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Entering Schedules

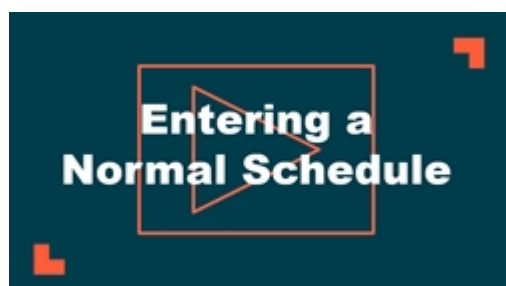
There are 3 different types of schedules that can be entered in FSDirect:

- **Normal** - A Normal schedule can be for a single date or multiple dates, but each event will be in the same location/room at the same time of day. You can add up to a maximum of 20 dates on a normal schedule.
- **Recurring** - A Recurring schedule is used for an event that takes place on a regular basis (For example, every Monday and Wednesday from October through December). These events will also be in the same location/room at the same time of day. You can enter up to a maximum of 100 dates on a recurring schedule.
- **Irregular** - An Irregular schedule can be used for single or multiple dates. Each event can take place in different rooms and at different times, if needed. You can add up to a maximum of 20 dates on an irregular schedule.



How to Enter a Normal Schedule

Watch the Video Tutorial:



- Click on the **New Schedule** tab and click the **Normal Schedule** icon.
- The schedule **Status** will default to Submitted for a new schedule. You can enter a schedule in the Approved status by selecting Approved from the drop down box. This will check the **Notify Booked By** and **Notify Contact Person** boxes. If you do not want these email notifications to go out, uncheck the boxes.
- Enter the **Event Title**.
- Select the **Location** and **Room(s)** you would like to reserve for your event.
- Enter the **Event Date(s)** by typing into the box or clicking on the dates in the calendar box to the right.

- Enter the **Start Time** and **End Time**, making sure to select AM or PM in the drop down boxes.
- If the **Setup Begin** and **Breakdown End Time** are different from the Start and End time, select those times next.
- Do not change the **Duration** or **Spans over** fields. These will calculate for you. **Note: Spans over should be left as 1 day unless you are requesting an overnight event.*
- You can click on the **Check Availability** button to make sure that you are not double booking a room.

Additional Information

This section will appear if you are using the [Questions](#) feature in FSDirect. These questions may or may not be required depending on how they are set up in the system.

Organization Information

- Select the **Organization** requesting the facility from the drop down menu or you may be able to enter a new organization in the box below the drop down.
- If contacts have been added to the Organization, you will see them listed in the **Contact Name** drop down box. If the contact name is not in the list, you can add the contact by filling in their name and contact information in the boxes.
- Type the **Billing Address** or check the box to use the Organization's billing address.
- If you are invoicing in FSDirect, select the user in charge of creating the invoices in the **Responsible for Billing**. This will put the schedule on their home page under the Waiting to be Invoiced heading.

Insurance Information

Any insurance policy information that you have entered for the organization auto-populates in this section on the request form. If no information has been entered yet, you can fill it in here and check the box to **Update organization record with the above insurance information**. Insurance information is not required for your organizations. If you do track policies and the coverage expires for an organization, the system will let you know on your home page and when you select the organization on a schedule request.

Services

The Services feature will only be used by those who also own FSAutomation.

Setup Requirements

Activated Maintenance and IT Services can be selected in this section. Check the box next to the requested service and enter a description in the box to let the service providers know what setup requirements are needed for this event.

Setup Requirements

Note: Tasks already generated for events will not reflect changes in service description.

<p>Required Maintenance Services</p> <p><input checked="" type="checkbox"/> Custodial</p> <p><input type="checkbox"/> Electrical</p> <p><input checked="" type="checkbox"/> Heating/Ventilation /Air Conditioning</p> <p>Required IT Services</p> <p><input checked="" type="checkbox"/> Audio / Visual</p>	<p>Service description</p> <p>Custodian after school hours</p> <hr/> <p>AC on</p> <p>Service description</p> <p>Projector</p>
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Rental Requests

If you are creating a brand new schedule, this section will not show any available Rental Requests to start. Once you save your schedule, you can come back to this section and click the **Add Rental Request** link on the right side of the screen to see a list of charge types that you can add to the schedule. Select the charge type from the list, enter the quantity, and write a rental description. Click Submit to save. Only Charge Types that you have allowed to be requested by MySchoolBuilding users will show in the list.

Additional Fields

- Enter **Number Attending**. You can also break this number into number of adults and number of children.
- Enter any **Other Needs**.
- The **Booked By** section will be automatically filled in with your information.

Schedule Activation

- If you are **Activating** the schedule at the same time that you enter it, you can select that option before saving. If the schedule needs to go through an approval process before activation, leave the schedule state as Inactive. **Note: Only the final person in the approval process should activate the schedule.*

Inactive Schedule

Pending Schedule? Add/Update Pending Reason

Pending Expiration Date

Activate Schedule?

File Attachments Add New File

Delete	Date	Submitted By	Description	Filename	Size
No attachments					

(No limit on number of files attached. Total size of all uploaded files must be less than 5MB)

Back to shortcuts

File Attachments

- Attach a file to your schedule request by clicking the **Add New File** link.
- Browse your computer for the file and select it. You can also enter a **File Description**. Click **Submit**.
- The attached file will now be listed in the File Attachments section at the bottom of the schedule. **Note: There is no limit to the number of files that can attached, however the total size of all uploaded files on the schedule must be less than 5MB.*

Click **Save** at the bottom of the screen to submit the schedule request.

How to Enter a Recurring Schedule

Watch the Video Tutorial:



- Click on the **New Schedule** tab and click the **Recurring Schedule** icon.
- The schedule **Status** will default to Submitted for a new schedule. You can enter a schedule in the Approved status by selecting Approved from the drop down box. This will check the **Notify Booked By** and **Notify Contact Person** boxes. If you do not want these email notifications to go out, uncheck the boxes.
- Enter the **Event Title**.
- Select the **Location** and **Room(s)** you would like to reserve for your event.
- Enter the **Start Time** and **End Time**, making sure to select AM or PM in the drop down boxes.
- If the **Setup Begin** and **Breakdown End Time** are different from the Start and End time, select those times next.
- Do not change the **Duration** or **Spans over** fields. These will calculate for you. **Note: Spans over should be left as 1 day unless you are requesting an overnight event.*
- Enter the **Start Recurrence** date.
- Choose your **Recurrence Pattern**.
 - Select **Daily** if your event will occur every day between the start and end dates.
 - If you choose **Weekly**, you can select if the event occurs every week, every 2 weeks, etc. Then put a check mark next to the days of the week that the event will occur.
 - If you choose **Monthly**, you can select the day of the month (for example, the 15th day of every 1 month) or you can choose the weekday of the month (for example, the second Monday of every 1 month).
- Enter the **End Recurrence** date.
- You can click on the **Check Availability** button to make sure that you are not double booking a room.

Start Recurrence

Recurrence Pattern

Daily
 Weekly **Recur every** **week(s) on:**

Sunday Monday Tuesday Wednesday
 Thursday Friday Saturday

Monthly Day of every month(s)
 The day of every month(s)

End Recurrence

Additional Information

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Organization Information

- Select the **Organization** requesting the facility from the drop down menu or you may be able to enter a new organization in the box below the drop down.
- If contacts have been added to the Organization, you will see them listed in the **Contact Name** drop down box. If the contact name is not in the list, you can add the contact by filling in their name and contact information in the boxes.
- Type the **Billing Address** or check the box to use the Organization's billing address.
- If you are invoicing in FSDirect, select the user in charge of creating the invoices in the **Responsible for Billing**. This will put the schedule on their home page under the Waiting to be Invoiced heading.

Insurance Information

Any insurance policy information that you have entered for the organization auto-populates in this section on the request form. If no information has been entered yet, you can fill it in here and check the box to **Update organization record with the above insurance information**. Insurance information is not required for your organizations. If you do track policies and the coverage expires for an organization, the system will let you know on your home page and when you select the organization on a schedule request.

Services

The Services feature will only be used by those who also own FSAutomation.

Setup Requirements

Activated Maintenance Services can be selected in this section. Check the box next to the requested service and enter a description in the box to let the service providers know what setup requirements are needed for this event.

Setup Requirements

Note: Tasks already generated for events will not reflect changes in service description.

<p>Required Maintenance Services</p> <p><input checked="" type="checkbox"/> Custodial</p> <p><input type="checkbox"/> Electrical</p> <p><input checked="" type="checkbox"/> Heating/Ventilation /Air Conditioning</p> <p>Required IT Services</p> <p><input checked="" type="checkbox"/> Audio / Visual</p>	<p>Service description</p> <p>Custodian after school hours</p> <hr/> <p>AC on</p> <p>Service description</p> <p>Projector</p>
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Rental Requests

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Additional Fields

- Enter **Number Attending**. You can also break this number into number of adults and number of children.
- Enter any **Other Needs**.
- The **Booked By** section will be automatically filled in with your information.

Schedule Activation

- If you are **Activating** the schedule at the same time that you enter it, you can select that option before saving. If the schedule needs to go through an approval process before activation, leave the schedule state as Inactive. **Note: Only the final person in the approval process should activate the schedule.*

The screenshot shows a form for entering a schedule. At the top, there are three radio buttons: 'Inactive Schedule' (selected), 'Pending Schedule?' (unselected), and 'Activate Schedule?' (checked, highlighted with a red box). Below these are input fields for 'Add/Update Pending Reason' and 'Pending Expiration Date'. A section titled 'File Attachments' contains a table with columns: Delete, Date, Submitted By, Description, Filename, and Size. The table currently shows 'No attachments'. Below the table is a note: '(No limit on number of files attached. Total size of all uploaded files must be less than 5MB)'. At the bottom, there are buttons for 'Back to shortcuts', 'Save', and 'Reset'.

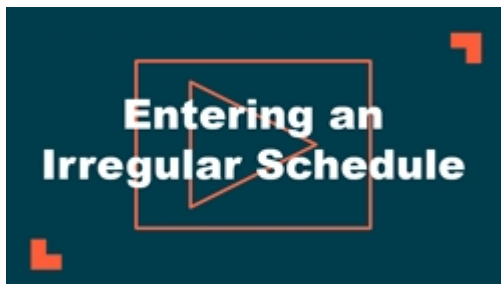
File Attachments

- Attach a file to your schedule request by clicking the **Add New File** link.
- Browse your computer for the file and select it. You can also enter a **File Description**. Click **Submit**.
- The attached file will now be listed in the File Attachments section at the bottom of the schedule. **Note: There is no limit to the number of files that can attached, however the total size of all uploaded files on the schedule must be less than 5MB.*

Click **Save** at the bottom of the screen to submit the schedule request.

How to Enter an Irregular Schedule

Watch the Video Tutorial:



- Click on the **New Schedule** tab and click the **Irregular Schedule** icon.
- The schedule **Status** will default to Submitted for a new schedule. You can enter a schedule in the Approved status by selecting Approved from the drop down box. This will check the **Notify Booked By** and **Notify Contact Person** boxes. If you do not want these email notifications to go out, uncheck the boxes.
- Enter the **Event Title**.
- Select the **Location** you would like to reserve for your event.

Additional Information

This section will appear if you are using the [Questions](#) feature in FSDirect. These questions may or may not be required depending on how they are set up in the system.

Organization Information

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Services

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Events

- Select the **Room(s)**, **Date**, and **Start** and **End Time** for each event date. You can enter three dates per page. To add more events click Save in the Events section. The screen will refresh with fields to enter more dates.
- Do not change the **Duration** or **Spans over** fields. These will calculate for you. **Note: Spans over should be left as 1 day unless you are requesting an overnight event.*
- You can click on the **Check Availability** buttons to make sure that you are not double booking a room.

Setup Requirements

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Activate Schedule?

File Attachments Add New File

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Click **Save** at the bottom of the screen to submit the schedule request.

Did you find this helpful?

Yes No

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