

# Site Administrator I and II: Entering Requests

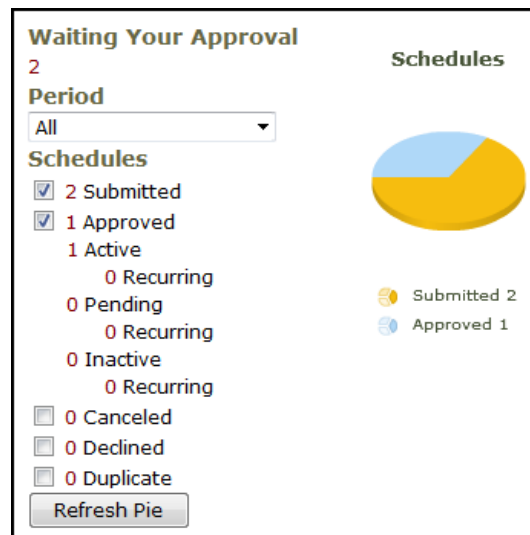


## How to Log in

- Go to [fsd.schooldude.com](http://fsd.schooldude.com).
- Enter your **Login Name** and **Password** (Make sure FSDirect is selected from the drop down menu under **Go to**).
- Click on **Sign In**.

## Facility Schedules & Events section

Once you have logged in, you will be on your Home page. The center of your Home page will display a breakdown of all the events at your designated location by status. You can view a listing of the **Submitted**, **Approved**, **Canceled**, etc. schedules by clicking on any of the numbers displayed in red.



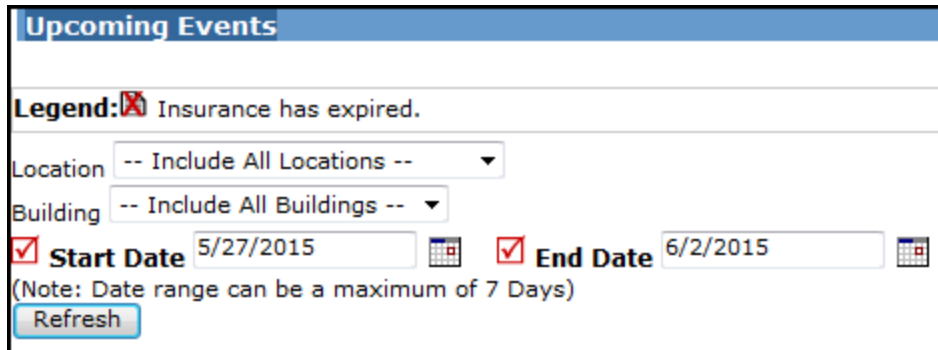
You can sort this list in ascending or descending order by clicking on the  symbol in the heading box. If you would like to print this listing of events, scroll to the bottom of the screen and click the appropriate print icon.

Schedule ID <input type="checkbox"/>	Status <input type="checkbox"/>	Location <input type="checkbox"/>	Recurrence <input type="checkbox"/>	Usage Fees <input type="checkbox"/>
Title <input type="checkbox"/>	Schedule State <input type="checkbox"/>	Building <input type="checkbox"/>	Start Date <input type="checkbox"/>	Total Invoiced <input type="checkbox"/>
No of Events <input type="checkbox"/>	Organization <input type="checkbox"/>	Room <input type="checkbox"/>	End Date <input type="checkbox"/>	Total Payments <input type="checkbox"/>
Declined Reason <input type="checkbox"/>	Approval Note <input type="checkbox"/>	Event Visibility <input type="checkbox"/>	Event Date <input type="checkbox"/>	
Current Route To <input type="checkbox"/>			Event Time	
47405	Approved	Chatham Central High School	Non-recurring	View
Athletic Meeting	Activated	Gym		\$100.00
5	Athletic Boosters Club	Private	4/28/2012	\$0.00
SiteAdmin Hayley			2/11/2013	
			2/12/2013	
			2/13/2013	
			2/14/2013	
			2/15/2013	
			7:00 PM - 9:00 PM	

## Upcoming Events section

At the bottom of the Home page, you will see the **Upcoming Events** section. The Upcoming Events section is a quick glance of events that will be taking place within the date range you select.

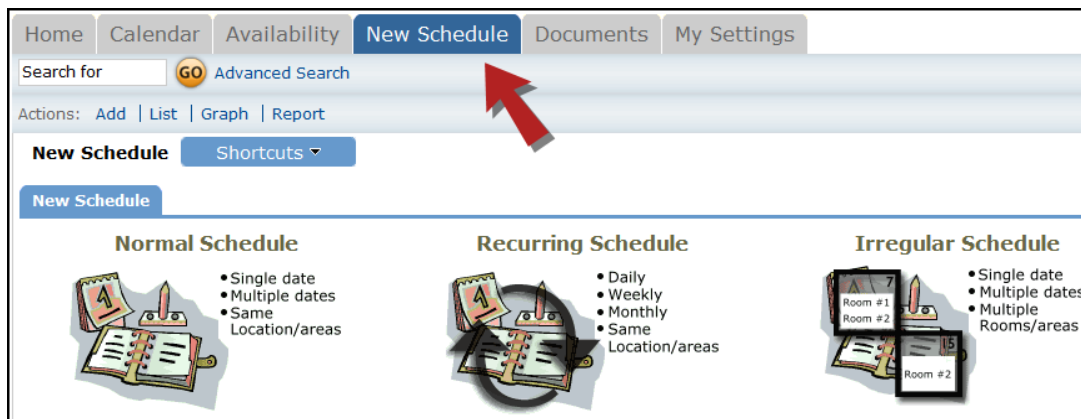
- Select the **Location** from the drop down menu.
- Select a **Start Date** and **End Date** to see events on and between those dates. A maximum of 7 days is allowed.
- Click on the **Refresh** button.



## How to Enter a Schedule Request

Click on the New Schedule tab then select the type of schedule that you would like to enter.

- **Normal Schedule:** *Most commonly used* (Up to 20 event dates can be selected). This schedule is used when all event dates will share the same time and room(s).
- **Recurring Schedule:** (Up to 100 events can be added). This schedule is used for events that follow a pattern (Every Monday and Wednesday for a semester or the 3rd Friday of the Month for the entire year). All event dates will share the same time and room(s).
- **Irregular Schedule:** (Up to 20 events can be selected). This schedule type can be used when each event will take place in a different room and/or a different time slot than the other event dates within the schedule. For example: The Boy Scouts will use the Gym on January 1st from 9am to noon and their next meeting will take place on January 31st in Room 200 from 1pm to 2pm.



When filling out a New Schedule there are some fields that are required (**Location, Rooms, Event Date(s), Start/End Time, Organization**). Any required field will have a red checkbox beside it. The required fields will be the same for each schedule type.

- **Schedule ID** - A permit number will generate once the schedule has been saved successfully.
- **Status** - The default status is **Submitted**. You may be asked by your system Administrator to change the status to **Approved** if you are in the approval process.
- **Event Title** - Describes the event (Soccer Practice, Play Rehearsal, PTA Meeting).
- **Area** (Optional) - The area is used as a filter to sort the room list. *\*Note: If multiple types of rooms are needed, do not use the Area filter.*
- **Location** - Where the event will be held (High School, Main Campus, Admin Building).

- **Rooms** - Specific rooms, fields, or other spaces where the event will be held. Hold down the CTRL key on your keyboard while you left click the mouse to select multiple rooms OR you may need to click on the binocular lookup to find the rooms that you need. Up to 50 rooms can be added to any schedule.
- **Event Date(s)** - Click the dates from the calendar or type them in the box provided. Be sure to use the MM/DD/YYYY format.

- **Start Time/End Time** - Must be entered in 15 minute increments.
- **Duration** - This number automatically calculates according to the Start and End Time that you enter. *\*Note: The boxes beside Duration and Spans over typically will not need to be changed. Spans over should be left as 1 day unless you are requesting an overnight event.*

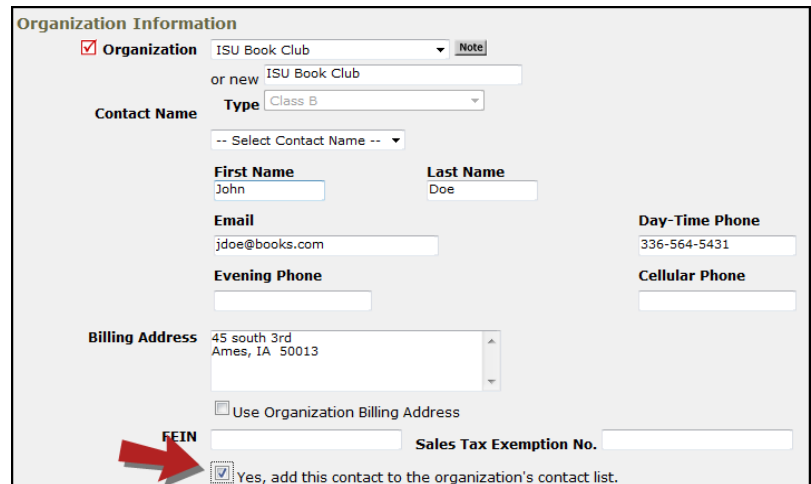
- Click the **Check Availability** button. A pop up window will appear and display any approved events that are already booked in the same Room(s), Dates, and Times that you selected. It will also display holidays that may conflict with your request.

## Additional Information

This section will appear if your organization is 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

- **Organization** - Click on the down arrow or the binocular lookup to select the Organization name. If you do not see the organization in the list, you may be able to enter a new organization if that option has been made available to you by the system Administrators. *\*Note: To ensure correct reporting, be careful not to enter duplicate organization names. Double check the current organization list before adding a new one. Slight misspellings and variations in the organization name are common and will cause a duplicate organization to be added to the list.*
- Select the **Contact Name** for the organization from the drop down list. Any contact information that was previously entered will automatically populate.
- If the contact is not listed, select **Other Contact Name** and enter their **First Name**, **Last Name**, **Email Address**, **Phone Number**, and **Address**. If you have an email address listed for the contact, the system will generate emails when the schedule has been Approved/Activated or when an event has been canceled.
- If you would like the contact to appear as an available selection in the future, select the box next to **Yes, add this contact to the organization's contact list**.



Organization Information

Organization ISU Book Club Note

or new ISU Book Club

Contact Name Type Class B

-- Select Contact Name --

First Name John Last Name Doe

Email jdoe@books.com Day-Time Phone 336-564-5431

Evening Phone Cellular Phone

Billing Address 45 south 3rd Ames, IA 50013

Use Organization Billing Address

FEIN Sales Tax Exemption No.

Yes, add this contact to the organization's contact list.

## Insurance Information

Any insurance policy information that has been 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.

## Setup Requirements

Setup Requirements are maintenance or IT services that may be needed for an event (Custodial, Event Setup, Audio Visual, etc).

- Check the box next to the item that is needed for an event.
- Type what is needed in the **Service Description** box. This will trigger an email notification to the designated Service Provider as to what task needs to be performed for the event.



Event Setup

Please setup chairs for the event.

## 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.

## File Attachments

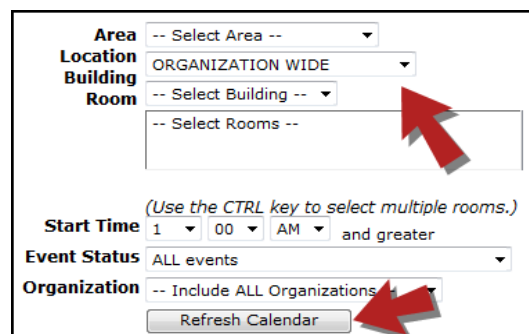
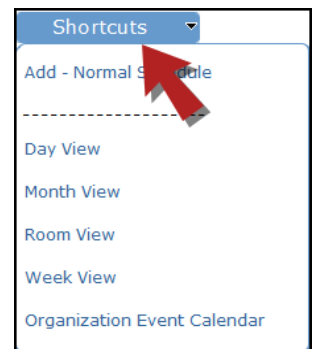
- Attach a file to your schedule request by clicking the **Add New File** link.
- Browse your computer for the file and select it. You can also enter a **File Description**. Click **Submit**.
- The attached file will now be listed in the File Attachments section at the bottom of the schedule.  
*\*Note: 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** to submit the schedule request. The Schedule ID number will generate once the schedule has been saved.

- There will be a confirmation email sent to you (or the user listed as the Booked By contact) and the Organization Contact.
- If you ever need to pull up the schedule in the future, type the schedule number into the **Search For** box then click **Go**. You can also access the schedule by going to the calendar.

## How to View the Calendar

- Click on the **Calendar** Tab.
- The calendar will default to the Month View. To change your view, hover your mouse over the **Shortcuts** menu to select your preferred view.
- When you initially look at the calendar there will not be any events displayed. Use the drop down menus beside **Location**, **Rooms**, **Organization**, etc. to filter what you would like to see on the calendar.  
*\*Note: You will need to select something from the **Location** drop down menu to see events on the calendar.*
- Click **Refresh Calendar** once you have made your selections.



When viewing the calendar you can:

- Hover your mouse over the event title to see the time of the event.
- Click on the event title to see more detailed information about the event.
- Click on the date to see a **Daily View** of the Calendar.
- Click on **Next Month** > in the right hand corner to see upcoming events for the next month.

Event Calendar for June 2014

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2 Swim Practice	3	4	5 Swim Practice	6 Swim Practice	7
8	9	10	11	12	13	14
15	16	17 Summer Baseball Practice	18 Summer Baseball Practice	19 Summer Baseball Practice	20	21
22	23	24 Summer Baseball Practice 1:00PM-3:00PM	25 Summer Baseball Practice	26	27	28
29	30					

<- Previous Month Next Month ->

## How to Print Calendar Details

- Once you have filtered your calendar, click on the printer icon next to **Print This!** (Located in the upper left corner of the screen.)
- Make selections in Steps 1 through 14 to filter for the events you need to see. To include event tasks on the report, check the **Print Event Tasks** box in Step 11.
- Click on the printer icon next to **Print**.

11. Select your events option:  
 Print Event Tasks
12. Select your room option:  
 Print Rooms
13. Choose a report format:  
 PDF  
 HTML
14. Custom Report Title

View (What's This)  
 Public  Private

Here is an example of the Event Calendar Report. Once you have the print preview on your screen you will be able to print it out.

Calendar Month							SchoolDude's Bootcamp
Events for 10/1/2014 - 10/31/2014 Organization wide							
Date	Area	Status	Event	Contact	Start Time	Setup Begin Time	
Schedule ID	Location	Organization		Day-Time Phone	End Time	Setup End Time	
Zone	Building	Room					
10/17/2014	Dining Room	Submitted	11111111111111111111		4:00PM	4:00PM	
1608	Aischwam High School	Baseball Team	11111111111111111111		7:00PM	7:00PM	
		Cafeteria	1111111111				
<b>Setup Requirements:</b>		Craft Custodial	<b>Description</b> FYI				
10/20/2014		Approved	Book Club Meeting		5:00PM	5:00PM	
1621	Location A	Book Club			7:00PM	7:00PM	
		Room 205					
<b>Setup Requirements:</b>		Craft Air Conditioning	<b>Description</b> Please set temp to 72 degrees				

## CONTACT US

Got questions? Answers are what we're here for.  
 Phone: 877.868.3833 – 8:00 am to 6:00 pm EST  
 Email: support@schooldude.com