All users in FSDirect have the ability to enter new facility rental requests, except for those in the Service Provider role. The following instructions outline the process that Administrators and Site Administrators use to enter permit requests. Requesters will use the form on the MySchoolBuilding.com Setup page.

How to Enter a New Schedule

- Click on the **New Schedule** tab.
- Select the type of schedule. There are three different types of schedules to choose from:
  - **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.

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.

How to enter a Normal Schedule

- 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 FacilityScheduleAutomation.

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.

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.
- 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.*

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 be 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.

A Recurring schedule is used for an event that takes places on a regular basis (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.

How to enter a Recurring Schedule

- 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.

Additional Information

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- 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.

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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.
- 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.*

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- 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 be 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.

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 an Irregular Schedule

- 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

- 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.
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Services

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New 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

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.

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.
- 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.*

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- 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 be 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.

The Calendar allows you to view events that have been Submitted, Approved, and Canceled. You have the ability to select different calendar views, such as month, week, day, or room view.

All events will be displayed on the calendar for Administrators, Site Administrators, and Service Providers. For those who allow internal requesters to submit requests on the MySchoolBuilding page or use CommunityUse for external requesters, you have the ability to mark events as "Private" to hide the event details.

The Dude Says:

If you would like to enter holidays and closures to the Event Calendar, you will need to add them as Organization Events. Having this information on the calendar is beneficial, because the system will look for Organization Events when it checks for schedule conflicts.

How to Access the Calendar

- Click on the **Calendar** tab at the top of the page. The default calendar view is for the current month.
- To the right side of the page, you can sort the calendar view according to **Area**, **Location**, **Building**, **Room**, etc. The more specific the selections, the more your calendar view will be filtered. *Note: If the calendar is blank, select **Organization Wide** or a Location name in the **Location** drop down and click **Refresh Calendar**. The Organization Wide option will not be available if you have over 2,000 events for one month.*
- To view a different month, select from the **Month/Year** drop down boxes to the left side of the screen.
- Click **Refresh Calendar** after your selections are made. Event titles will then be displayed on the calendar. You can click on the title to view the Event Details.
- Different colored symbols are shown beside each event title. There is a Legend at the bottom of the screen that indicates what each of these represent.
- If you would like to change the calendar view to the **Week**, **Day**, or **Room View**, hover your mouse over the **Shortcuts** menu toward the top of the screen and select the view that you would like to see.

How to Print the Calendar

- After you filter the calendar view, click on the **Print This** printer icon on the left side of the page.
- Step 1: Select a Saved Report from the list, if you have any available.
- Step 2: You can change the **Start/End** date range if necessary.

- Steps 3 through 9: Make changes to your filter selections if necessary.
- Step 10: Select the type of report. The **Summary Report** is the most commonly selected.
- Step 11: Select the box next to **Print Event Tasks** if you would like the maintenance service descriptions displayed on the report.
- Step 12: You will be able to select the box next to **Print Rooms** only if the Calendar Report was selected in Step 2 (or Weekly Report if you are looking at the Week View calendar).
- Step 13: Select PDF or HTML for your print format.
- Step 14: Enter a **Custom Report Title** if you are planning to save this report criteria for future use. If you want to save this as a Saved Action, click **Print and Save**. If not, click **Print**. A print preview screen will appear that you can then send to your printer.