



OPTIMIZED EVENT ESSENTIALS ACCOUNT SETUP IN ACTION

John Kincaid

Senior Client Implementation Specialist

Overview

- » What is EventEssentials?
 - » Value of Investment
 - » What is Quick Start?
 - » What is Pro?
- » SchoolDude Implementation Process
- » Account Setup Steps

What is EventEssentials?

FSDirect

- » Centralize and automatically route all of your event requests from internal and external groups to save time and increase efficiency

CommunityUse

- » Improve your customer service with the community by providing an online portal for event requests and automating status updates and communication with these community organizations

Value of Investment

- » Recoup approximately \$18 per student by implementing a cost recovery program and improving coordination of support resources
- » Recover \$5 per student annually and 10 minutes per event by improving efficiency and communication with external groups

What is QuickStart

With the purchase of EventEssentials, every SchoolDude client gets QuickStart, which includes:

- » Product Launch services

- » Includes implementation trainings along with one-time imports of Locations, Buildings, Rooms, Organizations and Users

- » Training

- » Support

- » Online Client Community

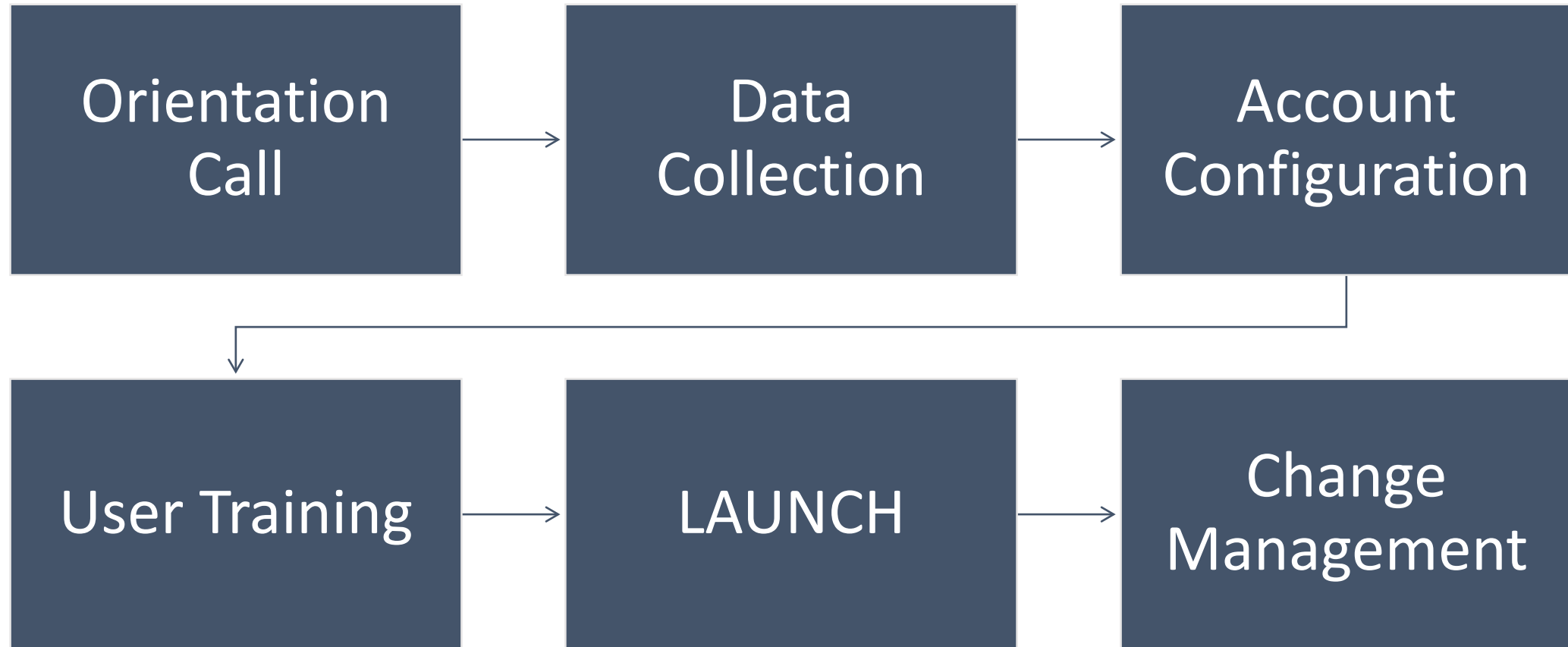
- » Best Practices

What is Pro?

- » Access to the latest enhancements to our EventEssentials platform:
 - » Google Calendar integration
 - » RSS/iCal Feeds
 - » Online Payments

- » Access to Trends and Comparative Maps

SchoolDude Implementation Process



Optimized Account Setup Overview

» Basic Account Setup

- » Locations, Buildings & Rooms
- » Organizations
- » Users

» Setting up Schedule Status Routes

» Setting up Maintenance/IT Services and Service Provider Support

» Setting up MySchoolBuilding

» Setting up CommunityUse

Optimized Location Setup

Locations typically describe the facilities in your organization.

- » Public K-12: Setup your Locations as the individual schools, administration buildings, etc.
 - » Example: Dude High School, ABC Elementary School, Administration Building
- » Higher Ed/Private Schools: Setup your Locations as the campuses at your school.
 - » Example: North Campus, Dude Academy

Adding Locations

- » Click on the **Add** link in the Action menu at the top of the page
- » Select **Locations** and fill in the following fields on the Add/Update Location screen:
 - » Required Fields: Location Description
 - » Optional Fields: Number of Students, Square Footage, Date Built, Notes, Number of Parking Spaces, Budget Codes and Assigned To
- » Click **Submit** to add the Location

Optimized Building Setup

Buildings are the individual free-standing structures at each of your Locations. You would use Buildings if your organization has multiple campuses with multiple structures at each one.

- » Public K-12: Setup your Buildings as categories needed for routing purposes
 - » Example: Your Athletic Director needs to approve schedule requests for all athletic spaces then you would create a “building” called *Athletics* so when we are setting up the Schedule Status Routes we can properly route those spaces.
- » Higher Ed/Private Schools: Setup your Buildings as your physical buildings on your campus

Adding Buildings

- » Click on the **Add** link in the Actions Menu
- » Select **Buildings** and fill in the following fields on the Add/Update Buildings screen:
 - » Select the corresponding **Location** from the drop-down box
 - » Enter the **Building Name**
 - » Optional Fields: **Square Footage** and **Number of Students**
- » Click **Save**

Optimized Room Setup

Rooms are the specific physical spaces that may be requested for an event.

- » Set up available rooms independently from one another rather than grouping rooms together
 - » Example: Classroom 202, West Gym, Main Soccer Field, etc.
- » If you have a Room that can be split into multiple spaces then you will want to list those multiple spaces as individual Rooms
 - » Example: If you have a conference room that can be split into 3 different rooms then you will enter them Conference Room A, Conference Room B and Conference Room C. Then to request the entire room you would select all three rooms or any combination of the rooms to get the space needed
- » The room field is a key contributor for how the system checks for conflicts

Adding Rooms

- » Click on the **Add** link in the Actions Menu
- » Select **Rooms** and fill in the following on the **Add/Update Room** page:
 - » Required Fields: Location & Room Name
 - » Optional Fields: Building, Area Type, Operating Hours, Invoicing Permitted, Room Configuration
 - » *Several of the Optional fields have default settings and do not need to be changed unless necessary*
- » Click **Submit** to save

Optimized Organization Setup

Organizations are the internal and external groups that will use your facilities for events.

- » Attempt to group your Organizations together based on group and insurance
 - » Example: Athletics, Boy Scouts, etc.
 - » List the coaches, troop leaders, etc. as contacts under the Organization
- » External community groups that are you invoice and have different insurance policies you would like separately

Adding Organizations

- » Click the **Add** link in the Actions Menu
- » Select **Organizations** and fill in the following to information on the 6 screens that follow as they apply
 - » You only need to document on the **Organization Information** screen in order to add the Organization to your account

Recommend populating **Organization Information, Insurance** and **Contacts** fields

Adding Organizations

1. Organization Information

- » Organization Name & Address are required fields
- » Organization Type – a way to group/categorize an organization, typically used to establish a fee schedule (Example: Non-Profit, Group 1, Group A, Internal)

2. Insurance

- » Can document the **Company**, **Policy Number**, **Coverage** and **Coverage Date**
- » FSDirect will indicate when the insurance has expired on a schedule request form and on the right side of the Home page

3. Departments: Informational only

4. Web-Site URLs: Informational only

5. Contacts

- » Can associate as many Contacts to the organizations as you'd like
- » Recommend adding contacts to your Organization whenever possible, this will help quickly populate this information on the schedule request form
- » Recommend adding Name, Phone number(s), email address, etc.

6. Notes

Optimized User Setup

Users are the different people who will have access to FSDirect.

There are **five** different user roles in FSDirect:

- » Administrator
- » Site Administrator I
- » Site Administrator II
- » Service Provider I
- » Requester

Adding Users

- » Click on the **Account Setup** tab
- » Click on **FSDirect Users** then click on **+Add User**
- » Select the **Role** for the user
 - » If this user is to be the Comptroller, check the box
- » Click **Next Step** to proceed to the Participant Information
- » Enter the below information:
 - » Login Name: must be unique to ALL Schooldude clients, we recommend using their email address
 - » Password: must be at least 8 characters and contain at least one of the following: one mixed case letter, one number and/or one special character
 - » Email Address: enter a valid email address
 - » Receive Email Notifications: if you do not wish for the user to receive emails from FSDirect, uncheck this box
- » Click **Next Step**
- » If the user you added is a Site Administrator I or II, you will be taken to a screen where you assign them to the Location(s) they need access to

Optimized Schedule Status Routes Setup

Routing in FSDirect allows you to automate your approval process – it tells the system where to send a schedule for approval. You can setup routing based on the Location, Building, Room or any combination of the three.

» KEEP IT SIMPLE!

- » This ensures that final approval is met in a timely manner
- » When it gets complicated, a request can get “stuck” on someone's virtual desk and slow down the process

Location vs. Building Based Routing

- » Routing defaults to the next highest level routing so if:
 - » If Rooms that are assigned to the same Building are selected on the same schedule, then the request will follow the **Building Level route**
 - » If Rooms that are assigned to different Buildings are selected on the same schedule or if a selected Room does not have a Building associated with it, then the request will follow the **Location level route**
- » Requesters are not required to select a Building on their request
 - » The Room should be tied to the Building in the Room Setup
- » If all Schedule Status Routes are set to Building level and a request is made across Buildings, then the request will default to the Comptroller

Adding Schedule Status Routes – Location Based Routes

- » Click on the **Account Setup** tab
- » Click on **Setup Schedule Status Routes**
- » The first route that you will establish is for one that has been *Submitted* into the system
 - » Under the **Add New** section, select **Submitted** from the Status drop-down menu
 - » Select the **Location** in the drop-down menu
 - » Select **No One** in the When Routed To box (top box) and select the approver's name in the **Route to Next** box (bottom box)
 - » Click **Add New** to save
- » The second route that you will create will be similar to the Submitted route. It tells the system who to send the request to once it has been approved by the first person in the route
 - » Under the Add New section, select Approved from the Status drop-down menu
 - » Select the **Location** in the drop-down menu
 - » Select the name of the first approver in the **When Routes To** box (top box) and select the next approver's name in the **Route to Next** box (bottom box)
 - » Click **Add New** to save
- » Repeat the second step if additional routes are needed

Adding Schedule Status Routes – Building Based Routes

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- » Repeat the second step if additional routes are needed

Using Maintenance/IT Services

Maintenance & IT Services can be setup to be selected on a schedule request when services are needed for an event.

- » Keep the list short

- » Makes it less confusing for your Requesters

- » If you own MaintenanceDirect/Incident these tasks and will be creating work orders/incident, make sure that you activate the same crafts/problem types in both products

- » If a craft has been activated in FSD and has not been activated in MaintenanceDirect/Incident, the work order/incident will not have a craft/problem type assignment when it is created

Activating Maintenance Service Crafts

- » Click on the Maintenance Services link under the *Information & Analysis* section on the Home page
- » This will bring up a list of available Crafts to be activated. They can be activated by clicking the grey thumbs-down
 - » Best Practice: Hover over **Shortcuts** and select **Manage Crafts**. This will bring up ALL available crafts and you can quickly check/uncheck the services you need
 - » Only select Crafts that will be needed for facility usage

Activating IT Service Problem Types

- » Click on **IT Services** link under the *Information & Analysis* section on the Home page
- » This brings a list of available Problem Types that can be activated. Click the grey thumbs-down to activate
 - » Only select Problem Types that will be needed for facility usage

Setting Up Maintenance & IT Service Provider Support

- » Click on the **Account Setup** tab
- » Select **Setup Maintenance Service Provider Support** or **Setup IT Service Provider Support**
- » Under the **Add New** section, select the maintenance service from the **Craft** drop-down menu
- » Select the **Location** and **Building** (if applicable)
- » Select the Service Provider or Administrator responsible in the **Assigned To** drop-down
 - » You cannot assign one Craft or Problem Type to two different people at the same Location/Building assignment
- » Click **Add New** to save

Optimized MySchoolBuilding Setup

MySchoolBuilding.com is the online portal that Requesters use to access the schedule request form.

- » Saves time for the facility use department
- » Streamlines the approval process
- » Enhances communication

Best Practices for MySchoolBuilding

» Introductory Paragraph:

- » Can use HTML coding to put web links, bold font, etc.
- » Use to put link to Requester Training Video, current calendar of events and to view previous requests

» Role Setup: FSD Requester

- » If you do not wish for internal Requesters to add new organizations to FSDirect you will need to uncheck the box here

Setting Up MySchoolBuilding

- » Click on **Account Setup** tab
- » Click on **Setup MySchoolBuilding** link
- » Enter an **Introduction Paragraph** to provide instructions for Requesters to follow
 - » This does accept some HTML coding for further explanation
- » Enter a **MSB Admin Contact Name, Phone and Email Address** to provide your Requesters with a contact person within your Organization for questions when submitting a request
- » Select **Yes** or **No** if you would like to require your Requester to enter:
 - » Number Attending
 - » Organization Address, Email, Name & Phone Number
 - » Extra Chairs
 - » Number of Parking Spaces
 - » Show Building, Calendar or Questions

Setting Up MySchoolBuilding

- » Decide if you would like your Requesters to see the **Calendar Visibility for New Schedules**. If so, select **Public**. If not, select **Private**.
- » **Prompt for Tentative Scheduling** will allow Requesters to tentatively book a Room. This option puts a schedule into the Pending state until final Activation
- » Click **Save**

Introductory Paragraph Welcome to Wilmington Public Schools Facility Rental Request Site for faculty and staff. To view a video with tips on how to submit a request, please click here.
To view a current calendar of events, please click here. To view your previous

Please indicate your web site URL and name. This is used on My SchoolBuilding to provide a way for your requesters to get back to your web site. It is optional so if you don't have one leave it blank.

Your Web Site URL, http://

Your Web Site Hyperlink Name

Your MSB Admin Contact Name

Your MSB Admin Contact Phone

Require User To Enter Number Attending Yes No

Require Organization Address Yes No

Require Contact Email Yes No

Require Contact Name Yes No

Require Phone Number Yes No

Prompt For Extra Chairs Yes No

Prompt For Number of Parking Spaces Yes No

Show Building? Yes No

Show Calendar? Yes No

Show Questions? Yes No **Order Questions**

Show Services? Yes No

Default Calendar Visibility for New Schedules Public Private

Prompt for Tentative Scheduling Yes No

Your 'Email Us' Email Address

Optimized CommunityUse Setup

CommunityUse is a powerful online facility use calendaring system that manages the facility use requirements of community organizations.

- » Simplifies the usage request process
- » Improves relations with community groups
- » Reduces data entry by district personnel

Best Practices for CommunityUse

- » Determine which Locations, Buildings and Rooms you want appear in CommunityUse by checking/unchecking the boxes on the item
- » Populate your Terms of Use/Agreement
 - » Community Organizations will be required to agree to the Terms and Conditions when they request access to submit requests and on each request they make
- » Publish the CommunityUse link to your organization's website. We recommend you also include on the page:
 - » Dude Solutions provided help guides/videos for the community organizations
 - » Your fee structure/schedule
 - » Special Notes
 - » Frequently Asked Questions

Setting Up CommunityUse

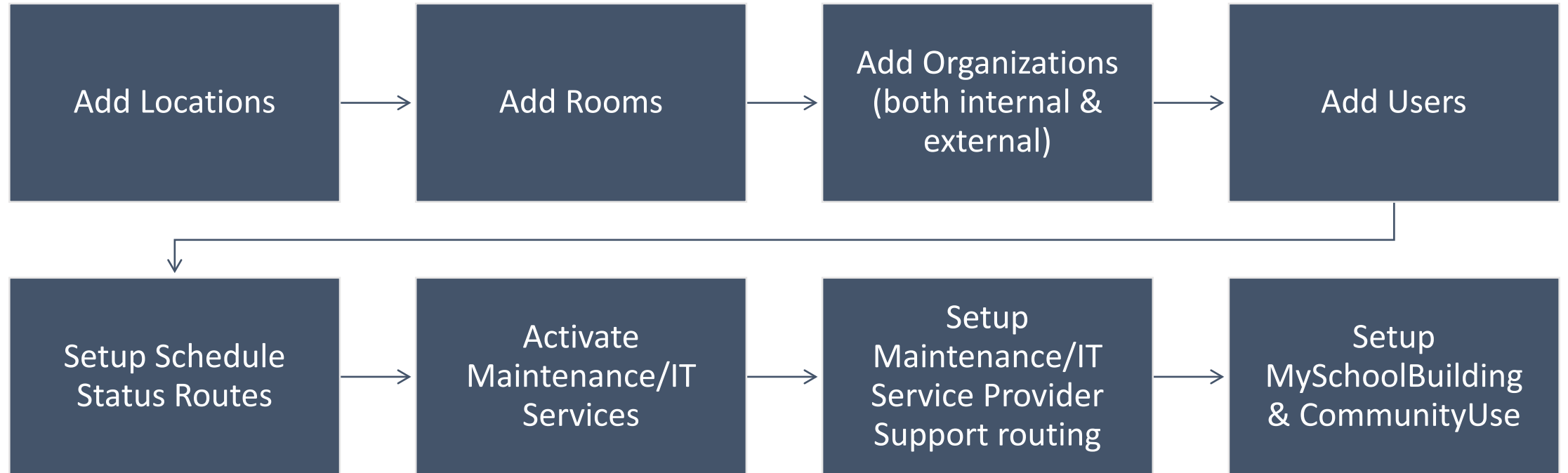
- » Click on the **Account Setup** tab
- » Hover over the Shortcuts menu and select **Setup CommunityUse**
- » Enter an **Introductory Paragraph** that will display at the bottom of each page on CommunityUse.
- » Enter your **Terms of Use/Agreement**.
 - » Organization Event Coordinators (OECs) will be required to agree to these terms when requesting access and on each request they make
- » Upload a logo in **CommunityUse Logo Setup**
 - » Must be 150x50 pixels
- » Enter **Your Website URL** and **Hyperlink Name**
- » Enter your **Community Use Contact Name, Phone** and **Email** for the person at your organization who is responsible for fielding questions from the community about facility use

Setting Up CommunityUse

- » Decide if you would like to **Display your calendar of public facilities events to unregistered visitors?**
 - » Checking Yes, enables your CommunityUse calendar
- » Decide if you would like to **Allow Organization Event Coordinator registration/login?**
 - » Choosing No will prevent community users from requesting access or logging in to submit requests.
- » Decide if you would like to **Allow Community Users to submit schedules in booked rooms?**
 - » This option enables or disables Community Users from submitting a request for a room that is already reserved.
- » Click **Save**
- » Your **CommunityUse** hyperlink will be displayed at the bottom of the page
 - » Click to view your page and you can give this link to your internal IT department for them to publish the CommunityUse calendar to your organization's website

Setting up EventEssentials Pro

FSDirect & CommunityUse



Questions?

