



The Studio Director Quick Start Guide

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The Studio Director
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Chapter 1: The Studio Director

The Studio Director is a web-based application designed to improve the efficiency of all aspects of studio management.

The Studio Director Tabs

The Studio Director application consists of the following nine major tabs:

Home

This is the default tab that is displayed when you first log into The Studio Director. Each season is displayed as a tab and classes are displayed within each season. This is also the tab that is used to log out of the system. Links to the Quick Start Guide and Frequently Asked Questions are available on this tab.

Classes

This tab is used to create, view, and modify classes with the current week's class schedule displayed at the bottom of the default screen.

Students

This tab is used to input and modify student information. Family information, class enrollment details, and tags are displayed here. This tab can be used to register students for classes and to perform other functions such as scheduling make-up classes.

Families

This tab is used to input and modify family information. Each student in the family is listed and you can see which classes the student is enrolled in by hovering your mouse over the student name. The family account ledger is displayed at the bottom of the screen.

Instructors

This tab is used to input and modify instructor information. Each instructor's teaching schedule is displayed and timesheets for instructors can be entered here.

Charges/Payments

This tab is used to enter global charges and payments.

E-mail/Text

This tab is used to send emails or text messages.

Reports

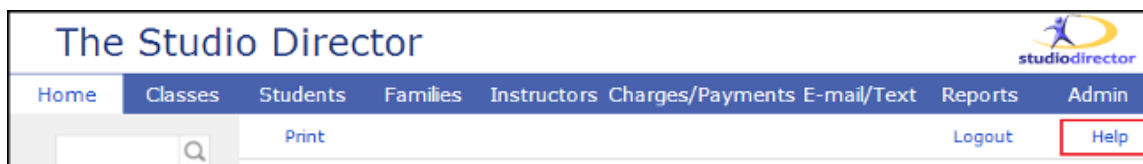
This page contains links to the wide range of reports that can be run within The Studio Director.

Admin

This tab contains links to various administration functions within The Studio Director. Administration functions are grouped into major task categories: Logins/Passwords/Security, Class/Date Administration, Family/Student Administration, Studio Information, Tuition Rate/Charge Administration, Inventory Administration, Events/Recitals Administration, Costume Administration, Manage Credit Card Payments(optional), QuickBooks(optional), On-line Registration, Student Check-In(optional).

Access Help Resources

The Studio Director application provides a variety of help resources that you can access while online. To view the help resources, click Help located at the top right of your application under the Admin tab.



The Help page is divided into four sections (General, FAQ, Documentation, Training Videos). Click **On-line Help** to access the online help module or **General FAQ** to access the online FAQs. If you would like to view the entire help document in PDF format, click **User Guide**.

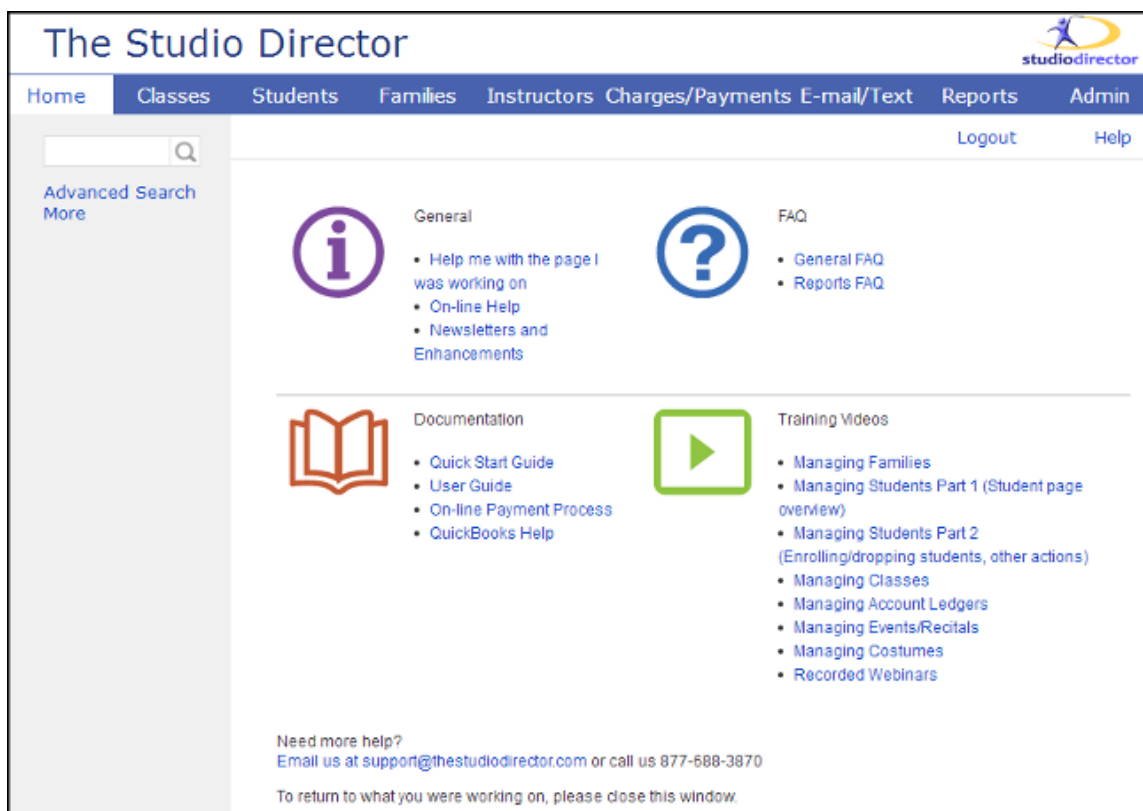


Table of Contents (TOC), Search, Index, and Glossary Tabs

Within the "On-line Help", the TOC, Index, and Search tabs in the left-hand column of this help

system allow you to find the information you need quickly and easily.

- The TOC tab is arranged like The Studio Director, with information grouped according to the tab it relates to so if you have a question while using the software, you can start looking for an answer by going to the help folder that matches the tab you are currently on.
- The Search tab is useful if you want access to *all* topics in the help system that contain a specific word, group of words, or phrase. To improve the usefulness of the search results, put search phrases in quotation marks. For example, if you type view and classes into the search field, you get a list of every topic that contains the word view and the word classes anywhere in the document. If you type "view classes", the search returns only topics that contain the word view right beside the word classes.
- The Index tab is useful if you want to find information about a specific task, feature, or item in The Studio Director. To find information about costumes, for example, looking under *costumes* in the index leads you to links for *ordering costumes, entering sizes and measurements for costumes, deleting costumes*, and so on.
- The Glossary tab provides definitions of the key words and phrases within The Studio Director. Each of the words also appears as a link the first time it appears in each topic. Clicking the word displays a pop-up box providing the definition of the word.

[Charges/Payments Tab](#) > [View a List of Charges-Related Actions Available in the System](#) > [Enter New Family Charges for Each Future Session](#)

Enter New Family Charges for Each Future Session

To enter new family charges for each future **session**, do the following:

1. Click the Charges/Payments tab to go to the Charges screen.
2. In the Charges region, click #5 Enter new family charges.
3. On the screen that appears, select the family charge relates to.
4. On the Session Adjustment Information screen, select the session adding.
5. Enter the amount of the charge.
6. From the Category drop-down list, select the category.

An accounting term used to refer to billing periods. If you bill monthly, you have a monthly billing session; if you bill quarterly, you have a quarterly billing session.

Popup Descriptions

The icons and bold-font text in the calendars and some of the blue hyperlinks within the application have descriptive information embedded in them. To view this information, simply hover your mouse over a class name, class type icon, description, or student name link. A popup box appears automatically, displaying details about the corresponding element.

Chapter 1: The Studio Director

2017-2018 Season

Monday					Tuesday					Wednesday				
Time	Name	Ages	Type	Instr	Time	Name	Ages	Type	Instr	Time	Name	Ages	Type	Instr
10:00 - 10:30	Intro to Ballet	3-4.5		MW	2:00 - 3:00	Combo	6-8		JS	5:30 - 6:30	Jazz	6-8		JS
5:30 - 6:30	Jazz	3-4.5		MW	5:00 - 5:45	Ballet I	5-7		MW	6:00 - 7:00	Hip Hop	10-12		CM
6:00 - 7:00	Pointe													
7:00 - 8:00	Acrobatics													
7:00 - 8:00	Lyrics													
7:00 - 8:00	Pointe													

Intro to Ballet
Ages: 3-4.5
Type: Ballet
Instr: Monica Wells
Loc:
Avail: 2 of 12 slots filled
Waitlisted: 0
Pre-Req:
Session Charge: 40.00

Field Level Help

Hovering your mouse over the “?” next to some of the field names provides additional information about how that field is used.

Class Information

Class Name ?

Season ?

Day ?

Start Time ?

Length ?

Instructor ?

Assistant Instructors ?

Season
The "calendar" of classes that the class will be grouped/organized into. Seasons also have an impact on how and when tuition will be calculated and posted to the family accounts.

External Help

If you are unable to find the answers to your questions within this help system, use the information below to contact us:

- Toll Free: 877-688-3870
- E-mail: support@thestudiodirector.com

Navigate Around The Studio Director Application

Each of the nine components of The Studio Director application can be accessed by clicking the corresponding tab in the menu row that appears at the top of every page:



In addition to the main tabs menu, the Home, Classes, Students, Families, and Instructors tabs also display a submenu action bar.



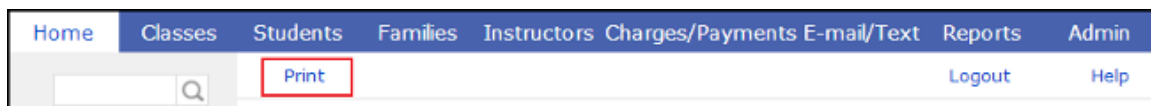
This menu can display any combination of the following buttons depending on what you are trying to do in the system:

- **New** – Refreshes the existing form to allow you to enter a new record.
- **Save Changes** – Saves any changes or additions you made to the information displayed in the form. If you do not click the Save Changes button before navigating away from the page, any changes you made will be lost.
- **Print** – Displays a print preview screen of the current record. To print the record, select Print from your browser window.
- **E-Mail** – Allows you to easily send one or more e-mail messages like class notes, report cards, invoices, class confirmations, statement letters, and summary invoices.
- **Text** - Allows you to easily send a text message.
- **Copy** - Allows you to easily copy class information to create a new class.
- **Delete** – Deletes the record displayed. Before the record is deleted, the system displays a popup screen asking you to confirm that you want to delete the information.
- **Logout** – Logs you out of your Studio Director account.
- **Help** – Takes you to the Help page.

Print Screens in The Studio Director

Most records within The Studio Director can be printed directly by doing the following:

1. Click Print in the top-left corner of the screen.



After clicking Print, a print-preview screen appears.

2. If the record you are trying to print appears as a webpage, go to File > Print or select Print in your web browser.

If the record is an Adobe document, click the  (Print) icon at the bottom of the screen.

3. (Optional) Select a printer from the drop-down list.
4. Click Print.

Run Searches and Work with Search Results

The Search box appears in the left-hand column of every screen within The Studio Director application, with the results of the search appearing directly below it.

Run a Basic Search

The basic search is a great way to easily find a class, student, family or instructor. To run a basic search, do the following:

1. Enter a name, email address, phone number, or part of a name/email/phone# in the Search box located at the top left side of The Studio Director application.
2. Click the GO button.
3. Click any of the items in the search results to display the record.
4. Use the Prev and Next buttons at the top of the results field to view the previous or next items in the search results.



Under the Admin tab, under the section Studio Information, select *Search Display Format* to select the format you would like the family, student and instructor names to be displayed in the Search results on the left side of the pages. You can select FirstName LastName or Last-Name FirstName.

Run an Advanced Search

The Advanced Search feature allows you to run searches that are targeted to any of the following specific kinds of records:

- Classes
- Families
- Students
- Charges/Payments
- History of e-mails sent

To perform an Advanced Search, do the following:

1. Click the "Advanced Search" link under the Search box. This is located at the top left side of The Studio Director application.
2. Select one of the options: Classes, Families, Students, Charges/Payments, or History of e-mails sent.
3. If you selected Classes, Families, Students, or Charges/Payments in Step 2, the next screen that appears displays a variety of additional parameters you can use to narrow your search. Enter or select values for all of the fields you want to use in the search.
4. If you selected "History of e-mails sent" in Step 2, the next screen displays a text-entry box into which you can type the e-mail address or addresses whose history you want to view.
5. Click Next to run the advanced search.



Under the Admin tab, under the section Studio Information, select *Search Display Format* to select the format you would like the family, student and instructor names to be displayed in the Search results on the left side of the pages. You can select FirstName LastName or Last-Name FirstName.

Work with Advanced Search Results

After conducting an advanced Families, Students, or Charges/Payments search, the search results

appear in the search pane on the left along with the total number of search results found. You then have the opportunity to do either of the following:

- Tag all the students or families listed in the search results. Examples of tags that can be applied include Closed Account, Early Registration, and Follow-up Needed.
- Send an email to all the students or families listed in the search results.



This is a quick and efficient way to apply tags to or generate emails for specific groups of students or families in the system.

More Search Features

You can easily create a search on a subset of families, students, classes and instructors.

1. Click the "More" link under the Search box. This is located at the top left side of The Studio Director application.
2. Select one of the options under Families, Students, Classes or Instructors.
3. The results will appear in the pane on the left.



Clicking on the Classes, Students, Families or Instructors tab will show ALL the classes or students or families or instructors. It will reset the search results.



Under the Admin tab, under the section Studio Information, select *Search Display Format* to select the format you would like the family, student and instructor names to be displayed in the Search results on the left side of the pages. You can select FirstName LastName or LastName FirstName.

Log Out of The Studio Director

To log out of The Studio Director click Logout from any screen in the application.



Chapter 2: Getting Started

The following links will help you get started using the basic features of The Studio Director. For complete information about any of topics covered below, refer to *The Studio Director User Guide*.

Step 1: Understanding the Basics

Seasons

Class schedules and enrollment are based on your Seasons, which are displayed at the bottom of the default Home page as different calendar tabs. Seasons are also displayed in the on-line registration pages if you have elected to allow on-line registration of classes. Each season has its own enrollment, so each season name must be unique. One way to do this is to include the year in the season name. Multiple seasons can be active at the same time: for example, you can have a season for your regular classes running at the same time as a season specific to your competition students.

The Studio Director allows you to set up two different types of seasons:

- *Regular Season*: Classes that meets the same day(s) each week for a period of time. This type of calendar is displayed with Monday through Sunday columns. Tuition for these classes is typically charged for time periods within the Season: for example, months, quarters or a one-time charge for the entire Season. This kind of season is commonly referred as a "Weekly Series" season.
- *Summer Season*: Classes that meet on a specific date or dates. This type of calendar is displayed in a standard calendar view: with all dates of the month displaying. Tuition for these classes is charged for each day the class meets. This kind of season is commonly referred as a "Date Specific" season.

Seasons can be defined or modified by going to the Admin tab and clicking the "Seasons" link in the Class / Date Administration region and then following the wizard-like workflow contained within the screen that appears.

Refer to the "Set Up a New Season" section of *The Studio Director User Guide* for complete details on how to create a new season in the system. If you need additional help, contact customer support at support@thestudiodirector.com.

Sessions

PREREQUISITE: Seasons must be defined before sessions can be created.

Billing periods are referred to as "sessions" within The Studio Director and sessions are defined by how you bill your clients. For example, if you bill monthly, there is a corresponding monthly session in the system. If you bill for the entire season up-front, there is one session for the whole season.

Although a tuition charge appears on the family account ledger for every session in the season, the balance due that appears at the bottom of the family ledger only reflects what the family owes as of the current date.

Sessions can be defined by going to the Admin tab and clicking the "Sessions (i.e. Billing Periods)" link in the Class / Date Administration region and then following the wizard-like workflow contained within the screen that appears.

Refer to the "Manage Sessions" section of *The Studio Director User Guide* for complete details on how to add, edit, and delete sessions in the system.

Class Types

Simply put, a Class Type is the kind of class being taught. The important thing to remember is that each class type is assigned to a Rate Group and Rate Groups allow a studio to give multi-class discounts, charge tuition by the hour, or charge tuition based on the total number of classes taken. The default Rate Group is 1.

Class Types can be defined by going to the Admin tab and clicking the "Class Types" link in the Class / Date Administration region.

Refer to the "Manage Class Types" section of *The Studio Director User Guide* for complete details on how to add, edit, and delete Class Types in the system.

Step 2: Enter Your Classes

Instructors

Instructor information, which must be entered before classes can be created, is added to The Studio Director by clicking the Instructors tab and entering the instructor's information in the fields that appear on the screen.

Refer to the "Add an Instructor" section of *The Studio Director User Guide* for complete details on how to add an instructor to the system.

Class Location

While this information is not required before setting up your classes, it is helpful to have it in The Studio Director before creating classes.

You can enter class location information by going to the Admin tab and clicking the "Class Locations" link in the Class / Date Administration region.

Refer to the "Manage Class Locations" section of *The Studio Director User Guide* for complete details on how to add a class location to the system.

Class Information (Minus the Session Charge Field)

PREREQUISITE: At least one season, session, class type, and instructor must be created before class information can be saved in The Studio Director.

New classes are created by populating the Class Information field on the default Classes screen.

When creating classes, pay particular attention to the following fields:

- Class Name – Class names must be unique within a season and one way to do that is to add the time or date of the class to the actual class name.
- Season – You must select a season for a new class from the drop-down list in the Class Information field. Otherwise, a summer workshop class could end up appearing in the Fall/Winter season by mistake. Seasons are listed in alphabetical order in the Season drop-down list.
- Description – Although it is not required, you should enter a short description for each class as you create it. This description will appear in a popup box whenever the customer hovers his or her mouse over the class name within The Studio Director.
- Class Notes – These notes are for the instructor and are not visible to students or families.
- Password – Passwords are used to restrict enrollment in a class. For example, assigning a password to a competition class and then providing the password to only those students who are eligible prevents other students from enrolling in the class.

If you are creating several classes in one sitting, you must click the Save Changes button after designating the parameters for *each* class. If you click the New button before you save a class, all of the changes you make will override the parameters you set for the unsaved class.

You can enter class information by clicking the Classes tab and filling in the Class Information field on the default screen.

Refer to the "Create a New Class" section of *The Studio Director User Guide* for complete details on how to add a class to the system.

Class Information (Including the Session Charge Field)

PREREQUISITE: If your studio gives multi-class discounts, charges by the hour, or charges by the week, the rate table for Auto Tuition Rates must be created before tuition can be automatically calculated. We have done your initial rates for you based on the answers to the set up questions. However, the Auto Tuition Rates might need to be updated if you raise your rates or for a new season. Refer to the "Manage Auto Tuition Rates" section of *The Studio Director User Guide* for complete details on how to add, edit, and delete Auto Tuition Rates in the system

Session charges do not always need to be filled in.

A session charge must be filled in when:

- Each class has a specific charge and no discounts are given.
- Each class has a specific charge, but a discount is given on each class if the student/family takes more than one class.
- Each class has a specific charge, but a discount is given on each class after the first class if the student/family takes more than one class.

A session charge is not required when:

- A student/family is charged per hour. The more hours taken, the cheaper the "per class" tuition.
- A student/family is charged per week. The more classes taken in a week, the cheaper their "per class" tuition.

The Welcome letter will tell you if Session Charges are required or not.

Step 3: Enter Some Families and Students

Families

Families are created in The Studio Director through the Families tab. Family information must be entered before students are entered/enrolled because tuition is billed per family and all tuition for students within the same family appears on the same family ledger.

Refer to the "Add a Family" section of *The Studio Director User Guide* for complete details on how to create a family in the system.

Students

PREREQUISITE: Family information must be entered before students are created in the system.

Students are created in The Studio Director through the Students tab and the name of the family must be selected in order to save the new student in the system.

Refer to the "Add a Student" section of *The Studio Director User Guide* for complete details on how to create a student in the system.