ARTS TOURING CONNECTOR

Canada-Ireland 180

PRESENTER USER GUIDE

.....1
Introduction.....3
About the Process.....3
The Canada-Ireland 180 Initiative.....4
Canada-Ireland 180 Subsidy Terms and Conditions.....4
Accessing the ATC.....5
If you forget your password.....5
Initial login.....5
Selecting the Active Season.....5
Initial Setup.....6
User Settings.....6
Navigating the System.....9
Settings / Notification Icons.....9
The Season Specific Menu Bar.....10
The General Menu Bar.....11
Bottom Navigation.....11
Using The.....11
System.....12
Selecting a Season.....12

Using the Dashboard and Responding to Notifications....12
Viewing Network Information....13
Viewing and Editing Presenter Info....14
User Account Creation / Edits....15
Requesting a New Artist/Show....15
Becoming a Champion for a Show....16
Wish-listing a Show....16
Creating and Editing a Booking Request....17
Show Chats....18
LOI Comments and Sign-off....19
Split Offers, Budgets and Contracts....20
Switching between Presenting Networks....21
Accessing Reports....21
Reviews....22
Glossary....23

INTRODUCTION

The **Arts Touring Connector (ATC)** is a digital platform that facilitates Tour Block Booking. This tool is designed to help Presenter Networks collaborate on the development of Artist Tours in order to make touring more effective and impactful for Artists, Presenters, and community audiences.

The platform was launched in 2022 after a multi-year process of consultation with stakeholders from across the performing arts touring sector. The project was made possible by funding from the Department of Canadian Heritage and the Canada Council for the Arts.

ABOUT THE PROCESS

The **Arts Touring Connector** is a tool available to Presenters within subscribed Presenting Networks. Block Booking is a PRESENTER-DRIVEN activity. This means that the Presenters determine which Artists they are interested in pursuing for Shows, and thus which Artists are added to the system.

What the Coordinator does is help streamline the actual Booking process. The Coordinator does not decide who Tours and who doesn't. And the Coordinator does not determine which Artists will play at which venues. The Coordinator takes the expressed interests of the Presenters and tries to make it happen. This online service is the means by which the Coordinator processes the Tour Requests and gets Tours to the contract stage.

Once sufficient interest is available for a Show, the platform allows the Artist's Representative to have a view into the process as the Tour is created, worked, and then finalized.

Remember, you drive the activity – this is the key to the Block Booking process.

Artists and Shows get added to the system based on your expression of interest and your desire to tour Shows.

Similarly, your Requests for Bookings move the process forwards towards an actual Tour. You will also be able to comment on the letter of intent (LOI) to ensure that the Tour is being booked as you expect, and to request changes as needed.

Once a Tour is confirmed you will be able to upload a budget for view by the Artist or their Representative (E.g., Agent).

THE CANADA-IRELAND 180 INITIATIVE

The Canada-Ireland 180 (C-I 180) portal is based on the ATC portal, currently used within several Canadian regional presentation networks. This portal is bilingual and has been adapted to the needs of the C-I 180 initiative to provide discoverability of participating Irish and Canadian artists, to coordinate the booking and touring of works, and has been designed to collect data for reporting on results and to administer subsidies specifically for this initiative.

This portal is accessible to professional Canadian arts presenters, with no requirement that they be current recipients of the Canadian Arts Presentation Fund (CAPF) or be members of CAPACOA. The intention of the translation and upgrading of the ATC portal is to provide opportunities for presenters, who may not typically collaborate, to do so with the intention of benefiting and strengthening the sector while encouraging discoverability of presentation ready artists.

CANADA-IRELAND 180 SUBSIDY TERMS AND CONDITIONS

Subsidy policy and portal access eligibility information are available on CAPACOA's website. Subsidies are not guaranteed and are subject to the availability of funds and submission of required final reporting. Conditions may be updated at the discretion of CAPACOA, should conditions warrant.

From the agreement: Block booking is not required to be eligible for a booking subsidy; in other words, subsidies may be provided for eligible artist bookings, even if two or fewer presenters seek to book the same artist on the portal and therefore do not participate in the block booking program.

ACCESSING THE ATC

The **Arts Touring Connector (ATC)** is web-based, and accessible at **arts-tc.ca**.

The Co-ordinator for your Network will add you to the system, at which time you will receive an email invitation. Clicking the link in this email will take you to the platform and allow you to set your initial password.

DO NOT share your login with other Users – this is a direct violation of the site User agreement. If other Users from within your Organization require access, talk to your Organization Administrator or the Coordinator to have new users added. Note that all activity in the system is logged and attributed to the logged-in User that performs the operation. You are responsible for all activity that takes place using your login.

IF YOU FORGET YOUR PASSWORD

Access the site as normal at **arts-tc.ca** and select the 'Forgot Your Password?' link. You will be prompted for your username (usually your email address); enter this and then click the 'Reset' button.

An email will be sent to the address in the system. This email will contain a link that will allow you to set a new password.

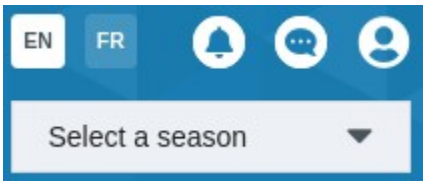
We recommend that you add no-reply@arts-tc.ca to your email contacts or safe-list to ensure that email from the system reaches you. Also, please check your junk/spam folder for system emails and mark them as 'Not Junk/Spam' if they have founds their way into those folders.

INITIAL LOGIN

On initial login you will be presented with a list of Networks to which you have been subscribed. Simply select the desired Network and you will be taken to that Network's site.

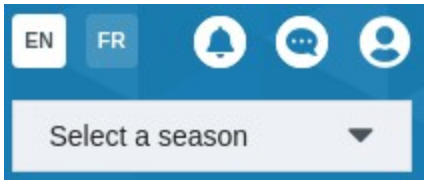
Selecting the Active Season

Once logged into a specific network you will see a drop list in the top right of the screen that allows for a selection of the active season. Select the desired season from this drop list to see the active shows, bookings and tours for this season.



INITIAL SETUP

Once you are granted access to the system and have logged in, you should complete your User setup as follows.

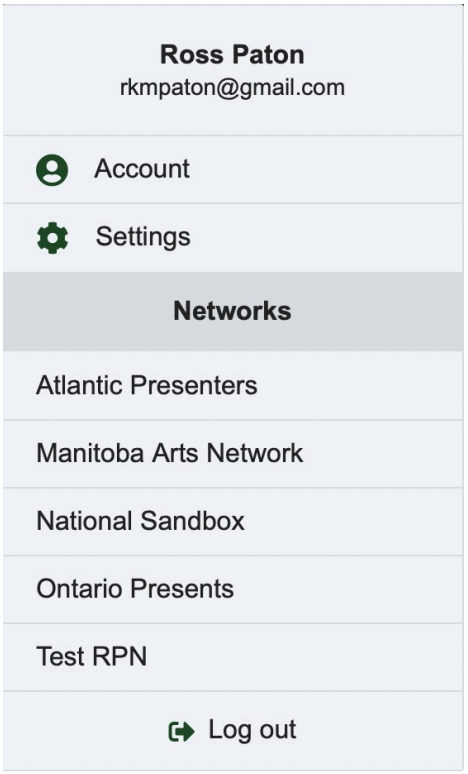


At the top-right of the screen is the settings bar, which allows you to perform these operations, in order from left to right:

1. Language display for the site (Note that user entered content is not auto-translated so will display in the language(s) in which it was input)
2. View New Notifications (see appropriate section of documentation)
3. View New Messages from Subscribed Chats (see appropriate section of documentation)
4. View User Settings

User Settings

Clicking on the User Settings option from the top toolbar will show a list of options, as seen here.



Displays the current User's name and email

Change Username, email, and password

Access notification settings

Switch between subscribed Presenting Networks

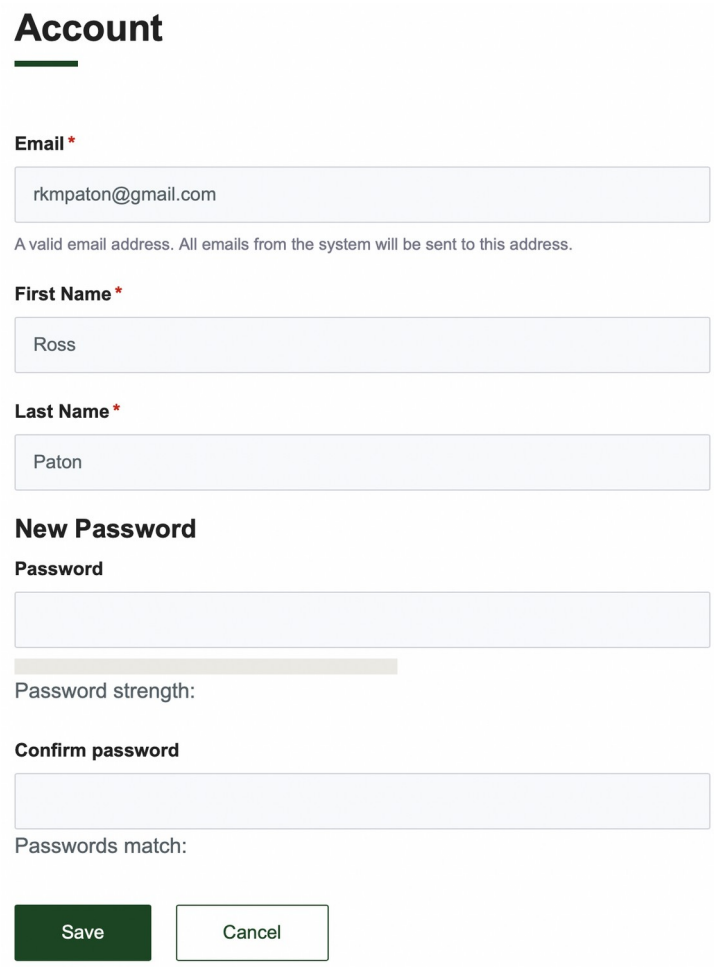
Log out of the system

The Account Page

This page allows the User to change their associated email, the First and Last name associated with the account, and perform a password update.

Note that email, first and last name are displayed within the system and in generated documents and reports (like the Letter of Intent). Email is also used as the username for logging into the site.

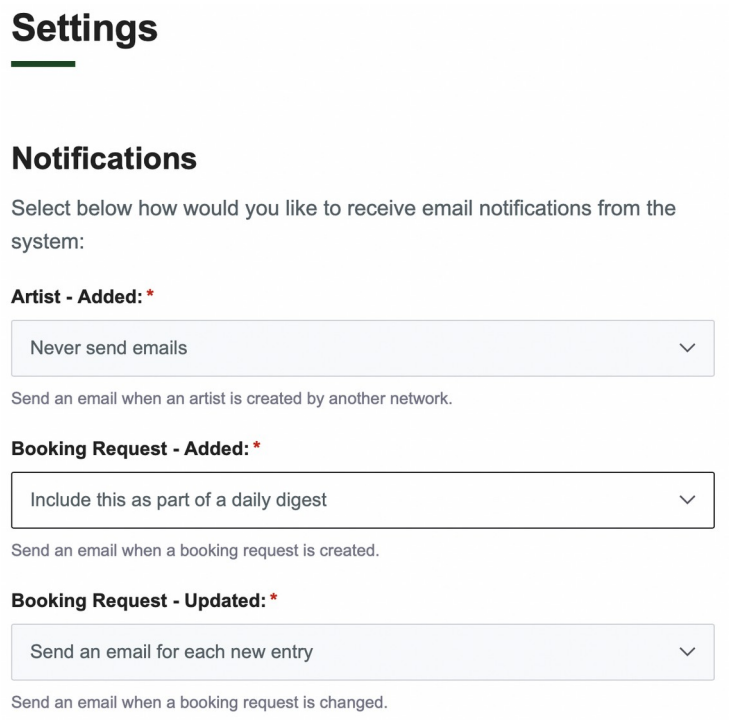
Once any updates are completed, click ‘Save’ to keep the changes, or ‘Cancel’ to discard them.



The Notification Settings

The ATC will send notifications for all significant events in the system. These notifications are available on the User dashboard, via the View New Notifications button on the top toolbar and can also be sent via emails.

These settings control the email behaviour for notifications. All relevant notifications will also show up in the tool.



There are three options for frequency of emails:

1. Never Send Email
2. Send as part of a daily email digest, collecting all emails for the day
3. Send an email when the event occurs

Note that the screen shot here does not show all notifications in the system, this is simply a selection to indicate the allowable options.

NAVIGATING THE SYSTEM

The system has been created to allow for an intuitive process that closely follows the steps in Booking a Tour. This starts with Presenters generating an initial list of shows/artists, then expressing interest, on to formal requests for Bookings, then Tour creation, and finally creating/collecting required documents and approvals.

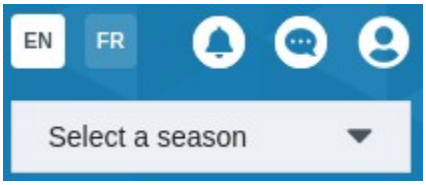
There are two main menu bars used to navigate the ATC website. The top menu allows for navigation of Season Specific information, while the lower menu bar provides access to data that is not tied to a specific Season.

Settings / Notification Icons

The top-right of the screen will show icons that can be used to manage settings and check notifications.

- EN/FR – Language selection
- Bell Icon – shows notifications
- Chat Icon – shows new messages in subscribed Chats
- Person Icon – accesses User settings

1. Season Selection Drop-List



When new content is available for notifications or chats, the icon will show a number that indicates how many new items are present for the User. Upon viewing items in these lists, the User can also mark the notification/message as read.

The Season Specific Menu Bar



The Season menu provides access to the data needed to manage a specific Season.

This menu will only be visible once a Season is selected (Seen here as 'Season One'). If no Season is selected the other menu items will not be visible and the Season list will display a prompt for the User to select a Season.

- Shows – view the available Shows for the Season
- Requests – view Booking Requests
- Tours – status of all created Tours
- Reports – Season specific reporting, including commissions owed
- Chats – discussions on Shows and Tours
- Season Selection Drop List – selection of Seasons

The menu options will be explained further in the **Using the System** section of this guide,

The General Menu Bar



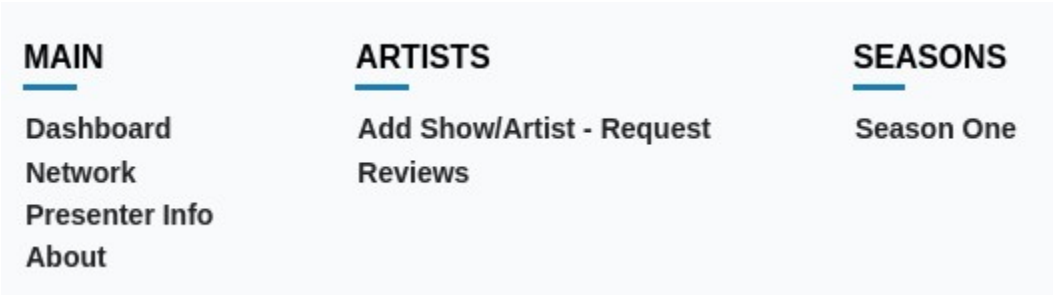
The general menu provides access to data and options that are not tied to specific Seasons. This includes:

- Dashboard – displays Notification and action items for the User
- Network – information about the Network and User setup for this Network
- Presenter Info – information about your account, venue setup, and user management
- Reviews – provides a view of show reviews and allows for entering reviews of completed shows

These options will be explained further in subsequent sections of this guide.

Bottom Navigation

There are links provided at the bottom of the page that allow for navigation of the ATC site. These items mirror those in the other menu bars. Note that not all Users will see all options, as the user's access level will change the options available.



USING THE

SYSTEM

This section of the guide outlines the common tasks and workflows in the Block Booking process, as facilitated by the Arts Touring Connector site.

Selecting a Season

Upon login and a Presenting Network being selected, the first step will usually be to select a Season in which to perform activities.

Use the **Season Specific Menu Bar** (see above) to select a Season. Once a Season is selected you will be able to perform activities that are Season specific, such as expressing interest in a Show, creating Booking Requests, etc.

The first time the Season is accessed you will be required to accept the terms and conditions of site use.

Using the Dashboard and Responding to Notifications

The Dashboard page will be very useful as a starting page for activities in the ATC site. This page will display any outstanding actions and notifications that need to be acted upon by the User.

For Presenters this will include:

- Changes to Shows information or statuses
- Updates to Bookings and Tours
- Requests to Review and Sign LOIs
- Show Reviews
- Any Announcements sent

From this page the User can quickly navigate to the required page to respond to the notification or to view the changes made to an Artist/Show/Booking/Tour.

Filters are also provided to only show new notifications or to allow past notifications that have been marked as read to be reviewed. Notifications can also be filtered by Network if the User is a member of multiple RPNs.

Once you have read a notification, you can mark it as read using the provided button, and the notification will be cleared upon refresh of this page (or navigation away from this page). Using the filters provided will allow viewing of previously cleared notifications.

Viewing Network Information

The General Menu Bar has a **Network** menu item that will take you to the information page for the Network you are currently signed into.

The information here is contact information for the main Network contact person, the ATC Contact (The Coordinator) and the technical support person.

You can also leave a Network from this screen – it is possible for Presenters to belong to multiple Networks, and in the event one Network is no longer relevant you can 'unsubscribe' from this page.

Finally, you can view all Seasons on this page, switch to a new Season, and print a copy of the Season agreement.

Viewing and Editing Presenter Info

The General Menu Bar has a **Presenter Info** menu item that will take you to your personal information page.

On this page you can view and edit all the information about your Organization. It is important that this information is correct and up to date, as it will be used to populate the letters of intent that the system generates.

Also on this page is your access to manage Users for your Organization and the Performance Spaces that you will book Shows into.

User Management

To edit an existing User, select the icon next to the User's details and edit the User details as needed. You can also remove Users from the edit User page.

Clicking the button next to the Users title text will take you to the Add Presenter User page.

On this page you will enter the User's details and select their access role. The role is set via the Type field and has choices of:

- Presenter Admin - full access to the system and the ability to manage Users for their account
- Programmer - full access to the system but no User management capabilities
- Staff - read-only access, so that the User can view information but cannot make Requests, edit info, etc.

Performance Space Management

To edit an existing Performance Space, select the icon next to the space's details and edit the details as needed. You can also remove spaces from the edit page.

Clicking the button next to the Performance Spaces title text will take you to the Add Performance Space page.

User Account Creation / Edits

On the Presenter Info page (accessed from the Main Menu) you can add new Users for your venue(s) by clicking on the *Add Presenter User* button ⊕ next to the title of the User list and then entering the User information.

The first User created for a Presenter will be a Presenter Admin User – they have full access to the system and the ability to manage Users for their account. A Programmer level User will have full access to the system but no User management capabilities, while a Staff level member will have read-only access, so that they can view information but cannot make Requests, edit info, etc.

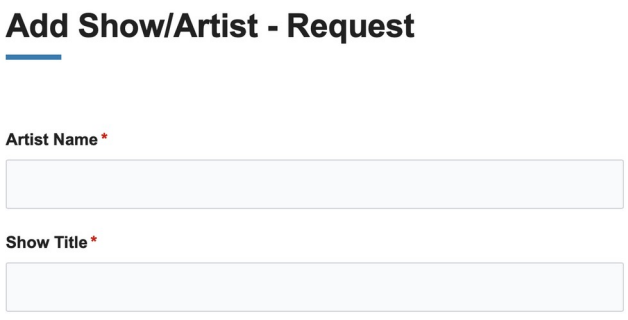
Also note that Users can be made inactive here, for instance in the event of a role change.

Editing is a similar process, by clicking on the edit button ✎ next to the entry to be edited in the list of Users accessed from the Presenter Information Page.

Requesting a New Artist/Show

From the Current Season Shows page (Accessed from the Season Specific Nav Bar), click on the Add Show/Artist – Request button ⊕ to open the Request page.

On the Add Show/Artist – Request page that opens, the Artist name and Show title are required information and must be entered. Other fields are optional but any additional information you can enter will be useful for the Coordinator.



Once you have entered all the info you can, scroll to the page bottom and click the Save button to send the Request to the Coordinator.

Once the Coordinator has received and reviewed the Request, they will be able to add it to the system, or, if the Artist is already in the system, activate them for the current Season.

Becoming a Champion for a Show

If there is a show you are excited to bring to your network, you now have the option to become a Champion for the show. If you champion a show you will be asked to provide some notes on the show, and you will also be given the ability to invite other presenters into the Chat for this show.

Championing a show will add it to the "Discover" tab of the Shows page, where colleagues from any network can browse recommendations. We suggest that this is used for bigger/special projects to keep the list manageable.

To become a champion, you can check the *I want to champion this show* checkbox when requesting a show to be added to the season (see the section for Requesting a New Show).

Wish-listing a Show

To wish-list a Show, navigate to the Shows page once a Season is selected, and select the wish-list option  for the desired Show (the third column from the right in the shows table). The star will be filled-in once the Show has been added to your wish-list.

If you then want to remove the Show from the wish-list, simply select this option again.

Creating and Editing a Booking Request

To create a Booking Request, first ensure the Season is selected and then click on Requests in the Season Specific Menu Bar.

You will then be taken to the Booking Requests page, which will show a list of all Requests for this Season.

Click on the ⊕ button to Add Booking Request, and fill out the relevant data on the Booking Request page (Performance Space, desired dates, any comments and notes, etc.)

The calendar at the bottom of the page can be used to see what other dates are booked and requested. This view defaults to only showing activity within your Network, but there is a checkbox to *Include data from other Networks* so that a broader view of the Show activity can be seen.

Show Chats

The Chat feature is a powerful tool that allows discussions to be shared, consolidated, and revisited at any time. With this we move the discussion away from a flood of emails into the platform so that the conversation is centralized.

All Shows in the system will have a Chat (Discussion Board) created when the Show is added to a Season.

Please use these discussion forums to ask questions, discuss the Artist and their work, request feedback from your colleagues, get answers to tech questions, etc.

Chats can be accessed from:

1. the Chats link in the Season Specific Nav Bar
2. Viewing the details of a Show – navigate to Shows in the Season Specific Nav Bar and then select the view icon 

LOI Comments and Sign-off

Once a Show has an LOI available for review you will receive a Notification in your dashboard will see the created Booking with an LOI Status of *Awaiting Review*.

My Bookings (for open seasons)

SEASON	SHOW	ARTISTS	TOUR STATUS	LOI STATUS	SPLIT - BUDGET
Season 22/23	Shakespearience!	Shakespearience Productions	Confirmed	Awaiting Review	*Not applicable*

Clicking on the Review button will take you to a page that displays the LOI for your review and approval. You can also choose to print from this page, and if you require edits to be made, you can submit them via the Request Changes field.

RECEIVED 1/2 APPROVALS

Approve

LETTER OF INTENT/OFFER

Between Ontario Presents, and Shakespearience Productions dated Sep 15, 2022

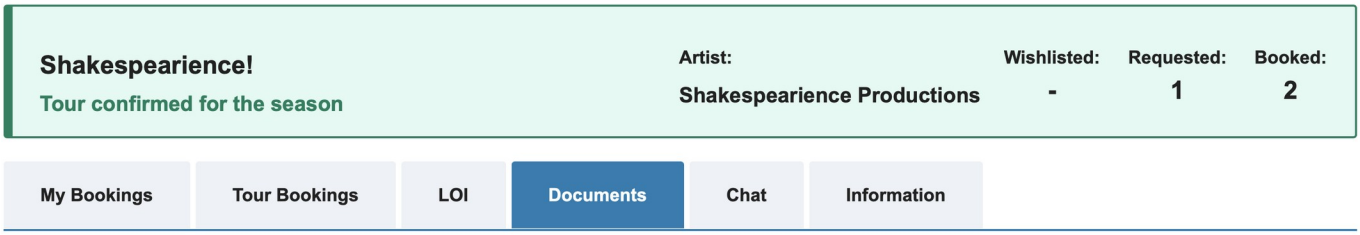
Artist/Group Name:	Shakespearience Productions
Title of Event:	Shakespearience!
Agent/Management:	Representative 1

Split Offers, Budgets and Contracts

When the Coordinator creates a Tour with a split offer then you will have an option to upload a budget for the tour. Those budgets are then available to the Representatives to view.

To do this, view the Tour, select the Documents tab, and upload the budget.

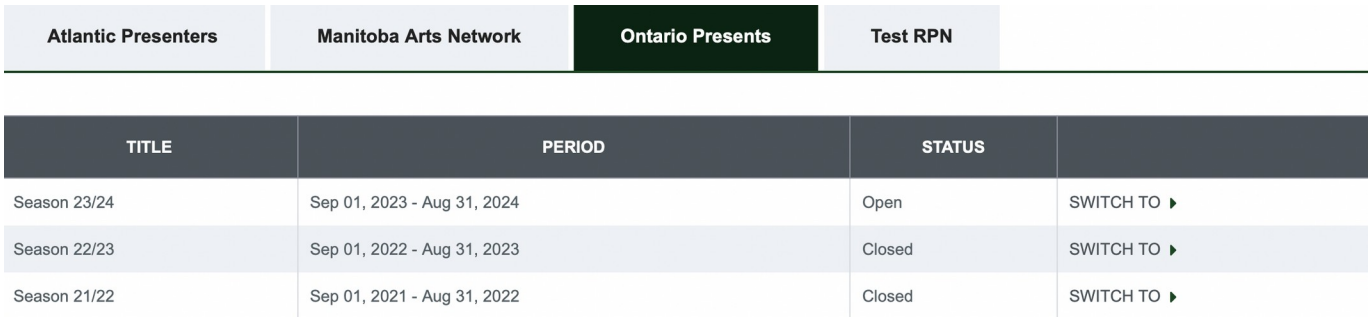
View Tour



On this Documents page you can also upload a copy of the contract for your records.

Switching between Presenting Networks

To change Presenting Networks, use the Season Dropdown in the Season Specific Nav Bar and select the Switch Network option. You will be presented with a tabbed view of all Networks that you are a member of.



Select the Network that you wish to access, then the Season to log into. You will be logged into the Network and Season you have selected.

Accessing Reports

Reports are accessed from the Season Specific Nav Bar, under the Reports link.

The reporting provides a summary of the Bookings for the Season and allows for export to csv (For import into Excel or other software) via the button below the report.

The reports page will show you a list of your Bookings for the selected Season, along with commission information. You can also export this report in CSV format, for use in Excel or other systems.

Reviews

Once a performance has occurred, you will be prompted to enter a Review capturing key data points for the Show. The dashboard will display a reminder to review a performance after it has occurred, and you can access a list of all Reviews by using the ‘Reviews’ link on the Main Menu Bar.

Presentation Review

We would appreciate your review on the tour Shakespearience! (Season 22/23).

Review the Show | Dismiss

The list of Reviews can be filtered to display an aggregate summary of activity, a list of all submitted reviews (from which you can edit completed reviews), a list of reviews yet to be completed, and a list of reviews that have been dismissed (i.e., a review was declined for this performance).

CREATED ON	SHOW	ARTISTS	SEASON	STATUS	
Sep 29, 2023	Howard Jones	Howard Jones	Season 23/24	Open	
Oct 23, 2023	Th'owxiya: The Hungry Feast Dish	Axis Theatre	Season 23/24	Open	
Oct 25, 2023	Casting Off	A Good Catch	Season 23/24	Open	
Oct 29, 2023	Frankenstein	Kidoons	Season 23/24	Open	
Nov 03, 2023	Dean Brody	Dean Brody	Season 23/24	Open	

This aggregated and submitted review data can be exported in CSV format for reporting purposes.

GLOSSARY

Administrator / **Coordinator** – each network will have at least one administrator assigned. These people will coordinate all activity on the site for their network.

Agent – see *Representative*

Announcement – a message sent via the platform to a targeted set of users

Artist – an individual or company that is providing a show being considered by the presenters

Champion – a presenter user that chooses to be a spokesperson for a specific show that they wish to promote to their network(s).

Chat / **Discussion** / **Forum** – each show in the system has a chat associated with it. This chat can have multiple topics and can be subscribed to by users

Company – see *Artist*

General Menu Bar – the general menu provides access to information that is not tied to a specific season

LOI – Letter of Intent

Presenting Network – a presenting network , e.g., Ontario Presents or Atlantic Presenters.

Presenter – a user from a presenting organization who has the ability to participate in the block booking process

Presenter Admin – similar to a *Presenter* user, but with the added ability to manage users for their *Organization*

Read-Only User – a user from an organization who can only view information and reports, but is unable to add/edit data

Representative – the person who represents a show and who will be responsible for activities such as providing artist and show information and reviewing/signing the LOI, e.g., an Agent or the artist themselves (see *self- representation*)

Request / **Booking Request** – a detailed request to book a show made by a presenter; a set of requests from multiple presenters will be used to build a tour

Review – the site collects data on shows booked within the system, to allow for reporting, e.g., for funding applications or for board members. Presenters will be prompted to provide show reviews once a performance has taken place

RPN – Regional Presenting Network

Season – a season is a defined time period for the network to work towards requesting artists and shows, expressing interest, and booking tours

Season Specific Nav Bar – once a season has been selected, the upper navigation allows selection of Shows, Requests, Tours, etc. that are specific to the selected season

Self-Representation – if an artist has no outside representation, the system refers to this as self-representation. The artist can then be granted access to the platform to act in the representative role

Show / **Performance** – a specific performance that has been requested to be in the system

Tour – a collection of booked performance dates

User – any person who is accessing the platform. Can be a coordinator, presenter, or representative