



What You Forgot About in EventEssentials

Melanie Bunn

Objectives

Learn how to maximize your use of Event Essentials using the following tips:

- » Adding items to the Organization Event Calendar
- » Linking to the Calendar in MySchoolBuilding
- » Creating Questions
- » Managing Schedules
 - » Editing Activated Schedules
 - » Renewing Schedules
- » Building Level Routing
- » Room Contacts

Organization Event Calendar

What is the Organization Event Calendar and why would I want to use it?

- » Allows you to easily note that an entire Location is reserved, closed, or unavailable for use
- » Can be created for all Locations at once
- » Ideal for noting Holidays and other school closings on your FSDirect calendar
- » Items entered on the Organization Event Calendar will flag for conflicts against schedules or other Organization Event Calendar items

Organization Event Calendar

How can I add an item to the Organization Event Calendar?

» Adding to this calendar is simple!

- » Click on the **Calendar** tab
- » Hover over the **Shortcuts** menu and click on **Organization Event Calendar**
- » Select your **Location** from the drop down menu or check the box to **Create for ALL Locations**
- » Enter the dates of your event in the **Begin** and **End Date** boxes. If the event is one day, enter the same date in each field
- » Select your Event Title from the drop down menu. If you do not see the event that you need, click on **Event Title** and enter the name that you would like displayed on the calendar
- » Click **Submit** to save your selections
- » The event will then display on the with the Event Title in bold letters. It will display across the top of the day, above any other scheduled events

Organization Event Calendar

Home **Calendar** Availability New S

Search for Advanced Search

Actions: Add | List | Graph | Report

Calendar Shortcuts ▾

- Add - Normal Schedule
-
- Day View
- Month View
- Room View
- Week View
- Organization Event Calendar**

Select Month: April ▾

Print This

Organization Event Calendar

Location: -- Select Location -- ▾

Begin Date: 04/10/2017

End Date: 04/14/2017

Event Title: Spring Break ▾

Create for ALL Locations

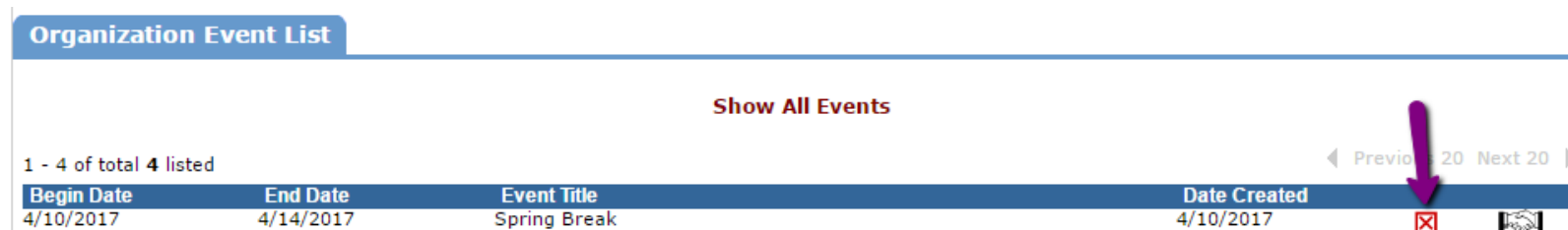
Title: Spring Break

10 Spring Break ● Boys Varsity basketball practice ● Varsity Baseball practice	11 Spring Break ● Varsity Baseball practice	12 Spring Break ● Varsity Baseball practice ● Boys Varsity basketball practice	13 Spring Break	14 Spring Break ● Boys Varsity basketball practice
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Organization Event Calendar

Can I delete events from the Organization Event Calendar?

- » If you entered something in error or just want to remove it from the calendar, you can easily delete it
 - » Navigate back to the Organization Event Calendar
 - » Under the Organization Event List, click the red X next to the event that you would like to delete





Organization Event List

Show All Events

1 - 4 of total 4 listed

◀ Previous 20 Next 20 ▶

Begin Date	End Date	Event Title	Date Created	
4/10/2017	4/14/2017	Spring Break	4/10/2017	 

- » The handshake icon indicates that the event is shared across all Locations. If you delete the event, it will be deleted from the calendar of all Locations

Linking to the Calendar in MySchoolBuilding

Q: Now that I've got all of my events and holidays added to the calendar, how can it be viewed by my requesters?

- » The Calendar is always visible in the requester portal, MySchoolBuilding, using the following steps:
 - » In MSB, click on the My Requests tab
 - » Hover over the Shortcuts menu and click on My Schedule Requests
 - » Hover over the Related Links menu and you will see options for the calendar
 - » Select a filter from the available options on the right-hand side and click Refresh Calendar

Linking to the Calendar in MSB

The image displays two screenshots of the MSB 'My Requests' page. The top screenshot shows the 'My Requests' tab selected, with a 'Shortcuts' dropdown menu open. The 'My Schedule Requests' option is highlighted with a purple box. The bottom screenshot shows the 'My Schedule Requests' page with a 'Related Links' dropdown menu open. The 'Month Calendar' option is highlighted with a purple box. A blue line connects the 'My Schedule Requests' link in the top screenshot to the 'Month Calendar' link in the bottom screenshot.

Top Screenshot:

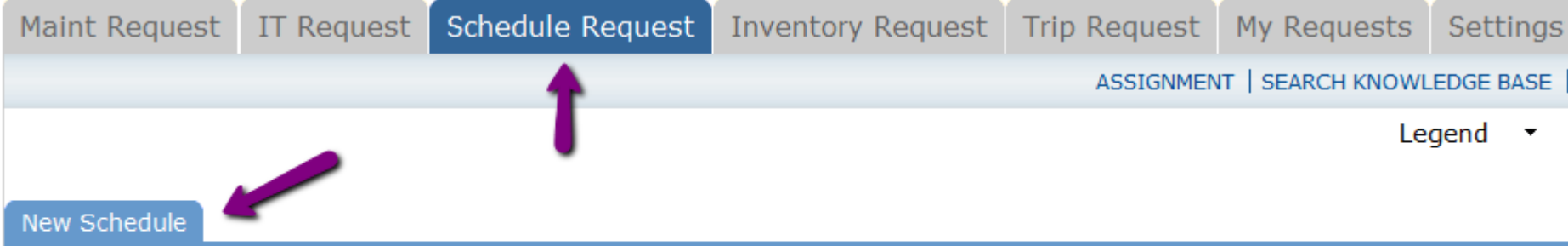
- Navigation tabs: Maint Request, IT Request, Schedule Request, Inventory Request, Trip Request, **My Requests**
- Page header: ASSIGNMENT | SEARCH KNOWL
- Section: **My Requests**
- Dropdown: Shortcuts
- Options: My Maint Requests, My IT Requests, **My Schedule Requests**, My Inventory Requests, My Trip Requests
- Text: Note: Once the request is approved, you no longer can edit the request. You can click on the request to view the latest changes on your request.
- Request Summary: 2 New Requests, 1 Declined

Bottom Screenshot:

- Navigation tabs: Maint Request, IT Request, Schedule Request, Inventory Request, Trip Request, **My Requests**
- Page header: ASSIGNMENT | SEARCH KNOWL
- Section: **My Requests**
- Dropdown: Shortcuts
- Dropdown: Related Links
- Options: List My Requests, **Month Calendar**, Day Calendar, Week Calendar
- Section: **My Schedule Requests**
- Section: **List of Requested Schedules**
- Text: Search for " [icon]
- Text: Search this results for: [input field]

Linking to the Calendar in MSB

- » Since that can be a lot of steps for your requesters to remember, we can add HTML code to the Introductory Paragraph that will give them a direct link to the calendar from the top of the request form



The screenshot shows a navigation bar with the following tabs: 'Maint Request', 'IT Request', 'Schedule Request' (highlighted in blue), 'Inventory Request', 'Trip Request', 'My Requests', and 'Settings'. Below the tabs, there are links for 'ASSIGNMENT' and 'SEARCH KNOWLEDGE BASE'. A 'Legend' dropdown menu is visible on the right. A 'New Schedule' button is located on the left side of the page. Two purple arrows point from the 'New Schedule' button to the 'Schedule Request' tab.

Welcome to our 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 requests**, please [click here](#).

Linking to the Calendar in MSB

» To create the link on the request page:

» Click on the **Account Setup** tab

» Click on Setup **MySchoolBuilding**

» Enter the following into the **Introductory Paragraph**:

To view a current calendar of events, please click here.

» For assistance with HTML code, contact support@schooldude.com and we will try to help!

Creating Questions

Q: I need to know specific information before I can approve a schedule request. How can I add that information to the form so they have to provide it upfront?

» The answer is to create Questions in FSDirect! Questions allow you to:

- » Enter your own questions and/or instructions on the schedule request form
- » Make these questions required so requests cannot be submitted without first answering
- » Answers can be Yes/No or Free Text so they can enter their own details

Examples: Will you be charging admission for this event? Will food be served at this event?

Creating Questions

» To create a Question:

- » Click on **Questions** under the **Information & Analysis** section of your Home page
- » Click on **+Add New Question** on the right-hand side of the screen
- » Enter a **Question Name** – this is informational only
- » Enter your **Question Text** – this will display on the schedule form
- » Select whether or not you would like it to be **Required**
- » Select your **Question Type** – Yes/No or Free Text
 - » If Yes/No, select if you would like the question to default to Yes, No, or No Default. A best practice suggestion is **No Default** so they are forced to read and answer the question
 - » If Free Text, you can type in text that you would like to auto populate. A best practice suggestion is to **leave this blank** so they are forced to read and answer the question
- » Click **Add Question**

Creating Questions

Information & Analysis

- Areas
- Budget
- Buildings
- Calendar Event Types
- Charge Types
- Fee Tables
- Invoices
- IT Services
- Locations
- Maintenance Services
- Organizations
- Payments
- Questions**
- Rooms
- Saved Actions
- Schedules
- Services

Quick Find: go

+ Add New Question

Add Question

Basic Information

Question Name:

Question Text:

Note: Maximum question length is 512 characters

Required: Yes No

Question Type:

Default Value: Yes No No Default

Add Question

Creating Questions

- » After you create the Question, you will see **Display** options. Select if you would like the Question to be displayed for all users, only internal users (MySchoolBuilding), or only external users (CommunityUse). You **MUST** have FSDirect selected as well for the Question to display
- » Click Activate Question to save and make it appear on the form

Display

- Check here to display this question in FSDirect
- Check here to display this question in MySchoolBuilding
- Check here to display this question in CommunityUse

Save

- » You cannot delete or edit a question once it's been activated. You can de-activate it to remove it from the schedule form by unchecking the boxes above and clicking Save

Creating Questions

- » After activating a question, it will appear under the Additional Information section of the schedule form:

Additional Information

Will you be charging admission for this event? Yes No

How many people will be attending your event?

Will you be serving food at this event? Yes No

- » Any questions appearing with a red check mark are required and must be filled out before the form can be submitted

Managing Schedules

Q: How can I edit a schedule that has already been activated?

» There are two ways to edit an activated schedule:

» Change the status back to **Submitted**, make your changes, re-activate and save

OR

» Change the status to **Duplicate** and then use the **Renew** feature

» Renewing a schedule will always work, but there are only certain instances where you will be able to change the status back to Submitted and make changes

Editing an Active Schedule

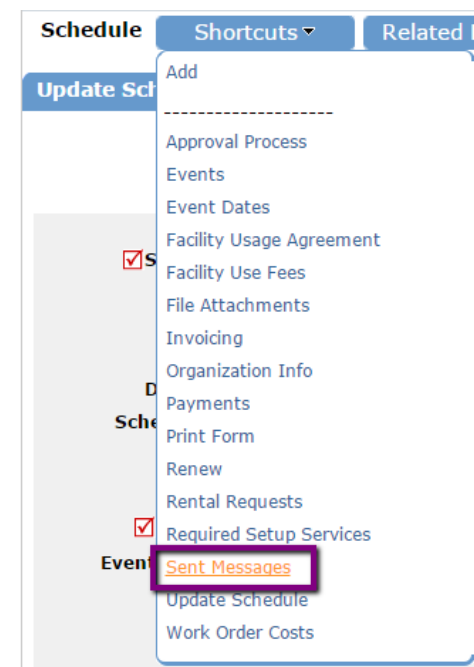
- » Changing the status back to Submitted is only a viable option if the schedule is “unlocked”. There are 4 things that “lock” a schedule:
 - » If an invoice has been created
 - » If task notification emails have been sent out
 - » If an event date has been canceled
 - » If an alternate event has been created
- » If any of the above have happened, you will need to proceed by using the Renew feature. If none of the above have happened, you will be able to change the status back to Submitted and make changes

Editing an Active Schedule

- » To see if an invoice has been created:
 - » Scroll down to the **Invoices** section of the schedule. If anything is listed there, the schedule is locked

Invoices						Create Invoice
Invoice Number	Status	Date Invoiced	Invoice Amount	Balance	Online Payment Account Status	
Post Payment 105	Void	6/15/2016	\$10.00		Email Invoice Merchant Account Required!	

- » To see if a task notification has been sent out:
 - » On the schedule form, hover over the **Shortcuts** menu and click on **Sent Messages**. If the Subject of any of the emails says FSDirect Task Notification, the schedule is locked



Editing an Active Schedule

» To see if an event date has been canceled:

- » Scroll down to the **Events** section of the schedule form. If any event date says Canceled, the schedule is locked

Event Start Date		Event End Date		Alternate Event			
		Location		Event Start Date		Event End Date	
2/20/2017	2/20/2017						
2/22/2017	2/22/2017						
2/24/2017	2/24/2017						
2/27/2017	2/27/2017						
3/1/2017	3/1/2017						Canceled
3/3/2017	3/3/2017						

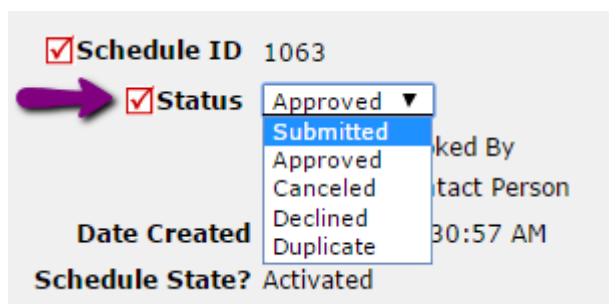
» To see if an alternate event has been created:

- » Also in the **Events** section, if any event has information under the Alternate Event heading, the schedule is locked

Event Start Date		Event End Date		Alternate Event			
		Location		Event Start Date		Event End Date	
2/20/2017	2/20/2017	BinderBunn High School		2/20/2017 3:30PM	2/20/2017 5:30PM		

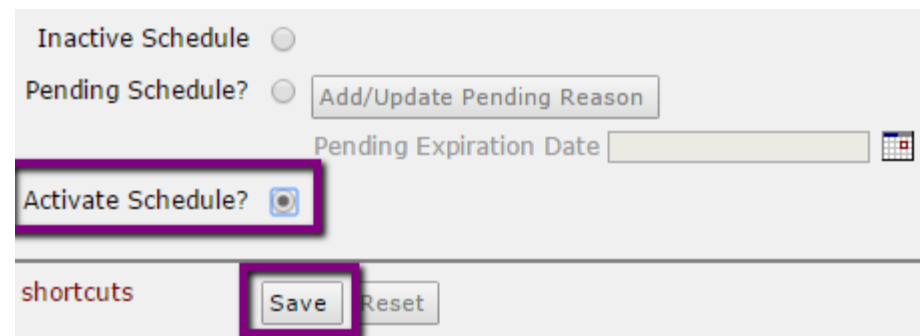
Editing an Active Schedule

- » If you've confirmed that none of the above have happened, change the status of the schedule to Submitted and click Save. The form should then allow you to make changes. You can click the bubble to Activate the schedule and click Save again. Your changes will be reflected on the schedule form and on the calendar



A screenshot of a web form for editing a schedule. The form includes the following fields and controls:

- Schedule ID** 1063
- Status** (A purple arrow points to this field. A dropdown menu is open, showing options: Approved (selected), Submitted, Approved, Canceled, Declined, Duplicate.)
- Created By** (partially visible)
- Contact Person** (partially visible)
- Date Created** 30:57 AM
- Schedule State?** Activated



A screenshot of a web form for editing a schedule, showing the bottom section. The form includes the following fields and controls:

- Inactive Schedule**
- Pending Schedule?** (with an **Add/Update Pending Reason** button)
- Pending Expiration Date** (with a calendar icon)
- Activate Schedule?** (This checkbox is highlighted with a purple box.)
- shortcuts** (with **Save** and **Reset** buttons. The **Save** button is highlighted with a purple box.)

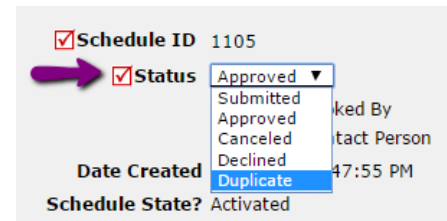
Editing an Active Schedule

- » If any of the 4 things listed above have happened and the schedule is locked, the easiest way to make changes is to use the **Renew** feature. This will copy your schedule information (minus the event dates) onto a new form with a new Schedule ID so that you do not have to manually enter all of the information again. Please make note of the event dates before renewing a schedule as you will have to enter them in on the new schedule form!

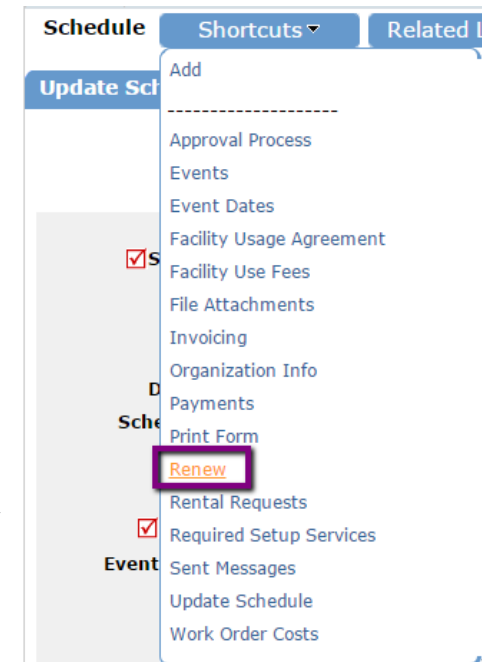
Renewing a Schedule

» To Renew a schedule:

- » Change the status of the schedule from Approved to Duplicate, then click Save. This will remove the existing schedule from the calendar



- » Hover over the Shortcuts menu and click on Renew. This will create a new schedule for you, in the Submitted status, where you can make changes. Enter your event dates, make any changes, and then re-activate the schedule and click Save. The Calendar will now reflect your newly scheduled information



Building Level Routing

Q: I have Room routing set up for the Theater and the Theater Lobby, but if someone selects both rooms on the schedule, it goes to the principal instead of the theater teacher. Why? How can I make this work?

» Room Level Routing only works if just one room is selected on the schedule. If more than one room is selected on the schedule, it will follow the next highest level of routing, usually the Location Level Route. For example...

Building Level Routing

» In the example below, we see Room Level Routing set up to go to Leslie Knope for both the Theater and Theater Lobby. This will work if only one of those rooms is selected on the schedule form. If both rooms are selected, the schedule will follow the Location Level Route going to Ron Swanson

	Status	Location Building	Room	When Routed To Route To Next	
Edit	Submitted	BinderBunn High School		Swanson, Ron	<input checked="" type="checkbox"/>
Edit	Submitted	BinderBunn High School	Theater	Knope, Leslie	<input checked="" type="checkbox"/>
Edit	Submitted	BinderBunn High School	Theater Lobby	Knope, Leslie	<input checked="" type="checkbox"/>

Building Level Routing

- » In order to have the schedule route to Leslie if both rooms are selected, we have to set up a Building Level route
- » There are a few steps to setting up a Building Level route:
 - » Creating or activating a Building
 - » Tying Rooms to the Building
 - » Creating the Building Level route

Building Level Routing

» To Create or activate a Building:

- » Click on the **Account Setup** tab
- » Under the Manage Codes section, click on **Buildings**
- » Buildings are shared across all SchoolDude products. If you see the Building you need to use, **click on the gray thumbs down**; this will turn it to a yellow thumbs up and activate it for our use
- » If you do not see the Building you need to use, click **+Add New Building**
- » Select the appropriate **Location** and add a **Building Name**. These are the only two required fields
- » Click **Save**

Building Level Routing

Home | Calendar | Availability | New Schedule | Documents | **Account Setup**

Search for **GO** Advanced Search

Actions: Add | List | Graph | Report

Account Setup Shortcuts ▾

Your FSDirect Account Settings

To begin your journey in FSDirect, you should enter your organization's information in the forms below beginning setup but you may come back to make modifications as often as needed.
Please note: begin using FSDirect by first defining account information, users, codes, status routes, and service above for each of these options.

- ▶ **Account Settings**
Setting your account for FSDirect.
- ▶ **Logo Setup**
Upload your organization logo. We'll display your logo on FSDirect interface.
- ▶ **Manage Codes**
Add and update all of your system codes such as budget, Fee Tables, location, organizations, and much more

Areas

- Buildings**
- Rooms
- Budget

+ Add New Building

Total Invoiced Total Paid

Add/Update Building

Location BinderBunn High School ▾

Building Name Theater

Building Used By

Square Footage

Number of Students

Note: Enter the number of students served by this building.

Entry Managed By Administrator : Bunn , Melanie

Save

Building Level Routing

- » Once you have created or activated your Building, you need to tie your rooms to that Building. *Note: Your users do not have to select the Building on the schedule form to follow Building Level Routing. Tying the rooms to the Building makes that unnecessary.
 - » Click on the **Account Setup** tab
 - » Under the Manage Codes section, click on **Rooms**
 - » Click on the **name** of the Room
 - » Under the **Building** drop down menu, select the appropriate building
 - » Click **Submit** at the bottom of the page
 - » Repeat the process for all Rooms that need to be tied to that building

Building Level Routing

Home | Calendar | Availability | New Schedule | Documents | **Account Setup**

Search for Advanced Search

Actions: Add | List | Graph | Report

Account Setup Shortcuts

Location	Building	Zone	Area	Room	Fiscal Year # Events (Submitted/Approved)	Available for Use
BinderBunn High School				Theater	0	Yes
BinderBunn High School				Theater Lobby	0	Yes

Your FSDirect Account Settings

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Please note: begin using FSDirect by first defining account information, users, codes, status routes, above for each of these options.

- ▶ **Account Settings**
Setting your account for FSDirect.
- ▶ **Logo Setup**
Upload your organization logo. We'll display your logo on FSDirect interface.
- ▶ **Manage Codes**
Add and update all of your system codes such as budget, Fee Tables, location, organizations, and much more

Areas
Buildings
Rooms
Budget

Location BinderBunn High School

Building Theater

Area Type -- Select Area --

Room Name Theater Lobby

Building Level Routing

- » Once you have created or activated your Building and tied all necessary rooms to that Building, you can create your Building Level route
 - » Click on the **Account Setup** tab
 - » Click on **Setup Schedule Status Routes**
 - » If you have existing room level routes for these rooms, click the red X next to the route to delete them
 - » Under the **Add New** section, select the status of **Submitted**, select the **Location** and the new **Building**, do not select a room, **When Routed To** should be No One and **Route To Next** should have the name of the first approver for these rooms (in this case, Leslie Knope)
 - » Click **Add New**

Building Level Routing

Home | Calendar | Availability | New Schedule | Documents | **Account Setup**

Search for Advanced Search

Actions: Add | List | Graph | Report

Account Setup Shortcuts ▾

Your FSDirect Account Settings

To begin your journey in FSDirect, you should enter your organization setup but you may come back to make modifications as often as you like. Please note: begin using FSDirect by first defining account information above for each of these options.

Add New

▶ **Account Settings**
Setting your account for FSDirect.

▶ **Logo Setup**
Upload your organization logo. We'll display your logo on FSDirect.

▶ **Manage Codes**
Add and update all of your system codes such as budget, Fee Tables, etc.

- Areas
- Buildings
- Rooms
- Budget
- Maintenance Services
- IT Services
- Charge Types
- Fee Tables
- Locations
- Organizations
- Questions
- Services

▶ **User Login Log**
All FSDirect users login information.

▶ **FSDirect Users**
Identify all FSDirect users and define their roles.

▶ **Role Setup**

▶ **Setup Schedule Status Routes**

Status	Location Building	Room	When Routed To Route To Next
Submitted ▾	BinderBunn High School ▾	-- Select Rooms -- ▾	No One ▾
	Theater ▾		Knope, Leslie ▾

Add New

Building Level Routing

» Your routing should now look like this:

	Status	Location Building	Room	When Routed To Route To Next	
Edit	Submitted	BinderBunn High School		Swanson, Ron	☒
Edit	Submitted	BinderBunn High School Theater		Knope, Leslie	☒

- » This now says that if a schedule is submitted for any room or rooms tied to the Building of Theater, the schedule will route to Leslie Knope
- » **The user does not have to select the Building on the schedule form for this to work if it's set up properly**
- » If rooms across multiple Buildings are selected on the form, it will follow the Location Level route

Room Contacts

Q: That's great, but I'd still like Ron Swanson to know when the theater is booked so he knows what's happening in his school. Can I do that without putting him in the approval process for that Building?

- » To have someone notified of room usage without having them in the approval process, we need to set them up as a Room Contact
- » This is a great option for teachers who need to know when their room is booked but don't need to approve the use

Room Contacts

» To set up a Room Contact:

- » Click on the **Account Setup** tab
- » Click on **Rooms**
- » Find and click on the name of the room
- » Click **Add Contact** above the Occupant Contact field
- » Enter the name and email address of the person who need to be notified, and click **Submit**
- » Make sure that **Notify occupant of scheduled events** is set to Yes
- » Click **Submit** at the bottom of the page
- » Repeat the process to add contacts to other rooms or to add more contacts to the same room

Room Contacts

Home | Calendar | Availability | New Schedule | Documents | **Account Setup**

Search for **GO** Advanced Search

Actions: Add | List | Graph | Report

Location	Building	Zone	Area	Room	Fiscal Year # Events (Submitted/Approved)	Available for Use
BinderBunn High School	BinderBunn High School			Theater	0	Yes
BinderBunn High School	BinderBunn High School			Lobby	0	Yes

Account Setup Shortcuts

Your FSDirect Account Settings

To begin your journey in FSDirect, you should enter your organization's information in setup but you may come back to make modifications as often as needed. Please note: begin using FSDirect by first defining account information, users, codes, above for each of these options.

- ▶ **Account Settings**
Setting your account for FSDirect.
- ▶ **Logo Setup**
Upload your organization logo. We'll display your logo on FSDirect interfa
- ▶ **Manage Codes**
Add and update all of your system codes such as budget, Fee Tables, loc

Areas
Buildings
Rooms
Budget

Add/Update Room Occupant Contact

Contact: Ron Swanson
Occupant Email: rswanson@schooldude.com

Submit Close

Add Contact

Occupant Contact	Occupant Email	
Ron Swanson	rswanson@schooldude.com	✖

Notify occupant of scheduled events? Note: Emails are sent at night to notify occupants of Room usages.
 Yes No

Room Contacts

- » Ron Swanson will now receive an email when a schedule with the Theater or Theater Lobby selected is Approved and Activated.
- » Room Contact emails are sent out overnight after the schedule is Approved and Activated
- » The date that the email is sent is determined by your email notification time frame defined in Account Settings

Email Event Notifications days before the event.

Emails are sent to service providers and room occupants.

- » In this case, Ron will receive the email 5 days before the event. If the schedule is Activated 7 days before the event, he will not receive the email until 5 days beforehand. If the schedule is Activated less than 5 days in advance, he will receive the email overnight the same day that the schedule is Activated

Questions? Need Help?

- » Come see us in the lab!
- » Contact our Legendary Support Team!

If you have questions about maximizing your use of our products, please do not hesitate to contact Dude Solutions' Client Services Center. We are here to help!

Email Support: support@dudesolutions.com

Phone Support: (877) 883-8337

Live Chat:  LIVE CHAT!

Monday – Friday, 8am – 6pm ET



SAN DIEGO
MARCH 18-21
2018

SAVE THE DATE!

DON'T FORGET!

IN THE APP:

**SESSION SURVEYS
& REQUEST MORE INFO**