Propared Training Exercises: **Contacts**

Overview

v8.24

Practice key actions and concepts related to setting up your lists of people, organizations, locations and spaces.

Key Actions

Create Person Contacts	☐ **Create a Contact for a Person for someone that works on your productions using the “New Contact” button.** ☐ Include Preferred Name, Pronouns, Email, Phone, Website and/or Address. ☐ Add a Default Role that this person generally has on projects. ☐ Add a Default Group that this person is usually apart of on projects. ☐ Upload a Photo.
Import Contacts	☐ **In a spreadsheet program, open the Contacts Import Template (available at help.propared.com) and add information for at least 5 people in the template.** ☐ Save it as a .csv file and import the information into your Contacts.
Create Organization Contacts	☐ **Create one or more Contacts for Organizations (perhaps a vendor or company you work with regularly on productions or the Company that one of your Person Contacts works for).**
Create Location & Space Contacts	☐ **Create one or more Contacts for Locations that you work in regularly.** ☐ Add 3 Spaces in that Location that you may want to schedule activities in.

Practice Actions

Contacts Screen	☐ Add an Organization to a Person Contact. ☐ Filter the table by Default Groups and then reset the filters. ☐ Group the table by Default Roles and then reset the groups. ☐ Create a duplicate contact and then merge it with the original contact. ☐ Delete a contact. ☐ Select two contacts and bulk edit them and add a new Default Group to both ☐ Export your contacts to a .CSV file

Propared Training Exercises: **Projects**

Overview	v8.24

Practice key actions and concepts related to Projects; the foundational building blocks for work.

Key Actions

Create Projects	☐ **Create a Project (or 3 if your subscription allows).** ☐ Include a Short Name, Color, Date range, and the Timezone. ☐ Add a Category for each Project by selecting an existing Category or creating a new one.

Practice Actions

Projects Screen	☐ Archive a Project. ☐ Unarchive the Project. ☐ Change the State of the unarchived Project from Draft to Active. ☐ Sort your Projects by Project Name. ☐ Pick a Project and use the “Go To” Menu to navigate to the Timeline Screen.

Propared Training Exercises: The Timeline

Overview

v8.24

Practice key actions and concepts related to creating phases, events, due dates & milestones in Propared.

Key Actions

Create an Event for a phase	☐ **Create 2 or more Events using the "New Event" button that represent the different phases of your production, such as Pre-Production, Tech, Rehearsals, Performances, Post-production.** ☐ Include date ranges. Leave the time empty. ☐ Add a Category Tag "Phases" for each Event. ☐ Add Department Tags for the different departments that are involved. ☐ Add any applicable Locations/Spaces.
Create an Event for a milestone	☐ **Create 2 or more Events using the "New Event" button that represent due dates, milestones, or deadlines.** ☐ Include a single date (same start and end date). Leave the time empty. ☐ Add category of "Deadlines" for each Event. ☐ Add any applicable Departments. ☐ Assign a Person or Organization that is responsible for or relevant to each Event. ☐ Add any applicable Locations/Spaces. ☐ Highlight an extra-important Event.
Create an Event with times	☐ **Create an Event using the "New Event" button that represents something you want to schedule like a rehearsal, meeting, maintenance call, focus, etc.** ☐ Include a single date (same start and end date) with different start and end times. ☐ Add a location/space, people & organizations, departments & categories. ☐ Mark events with Status "Confirmed". ☐ Clone the event to multiple dates. ☐ Select the events you just created and shift them ahead by two hours. ☐ Select all the events in this project and clone them to another Project with a new start date (professional subscriptions only).

Practice Actions

Timeline Screen	☐ Select multiple Projects to view. (professional subscriptions only) ☐ Display events for the next 7 days using the date selector presets. ☐ Group your Events by Category, Department, Status, etc. ☐ Hide some of the columns in the table. ☐ Filter by recent changes to see events that have changed in the last 24 hours. ☐ Change the timezone that you are viewing the timeline in.

Propared Training Exercises: **Production Books**

Overview

v8.24

Practice key actions and concepts related to sharing information.

Key Actions

Create a Production Book	☐ **Create a Production Book to act as a Rehearsal Schedule:** ☐ Name the Production Book and select a Project. ☐ Add some Public General Notes to show at the top of the schedule. ☐ Select the category "Rehearsal" or another category that you tagged some of your Events with. ☐ Open the Production Book and change views (List, Day, Month, etc).
Create a Production Book	☐ **Create a Production Book to act as a Daily Schedule:** ☐ Name the Production Book and select a Project (or more for professional subscriptions). ☐ Set the Date Filter to "Next 1 Day" or select a day that you have some Events scheduled for. ☐ Set the default layout to Day. ☐ Group the schedule by Location. ☐ Open the Production Book and change views (List, Day, Month, etc).
Create a Production Book	☐ **Create a Production Book to act as a calendar for one of your venues:** ☐ Name the Production Book and select one or more Projects. ☐ Select a Location or specific Space. ☐ Deselect the Locations Column. ☐ Open the Production Book and change views (List, Day, Month, etc).
Create a Production Book	☐ **Create a Production Book that displays deadlines for a specific department:** ☐ Name the Production Book and select one or more Projects. ☐ Select the Category "Deadlines". ☐ Select a Department. ☐ Change the Filter Logic to ALL to ensure you only show events tagged with both "Deadlines" and the Department.

Create additional Production Books	☐ **Create a Production Book to act as someone's personal itinerary.** ☐ **Create a Production Book that displays only Events where the Status is "Confirmed".**
Create a Production Book	☐ **For Professional Subscriptions Only: Create a new Production book that is your full Company Calendar** ☐ Include a name for the Production Book, select All Projects (current and future). ☐ Change default layout to Year. ☐ Open the Production Book and change views (List, Day, Month, etc).

Practice Actions

Production Book Screen	☐ Edit the name of one of your production books. ☐ Choose some columns to hide or show in the schedule. ☐ Clone a Production Book. ☐ Email a Production Book. ☐ Delete a Production Book. ☐ Export Production Book Schedule to a .csv. ☐ Group the Production Book by Project. (professional subscriptions only)
Production Book Webpage	☐ Filter a Production Book. ☐ Open the Project Key. ☐ Subscribe to a Production Book in your personal calendar program (Professional Subscriptions only).

Propared Training Exercises: Reports, Notes, To Do's

Overview

v8.24

Practice key actions and concepts related to creating Reports.

Key Actions

Create a Report	☐ **Create a Report from an Event in the Timeline.** ☐ Add a Team Member and some details to the "In Attendance" section. ☐ Add some General Notes. ☐ Add a Department Note: ☐ Tag it with a Department. ☐ Track this note. ☐ Select a Due Date. ☐ Add a few more Department Notes.
Save a Report as a Template	☐ **Save the Report as a Template:** ☐ Open the template and update the title, remove the text from the Department Notes so that only the Departments remain.
Create a Report from a Template	☐ **Create a Report from the Report Screen using a template.** ☐ Select an Event to link this report to. ☐ Select the Date and Location. ☐ Add new Department Notes.
Track To Do's	☐ **View your tracked notes from the Notes Tab in the Timeline Screen.** ☐ Update the Status of a Note. ☐ Mark a Note as Done. ☐ View your Done Notes
Share Notes	☐ **Add the Notes Page to one of your existing Production Books.** ☐ Update the Notes Page to only display one Department's Notes.

Practice Actions

Reports Screen	☐ View a Report via the URL. ☐ Email a Report.
Timeline Screen>Notes Tab	☐ Filter Notes by Department to see department to do’s still outstanding.
Production Books Screen	☐ View your Production Book and Navigate to the Notes Tab to see your outstanding Notes.

Propared Training Exercises: The Project Team

Overview

v8.24

Practice key actions and concepts related to the People, Organizations and Locations associated with a specific Project.

Key Actions

Add a Person to a Team from your Contacts	☐ **Add a Person Team Member to a Project Team using the "New Team Member" button.** ☐ Select a Person's Name that is already in your Contacts. ☐ If they have a Default Role, then it is automatically populated as their Project Role. For this project, their role is different. Update their Project Role, character, or job title.
Add a new Person to a Team	☐ **Add a Person Team Member to a Project Team using the "New Team Member" button.** ☐ In the Person Name field, select "New Person" to create a new person that is not already one of your Contacts. ☐ Enter First Name, Last Name, Email or Phone number. ☐ Add a new Project Role and Project Group for this person.
Add an Unknown Team Member	☐ **Add a Person Team Member to a Project Team using the "New Team Member" button.** ☐ Add a Project Role and Project Group only. Do not add a person's name (we don't know who this person will be yet)
Add an Organization to a Team	☐ **Add an Organization to your Project Team using the "New Team Member" button.**
Add a Location to a Team	☐ **Add a Location to your Project Team using the New Team Member button.**

Add a Team Member Automatically	☐ **Go to the Timeline and add a team member who is not currently in your Team to an Event (note that they appear automatically in your Project Team).**
Identify an unknown Team Member	☐ **Go to the Timeline and add the Role of the Team Member who does not yet have a Contact assigned to it to an Event.** ☐ Update the Team Member record that doesn't have a contact associated to it, to now include a person from your contacts.
Share Team Information	☐ **Go to the Production Book Screen and add the Team Page and Locations Page to one of your existing Production Books.** ☐ Adjust the settings for the Team Page by selecting specific Groups and adjust the visible columns. ☐ Adjust the settings for the Locations Page by selecting specific locations and adjust the visible columns.

Practice Actions

Team Screen	☐ Use the "Go To Contact" button to quickly navigate to a contact. ☐ Export your Team to a .csv. ☐ Send an email to a Group. ☐ Remove someone from your team. ☐ Group the table by your Project Groups.
Production Book Screen	☐ View your Production Book and Navigate to the Team and Locations tabs to see your Contact Sheets.

Propared Training Exercises: Setting up Items

Overview

v8.24

Practice key actions and concepts related to setting up the physical assets you own, rent, purchase, or borrow.

Key Actions

Add a new Item	☐ **Create an item using the "New Resource" button.** ☐ Include a Name, Department, and some details. ☐ Add a photo of the item. ☐ Select the Source for where this item lives or comes from. ☐ Indicate how many of these items you own. ☐ Add additional details about where to find the item at that source.
Import Items from a spreadsheet	☐ **In a spreadsheet program, open the Items Import Template (available at help.propared.com) and fill out information for 5 more items. Import and map the fields.**
Create Collection of Items	☐ **Create a Collection using the "New Resource" button.** ☐ Include a Name for the Collection and any additional details. ☐ Select items to include in your collection. ☐ Select the source you want each Item to come from and indicate how many of each Item you want to include.

Practice Actions

Item Screen	☐ Add a new source and create an Organization for your local rental shop. ☐ Add the rental shop source to each Item with the infinity symbol and include a default cost for items from the rental shop. ☐ Group the Table by Source or Department. ☐ View all of your Collections by going to the Collections Tab. ☐ Create a new Collection by cloning a Collection and adjust some Items.

Propared Training Exercises: Requirements

Overview

v8.24

Practice key actions and concepts related to allocating physical needs and resources to specific projects.

Key Actions

Create a Project Requirement	☐ **Create a new Requirement "New Requirement" button.** ☐ Select the Project this Requirement is for. ☐ Give the Requirement a Name. ☐ Select Dates this Requirement is needed for, the location where it will be used, a department, and a status. ☐ Select an Item that will be used in this Requirement by selecting from the list or by using the "Search" button. ☐ In the Sources, identify where this item will be coming from, how many items you will need from each source. (Note that the quantity remaining changes.)
Add Items to a Requirement	☐ **Clone the Requirement you just made and associate a second Item with this Requirement.**
Create a Project Requirement by Collection	☐ **Create new Requirements using the "New Requirement" button and selecting "By Collection".** ☐ Select the same Project that you used for the last Requirement. ☐ Select a Collection. ☐ Name the Requirement and select Dates and a Location.
Share Project Requirements	☐ **Go to the Production Books screen and add the Requirements Page to one of your existing Production Books.** ☐ Adjust the settings for the Requirements Page by adjusting the visible columns.

Practice Actions

Requirement Screen	☐ Select a Single Project from the Project Selector at the top of the Requirements Screen (professional subscriptions only). ☐ Group the Table by Requirement and expand your groupings to see all the Items part of each Requirement. ☐ Group the Table by Department to see the cost estimated by Department. ☐ Group the Table by Source to see the Items needed from each source. ☐ Export Requirements to a .csv ☐ Shift the Dates of some of your Requirements. ☐ Bulk Edit the Status of some of your Requirements.
Production Book Screen	☐ View your Production Book and Navigate to the Requirements tabs to see your Requirements
Project Screen	☐ Navigate to the Project Screen and look at total financials for Item cost by project

Propared Training Exercises: Labour Part 1: Setting up Positions

Overview

v8.24

Practice key actions and concepts related to setting up the Positions you'll be using in Labour Management

Key Actions

Create a Position	☐ **Create a New Position:** ☐ Include a Position Name, the Organization where this position is sourced from, a Department, a default Pay Rate, and any additional details about this position.
Add Labour Rulesets	☐ **Add a new Labour Cost Calculation Ruleset in the Settings Screen > Preferences Tab.** ☐ Give the Ruleset a name. ☐ Enter an overtime multiplier and indicate the number of hours before the overtime kicks in.
Create Positions	☐ **Create 3 more Positions and use your new Labour Cost Ruleset in one or more of them.**

Practice Actions

Resource Screen> Positions Tab	☐ Group by Department ☐ Group by Source

Propared Training Exercises: **Labour Part 2: Labour Lines**

Overview

v8.24

Practice key actions and concepts related to adding high level labour needs to Events

Key Actions

Add a Labour Line to an Event	☐ **In the Timeline, navigate to an event that you want to include labour for and add a Labour Line.** ☐ Select a position and indicate the quantity of that position needed. Enter at least 2. ☐ Add additional Labour Lines to this Event and to other Events.
Share Labour Lines in your Schedules	☐ **Go to the Production Book Screen and include crew in one of your Production Books. Choose to display Labour lines.** ☐ Open the production book to see your Labour Lines displayed.

Practice Actions

Requirements Screen> Labour Tab	☐ Select one of your Labour Lines and adjust the +/- hours to adjust how many hours you are budgeting for and enter details to describe the reason for the change. ☐ Adjust the Pay Rate for a Labour line in the Requirements Screen. ☐ Use the circular arrow button to return the pay rate to the default. ☐ Group the Table by Department to see departmental financial breakdowns.
Project Screen	☐ Look at total labour financials per project.

Propared Training Exercises: Labour Part 3: Crew Bookings

Overview

v8.24

Practice key actions and concepts related to managing crew bookings.

Key Actions

Enable Crew Bookings	☐ **Select an event in your Timeline with Labour Lines and enable Crew Bookings for it.** ☐ Select a Contact that you want to book for one of the Booking Slots, include a status.
Adding Contacts to Bookings	☐ **Go to the Crew Bookings Tab in the Timeline Screen, select a Booking without a person assigned to it, and select a Contact to book for this event using the "Search" button.** ☐ Update the status for this booking. ☐ Adjust the time-frame for this specific booking. ☐ Resync the booking time-frame to the event using the circular arrow button.
Share Bookings	☐ **Go to the Production Book Screen, select the Production Book you were just looking at, and change your displayed crew from Labour Lines to Crew Bookings.** ☐ Open the production book to see your Crew Bookings displayed.

Practice Actions

Timeline Screen>Crew Bookings Tab	☐ Group by Contact to see how many hours each person is scheduled for. ☐ Export a Crew Bookings list.
Requirements Screen>Labour Tab	☐ Select a Labour Line that you've enabled crew bookings for and note that the cost is now determined by the crew bookings. ☐ Export a Crew Bookings list.

Propared Training Exercises: **Project Cloning**

Overview

v8.24

Practice key actions and concepts related to use past projects as a template for future projects.

This action is not available to Student Subscriptions

Key Actions

Clone Projects	☐ **In the Project Screen Create a New Project by Cloning from an existing Project** ☐ Select the Source Project ☐ Select a task to use as a reference for generating the new project dates. ☐ Enter the New Date for that reference task ☐ Give the new Project a Name, short name, color. ☐ Create the New Project

Practice Actions

Projects Screen	☐ Create a Draft Project to act as a template that can be cloned to more quickly create future Projects.

Propared Training Exercises: **Attachments**

Overview

v8.24

Practice key actions and concepts related to organizing files, websites, & documents into attachments.

Key Actions

Create Attachments	☐ **Create New Attachment** ☐ Give Attachment a Name ☐ Copy and Paste the URL you want to link out to in the URL field ☐ Ensure URL toggle switch is enabled ☐ Select a Project (or Projects) to tag this attachment to ☐ Enter Categories, Departments and Details.
Share Attachments	☐ **Add the Attachments Page to your existing Production Book** ☐ Enable the Attachments Page and select the attachments that you want to include.

Practice Actions

Attachments Screen	☐ Disable and enable the URL link. ☐ Delete an Attachment