Invoice* button, items using such Rates will not be selected for invoice. This function is useful when you have people or equipment that come with a room booking that needs to be scheduled (but you do not bill for them). You can override this "not" selection by manually selecting these items.
4. To create the invoice, click the *Invoice Selected Items* button. You will be asked if this is a Final or Partial invoice for the Project. Studio Suite will then proceed to export the data to Studio Suite's **Invoice** module. Items in each Project that have been invoiced will now appear with red X's in the *Project/Events* tab.

Your response to the Final/Partial question will be indicated in the **Invoiced Status** field (which you may also override). You can do a Find in this field (by clicking the *Find* button in the Status Bar) to find all "Not Invoiced" or "Partially Invoiced" projects. A new option item for Studio Suite X within the *Invoice Status* section includes a checkbox for 'Not Billable'. Select if the Project is not billable; this will exclude it from the search results when clicking the *Find Unbilled Projects* button.

*NOTE: For more information on Invoices, read the **Invoices** chapter of this User's Guide.*

Share Project Calendar button

The Share Project Calendar button syncs the Project event item to Google Calendar, iCal (Mac), or Outlook (PC) calendar programs. you can determine which items are synced in the Calendar Settings area.



Print This button

At the top of the screen under the function bar is the Print This button. Through your standard operating system it allows the printing of the current Project Event record. You can also print out a current Project Event record with emphasis on a particular item.

How to print, email or SMS message a Project Event record (with emphasis on one item):

1. One the Events tab in the Add Items section, click on the Item name, the Start Date, the End Date or the Event Time.
2. A new window will pop up that has three buttons at the top; *Print*, *Email* or *SMS Message*.
3. Make sure all of the details for this item are correct.
4. Chose which medium you are sending this information: Print, Email or SMS Message.
5. Follow the prompts.

Email This button

Beneath the Print This button is the Email This button. Click the button to begin the process.

How to email the current Project Event record:

1. The standard operating system Page Setup dialog will appear once you have clicked the Email This button.
2. Follow the steps to your email client program to send the Project Event shown on the screen.

Tasks tab

This tab allows you to create tasks for this Project. You can create Task Groups, such as “Edit Session”, “The Shoot” or “Intern’s Tasks” and load them quickly into the task list.

How to create new “Task” items:

1. Click the black and green *New* button to the far left.
2. Enter the **Task** needed to be completed in the text field.
3. Click the **Priority** field and enter a priority ranking (i.e., 1, 2, 3, etc.) (Optional)
4. Click the **Status** field and select a status from the drop-down menu (i.e. Not Done, In Progress, Completed, etc.)
5. Click the **Due Date** field and select a date from the pop-up calendar.
6. Click the **Time** field and enter a time when this task should be completed.

Additionally, complete other optional task details such as the amount of **Days**, and estimated **Hours** to complete. Tasks can also be **Assigned To** the proper personnel from a provided pop-up window.

Information on the Assigned to Window will be forthcoming in the next edition.

Tasks will appear on the Main Menu for the people they are assigned to, and also in the Calendar on the Due Date.

If you wish to permanently delete a task, click the *Trash Can* icon to the far right.

Set Default Tasks sub-tab

The *Set Default Tasks* sub-tab allows you to create default Task Groups that you can assign quickly in the *Tasks* sub-tab. This can save time if you regularly assign the same set of tasks to many projects.

The left portion of this screen allows you to create, edit, and delete Task Groups. Click the *New* button to create a new Group. You may then name the group. You can also delete task groups using the *Trash Can icon* or edit the name by shift-clicking the **Name** field.

Once you have created a task group you may edit the contents of the group on the right side of this screen. Use the *New* button on the right to create new tasks within the group. Just as with the *Tasks* sub-tab you may set names and priorities to each task.

How to assign a task group to a Project:

1. Return to the *Tasks* sub-tab.
2. Click the field next to **Load Task Group**. A pop-up menu will appear listing your default Task groups. Choose a Task group from the drop-down menu. Click the *Load Task Group* button. Each priority task will be listed (in-order) in the list below. If you only want ONE of these priority tasks to appear, click the field next to *Add This Task*, select a Task then click the *Add This Task* button.
3. Add the **Due Date** and **Time** to the new task, and assign it to a person or Group.
4. Click the *Go To* button on any task line item will direct you to the **Tasks** module for more specific detail and Task management.

Status Colors sub-tab

The *Status Colors* sub-tab allows you to assign a color to your default task Status Names. The sub-tab also has a edit function to add or delete Status names.

How to edit the color and/or rename Status names:

1. You must first have at least one task in a preset to be able to edit task status names and colors.
2. Click the *Edit* button on the left. From the system provided prompt and list field, type a new *Status Name* at the bottom of the text field. Finish with *OK*.
3. Remove an existing Status name from the list by highlighting the item and then click delete. Finish with *OK*.
4. In the *Status Colors* sub-tab, double-click within any color field to assign or change the color for the just created Status name or Status name of your choosing.

Notes / Creative tab

This tab allows you to add notes and creative direction for the Project.

How to add notes and creative directions to a Project:

1. Click the *Add* button. This adds a date and time stamp to the field.
2. Type your notes in the field.



Talent tab

The *Talent* tab shows all of the Talent for each event in the entire Project. Actors, Musicians, Vocal performers, Voice Over, Production Stunt persons, etc. are in the Talent description to be included in the Project.

Note: In order to utilize the full functions of Studio Suite X, you should create a new contact entry for all talent being booked.

Talent that is added in the **Projects** module is added generically to the Project, but not to any specific event.

How to add a new Talent to this Project or Event:

1. Click the *Add* button.
2. The **Talent** field will display a drop-down list. Make a selection from this list.
3. With the cursor now moved into the **Name** field, displaying a list of all people in the **Contacts** module that have matching contents in the **Talent** field. If the Talent is not in the **Contacts** module, you may simply type their name into this field (this does not create a contact record for the talent).
4. When the talent **Name** is entered, their **Main Phone** number will be automatically entered in the appropriate field.
5. Enter the **Role** of the talent (if applicable).
6. Complete the talent's event **Status** (Confirmed, On Hold, Not Available, Left Message, etc.).
7. Click the **Date** field and select a date from the pop-up calendar.
8. Add a **Start Time** for the Event.
9. For your Event budgetary tracking purposes, complete the list by entering the **Cost** of each talent line item and subsequent billable **Charge**. The event talent Cost and Charge grand total calculations are shown in the two fields at the bottom of the screen. Click in and then out of each field to refresh the totals view, upon any changes made to the individual talent lines above.

| | | |
|-------|----------|----------|
| Total | 1,000.00 | 2,500.00 |
|-------|----------|----------|

Notes

- To delete Talent from this Project, click the *Trash Can* icon.
- You may choose not to include their phone # on any printouts by deselecting the **Include Phone on Print Outs** checkbox.
- Click the *Go To* button for each talent to take you to their record in the **Contacts** module.

Show Notes / Hide Notes sub-tabs

By now, you have noticed the two sub-tabs *Show Notes* and *Hide Notes*. Switching between these simply shows or hides the **Notes** field.

Setup Info tab

This layout displays detailed information (important to the setup of each project). Once data is entered here, it will appear in the setup of any new events that are created. This data can also be sent to all of a certain Project's events by pressing the *Update Related Events* button. This can be useful if the data is entered or edited after the events were created.

Although the **Events** module *Setup* tab and the *Projects Setup* tab appear identical, please keep in mind that it is possible to have different data in these two places. This is useful for different types of events on a single project.

Update Related Events button

Three of the sub-tabs in this *Setup* tab contain a *Update Related Events* button. This button will send all of the data and related records from this sub-tab to the same tab within the **Events** module.

General sub-tab

| Purpose | Format | Size | Speed | Frames | Tracks | Format | Dolby |
|---------|--------|------|-------|--------|--------|--------|-------|
| | | | | | | | |
| | | | | | | | |
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| | | | | | | | |

Sync

| Src | Rec | Master | Chase |
|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
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| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

In the *General* sub-tab, you can list the Formats and Machines that will be used for this session. Up to eight machines can be listed with fields for the following:

- **Purpose** – purpose for each machine (Master, Clone, Safety, Production, etc.)
- **Format** – Video or Audio format types, standard, and calibration settings
- **Size** - size of the media and type
- **Speed** - recording speed of the associated media
- **Frames** - the frame rate of the media
- **Tracks** – recording tracks to be utilized in the session
- **Format** – the audio output stream, i.e. Stereo, Dolby 5.1, etc.
- **Dolby** – types of audio output, i.e. Dolby A, AC3, 5.1 etc., and choices for turning Emphasis On or Off.

All of these lists can be edited to suit your needs.

Check the boxes on the right that apply:

- **Src** – Source Media asset
- **Rec** – Recording Media asset
- **Master** - Master Media asset
- **Chase** – Chase Media asset

In the fields below, enter when/if the **Tones Arrive**, whether or not you are locking to **Picture** or doing a **Layback**, and any **Copies Needed**. You may then enter any necessary notes in the **Setup Notes** field as well as listing the **Titles** for the Project.

Plug In sub-tab

Use the *Plug In* sub-tab to document audio recording mic plug-ins.

How to document audio recording mic plug-ins:

1. Click the *Set Input* button on the top of the first column. This will automatically enter 1-24 in the **Input** column the first time you click it, 25-48 the second time you click it, and 49-72 the third time you click it, then the cycle starts over again.
2. Click the **Qty.** (quantity) field and select the number of instruments or devices used.
3. Enter the instrument you will be using in the **Instrument** field.
4. Enter the # of **Mic's** (microphones), which type of **Mic** used, **Insert**, **Buss**, and **Cue** assignments, and the **Talent's** name.

To the right are more fields. Use these to:

1. Indicate whether to **Tune Piano** (Yes or No).
2. Enter the quantities needed of Mono Phones, Stereo Phones, Music Stands, Stand Lights, Chairs, Stools, and Video Monitors.
3. Specify whether you need a **Digital Metronome** (Yes or No).

Below, you will find the **Aux Sends** fields. Use these fields to document where the Aux Sends are to be patched. They are labeled **S-1** through **S-12**.

Video/Film/Graphics sub-tab

This area contains details associated with visual production. There are simple fields for **Cameras**, **Lens**, **Filters**, **Film/Tape**, **Props**, **Special Effects**, **Sets**, **Permits Needed**, **Transportation**, as well as a set of selectable **Locations** (as defined in the **Contacts** module).

If these fields don't quite fit your needs, you can always grab a field from the *User Fields* sub-tab (explained next).

User Fields sub-tab

This contains all of the User Fields for the **Projects** module as described in the **Studio Suite Basics** chapter of this User's Guide. We have provided many User fields in each module that you can customize to accommodate specific information. To use a user field, you may go into the Layout mode (within any module) and drag one of these fields in order to store your specific data.

Client Info tab

The *Client Info* tab is where you can view and manage all pertinent details about the client. It is best to enter as much information about the client as possible here.

Client and People sub-tab

When you created the Project, you specified a Client. This information now appears in the green text fields here.

Each new Project looks up the default set of "working people titles" (Producer, Editor, etc) from the *Main Menu/Setup/Title* tab.

How to add titles:

1. Click the *Add* button.
2. Click the **Name** field next to a title to reveal a pop-up list of people from the **Contacts** module with matching titles.
3. Select a name to lookup their phone numbers.
4. The checkbox next to the phone number determines if the phone number will appear on printouts (useful for maintaining client privacy).

Notes

- The people who appear here will also appear on every related record in the **Events** module.
- The people who appear here will also appear on labels generated from the **Library & Labels** module in the order specified by the check boxes on the right.
- Click the *Add To Contacts* button to add a new person to your **Contacts**.

At the bottom left, you will find the **Allow Release Of Client Materials** field. This is the exact same field that appears in the clients record in the **Contacts** module, so changing it here will change it everywhere. You may also enter a **Materials Release Note**.

Shipping Info sub-tab

The Delivery and Shipping Requirements apply to the entire Project. All other fields apply to the specific shipment.

How to specify shipment details for each package sent:

1. Enter the **Delivery and Shipping Requirements**, what service it was **Sent By**, which account to **Charge**, the **Tracking Number**, and list the **Enclosed Materials**.
2. The **To:** field is a pop-up list of ALL of your contacts from the **Contacts** module.
3. Select a contact from the list. Today's Date and the current Time will automatically enter (you can manually change these if necessary).

Click the *Track Package* button in the center of the field to automatically track the package.

The *Studio Suite 5* sub-tab shows data originally used in that version, as it held this data differently than newer versions.

Financial sub-tab

This tab gives an overview of the clients financial history, showing a full aging history (i.e. **Balance Due** date, how many days **Overdue**, **TOTAL Billed**, **Year to Date**, etc.) as well as the client's **Remaining Limit** and **Over Limit**.

To the right are **Tax Rates** and the **Discount Rate** for this project. This data is looked up from the Client record in **Contacts**, but may be changed here to reflect only this project, if needed.

*NOTE: For a detailed description about financial information, see the **Contacts** module chapter under the *Financial tab* section in this Users Guide.*

Invoices From This Project section

Below the aging section, you will see a portal showing all invoices that have been made for this Project and their payment status.

Commission To section

This area is used to assign a commission amount to a certain person within your studio (or network of sales representatives) for bringing new clients and/or projects to the studio.

How to assign a commission to sales representative:

1. Click the **Commission To** field and select a person from the drop-down list. This list will show all records in the **Contacts** module marked as an Employee.
2. Click the **Commission Percent** field to enter their commission percent. Enter the number as a decimal (8% = .08).

Media Asset tab

The *Media Asset* tab shows all of the media from the **Library & Labels** module that is associated with this Project.

Media Asset tab Navigation

- Click on a row of a particular media asset to highlight that media asset and show additional information at the bottom of the screen, including the **Current Location**, people involved, and all **Titles** on that media asset.

*NOTE: This screen is view only; changes to media must be done in the **Library & Labels** or the **Titles & Tracks** modules.*

- Click on the *Go To* button for each media asset to go directly to that record in the **Library & Labels** module.
- Click the *Go To* for a particular **Title** to go directly to that record in the **Titles & Tracks** module.

How to create a new media asset (record) in Library & Labels that's associated to a specific Project:

1. Click the black and green *Create NEW related media asset in Library* button (this will take you to the **Create New Media Asset** window in the **Library & Labels** module).
2. Fill out the information on all tabs and click *Done*.
3. For detailed description of this window, see *Create New Media Asset* section of the **Library & Labels module** chapter.

Studio Suite allows each media asset to be associated with more than one Project, since it may return to your studio several times in the course of its life. Read about this in the **Library & Labels** chapter of the User's Guide.

Attach & FTP tab

The *Attach & FTP* tab is used for attaching (recording, linking and/or embedding) external files, sounds, pictures or movies, URLs, and FTPs to an individual **Projects** record. The *Attach & FTP* tab is the where all of these attached files are referenced. For a detailed explanation of this tab, see the **Attach & FTP tab** chapter of this User's Guide.

List tab

The *List* tab shows a sortable list of all of the different projects in the **Projects** module. To sort by any of the categories: Client, Production #, Production, Project #, Project, etc., just click on the heading for that category.

Because not all fields that users may want to see can fit in this view, the right-most column in the *List* tab has a "Variable Field". By clicking below the "Variable Field" label, you can select from a pop-up menu for which field you would like to see displayed in the list. Clicking on the "*Variable Field*" label will sort by the selected field.

If you happen to select the field "TotalPlusTax", this field will take some time to populate, relative to the number of Events and Projects you have. Additionally, you may need to toggle to a different tab and back

for the field to properly refresh.

Report tab

The *Report* tab, formerly the *Print* tab, now has two sub-tabs, *Print Options* and *Audit Log*.

Print sub-tab

This sub-tab has a number of pre-set printout options. First, select which of your companies you are printing from via the pop-up menu in the **Company Name** field, and which letterhead you want to use. The Letterhead is automatically generated from the information you entered about your company in the *Setup* button contained in the **Main Menu**. The custom Letterhead places the letterhead graphic you pasted/imported. To use your own stationery, choose a blank record from your **Company Name** selector.

To the left side is a group of buttons resembling the *View Selector* in the *Events* tab. Click one of these buttons to print the associated report. The events will be sorted according to the green text and pop-up sort menu (provided below the *Print* buttons).

These reports will print the items as they are displayed in the associated *Events* tab. You can use the Filtering and Hiding options there to generate the exact report you want. There is also a *Print* button on each of those screens in the *Events* tab which allow you to print reports directly from there.

You can also print several other reports located on the right: *Audio Setup*, *Audio Plug-ins*, *Direction & Notes*, *Film/Video/Graphics*, *Project List* and *Talent List*. These reports print for all of the found records, so the *Find Only This Record* button will put only the current record in the found set.

Click the button labeled '*Other Report Options From Events*' to go to the *Report* tab in the **Events** module. Read the *Print* section of the **Events** chapter to learn more about that module's printing options.

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

Click the gray text *Productions* tab to go to the **Productions** module showing only the events associated with that Project.

Click the gray text *Events* tab to go to the **Events** module showing only the details associated with that Project.

Click the gray text *Calendar* tab to go to that module.

This covers all of the basics of the **Projects** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

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Purchase Orders module

File Name: SSX_Invoicing.fmp12

SSX

The **Purchase Orders** module allows you to create and track purchase ordering of materials.

In this chapter you will read about how to:

- Create a new purchase order
- Add a Purchase Order as a line item to a Project
- Add line items of a Purchase Order to a Project individually
- Receive an entire order at one time
- Print a detailed record of a purchase order

Detail tab

Create a New Purchase Order

How to create a new purchase order:

1. Click the black and green *New* button from the *Function Bar*.
2. Select the **Vendor** from the field's pop-up menu, which shows all companies identified as a **Vendor** in the **Contacts** module. To see and/or edit information about this vendor, you can click the *Go To* button which will take you to the *Detail* tab of the **Contact** module.
3. In the **Ship To** field, select from the pop-up menu which of your own companies or clients (as defined in the **Main Menu Setup**) the material order will be shipped to.
4. In the **Ordered By (Company Selector)** field, choose which of your company's logo and letterhead information you would like on the printed version of the purchase order.

| Requisitioner | Department | Sales Person | Ship VIA | F.O.B. Point | Terms |
|---------------|------------|--------------|----------|--------------|-------|
| | | | | | |

- As applicable, fill-in the order **Date**, **Sales Person**, **Ship Via**, **F.O.B.** (Free on Board) **Point**, **Terms**, the **Account #**, **Department**, **Requisitioner**, **E.T.A.**, **Customer #**, and **Project**.
- Enter items to be ordered in the list area. Specify the **Qty**, **Catalog #**, **Description**, **Unit Price**. If taxes apply, check the first (**Tax 1**) and/or second (**Tax 2**) box).
- A **Line Total** will be calculated, not including the taxes that are sub-totaled at the bottom. The **Line Total** can be overridden, meaning you can manually enter another amount. At the bottom, you will see your totals, and you can enter who the purchase order was **Approved By** and the approval **Date**.
- Click the **Arrived On** field and choose a date from the pop-up calendar.

At the bottom of the screen, the **Tax Settings** box displays the **Tax 1** and **Tax 2 Rates** which are from your preference settings in the **Main Menu Setup**. You can manually change either rate, per order. For more detailed information, read the *Taxes tab* section of the *Main Menu* chapter of this User's Guide.

| Tax Settings | |
|---------------|-------|
| LA County Tax | 8.75% |
| | |
| | |

New Feature: Add Purchase Order to a Project

There are three ways this new feature works.

First, the entire Purchase Order can be summarized and added to a selected Project. This summary can charge the client based on a Margin percentage or a Markup percentage.

Second, each line item can be added to a selected Project one at a time. This allows you three kinds of flexibility: you can omit line items on the Purchase Order from the Project, you can show the details of each item from the Purchase Order on the Project and you can apply different Markups (or Margins) to each item.

Third, each line item of a Purchase Order can be added to DIFFERENT Projects. A good example of this would be if there was one big purchase order for costumes for an entire season of a show (Production) and charged to the individual episodes (Projects).

Read the following "How To" boxes to find out how to take full advantage of this new feature.

How to add a Purchase Order as a line item to a Project:

1. Create a new Purchase Order the same as in "How to create a new Purchase Order".

| Category | Item | Rate | Charge | X | Expense | X | |
|----------|------|------|--------|----|---------|---|---------|
| | | | 1 | \$ | 0.00 | 1 | \$ 0.00 |

Add PO to Project

2. In the yellow fields above the items section, is where the entire Purchase Order will be summarized as a line item.
3. Choose a **Category** from the drop down list that describes the PO as it will appear on the Project as one line item.
4. Choose an **Item** for your PO to appear as in the Project. Before doing this, it is best to create an item for this specific purpose. It can be a general item such as Services.
5. Before choosing a **Rate**, you need to set one up that is connected to the item/s that you created to use for your POs. Again this can be general and have no dollar amount associated with it. This is for exporting to QuickBooks or MYOB. Both programs need to have the **Rate** and **Item** fields filled in.

| | | | | | | | | | | | | |
|---|-------|---|--|---------------|-------|----|--|--|----|--|--|----|
| <input type="radio"/> Calculate as Margin <input checked="" type="radio"/> Calculate as Markup | | Tax Settings <table border="1"> <tr> <td>LA County Tax</td> <td>8.75%</td> <td>\$</td> </tr> <tr> <td></td> <td></td> <td>\$</td> </tr> <tr> <td></td> <td></td> <td>\$</td> </tr> </table> | | LA County Tax | 8.75% | \$ | | | \$ | | | \$ |
| LA County Tax | 8.75% | \$ | | | | | | | | | | |
| | | \$ | | | | | | | | | | |
| | | \$ | | | | | | | | | | |

6. On the bottom left, choose if the client will be charged a *Margin* percentage or a *Markup* percentage over cost.
7. Once *Margin* or *Markup* has been chosen, put the percentage amount (10% would be .1) in the white field below the *Charge X* button.
8. Click on the *Charge X* button to calculate the total of the Purchase Order plus client markup (as chosen).
9. To charge the client a fee for the *Expense* that it cost you to make the order, to create the PO, to hire a freelancer, or anything involved with this aspect of the Project, choose *Markup* or *Margin*, the percentage of the *Markup* or *Margin* and click the *Expense X* button. (This step is optional).
10. Once all of your calculations are ready, click the *Add PO to Project* button.
11. A new window with all of your Projects will open. You can narrow the field by typing a few key letters in the field at the top. Choose your Project.
12. A new screen will open in the Projects module displaying the Project that you chose, with the PO as a line item.

How to add line items of a Purchase Order to a Project individually:

1. Create a new Purchase Order the same as in “How to create a new Purchase Order”.

| Tax Settings | |
|------------------|-------|
| San Francisco Co | 8.5% |
| San Diego Tax | 7.75% |
| LA County Tax | 8.75% |

Display Line Items with double lines?

2. Click on the button, *Display Line Items with double lines?* below the items section. The items section will now display a line of yellow fields and smaller buttons for each line item just like above the items section.
3. Proceed to fill in each field accordingly (see How to add a Purchase Order as a line item to a Project for details). 12. A new screen will open in the Projects module displaying the Project that you chose, with the PO as a line item.

Arrival Date button

As each item is received, enter its **Arrived On** date.

How to receive an entire order at one time:

1. Click in the field below the button labeled *Set Blank Arrivals To* and select a date from the pop-up calendar.
2. Click the *Set Blank Arrivals To* button. This will set any blank or empty **Arrived On** fields to the date you select or *Today's Date*:
3. When all ordered items have an **Arrived On** date entered, the **All Items Received?** (the check box at the top of the screen will be appropriately marked).

To print this purchase order request, click the red text *Print This* button provided.

List tab

The *List* tab shows a list of all purchase orders. Click the *Go To* button to view the *Detail* screen for that purchase order. To delete a purchase order, click the *Trash Can* button on the far right of each line. If the **All Received** checkbox is checked, this means all of the items on the Purchase Order have a 'received' date,

Attach & FTP tab

The *Attach & FTP* tab is used for attaching (recording, linking and/or embedding) external files, sounds, pictures or movies, URLs, and FTPs to an individual **Purchase Order** record. The *Attach & FTP* tab is the where all of these attached files are stored. For a detailed explanation of this tab, see the **Attach & FTP tab** chapter of this User's Guide.

Print This button

The *Print This* button will print a detailed page of information for the record that shows on the screen.

How to print a detailed record of a purchase order:

1. The standard operating system **Page Setup** dialog will appear. Make your selections and choose *OK*.
2. The page will then be displayed.
3. Click the *Continue* button in the Status Area to the right.
4. Another print dialog will appear.
5. In the **Print** dialog box, print the single record you are currently viewing on-screen. Choose copy amounts. Check printer source selected for correct printer to be utilized.
6. Click *Print* to print.

Report tab

Print Options sub-tab

Although there is a *Print This* button on the *List & Details* tabs, there are also print buttons called: *Purchase Order Detail* and *Purchase Order List* on the *Print Options* sub-tab.

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

This covers the basics of the **Purchase Orders** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

34

QuickLog module

File Name: SSX_Projects.fmp12

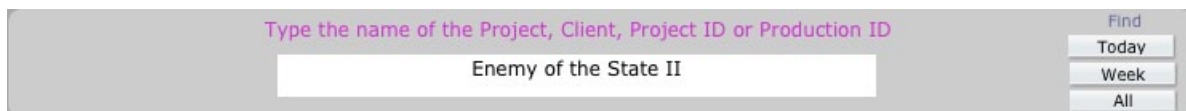
SSX

This module provides a quick and easy way for staff members or freelancers to log themselves (or log any resource item) into a Project, without having to learn about the entire **Projects** module.

In this chapter you will read about how to:

- Add an event in QuickLog

Click the *QuickLog* button from the **Main Menu**. This brings you to a screen showing a list of Projects scheduled this week. You can broaden or narrow that range by clicking on the provided *Find* buttons at the top right.



Type the name of the Project, Client, Project ID or Production ID

Enemy of the State II

Find
Today
Week
All

You can also just type the name (or partial name) of the Project, Client, or add the Project # etc. in the field at the top. Upon exiting the field, any Project containing that text will appear in the list beneath. Once the desired Project appears in the list, click the *Go To* button to go to the same **Add Item** screen that is used in Projects.

Adding Events

How to add an event in QuickLog:

1. The date fields at the top will be set to Today's date. You can use the *Start Date* and *End Date* arrow buttons to scroll forward or backward, or click in the Date fields to edit them. Please see below for information about the **Continuous** checkbox.
2. Once you have chosen a date, select the **Start** and **End** times for the Event and set the booking **Status**. Additionally, there are default start & end time ranges within the 4 selectable buttons (1,2,3,4) above the time fields (see more on Quick-Entry Time Buttons below). These values are preset within the *Main Menu/Setup/Modules/Projects* area.
3. At the top of each column, you can use the **Category** (menu), **Sub-Category** (menu), and **Item** (text) filter fields, to narrow the item list to what you are seeking for. Sort each column alphabetically by clicking the underlined column names.
4. You can also use the **Budget** field to filter for a specific budget code from the **Budgets** module, and the **Preset** field to view items within selected Calendar Presets.
5. When **Media Inventory** items are shown, their current **In Stock** and **Avail.** (Available) amounts are displayed.
6. To select an item to book, simply click its name (the row will turn green). You may select more than one item at a time, and you may change the filtered set (as needed to find and select multiple items).
7. Once you have selected all of the items you wish to add, click either the *Add To Project* button, or the *Add To Project (without dates)* button. This will book the item on the Project you specified, and drop you off in the **Projects** module.

Continuous checkbox

This checkbox, located between the Start and End date, governs how Studio Suite handles an event or events that span over multiple days.

For example, if you are renting a piece of equipment to be booked for a range spanning 5 days (from 9am on Monday, around the clock continuously to 5pm on Friday), you would select the Continuous checkbox. This appears on a Project as a single line item and there would be no ability to enter details about any particular day.

Alternatively, if you are booking a studio from 9am to 5pm on Mon., Tues., Wed, Thurs., and Fri., you would NOT check the Continuous checkbox, as the studio is available starting at 5 PM each day, until 9am the next morning. This would appear in the Project as 5 separate Events, allowing you to document different details about each day.

Recall Previous Selections button

At the top right, there is a *Recall Previous Selections* button. This will recall the last items you selected, (as indicated by the check marks on the right side of each item). Make sure to specify the date or time prior to clicking this button.

Create New Item button

If you need to create a new item (that's not a Room, Equipment, Person, or Media), click the button at the bottom left. This will present you with a **Create New Item** screen, where you can create new items as needed.

This covers all of the basics of the **QuickLog** module in Studio Suite.

35

Rates module

File Name: SSX_Invoicing.fmp12

SSX

The **Rates** module stores how much you charge for individual resource, items, and services. Each rate must be associated with a specific item (i.e.: Room, Person, piece of Equipment, type of Media, or Service). Items may have more than one Rate.

In this chapter you will read about how to:

- Create a Rate Cards
- Create a new Rate
- Make a new Default Rate
- Permanently delete a Rates record
- Create a new **Percent Tax** Rate
- Create a new **Percent Discount** Rate
- Print a detailed Rate record

Each Rate keeps track of both the billable amount (charge) and actual cost (expense) for each Rate. Rates are best created in the *Rates* tabs located in the **Contacts**, **Rooms**, **Equipment**, **Media Inventory**, **Library**, and **Categories & Items** modules.

There are two types of Rates - Standard and Percent. Standard Rates are the most common. A **Standard** Rate has a fixed price and is a “cost-per-unit” equation (i.e. 4 hours at \$100.00). **Percent** Rates are used to hold ‘percent’ Rate information, such as **Taxes** and (percentage) **Discounts**.

You may bill \$50 an hour for your engineer/editor, and pay him \$25, or you may bill \$100 per hour for a room, and it costs you \$8 per hour in rent and electricity. Each individual “item” may have multiple Rates, which

allows you to sell the same thing at many different Rates (Hourly, Daily, Evening Rate, Weekend Rate, etc). Prices for media (tape, disks, hard drive, and other materials) are also held as Rates, allowing you to set up multiple Rate structures (virgin, used, TC formatted, striped, dubbed, etc.). You can also create “Client Specific” rates, so that when a specific client uses an Item, their special rate is automatically applied.

Rate Cards tab

Usually, we start each module on the *Detail* sub-tab, but we’ll begin this module with a fundamental new feature.

NEW FEATURE: Rate Cards

Rate Cards allow you to group Rates that are used for a particular kind of work together. On the *Rate Cards* tab, you’ll see that Studio Suite comes loaded with several **Rate Cards** that you can use to divide your Rates up into “Normal, Internal, Corporate, Educational, Commercial, TV, Film, Web, Advertising, Rental, Music, Radio”, etc. You can use these, edit them, or delete and create new ones using the buttons in the Function Bar on this tab.

| | Name | Code | Description |
|----|-------------|------|---|
| 0 | All | | Items in this Rate Card will be available to ALL Rate Cards |
| 1 | Normal | | Normal rates |
| 2 | Internal | | Work priced for internal billing |
| 3 | External | | Work done for outside entities |
| 4 | Corporate | | Work done for corporate customers |
| 5 | Commercial | | Work done for commercial customers |
| 6 | Educational | | Work done at educational prices |
| 7 | Film | | |
| 8 | TV | | |
| 9 | Web | | |
| 10 | Advertising | | |
| 11 | Rental | | |
| 12 | Music | | |

The idea is that you can create a Rate Card for each type of work that you do. When you create a new Production or Project, you assign it a Rate Card, and it will then use Rates appropriate for the Project, based on the designated Rate Card.

Individual Rates can belong to more than one Rate Card (such as Corporate & Commercial). Rates that are attached to Rate Card “**0 (All)**”, will be accessible to *all* Rate Cards, allowing you to have some items that have the same price (or Rate) across all Rate Cards. All new Rates are attached to Rate Card “**0 (All)**” by default. Using Rate Cards is optional, and we’ll discuss their use again below.

How to create a Rate Card (or edit an existing one):

1. To edit a **Rate Card** click in any field to change the data that is pre-filled.
2. To create a new **Rate Card** just click the *New* button in the *Function Bar* and type in the field provided.
3. Go back to the *Standard Rates* tab and your **Rate Card** will be available for use.

Standard Rates tab

List sub-tab

This sub-tab provides a list of all Standard Rates. There are four 'Quick-Find' filter fields, allowing you to search or filter by **Category**, **Sub-Category**, **Item**, or **Client**. You may use two or three of the filter fields in conjunction. For example, you may use the **Category** filter first to view only **Equipment** rates, and then choose a **Sub-Category** to view only Microphones.

This view is intended to be a quick way to see a number of rates simultaneously. You will not be able to edit the information displayed on this page.

You may view (or edit) any rate in greater detail by pressing the *Go To* button on the far left of each row. It is possible to duplicate, delete, or create a new rate from this page using the Function buttons at the top of the screen.

Detail sub-tab

This tab displays all information related to a single Rate. This tab looks similar to the **Create New Rates** window. By following the same instructions as described under **Create a New Rate** (above), you can use this tab to make changes to a specific Rate.

At the bottom of the window, you can see the date/time this Rate was **Created** who it was created by as well as the date/time it was **Modified** and the person who modified it.

| | | | | | |
|---------------------------------|------------|----------|----------------------------------|------------|----------|
| <i>Created</i> Tue, Jan 3, 2012 | 3:08:42 PM | by Admin | <i>Modified</i> Tue, Jan 3, 2012 | 3:54:43 PM | by Admin |
|---------------------------------|------------|----------|----------------------------------|------------|----------|

How to create a new Rate:

*NOTE: Remember, Rates must always be associated with pre-existing Items (Rooms, Equipment, etc), so it is typically best to create Rates from the module where the item exists (the **Rooms** module, the **Equipment** module, etc). You can create Rates in the **Rates** module also, as long as you make sure they are assigned to existing resource items.*

1. Click the black and green *New* button in the *Function bar*.
2. The message "What kind of Rate do you want to create?" will appear. Choose *Standard* to create a normal rate or select *Percentage* to create a Tax or Discount.
3. Next, the message "What kind of Standard Rate do you want to create?" will appear. Choose *Credit*, *Overtime* or *Regular*. For our current purpose, choose *Regular*.
4. The **Create New Rate** window will appear, displaying fields for all the details of this Rate.

(Continued on next page)

Create New Rate window

Rates - Create New

Internal Accounting Details

Category: **Rooms** Client: **Home Away Studios, Andy Cosmo** Type: ☒ Regular ☐ Overtime ☐ Credit

Sub-Category: **Graphics** Action: **Edit - On Line**

Item: **Studio A** Rate Card: **0 All**

Rate Name: **Studio A 14**

External Accounting Details

Class: **Studio A**

Item Type: **Service**

Item Name: **Studio A**

Account Name: **Revenue Account**

Unit of Measure: **Hour(s)**

| From | To | Charge | Expense | Profit | Market |
|------|-----|--------|---------|--------|--------|
| 0 | 999 | 475.00 | 30.00 | 445.00 | 1,483% |

Tax Settings

Tax: **LA County Tax** (Multi Select) ☒ **All**

Overtime Rate Specs

Hours Before OT: **375** Price/Unit: **350.00**

Charge: **475.00** Expense: **375** Uses OT Rate: **20.00**

Avid 1 OT

☐ Include in Rate Sheet ☐ Use as "Child Item" Rate ☐ Retired ☐

☒ Is Normally Invoiced ☐ Exempt From Client Discount

☐ Commissionable ☐ Exclude from Un-Invoiced Item Reports

Set As Default: ☒ **D**

Default For Item = **Default For Client =**

Budget Code: **Budget Summed By:**

Invoice line items containing this Rate will have a description in based on the following, in this order:

Start Date: **Start Time: End Time: Action: Rate Name:**

Additional Invoice Test: **1**

TD: R-1 RTD: R-1

Continue

- In the top row, select the **Category** for the Item this Rate belongs to.
- Next, click on the Item field, and a new window will popup, showing all of the existing Bookable Items in the Category you just selected. You may use the white **Category**, **Sub-Category**, **Item**, **Budget**, and **Preset** 'filter' fields to narrow the list to the Item you're looking for. Select one or more item for this Rate, then click Done. It is best not to mix items from multiple Categories in a single Rate.

IMPORTANT NOTE: You cannot type text into the Category or Item fields. Use the menu selectors to make choices.

- Enter a description for the rate in the SS **Rate Name** field (i.e. 'ProTools Rig#1', or 'Studio A Hourly Rate', etc). Note: the **Rate Name** is followed by a number and is pre-entered for you upon the creation of a new rate (the number is used to make sure the name is unique, as all **Rate Names** must be unique).
- If this specific Rate is to be associated with a particular Client (a "Client-Specific" rate), click the Client field and choose their name from the popup window (**NEW**). This list displays each contact you have checked as a Client in the **Contacts** module. You may choose to list multiple clients for a single Rate by Shift-clicking this field in Rates. Hovering over the Client field will show a list of all Clients linked to this Rate in a tooltip. The 'C' button next to the Client field will Clear all client(s) selected in that field.

NOTE: If a Rate is Client-Specific and you remove the Client from that Rate, it will remain a Default Rate until you toggle the 'D' (Set As) button OFF (Gray).

(Continued on next page)

CAUTION: *There can be only one Default Rate per Client, per Item. Therefore, selecting a different Rate as a Default for a client will de-select the original Default for that client. When you create a Client-Specific Rate, make sure to include a reference to that client in the Rate Name field so it is recognizable as belonging to them when it is viewed in other modules.*

9. **NEW** Select the **Rate Card** appropriate for this Rate (*optional*). The Rate Card "0" (All) is applied to all new Rates by default, making each Rate available to all Rate Cards. You may leave this as is, or edit the assignment to one or more Rate Card by holding Command (Mac) or Control (PC). This Rate will now be used on Projects that have the same Rate Card assignment. Rates must be assigned to at least one Rate Card.
10. Select an Action for this Rate (*optional*). Project Events that are created using this Rate will have their Action loaded automatically.
11. To the right, click the correct rate **Type** (Regular, Overtime, Credit). **Regular** and **Overtime** are self-explanatory. **Credit Rates** are those which have a negative value on the total charge for a project. Examples of Credit Rates include "Deposit", "Payment", and "Credit Memo". These would be used when the client gives you money to decrease their balance on a Project.
12. On the right of the screen there are fields for External Accounting Details. The fields are labeled appropriately for the 3rd party accounting software you may be using in conjunction with Studio Suite. If you are not using 3rd party accounting software these fields are optional, but can be utilized if needed.
13. The Charge and Expense section is where the amounts you are charging the client, and the expense of the item are listed. Click the **Unit of Measure** fields and select a unit of time for both the **Charge** and **Expense** from the pop-up menus. The unit of measure can be one "Day" (one bill day) or other rate options include: Hour(s), Week(s), Each (or per unit), and One Time (single charge).
14. When you select a Unit of Measure of "Day(s)", an area is revealed on the right of the screen allowing your to specify the **Bill Days Per Week**, and **Bill Days Per Month**. For example, if you enter a '4' in the **Bill Days Per Week** field, Studio Suite will calculate the number of days to bill for a rented item as:

| Days Used | Days Billed |
|--------------|----------------|
| 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | ----- 4 |
| 5 | ----- 4 |
| 6 | ----- 4 |
| 7 | ----- 4 |
| 8 | 5 |
| 9 | 6 |

A similar formula can be applied using the **Bill Days Per Month** field.

(Continued on next page)

15. Next, type the amount you are charging the client and your expense (for the specified unit of time) in the fields below. **Profit** is automatically calculated by the mark-up percentage used. **Market** value allows you to enter with the “market rate” for this service is, allowing you to make comparisons of what any given project would cost at another facility.
16. The Charge and Expense section also includes fields to enter a resource quantity (**Qty**) amount range. You can charge your pricing fixed by bulk amounts from a quantity of 1 to 999. This is useful if you sell different quantities of material things at different prices, such as 1-10 = \$1. 11-20 = .90, 20-50= .80, and so on.
17. The **Expense** field is the amount that each Rate costs you, either in labor cost, material cost (for media), or other overhead (electricity, heat, etc). Enter the amount this item is costing you (for the specified unit of time).
18. Next, within the Overtime Rate Specs area, enter the number of **Hours Before Overtime** (begins) for the **Charge** and **Expense** associated with the device. Then click the **Uses OT Rate** field and select which overtime rate from the drop-down list. The **Charges Per** field will display the dollar amount of the overtime rate chosen.

NOTE: To accommodate 3rd party accounting programs, Overtime in Studio Suite must be its own separate Rate. The Rates for the Overtime Rates will be visible but not editable on the O.T. Rates-field.

18. Choose appropriate taxes in the Tax section. To use more than one tax, press SHIFT and click on your desired tax types. To use all taxes, click the *All* button. (See *Selecting Multiple Taxes* later in this section).
19. See additional settings in the Checkbox Options below...
20. Change how the **Invoice Line Item** information (bottom row) will appear. This is the order in which the item information will appear on an invoice. (See *Invoice Line Items* below).
21. Enter any **Additional Invoice Text** that you would like to appear on the invoice for this item in the text field below.
22. Click the *Continue* button to confirm your new Rate.

NOTE: The Rates-Create New window cannot be closed. You **MUST** click the *Continue* button. If you need to cancel the creation, just click *Continue* then *Delete* the record.

New Feature: Create Overtime Rate button

The new *Create Overtime Rate* button shortens the time it takes to create an overtime rate, and links it to the one that it is based on. There is also a new *Go To* button that allows you to navigate to the original Rate and the overtime one.

The image displays two side-by-side screenshots of the 'Overtime Rate Specs' window in Studio Suite. Both windows show fields for 'Bill Days Per Week' (7) and 'Bill Days Per Month' (30). Below these, there are fields for 'Hours Before OT' (8), 'Charge' (200.00), 'Expense' (20.00), and 'Uses OT Rate'. The left screenshot highlights the 'Create OT Rate' button with a blue box. The right screenshot highlights the 'Go To' button with a blue box. Both windows also show a 'Studio A OT' label at the bottom.

Standard Rates Checkbox Options section

Below the Charge and Expense area, there are several more ways to define each Rate:

- **Is Normally Invoiced** – this checkbox determines whether or not events using this Rate are normally invoiced. For example, if you normally supply an assistant engineer with the room, and you don't invoice separately for him, but still need to book him and track his hours, you would un-check this box. In the **Projects** module, on the Actual Charges view, clicking the *Select All for Invoice* button will *not* automatically include these items in the selection (you may of course select the item anyway if you want). This is specific to each Rate, so you could create an Engineering Rate for him that *would* be selected for the invoice.
- **Commissionable** - Check this box to make this rate commissionable.
- **Include in Rate Sheet** – check this box to include the rate in the public Rate Sheet. (can be printed out later).
- **Use as “Child Item” Rate** - **NEW** Some items have different Rates when they are listed as part of a ‘package’ than they do by themselves. For example, If someone rents just a power cord, you would charge for that. If the power cord was part of a larger package of equipment, you may want to list it in the order for recordkeeping, but have a price of “0” for it. Checking this checkbox will define this Rate to be used when the item is booked as part of a package. Typically, this Rate would be free, or less than the Rate for this item individually.
- **Exempt From Client Discount** - If checked, the discount for an item using this rate will not apply.
- **Exclude from Un-Invoiced Item Reports** - Omits this rate from any un-invoiced item reports created.
- **Retired** - **NEW** If a Rate is not to be used any longer, but you want to keep it available for reference, checking this box will make the Rate disappear from available Rate menus in other parts of Studio Suite.

Default Rate

The first Rate you create for each item will be the Default Rate for that item. If you create a new Rate for the same item and want this new Rate to be the Default Rate:

How to make a new Default Rate:

1. Click the *Set as Default ‘D’* button.



2. This Default Rate will automatically be selected whenever this device is booked.

Budget Code / Budget Summed By

You can assign an AICP or AICE style codes in the **Budget code** in the two fields to the right, to allow this Rate to be accessible from the Budgets module. Project Event items that use this Budget Code will be summarized within the Budget, based on this code. See the Budget module chapter for more info on this...

Invoice Line Items section

Invoice line items containing this Rate will have a description in based on the following, in this order:

| | | | | | | | |
|------------|------------|----------|--------|-----------|--|--|--|
| Start Date | Start Time | End Time | Action | Rate Name | | | |
|------------|------------|----------|--------|-----------|--|--|--|

The bottom of the Create New Rate window has a row of fields that determine how events using this Rate will be described on the printed Invoice. The contents are from the default settings in the Main Menu/Setup/Rates/Invoices tab, based on the **Category**. For example, when invoicing a Room Rate, you probably want to include the date, start and end times, the name of the Rate ("A Control Hourly") and perhaps the Titles (media assets) that were worked on. But when invoicing a hard drive or a CDR, you don't need the times, or the Rate name, just the Start Date, and the Name of the media. The result of these settings can be edited in the **Events** module (before Invoice is made) or in the **Invoices** module afterwards.

Selecting Multiple Taxes

If you are required to charge tax associated with the Client's locality instead of yours, you'll need to create a percentage rate for each tax that could possibly be applied. For example, if you have clients in Region 1, Region 2, and Region 3, each with different taxes, you would first create all of the relevant Tax Rates (See *Percent Rates* sub-tab below), then assign the correct Tax Rates to each Client in the **Contacts** module.

All of those same Tax Rates should be entered in the **Taxed By** field on the applicable Rates, either by clicking the *All* button or holding down by holding Command (Mac) or Control (PC) while selecting additional Rates.

Now, when you book a project for each client (as long as the correct Tax Rate has been applied individually to each Client, and collectively to each Rate) Studio Suite will use only the appropriate Tax Rate for each client.

Tip: Duplicate similar Rates

Selecting a Rate from the List window and clicking the *Duplicate* button in the *Function Bar* will create a duplicate copy of the selected Rate. The SS Rate Name will be identical, but will be appended within the **Rate name** field by the word 'Duplicate'. You can edit information for this rate by following the '*Edit the Rates Record*' instructions (refer to above).

How to permanently delete a Rates record:

1. Click a **Rate** in the List.
2. Click the *Delete* button in the *Function Bar*.
3. Choose '*Delete*' from the pop-up dialogue.

CAUTION: you CANNOT undo this. If you Delete a Rates Record, it will be permanently deleted.

Percent Rates tab

The *Percent Rates* tab is where you can create and manage rates based on percentages rather than fixed prices per unit. These Percent Rates are used for Taxes and Discounts. Studio Suite handles them as separate Rates, allowing you to export this data to 3rd party accounting programs.

List sub-tab

The *List* sub-tab displays all Percent Rates you have created. If you have created multiple Percent Rates, you can filter the list (by category) by clicking the **Quick find by Category** field and selecting either Tax or Discount.

How to create a new Percent Tax Rate:

1. Click the *New* button from the *Function Bar*.
2. You will receive the following pop-up message; 'What Type of rate would you like to create?' Choose 'Percent'.
3. You will then receive the following pop-up message: 'What kind of Percentage Rate do you want to create?'. Choose 'Tax'. Select Taxes as your **Rate Type**.
4. Click the **Rate Name** field and type the name you would like this percent rate to have.
5. Click the **Account Code** field and type the account code for this percent rate. The account code will match this tax Rate to an account in your external accounting program. The contents of this field flows from the **Rate** to the **Event** to the **Invoice Line Item**. It will be truncated by the values specified in the *Set Account Codes* tab.
6. Click the **Rate** field and enter the rate as a decimal; for example, a 7% tax Rate should be entered as ".07". When you click out of this field, the number will appear as a percentage.
7. You can also type a QuickBooks **Tax Agency Name** which will align taxes collected with each Tax Rate with the appropriate collection agency (Tax Agency or Vendor) in QuickBooks.
8. Then give this percent rate a **Tax Symbol**, i.e. 'T' for Tax or 'D' for discount. This symbol will be displayed next to taxable line items in Invoices, indicating which tax was applied to each item.
9. If your business is in a region of the world that requires some taxes to be applied after other taxes (such as Canada), you can define this in the **Tax after Tax** field. To select multiple taxes, CTRL+Click (Windows) or CMND (⌘)+Click (Mac) on each tax. To select all taxes, click the *All* button. To clear your selections click the 'C' button.
10. When you are finished, click *Continue*. The new percent rate will appear at the bottom of your **Percent Rates List**.

How to create a new Percent Discount Rate:

1. Follow the instructions above but do the following steps.
2. When you receive the pop-up message 'What kind of Percentage Rate do you want to create?', Choose 'Discount'.
3. Enter the **Rate** as a negative value. For example a 10% discount would be entered as "-.10"

Click on a Percent Rate in the List tab to display detailed information at the bottom of the window including the date/time this Percent Rate was **Created** and the person it was created by as well as the date/time it was **Modified** and the person who modified it.

QuickBooks (QB)

Effectively export invoice information via XML Interchange to QuickBooks on the PC (however, you may customize Studio Suite to work with different programs). In order to accommodate QuickBooks, we've provided a Percentage Tax setup **QuickBooks Account Code** field, and a **QuickBooks Type** field.

The **QuickBooks Tax Agency** or **Vendor** field is where you would put the name of the organization where you send any sales tax that you may collect. When this field matches exactly with the one in QuickBooks, all taxes collected on Studio Suite invoices will properly line up to that "vendor" in QuickBooks. This field also appears in the **Main Menu/Setup/Taxes** screen, where it is editable.

The **QuickBooks Account Code** field is for aligning a Rate in Studio Suite with a specific account in Quickbooks. The name must match exactly for it to work.

The **QuickBooks Account Code Type** field must also match the associate **Type** field in QuickBooks.

Print This button

The *Print This* button will print a detailed page of information for the record that shows on the screen.

How to print a detailed Rate record:

1. The standard operating system **Page Setup** dialog will appear. Make your selections and choose *OK*.
2. Click the *Continue* button in the Status Area to the right.
3. Another print dialog will appear.
4. In the **Print** dialog box, print the single record you are currently viewing on-screen. Choose copy amounts. Check printer source selected for correct printer to be utilized.
5. Click *Print* to print.

Report tab**Print Options sub-tab**

Although there is a *Print This* button on the *List & Details* tabs, there are also print buttons called:

Standard Rates Detail and *Standard Rates List* on the *Print Options* sub-tab.

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

- Click the *Rooms* tab to go to that module.
- Click the *Equipment* tab to go to that module.
- Click the *Contacts* tab to go to that module.
- Click the *Media Inventory* tab to go to that module.
- Click the *Events* tab to go to that module.
- Click the *Projects* tab to go to that module.
- Click the *Invoices* tab to go to that module.

This covers all of the basics of the **Rates** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

36

Recall module

File Name: SSX_Tech.fmp12

SSX

The **Recall** module stores details associated with a mix recall. It contains face-plate drawings of over 140+ of the most common pieces of outboard equipment used in recording studios. Select the equipment you're using (or load them from a default or previous mix), building a patch list for each device as you go. You can notate your settings with the on-screen layover text grid, or print out the recall sheets you are using and mark the settings with a pen or pencil. If you have your own drawings, you can add them as well.

IMPORTANT NOTE: We should point out that your User's License does not grant you permission to use these drawings/pictures for anything other than documenting settings on-screen and printing Recall sheets within Studio Suite.

NOTE: Further, we should acknowledge that any trademarks used in the drawings are the property of their respective owners, and the use of such trademarks does NOT imply endorsement of Studio Suite by said owners.

In this chapter you will read about how to:

- Create a new mix
- Add devices to a mix
- Print a report

List Mixes tab

The *List Mixes* tab shows a list of all mixes stored in the module. You can sort by **Song** title or by **Date**. Click the *Find All* button to find all of the mixes.

How to create a new mix:

1. Click the black and green *New* button in the *Function Bar*.
2. This will create a new record and move you to the *This Mix* tab (explained below), where you can enter details about your new mix. The cursor will automatically locate in the new label *Recall Name* text field within the *Devices* sub-tab.
3. You can also get to the *This Mix* tab by clicking the *Go To* button next to a specific mix.

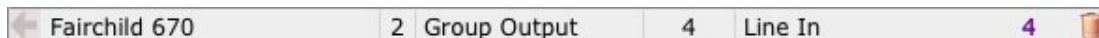
This Mix tab

In the *This Mix* tab, you'll enter the Song **Title**, **Artist**, **Mix** name, **Recall** name, **Engineer**, **2nd Engineer**, **Project # and name**, **Console**-utilized, Console **Software**-version, number of **Inputs** and **Date**. Within the provided *This Mix* tab sub-tabs, the Module is also used to input information about **Devices**, **Console I/O's**, **Sends & Busses** and **Mix Busses** used in your mix.

Devices sub-tab

How to add devices to a mix:

1. Click in the white field underneath the **Device Name** heading.
2. This will show a pop-up list of all available device drawings.
3. Scroll down to find the one you're looking for, or type the first few letters to jump to it.
4. If you need to document patches for something that's not in the list, hit the ESCAPE key to get a cursor in the field in order for you to type.
5. Under the **#** sign, you can enter which device you're referring to (if there's more than one of the same kind).
6. Under the **From** heading, click in the white field to get a pop-up list of available "from" points, starting first with typical console patches points, and going down into actual devices. Again, type the first few letters to jump to the one you want.
7. To the right of the **From** field, there is a small field where you can enter number or position of the patch-point you're referring to in the **From** field.



8. The **To** field works the same way, with a list of possible "to" points. Notice that the **To** number field will auto enter the same value as the **From** number field as a convenience. Of course, you can change this value, which will turn it purple, showing that it is an overridden value.
9. Clicking on the *Go To* button will take you to the **Line Item Details FULL View** tab where you can see a picture of the device you have selected, along with the patches you have defined. This view is explained in greater detail below.
10. Click the trash can icon to delete a line item from the devices portal.

Duplicate button in Function Bar

Tip: Use Duplicate button when using the same equipment

Once you have all items perfectly documented, you might move on to another mix where you're using all of the same equipment. Rather than re-enter everything again, from the *This Mix - Devices* tab, click the *Duplicate* button in the *Function Bar*. It will create a copy of this mix, as well as generate new device line items with the same settings as the previous ones. Make the changes as needed, based upon the setup of the previous mix.

NOTE: If you find you're using the same setup on a regular basis, a good trick is to save a mix as a default setup, and duplicate it for each mix you do. Another idea is to save a default for each Client, so when they come back, you have everything set for them.

Console sub-tab

Here you can document console patches for the **Inputs**, **Insert**, **Output**, **Monitor**, and **Monitor Output**. The **Insert** field has a pop-up list of available equipment. This tab is set up to accommodate a 96 input console (in two groups of 48 repeating fields to allow for page breaks when printing), but it's configured so you can modify this to suit your particular needs. Each of the repeating fields is actually defined to have up to 96 repetitions, so you can go into layout mode and redefine the field format for each group of fields to match your console. Make sure to repeat your changes on the print layouts.

Sends & Busses sub-tab

This is where you document **Sends**, **Send Returns**, and **Busses**, **Buss Inserts** or **Returns**.

Mix Busses sub-tab

This works basically the same as the previous tab, except it's designed to document Mix buss assignments.

Comments sub-tab

In the available large text box, you can enter any additional comments about the mix.

Line Item Details tab

The *Line Item Details* tab stores specific information about each device as it is used in a mix. All of this information should actually be entered into the *This Mix - Devices* tab, with the exception of the actual knob or value settings, which can be entered here.

On top of every drawing is a grid of fields:

Click over the knob of value you want to document and type the settings value (number) directly into the

field. You may need to move around a bit to find the best field to use. You may also need to add spaces in front of the entry to get the text located in the right place in relation to the drawing. These values will be printed as well.

You may choose to supplement these entered values with pencil marks on the printed copy to clarify the settings. The great thing about entering the settings here is that you do not actually have to print the sheets and you can always refer back to a mix without going through a mountain of paper.

Attach & FTP tab

The *Attach & FTP* tab is used for attaching (recording, linking and/or embedding) external files, sounds, pictures or movies, URLs, and FTPs to an individual **Recall** record. The *Attach & FTP* tab is the where all of these attached files are stored. For a detailed explanation of this tab, see the **Attach & FTP tab** chapter of this User's Guide.

Drawings Full tab

The *Drawings Full* tab view is mainly for reference, but clicking the device picture will take you to a screen where you can edit this picture, or add you own (as described on the screen when you get there). Do not try to document settings here, it will NOT work.

Drawings List tab

The *Drawings List* tab is the library of available pictures. Here, you can select which devices are Defaults by clicking the **Default Device** checkbox next to a device name. These devices will then be loaded into a mix when you click the *Load Defaults* button from the *This Mix - Devices* tab. To clear all default device selections, click on the *Clear All Defaults* button. You can also define default From and To-patches for each device. To clear all default patches, click on the *Clear All Default Patches* button.

Report tab

The Report tab, formerly the *Print* tab, lists all printable report layouts for the found set of all records.

Print sub-tab

How to print a report:

1. The Title should be auto-filled, however, you can type a new one or an addendum to the existing.
2. Enter the **Artist, Mix Name, Recall Name, Engineer, 2nd Engineer, Project #, etc.**
3. Click the **Company Selector for Printouts** field and choose a letterhead from the pop-up list. The letterheads are configured in the *Setup* of the **Main Menu**. You have the choice of **Auto** or **Custom** letterheads, based on the **Company Selector** pop-up.
4. In order to use the selected letterhead, click the *Custom* radio button.
5. If you would like to use the default letterhead you established in the **Setup** of the **Main Menu**, click the *Auto* radio button.

Clicking one of the following grey buttons will Print the desired layout of the found set of Records (from the *List Mixes* tab).

- **Full View Devices** – full view of the found device with its settings.
- **Devices List** – list of all devices used in this project, plus the line IN/line OUT configuration.
- **Console (1-48)** – list of the first 48 Inputs and Outputs as well as Insert and Monitor connections of the mixing console (if the Project uses one).
- **Console (49-96)** - list of the last 47 Inputs and Outputs as well as Insert and Monitor connections of the mixing console (if the Project uses one).
- **Sends & Buses** – list of Sends and Buses on the mixing console (if the Project uses one).
- **Mix Busses** - list of Mix Bus settings on the mixing console (if the Project uses one).
- **Comments** – comments from the This Mix tab.
- **List Mixes** – list of all mixes currently showing in the *List Mixes* tab.

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

This covers all of the basics of the **Recall** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

37

Rooms module

File Name: SSX_Tech.fmp12

The **Rooms** module keeps track of all the rooms in your facility, as well as “outside” studios, if you book them. It is important to enter in every single room, even if it is not a room you book or sell, so that as you further enter in all of the information about your studio, you can assign something to that location. Even though you may only have one or two bookable rooms where equipment, sessions and tapes might be scheduled, your office and lounge have important things in them that should be documented in the **Equipment** module. This enables you to build a total inventory and value of everything you own, which is great for insurance information.

Although this might seem like a simple and maybe unnecessary thing to keep track of, this module is central to the operation of Studio Suite. The **Rooms** module tells the **Calendar** module what rooms it can book, and it tells the **Equipment** module where each piece of equipment is located. It also tells the **Library** module where a particular media asset might be. It also stores a graphic image of the room, as well as dimensions (with phone extensions) to create a master phone list. But first, the rooms have to exist, so let's make some!

In this chapter you will read about how to:

- Edit information about a room
- Delete a 'Bookable' Room from the list
- Delete a 'Not Bookable' Room from the list
- Create a new Room
- Create a new Rate
- Edit/change the information of a specific rate
- Permanently delete a Rates record

List tab

The *List* tab provides a list of all of your rooms, their dimensions, types, *Bookable* status and record number.

How to edit information about a room:

1. Click the *Go To* button next to the room name.
2. The **Detail** window will appear, allowing you to edit room information.

How to delete a 'Bookable' Room from the list:

1. Click to select the room in the **List** window.
2. Click the *Delete* button in the *Function Bar*.
3. If the item is 'Bookable' you will receive the following message; 'This item is currently Bookable. You must toggle it to 'Not Bookable' before you can delete it. In this case click *OK*.
4. The Following pop-up message will ask you 'Are you SURE you want to make the item 'Not Bookable?'. Click *OK*.
5. Another pop-up message will appear asking you if want to 'Permanently delete this ENTIRE record?' If you are sure, choose *Delete*.

How to delete a 'Not Bookable' Room from the list:

1. Click to select the room in the **List** window.
2. Click the *Delete* button in the *Function Bar*.
3. If the room is set to 'Not Bookable', the following pop-up message will appear; 'Permanently delete this ENTIRE record?'
4. If you are certain, choose *Delete*.

Detail tab

The *Detail* tab is where you enter the room **Name**, **Type**, and its **Dimensions**, as well as any **Phone Extensions & Names** for the room. You can enter any **Included Rooms** that come with the room from a pop-up menu of all the rooms in your facility; for example, if Studio A comes with 'Lounge A' and 'Isolation booth A', add them in the Included **Rooms** field. Also, enter information about the AC **Outlets** (location), **Breaker**, **Amps**, and **Power** type (clean/dirty), and any **Notes**, perhaps including who designed the room, when it opened, and other historical details.

New Feature: Buildings

Another new feature in Studio Suite X is the Building option. If you have more than one building at your facility, you can designate which building a room is in when you created it in the system.

How to create a new Room:

1. Click on the *New* button in the *Function Bar*.
2. The *Detail* tab window will appear with the room name field highlighted in the upper left hand corner of the window. Type a **Room Name** in this field.
3. If there are multiple **Buildings** in your facility, choose which **Building** the Room is in from the drop down list in the **Building** field. You can edit and add to this list at any time.
4. Specify a room **Type** and set its *Bookable* status (The room must have a **Type** before it can be made bookable).
5. Use the various information fields to fill out as much information as you can about your room.
6. When you are finished, click the *List* tab. Your new Room will be displayed at the bottom of the *List* tab window.

Installed Equipment tab

The *Installed Equipment* tab lists all of the equipment that has been assigned to the room via the **Equipment** module. If you need to investigate a particular piece of equipment, you can click on the *Go To* button next to the equipment name, which will take you directly to that record in the **Equipment** module. Once you are in the **Equipment** module, click on the red-labeled *Rooms* tab located on the top right to return to the **Rooms** module.

Rates tab

The *Rates* tab is where all of the various rates associated with the rental of room is created and displayed through a portal to the **Rates** module. Each room can have multiple rates to accommodate all the different ways that it might be booked.

NOTE: Before a room can have Rates, it must be made Bookable.

How to create a new Rate:

1. Click to select a resource from the *List* tab window.
2. Click the *Rates* tab.
3. Click the black and green *Create New Rate* button.
4. If the item has already been made Bookable, skip to step 9.
5. If the item has not been made Bookable, 'Items must be Bookable before they can have Rates. Do you want to make this item Bookable?' will pop up.
6. In order to create a new Rate, you must choose *Yes*.
7. If the item is a part of a package and has child items attached to it, the following message will appear: "This item has child items in a Package. Do you want these child items to Also Book when this parent item is booked?" Choose *Yes* or *No* to continue.
8. "Do you want this new Bookable item to be displayed in the Calendar now?" will appear. Choose *Yes* to add this item to the Calendar or *No* to continue without adding it to the Calendar. The item can be added to the Calendar later.

9. Next, the message “What kind of Standard Rate do you want to create?” will appear. Choose *Regular*, *Overtime* or *Credit*.
10. The **Create New Rate** window will appear, displaying the details for this Rate. Follow the instructions below to add detailed Rate information.

Create New Rate window:

- In the top row, the **Category** and **SS Item** (Resource Name) will be entered. Enter a description for the rate in the **SS Rate Name** field (i.e. ‘Hourly Room Rate’, etc).

Note: Rate Names must be unique, so upon creation, each Rate Name is appended with a sequential number after the auto-entered text. You can delete this number as long as the Rate Name remains unique.

- There is a row of fields applicable to integration with QuickBooks. These fields are described in more detail in the **Rates** chapter.
- Select or change the rate **Type** (*Regular*, *Overtime*, *Credit*) as needed. **Regular** and **Overtime** are self-explanatory. **Credit Rates** are those which have a negative value on the total charge for a project. Examples of Credit Rates include “Deposit”, “Payment”, and “Credit Memo”. These would be used when the client gives you money to decrease their balance on a Project. You can also create a Credit Rate for downtime.
- The **Unit of Measure** field determines what factors are used to calculate this Rate. There are several choices for **Unit of Measure**:

- Hour(s)** - This will calculate a rate's quantity based on the difference between the end time and the start time of an event.
- Days(s)** - This will calculate a rate's quantity based on the number of days an Event spans, ie, each time an Event crosses midnight, Studio Suite adds a day. As such, you may need to watch & override these calculations, depending on your definition of a “day”.

When the selected unit is “Days”, you’ll see options to specify the number of days that are calculated for each week and month above the **Overtime Rate Specs** fields. For example, if you’re doing rentals, and only bill 4 days when a customer rents something for a week, you would enter “4” in the **Bill Days Per Week** field. If you bill for 12 days when a customer rents something for a month, you would enter “12” in the **Bill Days Per Month** field.

- Week(s)** - Because different users will have different definitions of what a “week” is, this unit allows the user to specify how many weeks to charge for manually. The calculation will enter a 1 by default in the quantity field, no matter the actual time range. The user must change this value if they want something different.
- Lockout** - This unit behaves exactly as Week(s) above, but just uses a different word.
- Each** and **One Time** - These two options behave the same way, and are intended

for items such as media, frame counts, or anything where the quantity is not something relative to time, requiring the user to enter the number of units manually.

- There is a separate **Unit of Measure** for both **Charge**, and **Expense**, allowing you to (for example) charge by the day, but pay the expense to you by the hour.
- Below the **Unit of Measure** fields, you'll see the **Quantity**, **Charge**, and **Expense** fields. Quantity allows you to specify a **From** and **To** range, ideal for setting up "Split" pricing for different quantities. These default to 1 and 999 respectively, however, you can define pricing such as 1-10 = a charge of \$5.00, 11-19 = \$4.50, etc. You can enter different Expense pricing at each quantity as well, with each line showing your dollar and percent profit per unit.

The **Expense** column is the amount that each item costs you, either in labor cost, materials cost (for media), or utilities (electricity, heat, etc).

NOTE: To accommodate 3rd party accounting programs, Overtime in Studio Suite must be it's own separate Rate. The Rates for the Overtime Rates will be visible but not editable on the **O.T. Rates** field.

- Enter the number of **Hours Before Overtime** (begins). Then click the **Uses OT Rate** field and select an overtime rate from the drop-down list. The **Charges Per** field will display the dollar amount of the overtime rate chosen. If you have not yet created any overtime rates, nothing will appear in the list, so you may need to do that first then come back and specify which overtime Rate to use.
- If the Rate is taxable, select which taxes apply in the **Taxes** field. To use more than one tax, hold down SHIFT and click on your desired tax types. To use all taxes, click the *All* button. (See *Selecting Multiple Taxes* in the **Rates module** chapter of this User's Guide).
- If this specific Rate is to be associated with a particular Client, click the Client field and choose their name from the drop-down list. This list displays each contact you have checked as a Client in the **Contacts** module. The 'C' button next to the Client name will Clear any client(s) selected in that field. To remove just one of many Clients from the list, select their name while holding SHIFT.
- Select whether this Rate **Is Normally Invoiced**, if it is **Exempt From Client Discount**, if it is **Commissionable** or if you want to **Include In Rate Card**. (See *Standard Rate Checkbox options* under the **Details sub-tab** section in the **Rates module** chapter of this User's Guide).
- Change how the **Invoice Line Item** information (bottom row) will appear. This is the order in which the item information will appear on an invoice. (See *Invoice Line Items* under the **Details sub-tab** section in the **Rates module** chapter of this User's Guide).
- Enter any **Additional Invoice Text** that you would like to appear on the invoice for this item.
- Click the *Continue* button to confirm your new Room Rate.

NOTE: The **Rates-Create New** window cannot be closed or cancelled. You **MUST** click the *Continue* button.

The new Rate will now appear at the bottom of the Rates List. You may need to use the scroll bar (on the right) to view items at the bottom of the list.

Edit the Rates Record

How to edit/change the information of a specific rate:

1. Click the *Go To* button on the left.
2. The **Rates-Edit** window will appear, allowing you to change information about this specific Rate.
3. Make your changes and click *Continue*.
4. Your changes will now be reflected in the Rates list.

Delete the Rates Record

How to permanently delete a Rates record:

1. Click the trash can icon next to the Rate you want to delete.
3. The following message will appear; 'Are you sure you want to delete this Rate?'
 - It is not un-do-able.
4. If you are sure, Choose *DELETE*.

CAUTION: you CANNOT undo this. If you Delete a Rates Record, it will permanently be deleted.

*NOTE: For more specific information about Rates, including Client Specific Rates, Multiple Client Rates, Default Rates, Taxes etc., read the **Rates module** chapter of this User's Guide.*

Visual Layout tab

The *Visual Layout* tab shows a graphic image of what your room looks like. Copy and paste or Insert the picture (or movie) of your room within the dotted square field by right-clicking (or Option+Click, Mac) and select Insert Picture. Make sure the **Store only a reference to the file** checkbox is not checked.

You can print this graphic should you need to document a setup or fax it to a prospective Client in order for them to see what the room looks like.

Attach & FTP tab

The *Attach & FTP* tab is used for attaching (recording, linking and/or embedding) external files, sounds, pictures or movies, URLs, and FTPs to an individual **Rooms** record. The *Attach & FTP* tab is the where all of these attached files are stored. For a detailed explanation of this tab, see the **Attach & FTP tab** chapter of this User's Guide.

Report tab

The *Report* tab, formerly the *Print* tab, now has two sub-tabs: Print and Audit Log.

Print sub-tab

The *Print* sub-tab displays report printing option buttons that allow you to **Print Visual Layout**, **Print Room List** (including phone extensions), **Print Room Details-General**, **Print Installed Equipment**, and **Print Rates** (associated with the rooms).

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

Click the *Equipment* tab to go to the **Equipment** module.

This covers all of the basics of the **Rooms** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

38

Sample & Clips module

File Name: SSX_Library.fmp12

SSX

The **Samples & Clips** module stores information about all of the samples and clips you may have. It regards the different disks and various formats, and what each sample is used for. It stores the Original Artist, Writer, Label, and Publisher to ease usage administration, and there is a direct link to each if they are setup in the **Contacts** module.

In this chapter you will read about how to:

- Enter details on an individual sample
- Attach a Sample or Clip to a record
- Assign samples to a Title
- Edit clips in the List tab
- Assign Flags
- Print a detailed Samples or Clips record

Detail tab

The *Detail* tab shows detailed information for each individual sample.

How to enter details on an individual sample:

1. Choose a **Sample Name**, **Category/Instrument**, and **Sub-Category**.
2. Click the **Mono/Stereo** field and specify whether the sample is Mono or Stereo from the editable pop-up menu.

3. Type what the sample **Length** is and enter a high and low **Key Range**.
4. In the text field to the far right, enter any descriptive **Keywords** associated with it.
5. Mid-page, you'll find **Music Styles** fields. You can choose up to seven different styles from a pop-up menu provided.
6. Above the Music Styles, enter searchable information in the **Flags 1, 2 or 3** fields in order to make them a member of a searchable group.
7. You can also show which **Format**, what **Disk Type**, **Disk Name**, **Disk #**, and the **Library Name** this particular sample came from. Additionally, add what **Track** it is on, and if it has an **Index**.
8. The rectangular fields below can be used to select the genre of Music this Sample may be. Click a field and select a genre from the pop-up list.
9. If it is a music sample, you can enter the name of the **Original Artist**, **Original Label**, **Original Album Title**, **Original Writers** and the **Original Publishers**. If you enter these names exactly as they appear in the **Contacts** module, clicking the **Go To** button will take you directly to their contact record so you can get in touch with them if you need to use the sample.
10. There is an additional field where you can enter the specific **Writer's Share** (or percentage) as well as for the **Publishing**.
11. You can track the **Usage Fee**, so if you pay-per-use you can document it here, as well as which projects it was **Used On** and any **Notes** you need to track.

Click to Play/Attach field

In the upper right hand corner of this screen, you will see a field titled **Click To Play or Attach**. This is used to attach your sample or clip to this module. From this field, you can then play the Sample or Clip.

How to attach a Sample or Clip to a record:

1. Click in the field.
2. A standard operation system search dialog will appear. Use this to search your Hard Drive for the Sample or Clip.

NOTE: In the lower left corner of this dialog, you will see a check box labeled 'Store only as reference file'. If you leave this checked, the file will only open within Studio Suite on the particular computer you are on. If you un-check this, the Sample or Clip will be embedded within Studio Suite, allowing ANYONE on your network to see and play the file.

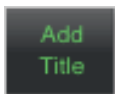
3. Select the file and choose Open.
4. The file will then appear in the Field.
5. Simply click on the file to play it back. The file should open in whatever program medium 'player' is associated with its file type.
6. Click the 'C' button to clear the field.

Titles using this Sample section

Near the bottom, you can assign the Current Found Set of samples to a specific Title from the **Titles** module.

How to assign samples to a Title:

1. Click the *Add Title* button.



2. This takes you to a new screen that shows a list of all titles.
3. Selecting your item of choice will return you to the *Detail* tab. Your Title will now display in the Sample list.

List tab

The *List* tab shows a limited amount of information, but displays a numerous amount of records.

How to edit clips in the List tab:

1. Click the fields to enter or edit the **Sample Name**, **Category/Instrument**, **Sub-Category**, and the high and low **Key Range**, **Disk Name** or **Notes** fields.
2. The disk **Format** and **Disk Type** fields produce editable pop-up menus.
3. The **Bookable Category** field on the far right displays a drop-down menu that is used to make your samples Bookable.
4. At the top of each column listing, you can click-on the field names to *sort* the list in alphanumerical or alphabetical order (ascending or descending).
5. Clicking the *Go To* button on the left will take you to the *Detail* tab for that item (explained next).

Flag List tab

The *Flag List* tab allows you to assign the **Flags** at a value of **1**, **2**, or **3**. For example, you may want to group some samples that sound like 'rain' as a Flag 1.

How to assign Flags:

1. Go through the list and use the **Category/Instrument** field to select 'rain' for each sample that sounds like rain.
2. Put a check in the F1 box for each sample that sounds like rain.
3. Click *Find* from the *Function Bar*.
4. Click the **Flag 1** checkbox, then click the *Find* button in the Status area to the far left.
5. This will show only the samples you flagged to sound like rain. You can then print that found group by pressing the *Print This* button on the top of the page.

Print This button

The *Print This* button will print a detailed page of information for the record that shows on the screen.

How to print a detailed Samples or Clips record:

1. The standard operating system **Page Setup** dialog will appear. Make your selections and choose *OK*.
2. The page will then be displayed.
3. Click the *Continue* button in the Status Area to the right.
4. Another print dialog will appear.
5. In the **Print** dialog box, print the single record you are currently viewing on-screen. Choose copy amounts. Check printer source selected for correct printer to be utilized.
6. Click *Print* to print.

This covers all of the basics of the **Samples & Clips** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

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Tasks module

File Name: SSX_Projects.fmp12

The **Tasks** module provides a central place where Tasks are held and managed. You can create and edit Tasks in the **Projects**, **Contacts**, and **Productions** modules, and you can view them from the **Main Menu**, and the **Calendar** module. However, the **Tasks** module is where they all actually *live*. While you can create Tasks in the modules mentioned, you can of course also create, view, and edit them in the **Tasks** module.

In this chapter you will read about how to:

- Create a new Task Status, or edit existing Statuses
- Print a detailed Task record

Status Colors tab

Usually we start on the *Detail* tab, but for this module we're going to start on the *Status Colors* tab, so we can get some things setup before any new Tasks are created. Click on the *Status Colors* tab - this is where you define your options for Task Statuses, and their associated colors. Also, this is where you specify default settings for some special statuses. On this tab you should see a list of existing Task Statuses and colors.

How to create a new Task Status, or edit existing Statuses:

1. Click on the *Edit* button above the column of Task Status names.
2. Edit the resulting list so that it reflects your desired set of Task Statuses, click *OK*.
3. After returning to the *Status Colors* tab, click on the **Color** field for each status and choose a color from the color picker.

Studio Suite needs to know what your preference is for the following statuses, so it can set those statuses and colors automatically as needed. To set your default statuses, click on the color boxes under the labels “New”, “Completed”, and “Overdue”, and select the appropriate Status from the popup menu. This process links these “user-named” statuses and colors with the “real-time” status of a particular Task.

Now that we’ve gotten some setup out of the way, proceed to the *Detail* tab.

Detail tab

The *Detail* tab shows the details of the current Task. This is the screen you will see if you click a *Go To* button from another module to view details of a Task. While it’s actually best to create Tasks from within a Project or Contact record, etc (so it’s automatically linked to that record in that module), you can create them within this module as well.

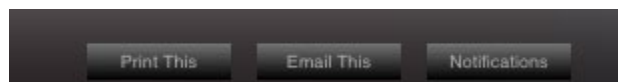
How to create a new Task:

1. Click on the *New* button in the *Function Bar*.
2. Type a description of the task in the **Description** field.
3. The Task will have the default “New” status, as specified on the *Status Colors* tab.
4. Assign a Priority.
5. Although you can assign this Task to a Project, if you have many Projects, this list will be long. If you are creating Tasks in association with a Project, it’s best to create them from within the Project. The main purpose of the **Project** field is not to assign, but to display what Project this attached to.
6. Assign a **Due Date**, **Time**, and **Duration** (in Days and Hours).
7. Assign this Task to a staff member, by selecting their name from the **Assign To** field. This Task will now appear on that person’s **Main Menu** on the Due Date when they log into Studio Suite, and also on the Calendar.
8. The blue text at the top only shows the first several words of the Task. The entire text of the task will appear in the larger field below.

Above the **Due Time** field, there is a slider that allows you to indicate without using a “status word” the progress towards completion. Even if you have put the slider to 100%, you still need to adjust the **Status** field to indicate the the Task is finally complete.

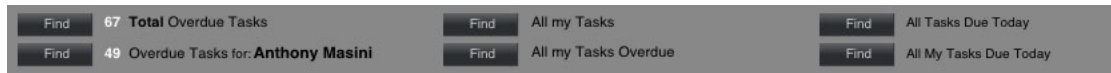
Clicking on the *Go To* button next to **Assigned To** will bring you to the Contact record for that person, if you need to contact them for any reason.

Email This, Print This & Notification buttons



This trio of buttons can either email the task, print the task or open the notifications window that will enable you to send SMS messages, Prowl notifications, Tweets or Direct messages in Twitter regarding the task. To learn more about how to use the notifications, read “How to send notifications” on page 32-20 in the Projects chapter of this Users Guide. To learn more about printing Tasks, read “How to Print a detailed Task record” on the next page of this chapter.

Quick Find buttons



These are all fairly self-explanatory with the exception of the bottom left one. Assuming you are a supervisor scrolling through a list of tasks due today, this button will show how many *other* non-complete Tasks are assigned to the person who is assigned to the Task you are currently viewing.

List tab

The *List* tab is where you can view a list Tasks. It contains the same set of *Quick Find* buttons described above.

Clicking on the column headers will sort by that field. Clicking the same header label again will sort the opposite way.

Clicking on the *Go To* button takes you to the *Detail* tab.

Print This button

The *Print This* button will print a detailed page of information for the record that shows on the screen.

How to print a detailed Tasks record:

1. The standard operating system **Page Setup** dialog will appear. Make your selections and choose *OK*.
2. The page will then be displayed.
3. Click the *Continue* button in the Status Area to the right.
4. Another print dialog will appear.
5. In the **Print** dialog box, print the single record you are currently viewing on-screen. Choose copy amounts. Check printer source selected for correct printer to be utilized.
6. Click *Print* to print.

Status Colors tab

Covered at the beginning of the chapter.

Attach & FTP tab

The *Attach & FTP* tab is used for attaching (recording, linking and/or embedding) external files, sounds, pictures or movies, URLs, and FTPs to an individual **Tasks** record. The *Attach & FTP* tab is the where all of these attached files are stored. For a detailed explanation of this tab, see the **Attach & FTP tab** chapter of this User's Guide.

Report tab

Print Options sub-tab

Although there is a *Print This* button on the *List* tab and *Detail* tab, there are also *Task Detail* and *Task List* print buttons on the *Print Options* sub-tab. It's simply another way to print **Tasks**.

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

This covers all of the basics of the **Tasks** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

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Titles module

File Name: SSX_Titles.fmp12

SSX

The **Titles** module keeps track of details for individual titles on a hard disk or media asset.

A Title is any kind of content, such as a song, video segment, image file, data file, etc. To ensure that each Title is assigned to a Media asset, they must be created *from* an existing Media asset *in* the **Library & Labels** module. The **Titles** module stores details about each Title such as: the name of the title, what's on each audio track, production statuses, composers, publishing splits, production notes, samples used, talent, and additional personnel, lyric sheets/scripts, locate points, takes, storyboards, keywords, production notes, etc. It documents up to 56 audio tracks per title, and prints track sheets for tracks 1 - 24, 25 - 48, 1 - 32, and 1 - 56. It lists, sorts, and prints by title, person, label, time code start, etc. It auto-calculates delay times, and stores and plays audio/video samples of each title. It also has an attachments tab to attach any kind of external file.

In this chapter you will read about how to:

- Edit the tracks' information
- Assign a Title to a different media asset
- Add Video or Photo
- Add Audio
- Enter lyrics
- Create a new QC Report

Tracks tab

The *Tracks* tab shows all 56 tracks, as well as general information about the title, most of which is taken from the Media asset from which it was created.

How to edit the tracks' information:

1. Provide the **Project** name and **Media Asset Title** information etc. in the text fields in the top section of the screen. There are also multiple selectable and editable text fields available in this section for your purposes. Click the light grey individual fields and make your choice from the pop-up menu or edit and create your own tiles or job function. Note: You can enter information into these fields at any time.
2. Below, entering a **Tempo** will auto-calculate the delay times for all of the different Note Values: **1/2, 1/4, 1/8, 1/16, 1/4 t, 1/8 t**.
3. In the **Time Code** fields, enter the **Begin** and the **End** time codes, which will calculate a **Duration**.
4. **Alignments** can be selected from an editable, pop-up menu.
5. To the right, you can document the **File Size**, which will help calculate the remaining space on a disk (in the **Library & Labels** module).

Tracks table

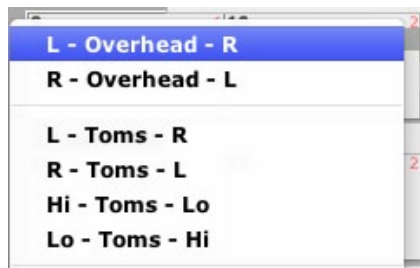
The **Titles** module stores up to 56 tracks per Title. You need to scroll down to see all 56 tracks. The Tracks table is broken up into groups of eight digital multi-tracks.

Each eight-track block consists of *four* horizontal sections. Each section can be modified, however, it must first be selected.

- Clicking and holding down in the very middle section (the 3rd of 4 available), will bring a pop-up menu of **Instruments** to assign to that particular track.



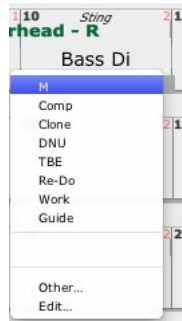
- Clicking directly in the middle of the section just above that (the 2nd of 4 available) will bring up a green color text pop-up menu for a **Stereo Instrument** that uses both Tracks 1 and 2, or Tracks 3 and 4, etc. You can assign something to both left and right tracks from the odd-numbered track only (1, 3, 5, etc.).



- Additionally, clicking in the top section (the 1st of 4 total) within of the block will take you to a generic text field where you can manually enter any other text for additional details about this track, the date, if it was a particular Instrument type or Musician, etc. Use the return key to horizontally adjust this information by line so that it will not conflict with any other entries that appear in that track box.



- Lastly, clicking at the bottom of the track block (the 4th segment) will bring up a pop-up menu of red color text **Notations**, such as Master, Comp, Clone, Do Not Use, TBE, Click or Guide Track. You can also edit this list.



NOTE: When the cursor has been inside a field, all of the other fields around it will be temporarily grayed-out. Since these layouts are comprised almost entirely of fields, this can be disorienting! To make the screen look normal again, click outside of the field into any available background.

How to assign a Title to a different media asset:

1. Click in the top section on the yellow **Library#** field.
2. This will take you to a screen telling you that *"The title 'xyz' is currently associated with Library# 'abc'."*
3. Enter in the new **Library#**, then click *OK*, or *Cancel* to keep the record unchanged. Changing the **Library#** will update the **Title**, **Project**, **Media Asset Title**, **Artist**, **Client**, **Producer**, **Engineer**, **Asst. Eng**, and **Project #** to reflect the new media asset.

Adding Media

You can also add media such as photo, video or audio to your title.

How to add Video or Photo:

1. Click the red *Record* button in the top right corner of the window.



2. Select Video, Photo, or Audio from the following dialog prompt.
3. A **File Select** dialog box will appear. Browse your hard drive for the file, select it and choose *Open*.
4. The *Record* button will now change and display either the image or the first frame of the video material.
5. Clicking that video frame will “play” the file in a QuickTime window embedded into the layout. A Photo file will open and display when you click the image.

How to add Audio:

1. Click the red *Record* button in the top right corner of the window.
2. Select *Video* or *Picture* from the following dialog.
3. A set of recording controls will appear that will record directly from the audio inputs of your computer (so the quality depends on your computer’s audio settings).
4. Click the *Record* button to begin recording.
5. Click the *Stop* button when you are finished.
6. When you are done, click the *Play* button to hear what you recorded.
7. If you like it, click *Save*. Otherwise, click *Cancel*.
8. Once you have recorded your segment, the *Record* icon will change to a *Speaker* icon.
9. Clicking the *Speaker* button will play back the segment you recorded.

NOTE: Unlike the *Picture* or *Video* options (which link to an external file), ‘*Sound*’ records the data directly into the database record, which has the potential to dramatically increase the size of the database file.

If you need to re-record or clear the (Picture, Video, or Audio) segment, click the gray ‘*Clear*’ button to clear the record of any contents.

Detail tab

The *Detail* tab is where you keep track of production status. On the left side of the page, there is a pre-defined list (**Preset Stages**) of things that are typically done to a production (which you may edit in Layout Mode). Just to the right of that is a **Status** field, where you can define if that particular **Preset Stage** has been “DONE”, if it needs “to be redone”, etc., from the pop-up menu. If you find that you need to add different stages, you can enter them under the **custom stages** field at the bottom of the list. If, for instance, you always “Record Piccolo” on your productions, you can type in the word “Piccolo” there and give it the same Status of “needs to be redone”.

At the top of the screen, there is a section where you can keep track of the **Composer**, **Publisher**, and what **% Split** they are associated. There are three additional fields to the immediate right that track who were the **Lyrics By**, the **Arranger**, and the **Programmer**. Below, is an area to list items by **Sample Name** (Song), **Category** (Musician or Music style), and **Identifier** (Publisher).

Samples & Clips button

Just above the **Sample Name** list (and on the right) is an *Samples & Clips* button. Clicking this button will take you to the **Samples & Clips** module.

Beneath this middle section, there are fields to enter additional information regarding **Talent**, **Additional Personnel**, **Production Notes**, **Comments**, and **Miscellaneous**.

On the Right, there is a column listing in which you can enter the **Tracking Studio**, **Recording Engineer**, **Assistant Engineer**, **Recording Format**, **Mix Studio**, **Mix Engineer** (2x), **Mix Format** and **Protocols Engineer**. Notice the two fields (field 5 and field 11) in this area that are customizable from a pop-up menu or editable for your purposes.

Lyrics/Script tab

This has two sub-tabs; *Lyrics* and *Script*. When you first view the *Lyrics/Script* tab, the *Lyrics* sub-tab will appear first.

Lyrics sub-tab

The *Lyrics* sub-tab contains a Lyric Sheet. Each line can be assigned a **Section**, **Loc. # (locate number)**, and you can have up to five **Track Selects** for each line of lyrics.

How to enter lyrics:

1. Click the first lyric line field and begin typing your text.
2. To go to the next field, press the tab key or click on the field below.
3. To print out this sheet, click the large *Print button* on the right.
4. This will open a standard operating system print dialog.
5. Make the appropriate selections and choose *OK* to print.

Script sub-tab

The *Script* sub-tab contains a single field where you can paste the portion (or all) of the script for this title. This layout can be used for lyrics as well, if you want to paste all of your lyrics from another document in a single step.

Takes/Locates tab

The *Takes/Locates* tab has three sub-tabs; *Takes*, *Locates*, and *Log*. When you first view the *Takes/Locates* tab, the *Takes* sub-tab will appear first.

Takes sub-tab

The *Takes sub-tab* displays an area where you can enter each of the multiple Takes associated with this title. You can store the **Real** time, the **Absolute** time, or the **TC** (time code) time. This portal is sorted by the **Real** time field only. You can enter in a Take Type from the (editable) pop-up menu located in the **Section** column header. Provide any notes in the **Comment** column.

To print this as a Take sheet, click the large *Print* button at the upper right of the window.

Locates sub-tab

The *Locates* sub-tab stores different segments of titles and their associated time code values. You can use this for logging scenes in a video or sections in a song. It works essentially the same way as the *Takes sub-tab*, except instead of having a '**Take**' **Type** available in the Section column, you'll enter a **Section** type from an editable pop-up menu. If you are working with music and have entered the **Tempo**, the **Time Signature**, and the **Length in Bars**, Studio Suite will automatically calculate the **Length in Time**.

To Print this page, click the large *Print* button at the upper right of the window.

Log sub-tab

The *Log* sub-tab allows a manual entry record of needed Take entries. Log individual shot Takes describing the scene of record, **Character/Role** involved, and their **Line**.

Disk Log sub-tab (New in Titles module)

This tab allows you to document ("Log") all files that are on a given disk, or just a specific folder, in association with a specific Media asset, Project, and Client. More than one log can be attached to each record.

Tips for Using the Disk Log

- Clicking the *Log a Directory* button will open a standard operating system dialog where you can select the Hard Drive or Folder you would like to log.
- When adding Hard Drive to a Disk Log you have the option to filter the meta data or to log the entire contents of a folder (or multiple folders).
- If you log a Hard Drive, you can type the Hard Drive size in the **Capacity** field.
- The list will then display a new line item record for each file and folder within the drive or folder you selected.
- The **Viewing Log** field will display the log number you are viewing, i.e. 'Viewing Log 1 of 1'.
- Each log has 7 columns all with drop down options for what will be displayed. The display options range from **Image Description**, **Created Date**, **File Type** to **File Size**, **JPEG Comment** and **GPS**, and many more, all taken from the file information.

- Clicking the arrow next to a folder will expand or collapse it,
- Clicking ON the folder name will display a message asking if you want to 'Open this folder?'. In the future, you can bypass this message by SHIFT+Clicking on the folder.
- Clicking on a file name will display a message asking if you want to 'Open this file?'. Choosing Yes will launch it in it's native application. In the future, you can bypass this message by SHIFT+Clicking on the file.
- Clicking on the file or folder icon will select it. You can then delete the single file or folder from the log by pressing the *Delete* button in the *Function Bar*.
- To Delete the entire log, click the *Delete Current Log* button above the log list.

NEW FEATURE: Disk Log Meta-data options

This is more of an “additional” feature than a new one. Disk Log now gathers more meta-data types, including: Timecode Beginning, Ending and Current, Movie Duration, Movie Description, IPTC, Image Description, GPS, ImageURL, JPEG, RawExif, Exif, and XMP. When logging a hard drive, all of these options will be presented as filters.

QC Report tab

The *QC Report* tab is the portal for creating project Quality Check (QC) Reports. The upper portion of this page displays data from the **Projects** module. The bottom portion allows you to create and view Quality Check reports for the current media asset. You may make several reports for a single media asset to track the quality of a media asset over time.

Log a specific discrepancy issue location by **TC Start** (time code), or **Feet/Frames**, the **Description** of the noted discrepancy, **Character/Role** involved, the timed **Duration** of the issue, any **Ch #**, the **Severity**, **Source**, **Fixed** check-box, and any further details provide in the **Comments** column.

How to create a new QC Report:

1. Press the black and green *New Report* button. A dialog will appear asking you to name the new report.
2. The **QC Report Date** and **QC Tech** fields will automatically list today's date and the user logged into Studio Suite. These may also be edited as needed.
3. A field (to the left) is provided to list applicable Time Code **Offset**. An adjacent general **Notes** text field is available to enter specifics regarding the QC report.
4. Use the **QC Checks** boxes provided to denote the types of checks performed during this report.
5. At the end of the Quality Check, list a QC Grade in the top right corner QC sub-tab window.

As the QC is performed, errors can be itemized in the space provided.

- Enter the time code for an error in the **TC** field. The Feet|Frames field will be auto-calculated from this entry.
- Enter the type of error into the **Description** field (i.e. pop, clip, distortion, etc.)
- If a particular character or role is affected, list their title in the **Character/Role** field.
- Use the **Duration, Channel # and Severity** fields to list the appropriate information.
- Use the check boxes to list whether the error is in the source material and eventually to note that it has been fixed.
- List any comments regarding a particular issue in the **Comments** field to the far right of the entry.

You may view old QC Reports by selecting them from the drop-down menu labeled **Select Report**. You may, of course, print any QC report using the *Print* button in the QC information box.

Production Notes tab

This is a simple view of two areas, one for **Production Notes** and one for **Post-Production (Mix)** notes. Simply click in either field and begin typing. You can print these notes by clicking the *Print* tab. From the provided group list, click the *Production Notes* button.

Storyboard tab

Here you can paste (or insert) storyboard **Pictures, Scene Descriptions, Script** segments, etc. into appropriate fields, to create a storyboard for a title. The '**Scene**' **Sort** field determines the order in which each record appears. To view this in a normal storyboard format, hit the *Print* button, which will go into Preview mode. Hit *Continue*, then *Print* or *Cancel*.

Publishing & Copyright tab

License/s sub-tab

Use this layout to store information regarding all the instances in which this title was licensed for use. Once again, you may attach and store an agreement. Use the scroll bar on the right to view multiple licenses.

Submissions sub-tab

Use this page to track the Submissions and Usage of any Title property. Select the black and green *New* button to begin a new entry.

Writer/s sub-tab

In this layout, the user can list detailed information regarding the Writer or Writers of each title. Space is provided for each Writers' and Publishers' percentage shares. As with all percentage fields, remember

to enter the number as a decimal (i.e. 50% is entered as .5).

You may also attach and store a copy of the Writers' agreement on this page.

Sample/s sub-tab

This sub-tab allows you to choose from a list of Samples in the Samples and Clips module. For more information regarding Samples, see the chapter in this user guide title **Samples**.

Keywords tab

Here you can define **Keywords for this Title**. Once keywords are entered you can search for any keyword for any media asset. Detailed Keywords instructions are also included in the center of the page.

- **Keywords for this Title** – this field holds keywords that can be entered by typing in the field or making Keyword selections in the field to the right (described next).



A screenshot of a software interface titled "Keywords For This Title". It features a light gray rectangular area with a thin black border. Inside this area, the following keywords are listed in a dark gray font: "Pop", "Rock (Pop)", "Instrumental", and "Brazilian".

- **General Keyword Choices** – this field displays a default list of keywords. When you check a box, the word appears in field to the left. You may edit the available choices by clicking the *Edit* button.



A screenshot of a software interface titled "Keywords For This Title". It features a light gray rectangular area with a thin black border. Inside this area, the following keywords are listed in a dark gray font: "Pop", "Rock (Pop)", "Instrumental", and "Brazilian".

List tab

The *List* tab displays a list of your Titles, along with the associated **Artist**, **Producer**, **Client Engineer**, **Media Asset Series** or **Project**. You can click the *Sort* buttons above each column to sort by that field in ascending order (A-Z).

Attach & FTP tab

The *Attach & FTP* tab is used for attaching (recording, linking and/or embedding) external files, sounds, pictures or movies, URLs, and FTPs to an individual **Titles** record. The *Attach & FTP* tab is the where all of these attached files are stored. For a detailed explanation of this tab, see the **Attach & FTP tab** chapter of this User's Guide.

Report tab

The *Report* tab, formerly the *Print* tab, allows you to print various aspects of information about a record.

Print sub-tab

How to print

1. Pick one of your companies or clients return address and logo information from the **Select Company** field.
2. You will see all the different List Bars so you can print all of the various lists, sorted from left to right in different field orders. These lists print in the order that they are currently sorted, with the current found group. We advise you to be sure that you have found only the records you want to print, and that you have used the *Sort* buttons to get them in proper order (prior to printing). Of course, the *List* view would be the best place to find and sort all of your records just before clicking the *Report* tab.
3. You have the option to print a Full Track Sheet, which prints 1 - 56 Tracks, a 1 - 24 Sheet, or a 25-48 Sheet. It will also print the Lyric Sheet, *Locate(s)* list, and *Storyboard*.
4. The Status Only option will print just the Status column for each of the currently selected songs. So, if you are working on an album of 10 songs, make sure they are the found set. The Status Only printout will show the status of all 10 to keep track of your progress.
5. Other bottom row print options include *Detail*, *Takes* and *Production Notes*. Green colored print options for *Writers Agreement* and *Production Worksheet* are on the right. The Writers Agreement is a provided template for "writing and publishing splits" composition purposes. The Production Worksheet is complete summary detail of the song, related artist, and technical information.

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

Click the *Library & Labels* tab on the right side to go to that module.

This covers all of the basics of the **Titles** module in Studio Suite. To return to the **Main Menu**, click the *Main Menu* tab.

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Web Glancer module

File Name: SSX_Projects.fmp12

The **Web Glancer** add-on provides basic read-only access to the **Contacts**, **Calendar** and **Tasks** modules in Studio Suite, similar to the iPhone add-on but formatted for a larger screen. It can be used on any modern web browser (Internet Explorer 7+, Chrome, FireFox, Safari, and Opera have been tested to work with this module).

To access the Web Glancer add-on, simply point your web browser to the following location:

- If these files are hosted on a **Mac**: {Server IP}/~username/StudioSuite/WebGlancer
- If these files are hosted on a **PC**: {Server IP}/StudioSuite/WebGlancer

Where {Server IP} matches that of your server, e.g. "192.168.1.10," and ~username matches the user account on the server that has the files installed to its Sites folder (if on a Mac). If accessing this add-on from outside of your LAN, you will need to substitute the IP address of your server with you router's public address.

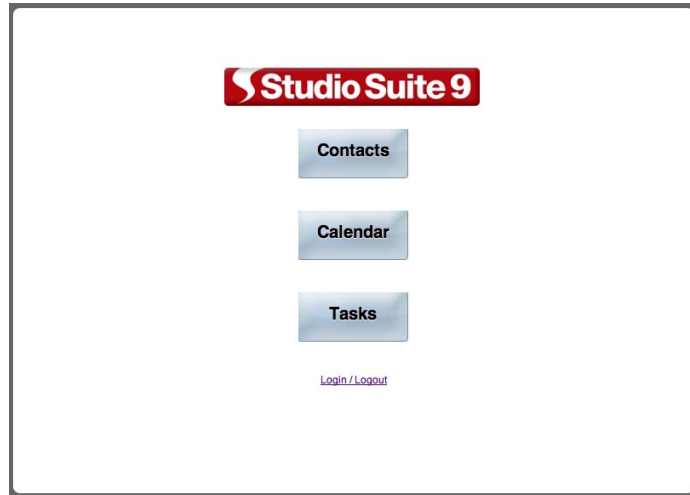
Login as you normally would to Studio Suite via a username and password. You can then view (but not edit) contacts, see what is going on at your facility on any given day, or be reminded of what tasks you have assigned to you.

Limitations:

- No Record Level security
- No event or task filtering

Home Page view

When you are at the *Home* page, select from **Contacts**, **Calendar**, and **Tasks**. Choose from the available functions and read-only items.



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Web Request module

File Name: SSX_Tech.FP7

SSX

The **Web Request** module is designed to allow your clients to submit a request from your website to your facility via Studio Suite. This module can also be used for requests in house as well.

If you are using the Network or Internet versions of Studios Suite 10, HTML pages were installed to your server as part of the server installation. To access those pages via a browser, enter:

For... [http://\[server ip address\]/studiosuite/webrequest/addrecord.php](http://[server ip address]/studiosuite/webrequest/addrecord.php)

New Web Request

The client fills out a request on your website which includes pertinent information regarding their request. The form allows for the addition of resource specific items (i.e. editors, engineers, rooms, equipment, etc.).

When the requestor clicks the *Submit* button an email is sent to both requestor and assigned Studio Suite users as confirmation for the request. Upon logging into Studio Suite, the web request administrator will be notified of new web request awaiting approval. The exact verbiage of both emails can be set from the *Preferences* tab.

Detail tab

The *Detail* tab looks very similar to what the client sees on your website. From the *Detail* tab, you have the option to mark the request as **Declined**, **Accepted**, **New**, and/or **Cancelled**. After which an email will be sent back to the requestor informing them of the request status. This email will be sent from the email address designated under the *Preferences* tab to the email provided by the requestor.

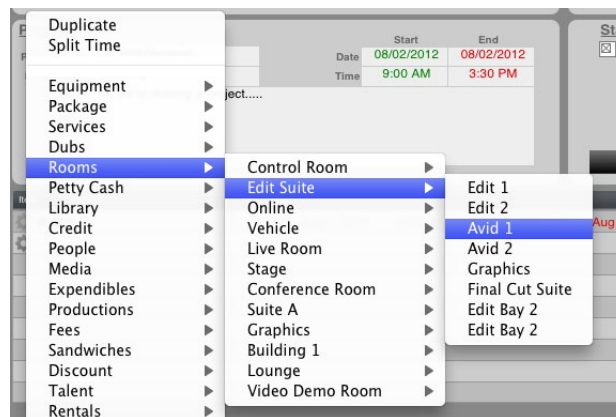
Item section

The Item section at the bottom lists all of the items in the Web Request that you are viewing. It includes conflicts, if there are any, and the gear at the left allows you to choose an item that will alleviate the conflict before you accept the request.

| Item | Start | End | |
|---|---------------------------|---|-------------------|
| <div>⚙</div> <div>Avid 2</div> <div>⚙</div> | Thu, Aug 2, 2012 10:00 AM | <div>✖</div> <div>3:00 PM</div> <div>Thu, Aug 2, 2012</div> | Approved to Start |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

| Item | Start | End | |
|---|---------------------------|--|-------------------|
| <div>⚙</div> <div>Avid 1</div> <div>⚙</div> | Thu, Aug 2, 2012 10:00 AM | <div>3:00 PM</div> <div>Thu, Aug 2, 2012</div> | Approved to Start |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

You can also add additional items to the request by clicking on the gear. The gear will bring up a pop up menu.



List tab

The *List* tab shows a list with basic information of all of the **Web Requests** that you've received, including any that you have **Cancelled** or **Denied**. Records cannot be modified from this tab. This view is sortable by each header in the list.

Attach & FTP tab

Just like the *Attach & FTP* tab in other modules, this tab gives you a place to Attach relevant material to the **Web Request** record. For more information on how to use this feature, go to the **Attach & FTP tab** chapter.

Preferences tab

The *Preferences* tab is where you set up the different email messages that are sent in relation to **Web Requests** and who will be receiving and sending them. In the **User Account** field, choose the main moderator of the Web Requests and click *Accept* to set it. The email address that was entered for this person in the **Contacts** module will fill in automatically.

In the **Notifications will go to requestor and:** field you can include anyone in your organization that you want to monitor the communications going through the Web Request system.

Under the *Request*, *Accept*, and *Deny* sub-tabs, is where specific messages regarding those actions can be written. At the bottom of the Request sub-Tab this covers all of the basics of the **Contacts** module in Studio Suite. To return to the **Main Menu**, click on the *Main Menu* tab in the upper right of the screen. tab is a **Redirect** field where you can designate where to automatically redirect the client after they have submitted their request as well as time in seconds for the the redirect to happen.

Under the *Web* sub-tab is where the message is written that will be emailed to the requestor when a **Web Request** is submitted.

Report tab

Print sub-tab

Under the *Print* sub-tab, there is only one option, *Print This*.

Audit Log sub-tab

The new feature, Audit Log, displays all of the changes that were made to the record that you are viewing as well as who made them and when. You can also use the Audit Log to view the details of a deleted record. To read about how to do that and for more details about how to use the Audit Log read the Audit Log chapter in this manual.

This covers all of the basics of the **Web Request** module in Studio Suite. To return to the **Main Menu**, click on the *Main Menu* tab in the upper right of the screen.

Appendix A

File Recovery And How To Avoid It
(Source: FileMaker Inc.)

Why does the Recover command sometimes need to be used? A little background regarding how FileMaker Pro maintains files during usage sheds some light on how databases can become damaged. FileMaker Pro is a disk-based application, meaning FileMaker does not need to load the entire database into RAM as the file is opened.

The application contains code that manages the transfer of data from the hard drive to RAM and back. The memory allocated to FileMaker is divided into two portions: application code, and data from the file itself. As the file is used, FileMaker will routinely write updated sections of the file from data buffers in RAM to the hard drive. By far, the most common cause of file damage is an unexpected application termination. In most cases, an unexpected Quit will occur at a time when the file has been idle since the last hard drive update. In this situation, the next time the database is opened, FileMaker Pro will run a consistency check on the file.

Typically, the file will open without problems. However, if the unexpected Quit occurred during a hard drive update, the file is likely to be in an inconsistent state, and require repair measures the Recover command provides.

File corruption is not inevitable, but it's a good idea to take measures to prevent damage to a database and also ensure that databases are properly backed-up in case of disaster. Routine back-ups are imperative with any database. Magnetic media has an occasionally transitory nature; entropy surrounds us and our data.

A good back-up program should provide multiple copies of a database as sources for restoration. A scheme involving rotating back-ups can accomplish this. This method involves separate back-up copies over no less than a two week rotation. The file is backed-up to a set on day one, a new set on day two, until ten sets of back-ups exist assuming a five day work week. On the eleventh day, the first set is reused.

This type of rotation ensures that a lurking problem will not spoil your chances of an undamaged file

restoration. If new data entry has been minimal since the last back-up, with large files it may be more efficient to simply use the back-up rather than going through a time-consuming recovery. Many programs are available that ease the drudgery of routine back-ups. Using a back-up program that allows file or folder specific back-ups will provide the most efficient protection of important database files.

Periodically saving a clone will provide a master copy of the database structure which can be useful for restoring scripts or layouts that may be deleted in the recovered file. In many cases, it is a good idea to save a clone of the file and a back-up at an off-site location, should the disaster not be limited to the file itself.

Since unexpected application termination is the most common cause of database corruption, avoiding unexpected Quits on the computer from which the file is running is the best way to avoid damaging a database. In general, commercial extensions should not be a problem as long as an almost religious commitment to running current versions of this software is maintained. Of course, any public domain or shareware extensions should be avoided. Even the use of commercial extensions should be conservative on the machine responsible for running the database.

If the file is being used in an area subject to power outages, an **un-interruptible power supply** (UPS) is strongly advised. The cost of a UPS might equal the time involved in one file recovery. FileMaker Pro limits database size to 2 gigabytes (32 MB in 2.x). Files that have exceeded that limit will be damaged beyond repair, since it is likely that key elements of the file structure will have been obliterated by overwriting.

In cases of multiple corrupted files on a hard drive, the hard drive itself may be the culprit. Check the health of the hard drive with a drive utility program. Software that optimizes, compresses, or partitions the hard drive should be current versions. Driver software must be compatible with the Operating System version.

In most cases, no maintenance beyond frequent back-ups is necessary. However, most databases are good candidates for a routine compression. **Saving a compressed copy** rewrites the entire database, fitting as much data into each block as is possible. This procedure not only reclaims unused space in the file, it also rebuilds the file's structure. Compression can be time-consuming and might be best accomplished as an overnight task in large databases.

In general, recovering a file should be reserved for files that will not open, or are displaying obvious index problems. Field indexes are used by FileMaker for finding and sorting. Databases that are returning records incorrectly from a find or are sorting in unusual orders should be fixed by recovery. Keep in mind that there are many other conditions that will result in incorrect finding or sorting, including mismatched field types. Be certain you have eliminated all other possibilities before recovering a file.

Including file recovery in the regular maintenance of a file may help to correct file structure problems before they become apparent. Files that are undergoing structural changes should be treated somewhat conservatively. It's a good idea that any major changes to a file, including field deletions or modifications, be done in a clone of the database which can be refilled with data via an import after the design work is done. The importance of using a clone for design modifications increases as the database size grows.

Timely back-ups are the only guarantee of database integrity and data safety. Using FileMaker's Recover command is like tossing a life-saver to a person who can't swim; it will probably save the person, but it would have been more prudent to keep them from getting wet in the first place!

Please read **Appendix B** (Troubleshooting) for instructions on how to recover a file.

Appendix B

Troubleshooting

What To Do If You Have A Problem

Problems can occur for a variety of reasons, including:

- System Extension conflicts
- Insufficient RAM or amount of memory allocated to FileMaker
- Failure to meet the Hardware and Software requirements
- Damaged equipment, hardware, operating system software, FileMaker application, or document/file.
- Operator error
- Bugs.....

Many times, simply restarting your computer, quitting and re-launching FileMaker and Studio Suite will remedy many problems.

Before calling for technical support, it is important to isolate your problem. Write down a complete description of your problem, what module/file it occurs in, what you do just before the error happens, and if it happens in any other situation.

Damaged files / Recovery

Occasionally a file becomes damaged, and you will be told via a dialog box to use the Recover command to recover the file. The procedure is simple enough (Select Recover from the File menu), but havoc can ensue

If the proper naming conventions are not used.

A common mistake is to allow the recovered file to be named "Filename Recovered.fp7". This will be a good file, but because Studio Suite's looking for the specific file name, it will still try to use the old damaged file.

The problem can get worse if FileMaker says "The file "Filename.fp7" cannot be found..." , and you (thinking yourself wise) tell it to use the file named "Filename Recovered.fp7". Then, some relations will be from this file, and some will be from the original damaged file, causing a complete data scramble. Further, you will continually be told that it can't find the original file.

So, follow this example religiously:

1. When told to recover a file, click Cancel.
2. Go to the desktop and RENAME the file from (for example) "Filename.fp7" to be "FilenameOLD.fp7".
3. Return to FileMaker, select Recover from the File Menu, and select the FilenameOLD.fp7 file.
4. When it asks you to name the recovered version of the file, remove the words "OLD" and "Recovered" from the file name, re-instating the original name.

Printing problems

Since there are so many printers on the market, you may need to make minor tweaks or adjustments to any printing layout to make it fully compatible with your printer. Refer to your FileMaker User's Guide about the Layout mode, and how to move and arrange fields. All printers work slightly different, and minor layout adjustments are really a NORMAL occurrence. Before you print on an expensive letterhead or fancy paper, perform a test-print on regular paper to be sure all areas print where they are supposed to.

1. Make sure that your printer is plugged in and turned on. Check the cable connections to be sure they are plugged into the correct port.
2. Can you print from any other applications?

Deleting sample records

Studio Suite comes with sample records pre-entered to give you an idea of how to use each field. When you are ready to delete these records, from the *Script* menu, select "Delete Sample Records". Repeat this process in all files and modules. It is best that you delete the sample records from the Server/Host machine only.

Missing status area (in the Calendar and other files)

If you don't see the status area, there is a good reason for it being locked out.

There is a script available to the two highest access levels that can only access the Layout mode. Choose "Show Status Bar" from the *Script* menu. When finished, click on the *Status Bar* button on the bottom of the screen to hide the status area again.

To make changes in the Layout mode if the Status Bar is not showing, click on the *Script* menu and select the “Show Status Bar” script. You can use this script only if you have Layout access.

If you HAVE access to the Scripts and Layouts, DO NOT ALLOW general access to the Status Bar by changing a script or showing it in a layout. This may cause accidental corruption or damage to the file. Be sure the checkbox for “Include in Menu” is not checked.

Appendix C

*Importing your data into CONTACTS
(From non Studio Suite sources)*

NOTE: The following instructions are for importing data that IS NOT from previous version of Studio Suite. If you are importing from previous version of Studio Suite, please read Chapter 5.

When performing this type of operation, it's smart to make a safe backup of your existing "from" file in case something gets mangled. Do it!

If you are importing from another FileMaker file, make sure you have the proper "found set" as only the current records will be imported.

If your existing "from" file has different records marked as "Client", "Vendor", "Employee", "Personal" or "Prospect", you should import them as separate groups in separate imports. Then you can re-identify each group in those fields after they are imported to the Contacts module. Read about how to identify records as "Client", "Vendor", "Employee", "Personal" or "Prospect" in the Contacts module chapter of this Studio Suite User's Guide. Also, read about the "replace" function in the FileMaker User's Guide.

FileMaker can import the following types of files:

- FileMaker
- tab delimited text
- comma delimited text
- SYLK
- DIF
- WKS
- Basic
- Merge
- Claris Works
- Killer
- DBF
- Excel

Make sure your file is in one of the above file formats. You may need to read the User's Guide for the application of the existing file to determine how to do that if the file is not already in one of these formats.

1. Once you have determined that your existing file is in one of these formats, go to the Contacts module of Studio Suite, and under the File menu, select "Import/Export" and then "Import Records".
2. You will then come to a dialog box where you need to select the file you are importing from.
3. After selecting the file, you will see the "Import Field Mapping" screen of FileMaker.
4. This screen is where you align the data from the file you have chosen to the appropriate fields in Studio Suites Contacts module.
5. On the left side of the screen is the data from your file, and on the right are the field names in the Contacts module.
6. By clicking and dragging the field names on the right, you can slide them up or down so that they will correspond properly to the data on the left.
7. Clicking on the "--" in the middle will change it to "->" indicating that the data will transfer from left to right. If it is already showing as "->", clicking again will change it to "--", showing that this data will not transfer.
8. If the field name is gray, or you can't get the "--" to turn into "->", that means the field is a calculation, and that you don't want to (and cannot) import into it.

9. In the upper right is a “View By” selector. This will change the order of the fields on the right.
10. Select the one that most closely matches the data on the left. There may be no optimum position, depending on the type of file you are importing from.
11. In the bottom left, there are “<<” and “>>” buttons that will scroll to the next and previous records in the incoming file, so you can see data from different records in the left side. This is useful if some records have incomplete data, you can scroll to a record that has complete data to make sure it is aligned properly to the correct field on the right.
12. Also in the bottom left is the “Add New Records” or “replace data in found set”. Make sure to select “Add New Records” .
13. Once everything is aligned properly, click on the “Import” button.
14. Next you will see the “Import Options” screen.
15. Make sure “Perform auto enter options while importing” is checked, and make sure “Keeping them in the original record” is also selected.
16. Click OK. Your contacts module will now be filled with data from your other file!

Import Fields

The following is an alphabetical list of just the user import fields from the Contacts Module that appear on the right of the “Import Field Mapping” screen of FileMaker. You might not have corresponding data for all of them, but here they are in case you do. Match your data to these fields. The most commonly used fields are marked with “*”. There are many fields that don’t appear on this list - leave them alone for now.

| Field Name | Explanation or “sample” |
|-------------------|--|
| *Address 1 | first line of address, usually street |
| *Address 2 | second line of the address, like Apt |
| Billing Terms | usually “net 30” or something like that |
| Birth Day | DAY of birth only, not full date |
| Birth Month | MONTH of birth only, not full date |
| Birth Year | Year of birth only, not full date 0811 |
| *Category | “Producer, engineer, label, attorney, etc” |
| *Cellphone | cell phone number |
| *City | |
| Client Tax Rate | if different from your local rate |
| Comments | |
| *Company Name | Name of company |
| *Country | |
| County | for tax purposes |
| Credit Limit | “\$20,000” |
| Date Hired | |
| Date Left | |
| Dependents | |
| *Email | |
| Employee Notes | “works well with others...” |
| Employee Picture | |
| Employee Status | “Full time, part time, ind. contractor” |
| Extensions 1 | Phone extension for OFFICE PHONE |
| Extensions 2 | Phone extension for OFFICE FAX |
| Extensions 3 | Phone extension for HOME PHONE |

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| | |
|-----------------------|--|
| Extensions 4 | Phone extension for HOME FAX |
| Extensions 5 | Phone extension for CELL PHONE |
| Extensions 6 | Phone extension for PAGER |
| *First Name | |
| Flag 1 | marker, like "brochure", or "party" |
| Flag 2 | |
| Flag 3 | |
| Flag 4 | |
| FoodRestaurant Prefs | "likes McDonalds" |
| Health Issues | "diabetes" |
| *Home Fax | |
| *Home Phone | |
| *Instrument | |
| Last Here | was last at our studio |
| *Last Name | |
| Last Spoke | |
| letter sent | date of last "bulk" letter |
| Letter Text | |
| Manual SS9 | KMiller 2009 writer |
| Mics | Mic prefs - "TLM 170 on vocals" |
| *Middle Initial | |
| Mix Alignment | "996 30 IPS +6@250" |
| Multi Track Alignment | "996 30 IPS +6@250" |
| *Office Fax | |
| *Office Phone | |
| Other Preferences | "likes cheese doodles in control room" |
| *Pager | pager number |
| Personal Days | number of personal days taken |
| Phone Book Notes | usually directions to hours |
| *Prefix | "Mr, Mrs, Dr, Reverend, etc" |
| Reason Left | "moved to better company" |
| Salary | "\$500 week" |
| Schedule | "10am to 6am, Monday thru Sunday" |
| Sick Days | actual sick days taken |
| Special Talents | "Imitates Trent Reznor" |
| *State | |
| Styles | "R&B" |
| Tax Exempt | must be "yes" or "no" |
| Tax Exempt Number | |
| *Tax Number | Social Security # or EIN |
| *Title | "President, Manager, etc...." |
| Unions | "AFM, SAG, etc" should have carriage return after each |
| Vacation Given | actual dates of given vacation |
| Vacation Preference | preferred vacation dates |
| Web Site | |
| x00 - x03 | Holiday cards for 2000 - 2003. Must be |
| "Yes" or "No" | |
| x96 - x99 | Holiday cards for 1996 - 1999. Must be |
| "Yes" or "No" | |
| *Zip | Postal Code 93063 |
| *ZipPlus | Postal Code 4 digit extension |

Appendix D

Backing up “Mission Critical Data”

Backing up data is an easy thing to put off until later, but that's not a good idea. As they say, it's not a matter of IF your drive will crash, it's a matter of WHEN. Power spikes and outages also can damage files that are running, and these can occur any time. To help prevent this, your server should be on a UPS (Uninterrupted Power Supply).

Here are some recommendations for backing up your "Mission Critical Data".

1. If possible, use FileMaker Server, as it has some special advantages for creating backups:
 - 1) It will create backups while the files are open and in use.
 - 2) It will do it automatically.
2. Create a folder called "Studio Suite 9 Backups" on a drive other than where the "live" data itself resides. If one of the drives crashes, you'll still have recent data on the other drive. When possible, use RAID drives.
3. Create a folder for each day of the week (Monday, Tuesday, Wednesday....)
4. Create folders for specific times throughout the day (noon, 3pm, 6pm, 9pm, or what ever intervals you feel comfortable with).
5. Using FileMaker Server, create backup schedules that will backup into each of these folders. See the FileMaker Server manual for specific details.
6. Do the final backup of each day into that days folder. i.e., backup at 11pm into the Monday folder.
7. At the end of the week, create a DVD backup of each of the daily folders.
8. There is a particular file: **SS8_Resources.fp7** that only holds "reference data" such as Postal Codes, Graphics, Interface Text and Translations, and Recall Drawings. Since you will not typically be altering this data on a regular basis, you don't need to include it in your regular backups, however, if you do need to make a change to any this data, you should make a backup of this file first, then again after you make the change.

This method allows you recall the final backup for each day in history, and also go back to a previous backup from “today” (as possible by step 4 above). This backup will be useful when someone accidentally deletes data they shouldn’t have.

Don’t just assume that the backup schedules are working. CHECK that the backups are actually being made. Permissions on folders and drives, or invalid file paths will prevent backups from getting made. Don’t assume they are being made- check it!

If you are NOT using FileMaker Server, you can adopt a similar “folder” approach to the above, with one important exception: You must close the files (quit Studio Suite) before copying the files. If you copy a file while it’s open, it will not be a reliable backup. Close files first. This applies if you are using 3rd party backup applications like Retrospect, etc.

Should you find that you need to revert to a backup, you may want to review the section called “Studio Suite file structure in chapter 4, to make sure you replace the correct file.

In any case, if you are using FileMaker Server, make sure to Close the database in question (Using the FileMaker Server Admin application), swap the file, then re-open the file. If you are not using FileMaker Server, make sure to Quit Studio Suite before moving the files.

It’s also possible to be more surgical, by opening up the backup on a separate computer, finding the data you want to restore, and importing just that data into the appropriate table in the “live” version. You should be very familiar with Studio Suite and FileMaker before attempting this process.

MAKE REGULAR BACKUPS!

Appendix E

The Postal Codes Table

The **Postal Codes Table** holds postal **US Zip Codes** and their associated **City, State, County** and **Country**. This 'support' file is used by the **Contacts** module, and it automatically enters these fields when a **Zip Code** is entered and the tab key is typed.

Adjustments and additions

Since postal data is under constant change, you may need to make adjustments or additions to your **Resources** file. The Resources file was not intended as a User file. We recommend that you carefully follow the instructions below to modify the Resources file.

If Studio Suite does not automatically enter the **City** and **State** when a **Zip Code** is entered in the **Contacts** module, then the values probably don't exist in the **Postal Codes** table.

1. Click on the Window menu in the toolbar (top of your screen).
2. Select 'Show Window', then choose '(SS_Resources_7)'.
3. This will open the **Resources** window within Studio Suite.
4. Click on the Postal Codes tab to open the Postal Codes table.
5. Click a sort button to sort the list alphabetically by **City, State, PostalCode** or **County**.
6. Scroll through the list for the entry you would like to modify.
7. You can also click on Edit > Find/Replace and type in the name of the **City** or **State** or type the Postal Code and hit 'Find Next'. This will automatically search the **Resources** file and find your specific entry.

NOTE- If there are more than one records in the Postal Codes table that have the same zip code, Studio Suite will lookup the city and state from the first record that has a matching zip code. Be sure to make your changes on the first found record.