# INTRODUCING STUDIO MANAGER 14

*by Janet Tokerud, owner/developer*

Welcome to **Studio Manager 14**, the best-designed and most functional software product available for the management of creative services. One of the reasons Studio Manager works so well, is that it is a FileMaker database. If you already use FileMaker, you know how great it is. If you are new to FileMaker, you will soon learn that it is the most popular Mac database application for a good reason. *More on that later.*

## THE HISTORY OF STUDIO MANAGER

Tokerud Consulting Group, developers of **Studio Manager,** started out building custom systems for graphic design firms in the San Francisco Bay Area. The functionality and interface improved with each custom database. Fifty customers later, TCG decided it was time to create a product incorporating the best of those various custom designs.

**Studio Manager** was one of the first software products designed specifically for the creative services market. Under continuous development since 1992, it is entirely up-to-date, supporting Mac OS X and Windows, as well as all iOS mobile devices (iPhone and iPad), and the most recent version of FileMaker.

In 2003, Studio Manager was designated #1 by *Creative Business Magazine* in the Integrated Software category, beating previous front-runner Clients and Profits. Not long afterwards, **Studio Manager** was redesigned from the ground up in 2004 to take advantage of the monumental upgrade that was FileMaker Pro 7.

In 2006, **Studio Manager** received a complete face-lift to take advantage of FileMaker 8.5's new ability to use the now-common tabbed user interface to emphasize the most important things and hide less important details in tabs that are still available one click away.

Studio Manager 11, released in January 2011, introduced support for the iPhone and iPad via the FileMaker Go app, available for free. iOS support has been upgraded with every subsequent release and is now more important than ever because FileMaker Go 14 runs efficiently even over cellular connections.

This document mostly describes the most recent major release - **Studio Manager 14**, which takes advantage of the enhanced UI toolset FileMaker 14. It sports custom theme and object styles that modernize the User Interface, including support of

object states, conditional formatting, editable pop-out windows and the use of ultra-modern embedded SVG graphic buttons. These changes make it easier and more fun than ever to use **Studio Manager**.

## WHY IS STUDIO MANAGER BETTER?

*Three things matter most:*

- **Flexible**. Because it is based on FileMaker, you can quickly add new features and alter existing ones. **Studio Manager** is well organized on the front-end for users and on the back-end for developers. It is also well-documented.

- **Easily Customizable**. TCG continues to customize Studio Manager for our customers on request. We are most proud, however, to have developed a product that is easily customized, unlike most of our competitors who tend to keep the back-end and even the front- end locked up tight. We don't monopolize customization; you can alter your version yourself or hire a FileMaker consultant to do it for you. We frequently coach clients via phone and screen- sharing in how to customize layouts and functionality, allowing you to learn the nuances FileMaker as you customize.

- **Our Staff**. Janet is the most over-educated of the group with 2 Masters degrees, including an MBA from UC Berkeley. Sally has a Masters in Education and Scout a Magna Cum Laude Bachelor's degree in Social Work. Scout also worked many years as a graphic artist. So all three of our core staff are able to think well, understand you and explain things clearly. Our expertise also translates to well-written user manuals. We draw on other top FileMaker consultants to deliver help wherever it is needed.

## FILEMAKER IS DIFFERENT

Introduced in the mid-80's, FileMaker started out in a pack of over 25 different database products and rose steadily to #1 in the world in the 90's. And it has stayed at #1 ever since due to vigilant and wise updates to take advantage of an ever-changing technology environment.

### FileMaker is known for two main things:

1. Its ease of use for normal knowledge workers who aren't FileMaker specialists, using either Macs or PCs.

2. Its rapid development ability, making it possible to create databases, new features and reports in much less time than with more cumbersome web-based, SQL or Xcode development tools.

Over the years, FileMaker has evolved from a really great end-user database to a full-featured and powerful development environment. Yet it still lets normal knowledge workers get under the hood and do amazing things. That's exactly what is possible in **Studio Manager**.

## Studio Manager requires FileMaker

You might think of Studio Manager as a very powerful FileMaker template. The concept is similar to Excel spreadsheets and Word documents. They can be created, opened and edited *only* if the Excel or Word application is installed.

**Studio Manager** is the only template of its type that provides such a comprehensive set of features with an interface that is attractive and a functionality that is easy to understand, learn and use.

## STUDIO MANAGER FEATURES

Here is a brief overview that will give you a good sense of the essentials, a few frills and how it all works together.

**Contact management** with specialized screens for prospects, clients, vendors and employees.

**Job tracking** with instant access to every aspect of each job whether that is a list of tasks, a schedule of deadlines, a calendar of tasks, optional task assignments, estimates, actual job costs, dozens of reports and especially billing.

**Job cost tracking** means that you can look at a project at any point to determine exactly how much time and direct expenses have been recorded. Compare estimates to actuals in order to make informed decisions.

**Timesheets** that track labor or time per project can be enabled for every single person on the network, locally or remote.

**Estimating** is so easy (via a checklist and modification scheme) and intuitive that any excuses to not estimate promptly are often rendered mute.
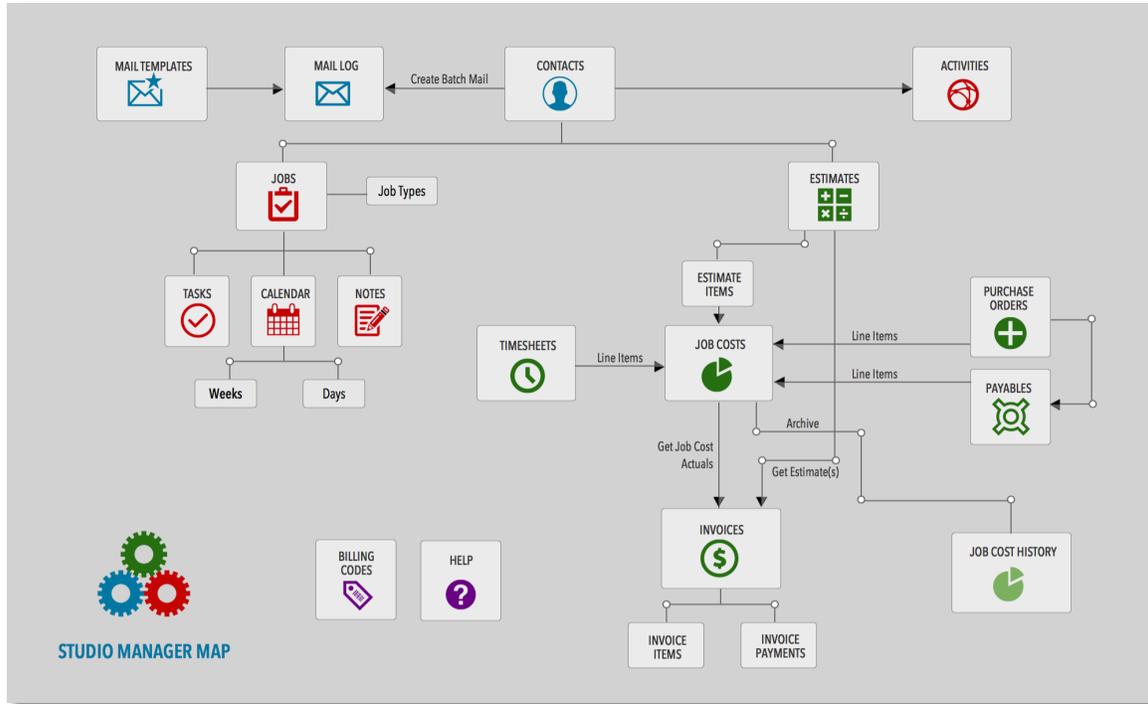
**Invoices** can be generated from actual costs or estimates as well as from scratch.

**Calendar**. The calendar view shows task deadlines. You can filter the month view by employee, job or client and then, of course, print or PDF that calendar.

Other features include, but are not limited to, a modular Task Detail window, portals that allow you to view data stored in different modules, a Week view to let

you focus in, Purchase Orders, Payables as well as the generation and storage of job-related Email, complete with PDF reports (even from mobile devices).
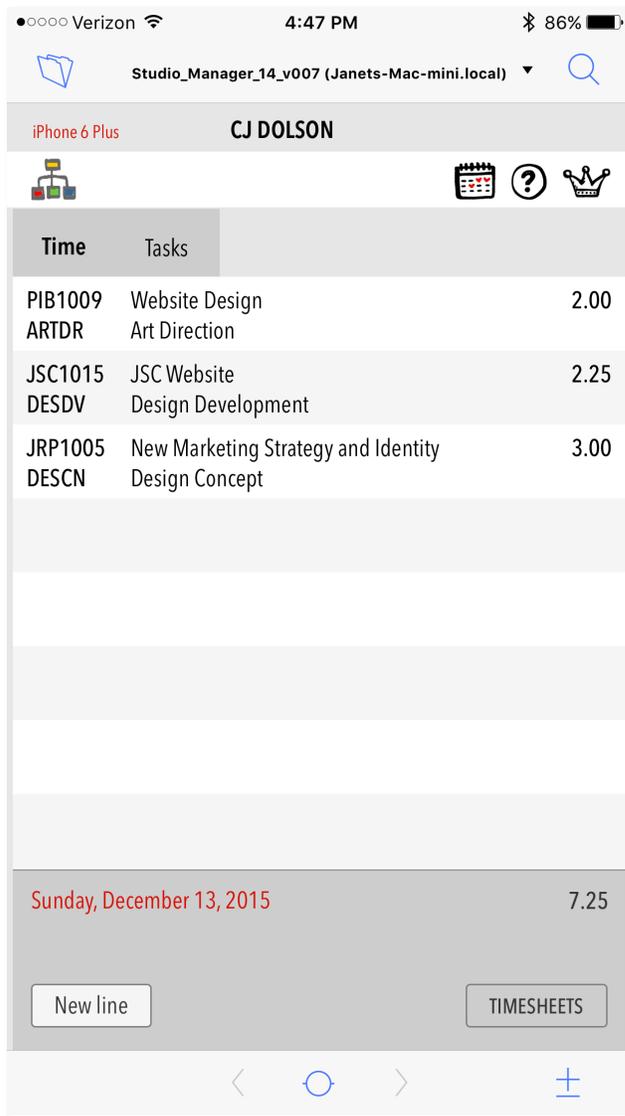
## STUDIO MANAGER MAP



For those of you who like flowcharts, note that Studio Manager includes a map that diagrams the flow of data and utilizes custom icons to represent each major feature. Referring to the map, either here or within SM14, may be useful for anyone attempting to learn how the various pieces of **Studio Manager** come together to form a whole, comprehensive management tool.

Clicking on the **Studio Manager** icon on any entry or list screen opens the Map. The icons on the map double as navigation tools; one click takes you from the Map to whichever module you choose.

## IPHONE SUPPORT

Mobile devices are carving out a permanent place in the computing landscape and changing the way we work. **Studio Manager** provides iPhone support because:



1. The iPhone is likely to be handy and connected on a 24/7 basis. You can get to your data when you need it and even when you didn't expect to need it.

2. The FileMaker Go app is free. It's like web access but better, more focused and easy to deliver since via **Studio Manager** is not PHP, SQL or Xcode.

We use them so we know; the iPhone screen is small (unless you have an iPhone 6 or 6s Plus). Even so, from the iPhone you can...

1. Record time spent on jobs or projects via daily timesheets.

2. View your job task. Drill down into a task and see details. See who is working on what. Create and share notes. Mark tasks done.

3. Lookup contact and job information including jobs and deadlines for specific customers.

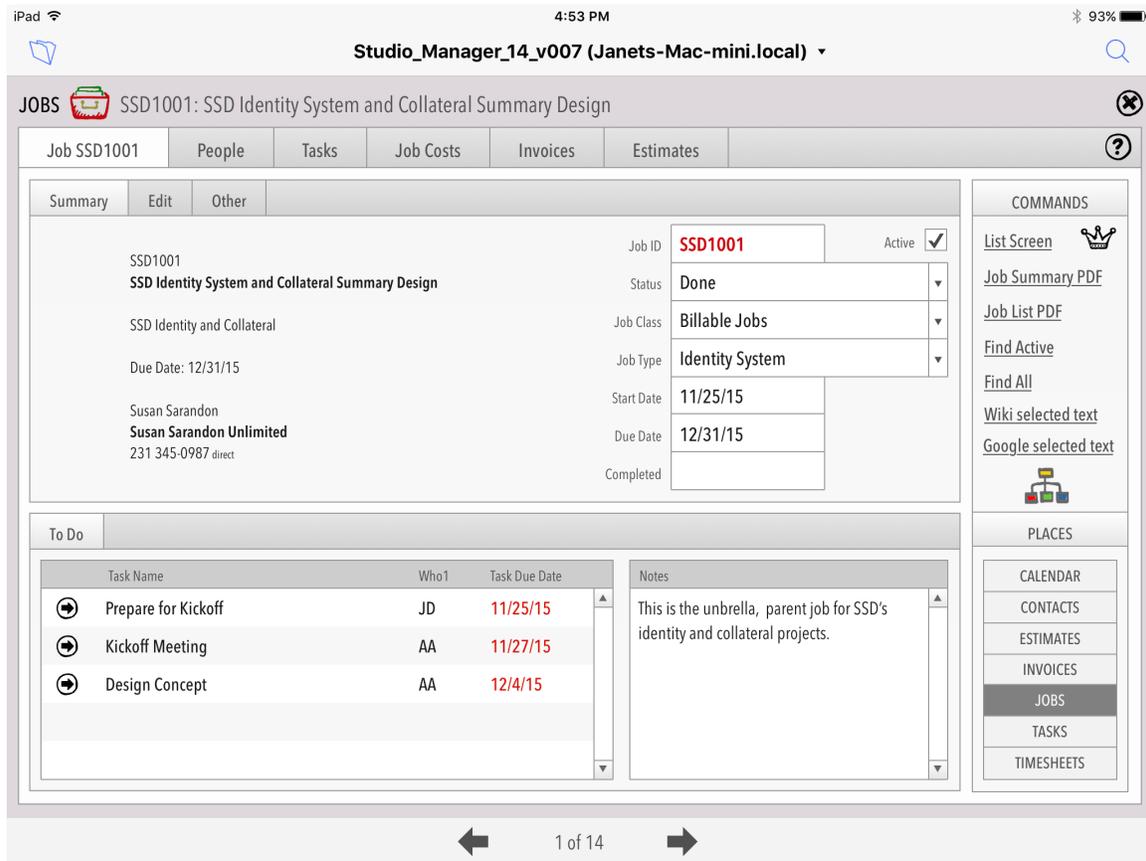4. Generate reports as PDFs. View, annotate, initial or email them.

5. View a calendar of your job tasks and deadlines, which you can also PDF, annotate and email.

**Studio Manager** automatically uses the right layout to fit iPhones from the 4s through 6s Plus and everything in between.

## IPAD SUPPORT

The iPad lives somewhere between the small iPhone screen and a full notebook or desktop computer setup. It's clearly more portable and easy to use and has an 8 or 10-inch screen that lets you see more than on a phone. The iPad can be a mobile clipboard at work that can sit on a stand at a desk, on your lap or be accessed one-handed when actually on the move.

Here is the Jobs Entry screen on iPad. Lots can be seen and done here:



An iPad with FileMaker Pro is practical and economical:

1. It's a cheap FileMaker client with a big enough screen to easily do basic things like enter time, look up information, update your task list. View reports.

2. Depending on your needs, it may be enough **Studio Manager** access to get you by when a laptop seems too cumbersome or isn't handy.

3. Look up just about anything from your iPad. For example, view invoices and estimates or print them. Heck, you can create an estimate or invoice if you have to, then send it to your customer as a PDF with your custom signature, over lunch.

There's got to be a downside in here. Everyone says the iPad is just a consumption device. Yes, there are some downsides. We've *only* delivered the core of Studio Manager's functionality on iPad- sized screens.

On the iPad, you can still navigate to the bigger screens designed for laptops and run the heavy-duty stuff, if you have to. You'll just need to pinch and zoom to operate screens that have not been optimized for fat fingers.

## STUDIO MANAGER ON MAC AND PC

Most creative services firms still do most of their work in offices with lots of big screen Macs and quite a few MacBook laptops with a PC here and there for the numbers side of the house.

**Studio Manager** was designed for this environment. If the majority of your staff are at desks working on computers, it makes sense to deliver the best possible access and operation to those screens.

**Designers and Production Artists**. These folks don't need to spend a lot of time in **Studio Manager**. They primarily need to record time spent on jobs, share job-related notes and see what is on their schedule.

That's why users start at their own optimized screen (the Employee Dashboard) where they can enter today's time, see their tasks and generally not even have to navigate into the rest of Studio Manager at all.

**Managers & Executives**. These folks have a lot more things to do in **Studio Manager**. They may need to see the details about jobs to stay on top of their current status. They tend to hang out in Jobs, Contacts, Estimates and Invoices, where they can set up jobs, create estimates, manage change orders and even generate invoices.
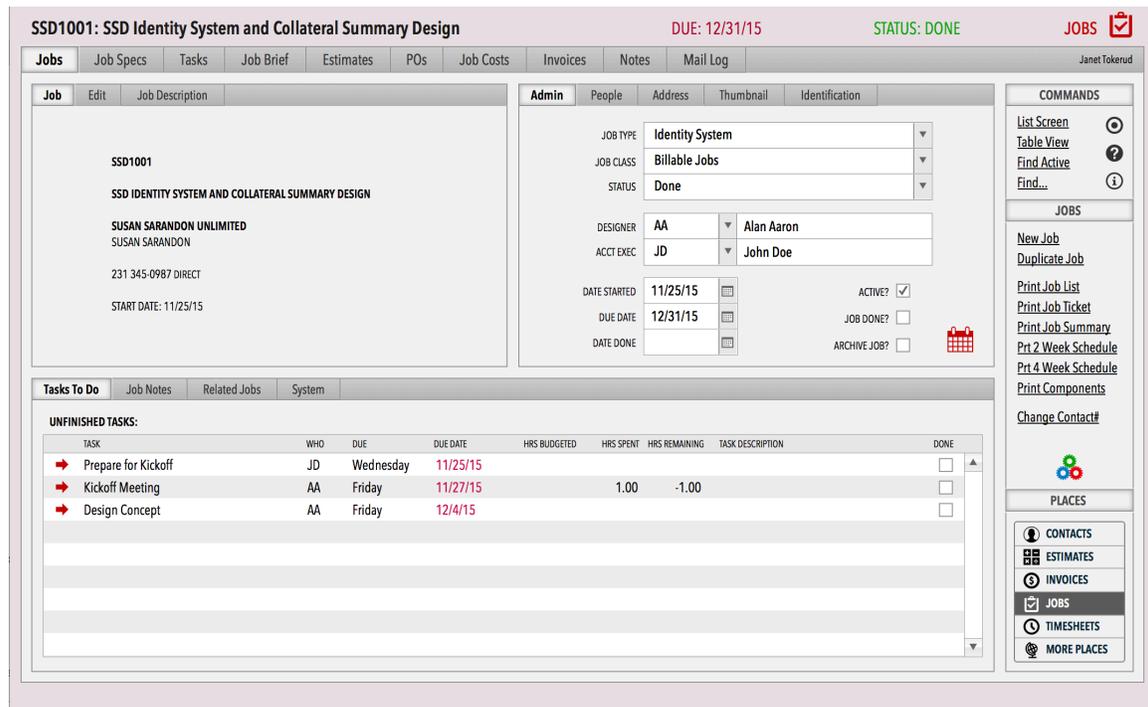
**Traffic**. Someone needs to make sure the trains run on time. Traffic managers set deadlines for new jobs. They juggle and cajole to get things done on time. They tend to love Jobs and the Calendar, schedules and reports.

**Administrators.** Somebody's got to enter expense data into Job Costs and oversee communications.

**Bookkeepers.** Jobs, Payables, Purchase Orders and especially Invoicing keep these folks busy and happy. They benefit from lots of reports for tracking financial data.

**Marketing.** There are activity screens for marketing reps and even the ability to generate bulk mailings.

Here's the Jobs Entry screen - on a retina display:



In **Studio Manager** you can take tasks from previous jobs and assign them to new jobs of the same type. You can also pull up a fresh deadline list for each kind of job. You can slide deadlines for jobs forward and backward to squeeze in a new job that just has to happen right now if it is going to happen at all.

## HOW DO YOU GET STARTED?

We could go on and on about Studio Manager's capabilities. But you've got jobs to do, places to go and people to see. Before we go, we will just tell you a few more basics so you know what you need to do to get going with **Studio Manager**.

## NEXT STEPS

**Free Demo**. If you are the do-it-yourself type, download our demo and play with it on an iPhone, iPad or Mac/PC. It's the full product with a couple restrictions. So you can see it all if you really want to let you get your feet wet including sample data. There's even a little walk-thru Demo Manual that doubles as a training tool.

**Email, Phone and Screen-sharing**. If you would like a little help while sussing this out, please ask. We will help you see what's here. Sometimes I step you through the tour pages and answer your questions. Screen-sharing works too if I'm not handy to your location.

## HARDWARE & SOFTWARE REQUIREMENTS

We recommend a dedicated Mac or PC for the **Studio Manager** file. If a Mac, we like the Mac mini or an older Mac that can run FileMaker 14 - it needs to run at least Mavericks (Mac OS X 10.9).

On the PC side, you can get away with running on a Windows 7 PC server if you know what you are doing. We'd like you to be running FileMaker Server 14 on that machine. The rest of the office should be running FileMaker Pro 14 with the exception of workstations where you can get by running from an iPad or even iPhone. Google "FileMaker Pro 14 Tech Specs" for every detail on this.

## REMOTE ACCESS

**The Setup**. You will have your IT department or outsourced IT guy or gal put a couple specific holes in your firewall that FileMaker likes. You can run with or without VPN depending on your security requirements. After that, generally you keep your server up 24/7. You use FileMaker Server to automatically backup the database every day, hour or whatever, according to your preference. It's very easy to set up. When your normal backups for the office also backup FileMaker's backups then everyone is happy. What's cool about FileMaker's backups is they can do incremental backups while **Studio Manager** is being used. Very cool stuff.

**Remote Access**. If you have FileMaker Pro installed on your Mac or PC and you are connected to the Internet in some fashion, you can log into **Studio Manager** from home, from the road, or even from your car if you've got a personal hotspot on your iPhone running. Alternately, login from your favorite iPhone, iPod touch or iPad.

## WE LOOK FORWARD TO HEARING FROM YOU

The intention of this informal brochure has been to give you an overview of **Studio Manager 14**. We've given you a taste, but seeing is believing. Call 415 272-8563 or email me: janet.tokerud@gmail.com. For more details and visuals, come see the tour or check out the iOS features at http://studio-manager.com. From there, also be sure to download the free full-function **Studio Manager** Demo.