PDS Facility Scheduler Training Guide

2016

PDS Facility Scheduler 7.2F – Last updated 3/24/2016 3:07 PM

Contents

Introduction to This Guide

Today you'll discover how to manage your events and coordinate the use of your facilities using PDS Facility Scheduler. Being able to schedule an event or meeting is important, but we'll also go over how to schedule multiple events for a single occasion (such as a wedding), set reminders for events, create custom calendars, and print them by per day, week, month, and year.

If you're new to the program, we'll talk about how to set up your facility records and schedules, along with some defaults and preferences. Before you know it, you'll be scheduling facilities like a pro!

Let's start off with another introduction

Paula Martin has been on staff at Saint Mary's Catholic Church for almost 5 years now. She was reluctant to use new software at first, but after a product demo, she sees that it would eliminate a lot of manual work she's become used to.

Paula has over 20 facilities that she tracks in a bunch of different spreadsheets. Sometimes, people outside the parish come by the office to ask about using a facility for an event. She gets weekly requests via email from parish staff and volunteers. It can get overwhelming. Paula looks forward to better organization and management of Saint Mary's facilities. So let's begin.

Unit 1: Setting Up PDS Facility Scheduler

Paula's ready to jump in and start working. But before she can add her facilities, she needs to think of the features each one has to offer as well as what people are required to do in order to use a facility. She can include these on her facility records.

By the end of this unit, you'll be able to:

- Set your default preferences for Facility Scheduler
- Schedule automatic data backups and back up your data manually
- List the features that your facilities offer and add them in PDS
- Add the requirements and charges necessary to use your facilities

Get Started

The first thing Paula needs to do is start Facility Scheduler.

Double-click the **PDS Facility Scheduler** icon on your desktop to launch the program.

The very first time you open PDS, the License Registration Wizard displays. This will help you create a new database or convert your data from a prior version.

Set Initial Options

In the past, Paula has had people use a facility back-to-back, and they complained that the previous person didn't finish cleaning up until the next event was scheduled to start. So, she decides not to allow setup and cleanup times to overlap.

And she wants to make sure Facility Scheduler automatically adds 15 minutes for setup and 30 minutes for cleanup for every event.

There are some options Paula needs to come back to after she becomes more familiar with the PDS.

You can specify various options and preferences, and set the default subdirectories. On the File menu, click **Setup** > **Initial Setup**.

Paula is eager to add her facilities to PDS and start entering information about events at Saint Mary's. She's ready to get rid of the facilities spreadsheet she's been keeping track of for years. However, we need to set up some features about the facilities first.

Set Up Facility Features

Paula wants to track how many people can comfortably fit in a facility, if the facility has tables or chairs, and other features like equipment.

She takes a look at her spreadsheet that she's added on to ever since she "inherited" the document from Jim (the previous facilities manager). The notes she's taken on each facility over the past 3 years will come in handy here.

	Facility	Seating	Tables	Phone	Projector	Microwave	Wifi	TV	White board	Computer	Notes
2											
3	Lobby	0	1	Y	N	N	Y	N	N	N	Small table for decorations
4	Banquet Hall	100	17	Y	Y	N	Y	Y	N	N	1500 sq ft; Connected kitchen
5	Gym	350	0	N	N	N	Y	N	N	N	Retractable bleachers
6	Meeting Room 101	10	1	Y	Y	N	Y	Y	Y	Y	Boardroom setup; Coffee maker
7	Meeting Room 102	10	1	Y	Y	N	Y	N	Y	Y	U-shaped setup
8	Meeting Room 103	10	1	Y	N	N	Y	Y	N	Y	Hollow square setup
9	Meeting Room 104	10	2	Y	N	N	Y	N	N	Y	Round tables for 5 people each
10	Kitchen	0	0	N	N	Y	N	N	N	N	Stove, oven, fridge, utensils
11	Parish Life Center	200	50	Y	Y	Y	Y	Y	Y	Y	Storage area, pool table, ice maker
12	Parish Hall	50	5	N	N	N	Y	Y	N	N	Storage for tables and chairs
13	Classroom 105	21	21 (desks)	N	N	N	Y	Y	Y	Y	One desk at front, 5 rows of 4
14	Classroom 106	36	35 (desks)	N	Y	N	Y	N	Y	Y	One chair at front, 5 rows of 7
15	Classroom 107	50	50 (desks)	N	Y	N	Y	Y	Y	Y	5 rows of 10, with middle aisle
16	Conference Room 108	15	1	Y	Y	N	Y	N	N	Y	U-shaped setup
17	Conference Room 109	15	1	Y	Y	N	Y	Y	Y	Y	Round table; Coffee maker
18	Conference Room 110	15	1	Y	N	N	Y	Y	Y	Y	Boardroom setup; Coffee maker
19	Parking Lot	0	0	N	N	N	N	N	N	N	4 acres; 750 parking spaces
20	Father Henry's Office	3	1	Y	N	N	Y	N	Y	Y	2 additional chairs
21	Father Philip's Office	4	1	Y	N	N	Y	N	Y	Y	3 additional chairs
22	Admin Office	3	2	Y	N	Y	Y	Y	Y	Y	L-shape configuration
23	Van 1	8	0	N	N	N	N	N	N	N	2 front, 2 rows of 3
24	Van 2	12	0	N	N	N	N	N	N	N	2 front, 2 rows of 3, 1 row of 4
25	Van 3	15	0	N	N	N	N	N	N	N	2 front, 3 rows of 3, 1 row of 4
26	Basketball Court	0	0	N	N	N	N	N	N	N	4 goals; Manual scoreboard
27	Outdoor Amphitheater	55	0	N	Y	N	N	N	N	N	Stage; Behind the main building

Figure 1-a. Paula's facilities spreadsheet

In PDS, a feature can be anything that people can use in a facility, like tables, chairs, phones, and so on. You can create up to 18 facility features.

To insert a new facility feature

1. On the File menu, click **Setup** > **Facility Features**.
2. The Facility Features dialog box displays. Click **Insert Features**.
3. Enter a name for the facility feature.
4. Select whether the feature uses a number or Yes/No. For example, a "seating capacity" feature uses a number, whereas a "projection screen" feature uses a Yes/No option.
5. When you're finished, click **Save/OK**.

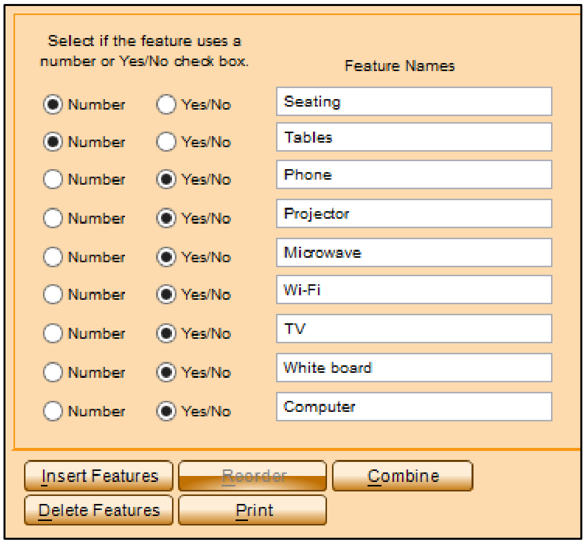


Figure 1-b. Facility features from Paula's spreadsheet

When you add records for your facilities, you can indicate which features each one has. We'll get to that in a moment.

Warning

Never change the name of a feature once you've used it on records. If you no longer need to use a feature, you can delete it. Or if you have two similar features, you can combine them.

Now it's your turn

1. Think about one of your facilities or rooms that you know pretty well. List the features of it, and think about what you need to know when scheduling that facility or room.

   Your Facility or Room Name: ____

   Feature: * ______________________________ Is this a number of items or a yes/no? __________

   * ______________________________ Is this a number of items or a yes/no? __________

   * ______________________________ Is this a number of items or a yes/no? __________

   * ______________________________ Is this a number of items or a yes/no? __________

   * ______________________________ Is this a number of items or a yes/no? __________

Add Keywords

Paula noticed something called keywords on the File menu when she was setting up PDS. She clicks it to see what it is. Keywords represent data used repeatedly in Facility Scheduler. This simplifies data entry and eliminates the possibility of spelling errors and inconsistent usage.

She understands Address Types, City/State Names, and Phone Descriptions. For now, she focuses on Request Types and Requirement Types. These are essential for managing events, which we'll talk about in a bit.

Paula gets lots of emails – too many – asking to use a facility, so that's the first Request Type she inserts. She wants to start an online request system for parishioners as well, and she heard PDS can do that, so she enters "Online" as a keyword. You can add as many keywords as you'd like.

Several facilities, Paula knows, have specific requirements in order for an event to take place there. For instance, there's a liability insurance form to sign when using the gym. She can enter these in the Requirement Types list. Others include an interview, security guard, permit, and so on.

Figure 1-c. Examples of requirement types

Warning

If you change a keyword, all the places where you added that keyword on existing records are changed.

Now it's your turn

1. What kind of requests do you get? Who makes these requests?

   * ____

   * ____

   * ____

   * ____

   * ____

2. Think about what it takes to use your facilities. List rooms or areas and their specific requirements that must be completed before people are OK'd to use them.

   * ____

   * ____

   * ____

   * ____

   * ____

   * ____

   * ____

Set Up Charges & Payments

Okay, Paula would really like to put her facility records in PDS now… but there's one more thing to do before she can do that. Let's look at charges and payments while Paula practices her patience.

Useful Information

If fees *never* apply for your facilities, skip this. Just choose **No** for that option in Initial Setup.

Paula's parish charges a $20 cleanup fee when someone uses the Banquet Hall, so she knows she'll have to add that one. Oh, and there's a rental charge for the parish vans that she'll need to add as well.

Each charge and payment is an "activity". Related charge and payment activities can be grouped together to help Facility Scheduler know that when you enter an amount and call it "Clean Up Payment", it should be applied to the amount for "Clean Up Fee" and not the amount for, say, "Setup Fee".

There are some common groups and activities set up for you in PDS. Use these predefined groups as they are, or change them to fit your needs. You can also add to the list or delete any you will never use.

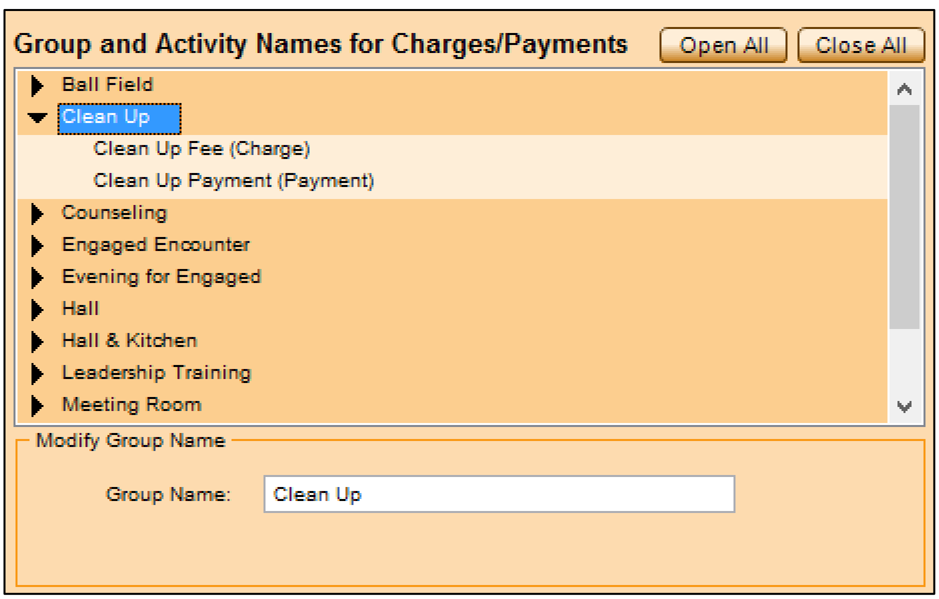


Figure 1-d. Common charge/payment groups and activities

There are 5 predefined activity types that instruct Facility Scheduler how to handle the amount:

- A **charge** is an amount to be billed to the organization/individual using your facility. It could be a rental fee, deposit, cleanup fee, or other fee. For each one, it's best to have a corresponding payment. These names print on statements to help you see the outstanding charges.
- A **payment** is an amount paid to you. This reduces the balance due.
- Use the **Ignore** type for insufficient funds (ISF) checks. This way, you can keep a record of the payment but not include the amount in any calculations.
- A **Credit** is not a payment but is included in payment totals. It can indicate a refund on a deposit.
- Use **Prior Due** to show an amount due from a prior year. This is just like a charge.

To add a group

1. On the File menu, click **Setup > Charges/Payments**.
2. Click **Add** to add a new group below the one you have selected.
3. Select **Add New Group**, then click **Add/OK**.
4. Enter a unique group name in the text box.
5. Click **Save/OK**.

To add an activity to a group

1. In the Charges/Payments window, select the group you want to add an activity for.
2. Click **Add**, then select **Add Charge or Payment Activity Name**. Click **Add/OK**.
3. Enter a unique activity name. Include the group name for easier selection and better identification on lists and billing statements.
4. Select the activity type.
5. Click **Save/OK**.

Now it's your turn

1. What fee groups does your parish need? What activity names do you need for each group?

* ____
    * ______________________________________
    * ______________________________________
* ____
    * ______________________________________
    * ______________________________________
* ____
    * ______________________________________
    * ______________________________________
* ____
    * ______________________________________
    * ______________________________________

Okay, we've finally made it to the point Paula has been waiting for. Let's add our facility records!

Unit 2: Adding Records for Your Facilities

Paula has all of her facilities listed in different spreadsheets on her computer. She's so ready to get them into one place, organized in a way that she can efficiently manage them.

At the end of this unit, you'll be able to:

- Create a record for a facility and add information and contacts for it
- Set up subgroups and multipurpose rooms in Facility Scheduler
- Assign general fees for the use of a facility
- Schedule all of your facilities at one time

Add a Facility

Paula looks again at her spreadsheet. She grins at the thought that these are "her" facilities that she cares for. She finds her purpose in helping people have a place to do their ministry.

She remembers a few months ago when her 7-year-old, Lily, received her first Holy Communion at the altar. That takes her back to her own childhood at Saint Mary's, where she was baptized and confirmed. She also married the man of her dreams, Daniel, here.

These facilities are not only part of Paula's job; they're part of her life. The smile never leaves her face as she adds each one.

You can add a single facility, such as a gym or meeting room. Every place you want to schedule is considered a "facility", including things like vehicles, recreation fields, parking lots, and so on.

To add a single facility

1. On the Information tab, click **Facilities**.
2. At the top, click **Add Fac**.
3. Enter the name of the facility.
4. Enter an abbreviation of the facility name. This displays on schedules and calendars.
5. If needed, enter additional information about the facility in the Remarks text box.
6. Enter the facility address if it's different from the default address in your License Information window. Otherwise, select **Use Default Address**.
7. Select the features available in this facility.
8. In the navigation pane, click **Contacts**, and enter the contact information for the facility.
9. Click **Save**.

Add Subgroups & Multipurpose Rooms

Paula thinks of Saint Mary's Social Center area. It's made up of three rooms (A, B, and C) that can be separated with partitions, as shown in Figure 2-a.

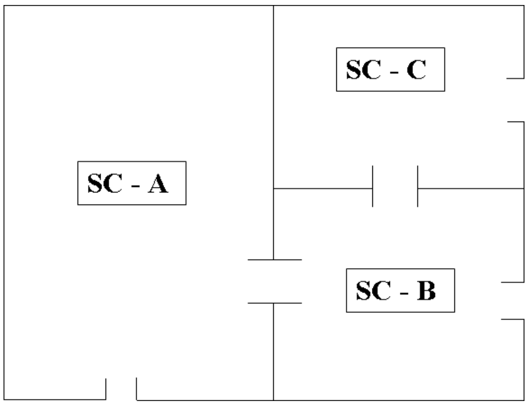


Figure 2-a. Setup of Saint Mary's Social Center rooms

She can schedule any or all of these rooms together, so she needs to set up 6 different facilities:

- Facility "Social Center - A"
- Facility "Social Center - B"
- Facility "Social Center - C"
- Group facility "Social Center - A/B" (with SC - A and SC - B as subgroups)
- Group facility "Social Center - B/C" (with SC - B and SC - C as subgroups)
- Group facility "Social Center - All" (with SC - A, SC - B, and SC – C as subgroups)

That way, she can easily schedule all of the rooms at the same time. Then, during scheduling, when she selects the group facility, there's a **Show Groups** button. Paula can select all the rooms in the Social Center group or just certain ones.

To set up a group facility

1. Add each facility that will be part of this group. So, if you have classrooms 101 through 108, add a facility for Classroom 101, a facility for Classroom 102, one for Classroom 103, and so on.
2. Add an additional facility for the group, and enter a descriptive name like "Classrooms".
3. Enter a unique abbreviation.
4. In the navigation pane, click **SubGroups**.
5. Insert all the single facilities for this group that you added in step 1.
6. Click **Save**.

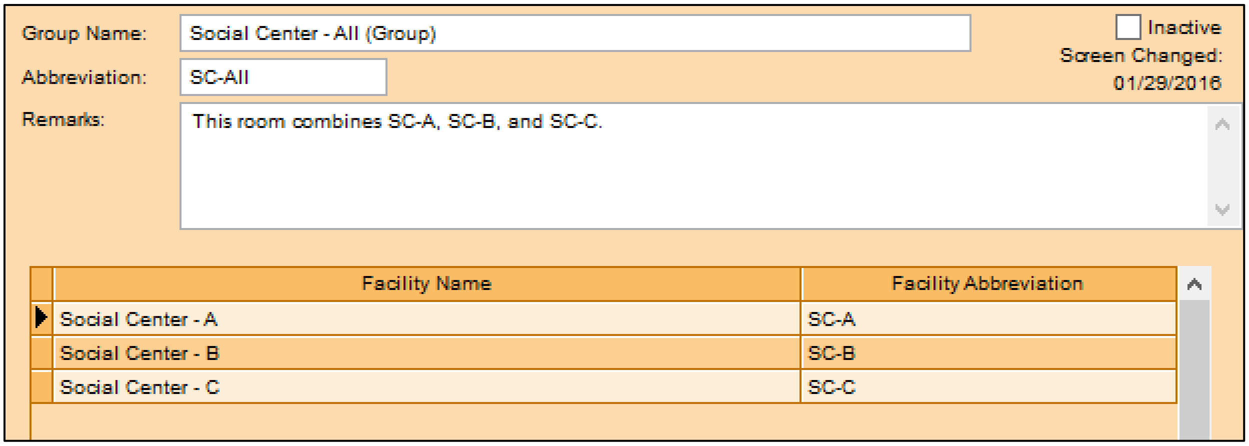


Figure 2-b. Group facility for Social Center - All, with each room as a subgroup

Assign Fees

All this talk about planning facilities reminds Paula about facility fees. If a facility has a "normal charge", that is, a charge that is normally associated with using a facility, she can add it in the Facilities window.

For example, that fee for renting the parish vans that Paula thought about earlier – that needs to go on each van's facility record.

To set up a facility charge

1. Locate the appropriate facility.
2. In the navigation pane, click **Charges**.
3. In the Type of Charge drop-down list, select how to apply charges.
4. Below the grid, click **Insert**.
5. In the Description drop-down list, select an activity name, such as Clean Up Fee.
6. Enter the amount for the normal charge.

> **Useful Information**
>
> If this is a group facility, charges apply to the group, not to each facility in the group.

7. Click **Save**.

When you schedule events, this facility fee is inserted as the normal charge; however, you can remove it, change the amount, or add additional charges during scheduling.

Schedule All Facilities as Unavailable

Sometimes, Paula needs to close all of the parish's facilities for the same day and time. Luckily, Facility Scheduler has a special facility named "All (Group)" that she can use.

For example, she can schedule the All (Group) facility with the Closed organization (which we'll talk about in the next unit) to indicate that all facilities are closed for Thanksgiving.

Now it's your turn

1. Do you have any facilities that are made up of smaller connected rooms? Draw the layout for one of those below. Then label the individual facilities you need to add in PDS to set up the group.

2. List any facilities your parish charges people or groups to use, along with the cost. Note whether the cost changes based on a certain event, organization, personal relationship, or member discount.

Your Facility Name: ____ Cost: ________________

Does the cost change? ____

____

Your Facility Name: ____ Cost: ________________

Does the cost change? ____

____

Your Facility Name: ____ Cost: ________________

Does the cost change? ____

____

Your Facility Name: ____ Cost: ________________

Does the cost change? ____

____

Unit 3: Adding Organizations & Individuals That Use Your Facilities

Paula keeps a list of the organizations that use the parish's facilities. For example, the local Boy Scouts troop meets in the Parish Life Center every Tuesday night. She also has several individuals within the parish, like Father Henry, who use conference rooms during the week. All of these can be added into PDS so they can be scheduled.

At the end of this unit, you'll know how to:

- Add records in PDS for organizations and individuals with contact information
- Assign fees for certain organizations or people to use your facilities
- Close all of your facilities for particular days
- Post payments that organizations and individuals owe for the use of certain facilities

Add an Organization or Individual

Paula can add everyone she wants to schedule as an "organization", even if they aren't truly organizations, like the Boy Scouts.

These could include "Maintenance", "Cleaning", or "Painting" to schedule general maintenance functions, or individuals like "Father Henry".

Now it's your turn

1. List 5 organizations or individuals that use your facilities. Remember, this can also be a function.

    1. ____
    2. ____
    3. ____
    4. ____
    5. ____

You can add any number of contacts for an organization. Here are some tips:

- Each contact shows on a separate tab: Primary, Contact 2, Contact 3, and so on.
- Most organizations will usually only need one, whereas others (like an organization for weddings) might have as many as 8 or 9.
- You can also import contacts into Facility Scheduler from PDS Church, Formation, or School Office by clicking **Import Contact** in the Contacts window.

To add an organization or individual

1. On the Information tab, click **Organizations & Individuals**.
2. At the top, click **Add Org**.
3. Enter a unique name and abbreviation for the organization or individual. Abbreviations print on calendars and reports to save space.
4. Select a number that indicates the priority of this organization or individual if a conflict occurs when scheduling.

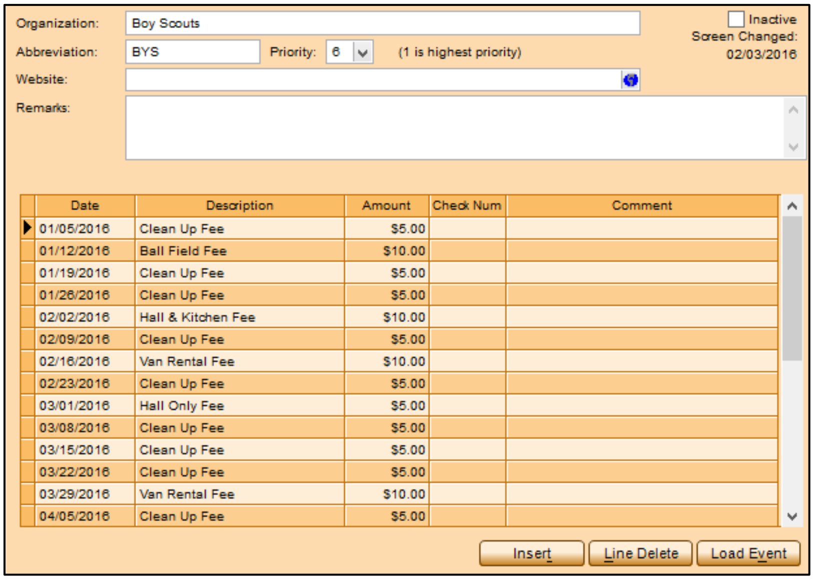
> **Useful Information**
>
> The highest priority is **1**, and the lowest priority is **9**. If a conflict occurs, you can schedule the organization that has higher priority.
>
> We recommend you create guidelines for priority numbers in order to keep consistency, especially if more than one person can add records.

5. In the Remarks text box, enter any additional information you'd like to know. For example, if it's a cleaning function, you can say, "This record is used when a facility is to be closed for cleaning".
6. At the bottom, enter the contact information for this organization or individual.
7. Click **Save**.

Paula adds the Boy Scouts organization record. She lists the leader as the primary contact and the den mother as Contact 2. But she's curious about the other items on the left. Let's talk about those.

Assign Fees

Paula needs to assign fees to the Boy Scouts organization without tying them to any particular event. She can do that on the record she just created.



Date	Description	Amount	Check Num	Comment
01/05/2016	Clean Up Fee	$5.00		
01/12/2016	Ball Field Fee	$10.00		
01/19/2016	Clean Up Fee	$5.00		
01/26/2016	Clean Up Fee	$5.00		
02/02/2016	Hall & Kitchen Fee	$10.00		
02/09/2016	Clean Up Fee	$5.00		
02/16/2016	Van Rental Fee	$10.00		
02/23/2016	Clean Up Fee	$5.00		
03/01/2016	Hall Only Fee	$5.00		
03/08/2016	Clean Up Fee	$5.00		
03/15/2016	Clean Up Fee	$5.00		
03/22/2016	Clean Up Fee	$5.00		
03/29/2016	Van Rental Fee	$10.00		
04/05/2016	Clean Up Fee	$5.00		

Figure 3-a. Fees assigned to the Boy Scouts in the Charges & Payments window

To assign charges or payments directly to an organization

1. Locate the appropriate organization or individual.
2. In the navigation pane, click **Charges & Payments**.
3. Click **Insert**.
4. In the Description drop-down list, select an activity name.
6. Enter the amount of the charge or payment.
7. Click **Save**.

Now it's your turn

1. Do you charge any of the 5 organizations/individuals you listed under the Add an Organization or Individual section? If so, how much?

    1. NO / YES - Fee(s): ____
    2. NO / YES - Fee(s): ____
    3. NO / YES - Fee(s): ____
    4. NO / YES - Fee(s): ____
    5. NO / YES - Fee(s): ____

Close a Facility When It Can't Be Used

The family life minister, Estelle, runs into the office and tells Paula that a bathroom in the gym flooded, and water is everywhere. Ten minutes later, Mr. James, the custodian, comes in with his shirt and pants soaked. His shoes slosh as he stops at the doorway.

Paula scrambles to find him a towel, then makes him a cup of her favorite coffee blend, Chocolate Mousse Ambrosia. Mr. James tells her the leak has been contained, but the wood floors have been damaged, and sections will have to be refinished. Until the leak is fixed and the floors are redone, the gym is closed.

After calling a plumber and the parish insurance agent, Paula needs to make sure no one can schedule the gym. Facility Scheduler includes a special organization named "Closed" for this type of situation.

You can schedule the Closed organization to show that a facility can't be used for anything. (We'll talk about scheduling in a later unit.) Other situations include remodeling, holidays, and so on.

Post Payments

After everything has settled down, Paula sits down at her computer and tries to focus again.

Okay, back in the groove. What about those fees we assigned earlier? What happens when the organization or individual pays that?

You can post payments made by organizations and individuals for the fees involved in using facilities.

To quickly post payments

1. Click **Processes** in the Organization & Individuals navigation pane.
2. In the navigation pane, click **Processes**.
3. In the Processes window, click **Quick Posting of Payments**.
4. Select either an organization or event package.
5. Enter the date of payment, payment name, and amount. If applicable, enter a check number, or enter "M.O." or "Cash".
6. Then enter any comments pertaining to this quick posting entry.
7. Click **Next**.
8. Select whether to display events related to this payment or to display all events. Select the event(s) the payment should be applied to, then click **Apply/OK**. The amount is posted.
9. If needed, click **Yes** to post additional payments until all payments have been posted.

Action Plan

Whew, that was a lot of information! Let's take a short break to review. So far, we talked about setting up options, adding facility records, and adding organizations and individuals.

Use the space below to write down:

- Questions you need to ask when you get back to the office.
- A list of tasks you need to do to set up PDS for your parish.
- People you need to talk to and why.

Unit 4: Setting Up Your Calendars

Your events probably fall into various categories. For example, Saint Mary's Catholic School hosts several plays at the parish's outdoor amphitheater. Paula can list those under a "School" calendar and can keep them separate from parish events.

At the end of this unit, you'll be able to:

- Add special days and holidays to your Facility Scheduler calendar
- Set up different calendars for specific types of events
- Display events just on the relevant calendar(s)

Add Special Days & Holidays

The first thing Paula thinks to put on her calendar is holidays. Those are easy enough. These can be:

- Holidays (Easter, Christmas, Mother's Day, and so on)
- Holy Days (Good Friday)
- Birthdays (Fr. Henry's birthday)
- Special Events
- Anything you want to print on a certain day that doesn't have a specific time or facility.

There are two ways to add new special days. You can:

- Add individual days.
- Choose from a list of predefined holidays. Use this option when you first start using PDS.

To add an individual special day or holiday

1. On the Administration tab, click **Special Days & Holidays**.
2. In the Tasks group, click **Add Date**.
3. Enter the name and date/range for the special day or holiday.
4. Select how you want to calculate the event for next year.
5. Select which event calendar(s) you want the special day or holiday to display on.
6. Select how you want the special day or holiday to print on calendars.
7. If you have an image to associate with the special day/holiday, click the folder icon to locate it.
8. Click **Save**.

You can set up a future year's calendar automatically rather than entering each holiday manually.

To automatically set up special days or holidays for a new year

1. On the Administration tab, click **Special Days & Holidays**.
2. In the navigation pane, click **Auto Setup for New Year**.
3. Enter the dates of the new calendars you want to create, for example 01/2016 thru 12/2016.
4. If you want to use the dates already set up for the previous year in the Special Days & Holidays window, select **Repeat dates already in the list**.
5. If you want to select from predefined lists, choose **Select predefined dates** and select each list you want to add. To select which event calendars use the list, click **Show on which Calendars**.
6. Click **Add/OK**.

Create Event Calendars

Paula likes the idea of having different calendars for related events. She can add a "Church" calendar for all events at the parish, and a "School" calendar, where she can see all of Saint Mary's School plays and assemblies.

She thinks of other events… oh yeah, she'll need a separate calendar just for Father Philip's meetings – he has a lot of them during the week! And then there's weddings, which happen aplenty around here! Paula keeps thinking of more and more event calendars she'd like to be able to view. Luckily, she can create up to 21.

When you set up an event, you select which calendar the event displays on. This can be very handy because you may find it hard to print all events at once on a single calendar due to the size of a page.

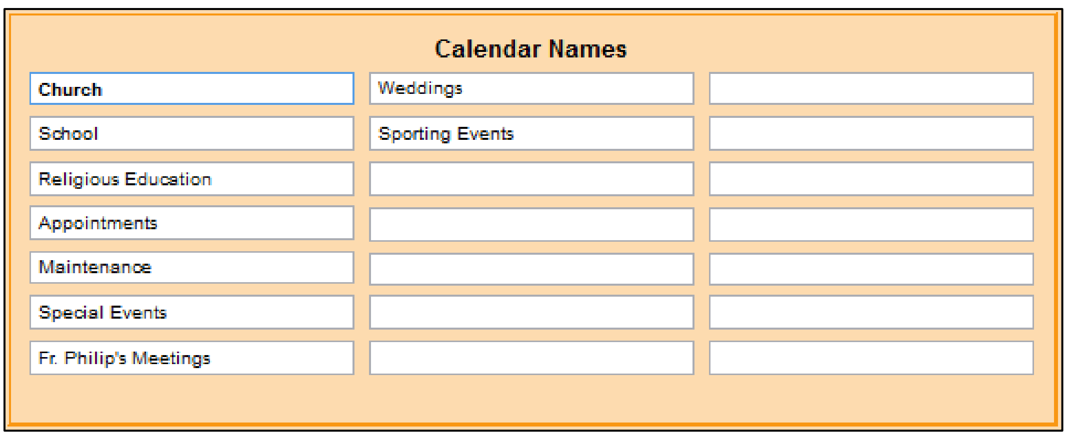


Figure 4-a. Paula's event calendar names

To insert a new event calendar

1. On the File menu, click **Setup** > **Event Calendars**. The event calendar list dialog box displays.
2. Click **Insert Names**, and enter a name for the new event calendar.
3. When you're finished, click **Save/OK**.
4. Click **Close**.

Now it's your turn

1. What categories of events do you have at your parish?

* ______________________________ * ______________________________

* ______________________________ * ______________________________

* ______________________________ * ______________________________

* ______________________________ * ______________________________

* ______________________________ * ______________________________

Events

Every event you schedule is added to the Events window, where you can view and modify information for a single event. To add a new event, you must use a scheduling wizard. We'll talk about that in Unit 6.

On the Information tab, click **Events**, and click **Event Calendars** in the navigation pane. You can select or clear event calendar selections in this window at any time after you schedule an event.

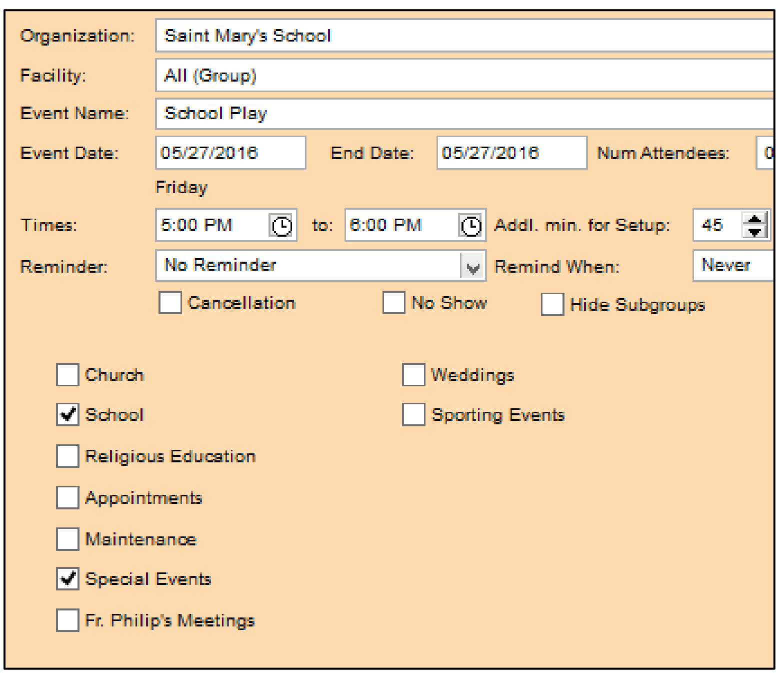


Figure 4-b. School play marked on the School and Special Events calendars

Unit 5: Setting Your Mass Schedule

There are recurring masses that Paula knows must go on the calendar. These are first priority, so she wants to get these on the calendar so no other events will be booked in the parish at those times.

By the end of this unit, you'll know how to:

- Schedule all of your weekly masses for a certain date range
- List intentions for particular masses and add them
- Add an intention for a group of masses that share common elements

Schedule All Masses

Paula has a list of the daily masses that Saint Mary's holds every week. After she adds each mass, she can schedule all of them in one quick swoop.

Useful Information

The term "mass" is used, but you can customize it to display the term you use instead. On the File menu, click **Setup > Initial Setup**. Under Name for Meetings, enter the term you want to use.

To add and schedule all masses

1. On the Information tab, click **Mass Schedule**.
2. To insert a new mass, click **Insert**.
3. Select the day of the week the mass falls on.
4. Enter the start and end times and the name of the mass, such as "Sunday Mass".
5. Select the facility where the mass occurs, and select the organization scheduling the mass.
6. Select the calendar(s) where you want the mass to display.
7. Repeat steps 1-5 for each mass you want to schedule.

   Important Note

   Do not add multiple instances of the same mass. You can schedule recurrences.

8. Select the masses in the list that you're ready to schedule.
9. At the bottom, enter a date range. The masses you selected will be scheduled during this range.
10. Click **Schedule as Events**.
11. If there are no conflicts, click **Schedule** to complete the scheduling process. Click **Next**.
12. To print a list of scheduled events, click **Print List**. To print a letter that includes event details to send to the organization associated with the event, click **Print Letter**.
13. To return to the Mass Schedule window, click **Next**.

Set Mass Intentions

Paula has several masses on her list that are being offered for someone. For example, Wednesday's mass is dedicated to Rachel Ingram. She can track that person's name in the Mass Intentions window. In the navigation pane, click **Mass Intentions**.

Intentions also display under Event Remarks on mass records.

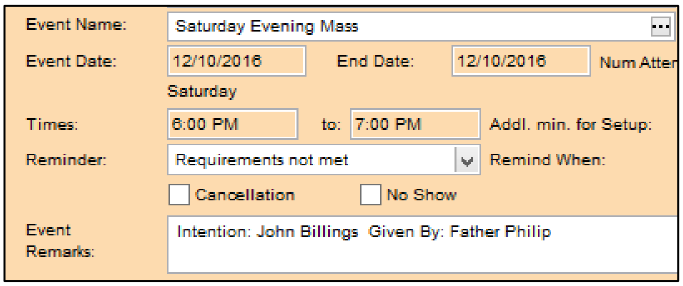


Figure 5-a. Intentions display in Event Remarks on mass records

If the same intention is given at every Monday mass in June, for example, you can filter the list, then click **Assign Intention to Filtered List**.

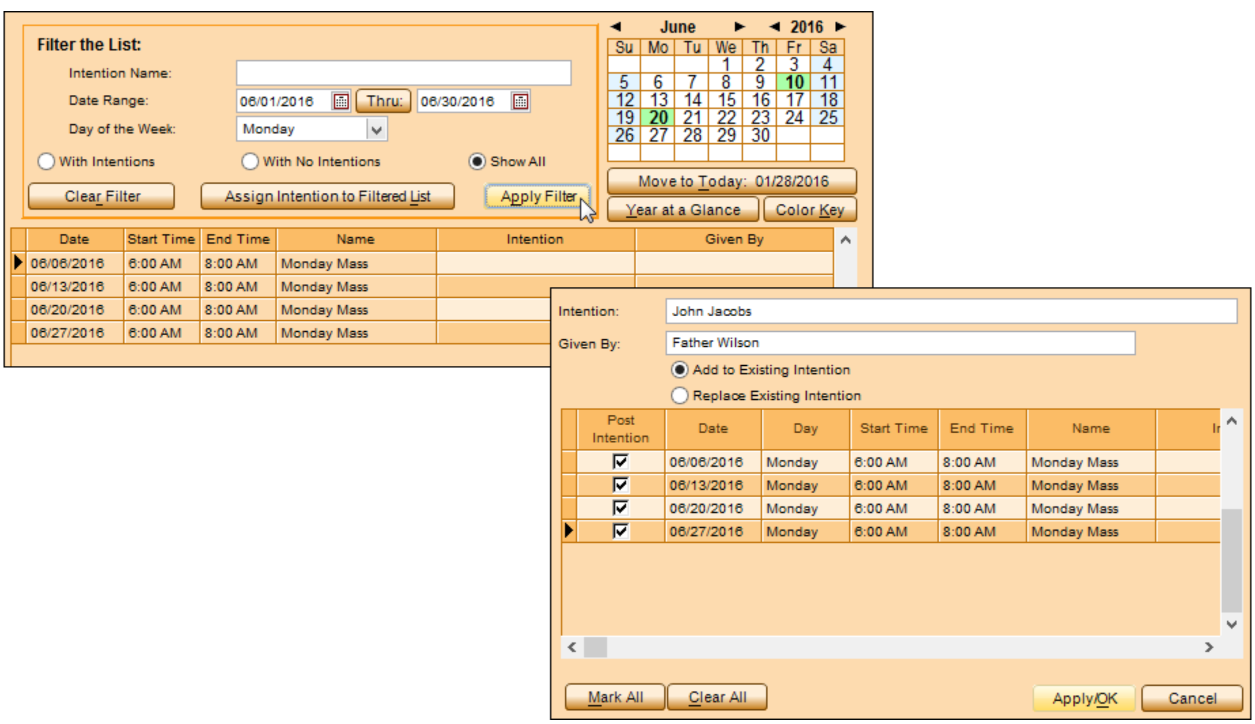


Figure 5-b. Assign the same intention to a filtered list of masses

Now it's your turn

1. Father Henry comes by Paula's office and reminds her that he's dedicating next Wednesday's mass to Rachel Ingram. Paula looks at that mass and realizes she accidentally put Rachel on every Wednesday mass for the rest of the year. What should she do to correct this?

Unit 6: Scheduling Events at Your Facilities

You can schedule several types of events, ranging anywhere from a simple, one-time event (such as a fundraiser) to a series of interrelated events (like a wedding).

By the end of this unit, you'll be able to:

- Schedule a simple, one-time event in PDS
- Schedule the same event that happens regularly over time
- Schedule an event that lasts more than 24 hours
- Schedule an event that you've held before
- Receive an online request and create and register an event from it
- Schedule a group of related events, like events for a wedding
- Add fees for an event while scheduling it
- Schedule a group or multiple facilities at the same time
- Add details about the request for an event
- Alter a schedule you've already created in Facility Scheduler

You can schedule different types of events. The scheduling process is similar for all scheduling wizards, with only a few differences. On the Information tab, click **Scheduling Wizards**.

Schedule a One-Time Event

Paula knows there's a fundraiser coming up in two weeks to benefit the Beckmann family, whose house burned down in a fire. That's a simple, one-time event that doesn't have a recurring pattern, so she can enter it in now.

To schedule a one-time event

1. In the Scheduling Wizards window, click **Schedule Simple Events**.
2. Select the organization and facility where this event will occur.
3. Select whether charges apply for this event, and whether there are requirements.
4. Enter the times and add the date(s) of the event. Click **Next**.
5. If this event has charges, the next window displays options. Make selections, then click **Next**.
6. If this event has requirements, the next window displays with requirement options. When you're finished making selections, click **Next**.
7. Define how the event will print on calendars. If you want to, set a reminder and enter remarks for the event. Click **Next**.
8. Enter the number of attendees (if known). Select the calendars you want the event to display on and how it displays on calendars. Click **Next**.
9. When you're ready to schedule the event, click **Schedule**.
10. Click **Next**. You can print a list of events that you scheduled during this process. You can also print a letter to the organization's contact about the event(s) you just scheduled.
11. Click **Finish**.

Schedule Recurring Events

The Retired Ladies' Bingo League meets in the Social Center every Thursday afternoon. Paula can schedule this event with a recurring pattern instead of entering each event separately.

To schedule a recurring event

1. In the Scheduling Wizards window, click **Schedule Recurring Events**.
2. Select the organization and facility where these events will occur.
3. Select whether charges apply for the recurring events, and whether there are requirements.
4. Click **Next**.
5. Define the times, frequency, and dates for the recurring events, and click **Next**.
6. If necessary, add any additional dates. Click **Next**.
7. If charges apply, the next window displays with options. Make your selections, then click **Next**.
8. If the events have requirements, the next window displays with requirement options. When you're finished making selections, click **Next**.
9. Define how the recurring events print on calendars. If you want to, set a reminder and enter remarks for the events. Click **Next**.
10. Enter the number of attendees (if known). Select the calendars you want the recurring events to display on and how they display on calendars. Click **Next**.
11. When you're ready to schedule the events, click **Schedule**.
12. Click **Next**. You can print a list of events that you scheduled during this process. You can also print a letter to the organization's contact about the event(s) you just scheduled.
13. Click **Finish**.

Schedule Events that Last Over 24 Hours

The wet shoe prints on Paula's office floor from Mr. James reminds her that she needs to schedule the Closed organization in the Gym so no one can use it while it's being remodeled. That's definitely going to take more than a day, so Paula enters it as an event over 24 hours.

1. On the Scheduling Wizards window, click **Schedule Events Longer than 24 Hours**.
2. Select the organization and facility where this event will occur.
3. Select whether charges apply for this event, and whether there are requirements.
4. Enter the times and date(s) of the event, then click **Next**.
5. If charges apply, the next window displays with options. Make your selections, then click **Next**.
6. If the event has requirements, the next window displays with requirement options. When you're finished making selections, click **Next**.
7. Define how the event prints on calendars. If you want to, set a reminder and enter remarks for the event. Click **Next**.
8. Enter the number of attendees (if known). Select the calendars you want the event to display on and how it displays on calendars. Click **Next**.
9. When you're ready to schedule the event, click **Schedule**.
10. Click **Next**. You can print a list of events that you scheduled during this process. You can also print a letter to the organization's contact about the event(s) you just scheduled.
11. Click **Finish**.

Schedule Using Past History

Saint Mary's annual leadership retreat happens every April. Once Paula adds it in for this year, she can come to this scheduling wizard when she needs to schedule the exact same event next year.

To schedule an event using past history

1. On the Scheduling Wizards window, click **Schedule Using Past History**.
2. Select the organization associated with the event.
3. From the list, select the past event that you want to use as a template, and click **Next**.
4. If you selected a simple event, the Simple Event Scheduling wizard displays. If you selected a recurring event, the Recurring Event Scheduling wizard displays. The information from the existing event displays, except for the event dates.
5. Enter the event date(s), and click **Add Date to List**.
6. Click **Next** to step through the windows, editing any existing information as necessary.
7. When you're ready to schedule the event, click **Schedule**.
8. Click **Next**. You can print a list of events that you scheduled during this process. You can also print a letter to the organization's contact about the event(s) you just scheduled.
9. Click **Finish**.

Schedule Events Online

Paula is excited about preparing a way for parishioners to submit event requests online.

She can create a form to put on Saint Mary's website so parishioners can suggest events at any of the parish's facilities. From those suggestions, Paula can create the events that the facility can host.

Create a Web Registration Form

First, create an event registration form for your parish's website. Parishioners can submit their ideas or needs for an event.

To create an online event registration form

1. On the Scheduling Wizards window, click **Event Online Registration**.
2. In the Event Online Registration window, select **Create Web Registration Form**.
3. If you use the ACS Extend Platform to maintain your church website, select **Use Our Extend Platform Service**; otherwise, select **None - Use Other Service**. Click **Next**.
4. Read the process description, and click **Next**.
5. Enter the form name and brief introduction to display at the top of your web form. Click **Preview** to see what your form will look like. When you're done, close the form then click **Next**.
6. Enter the email address of the person who should be notified after a parishioner registers online. Typically, this is the person at your parish who processes registrations.
7. Enter a message to be emailed to the parishioner to confirm that the information was sent to your parish. When you're finished, click **Next**.
8. Select whether to store or transfer the files. Enter the location to store the files or your FTP server information.
9. If you're updating this form, select **Overwrite the CSS file if it exists**. If you're creating a form for the first time, don't worry about this.
10. Click **Finish** (if you're storing files to a location) or **Transfer** (if you're transferring files using FTP).

> **Useful Information**
>
> The HTML, CSS, and JavaScript files for your form are created after this process finishes.
> If you are the website manager, consult the Read Me file for comprehensive instructions.

11. Copy the files that were created and send them to your website manager. These files contain the form that needs to be put on your website.

Check & Register Event Requests

After parishioners complete and submit the online form, you decide whether to host it. You can view registrations, add new events, or update existing events.

To check for and process registrations

1. On the Scheduling Wizards window, click **Event Online Registration**.
2. In the Event Online Registration window, select **Check and Register Events**, and click **Next**.
3. Select the event(s) you want to schedule.

> **Useful Information**
>
> If you no longer need a registration for an event, select **Delete Form** to remove it from the web server after completing this process.

4. Review the information for the event you're scheduling. Make any necessary selections or changes. When you're ready to process the registrations, click **Next**.
5. If you're scheduling a simple event, the Simple Event Scheduling wizard displays. If you're scheduling a recurring event, the Recurring Event Scheduling wizard displays. The information from the web form displays.
6. Since you're scheduling this event because of a request, click **Enter Request Info**, and enter the information. Click **Apply/OK**.
7. Click **Next** to step through the windows, editing any existing information as necessary.
8. When you're ready to schedule the event, click **Schedule**.
9. Click **Next**. You can print a list of events that you scheduled during this process. You can also print a letter to the organization's contact about the event(s) you just scheduled.
10. Click **Finish**.

Schedule Event Packages

Sometimes, an event involves more than just scheduling one organization at one facility. Paula thinks of all the things that have to happen before a wedding. The wedding ceremony is one event, but it's preceded and followed by many other events, such as an interview, counseling sessions, rehearsal, and reception. To handle this type of event, Paula can add an event package.

So What *Is* an Event Package?

An event package is a series of interconnected events. A main event can have several smaller events, and each smaller event can have its own charges and requirements.

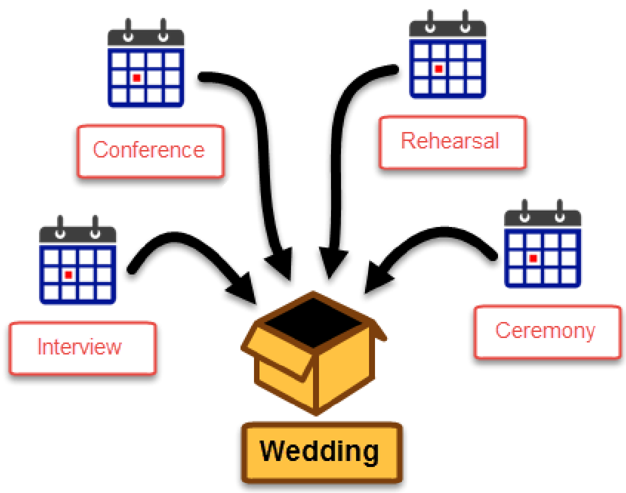


Figure 6-a. Many events go into one big wedding package

In Facility Scheduler, this idea translates into an event package record, as shown in Figure 6-b.

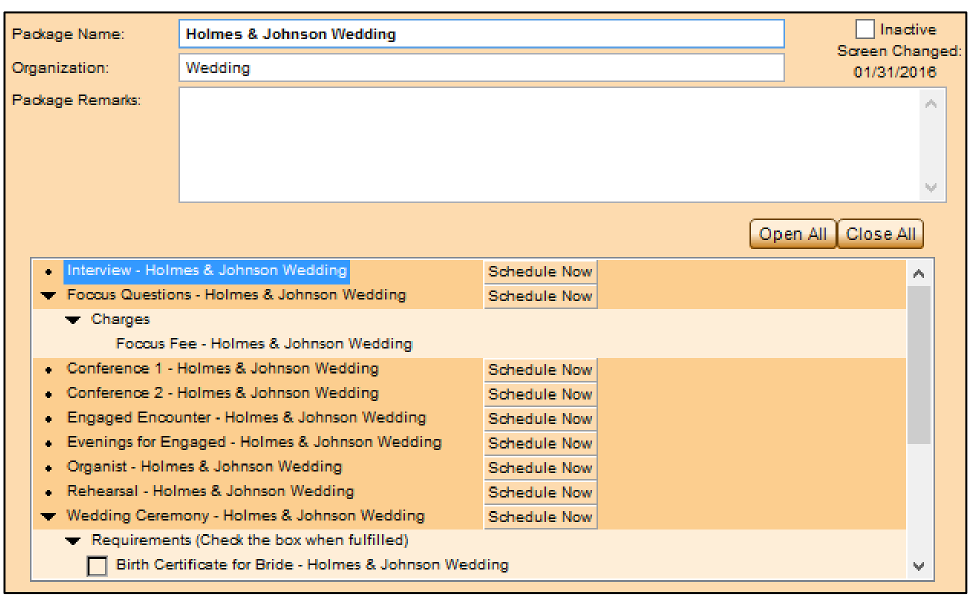


Figure 6-b. Example of a wedding event package

Other examples of event packages include funerals, social events, leadership training. You may also want to add a maintenance package if your parish requires bids and contracts.

Before You Add an Event Package

You must set up elements for the package before adding it. Do the following:

- Set up the templates for packages. A good template contains every event, charge, and requirement necessary for the event package.
- Set up the organization and contact names. You can set up a generic organization, such as "Wedding", to use for similar event packages.

Set Up Templates

There are several predefined templates installed in Facility Scheduler. Use these to create an event package, or create your own templates.

To create a new template, event name, requirement, or charge

1. On the File menu, click **Setup > Template for Event Packages**.
2. In the list, select the line above where you want to insert the new item, then click **Add**.
3. Select the item you want to add to the list, then click **Add/OK**.
    - **Add Template** — If you add a new template, enter the template name.
    - **Add Event Name** — If you add an event name, enter the event name.
    - **Add Requirement** — If you add a requirement, enter or select the requirement.
    - **Add Charge** — If you add a charge, enter or select the charge activity name.
4. To add another item, click **Add** again. After you finish adding items, click **Save/OK**.
5. After all items are added, you can click **Reorder** to rearrange the items in the list.
6. When you finish defining your templates, click **Close**.

Add an Event Package

After you set up templates, you're ready to add event packages for any upcoming weddings, funerals, maintenance, and so on.

To add an event package

1. Click **Event Packages** on the Information tab.
2. At the top, click **Add Pkg**.
3. Enter the package name. For example, "Holmes & Johnson Wedding".

4. Select the organization scheduling the event package, and enter remarks about the event package, if necessary. Click **Next**.
5. From the list on the left, select items to include in the package. Click the right and left arrows to move items from one list to the other. After you move all the items you want to include in the list on the right, click **Next**. The events display in the Events Left to Schedule grid.
6. For each event, enter the date, facility, and starting and ending times. If any conflicts occur, the details display.
7. To schedule each item, select **Mark to Schedule**. The Simple Event Scheduling wizard displays.
8. As you schedule each event, it displays in the Scheduled Events grid.
9. You can click **Finish** at any time. If you click **Finish** before you finish scheduling the events, the Schedule Now button displays next to the event in the Package Events window. Or when you're ready to continue scheduling the events, click **Complete Schedule** in the navigation pane.

Some contacts for a wedding are unique to the wedding, such as the bride, groom, best man, mother of the bride, and so on. However, some contacts are the same for all weddings, like the pastor, wedding coordinator, organist, and so on. We recommend adding these people as contacts for the "Wedding" organization. That way, you can add them quickly in this window.

To add a new contact

1. Locate the event package you want to add a contact to. So if you're adding the bride, you'd open the Wedding record associated with her wedding.
2. In the navigation pane, click **Contacts**.
3. Under the contact section, click **Add**.
4. You're prompted to use a contact from the organization that scheduled the event package.
5. If you're adding a contact unique to the wedding, such as the bride or groom, click **No**, and manually enter the contact information.
6. To use one of the organization's contacts, click **Yes**, select the contact, and click **Use/OK**.
7. Click **Save**.

You may need to add a requirement (like a form or contract your parish needs) that wasn't in the template you used. You can add those in the Package Events window.

To add a requirement to an event package

1. Locate the event package to modify.
2. In the list, select the event you want to add to, and click **Add Item**.
3. Select **Add Requirement**, then click **Add/OK**.
4. Enter or select the requirement.
5. Click **Save**.

Schedule a Package

Now that you've added the event package, you can schedule the events in it.

To schedule an event package

1. On the Scheduling Wizards window, click **Schedule Event Packages**.
2. Select the event package, and click **Next**.
3. The grid at the top displays unscheduled package events with a status of "Incomplete".
4. Click an unscheduled event line, and enter the date, facility, and starting and ending times.
5. If there are no conflicts, select **Schedule Now**. The Simple Event wizard displays.
6. Step through the scheduling wizard, entering all the necessary information.
7. After you schedule an event in the package, it displays in the Scheduled Events grid. Repeat these steps for each event you want to schedule.
8. After you schedule all remaining events, click **Finish**.

Now let's talk about some things you can do during the scheduling process, no matter what type of event it is.

Assign Fees

For some events, Paula wants to be able to add or change a fee. For example, the parish allows the Retired Ladies' Bingo group to use the Social Center at a discounted rate, so the "normal" fee for that facility wouldn't apply. Paula can change the fee when she schedules the bingo events.

- If charges apply to an event, select **Yes** for the **Will Charges Apply?** option.
- If a facility has a normal charge, **Yes** is selected by default. Otherwise, the default is determined by what you selected during Initial Setup.

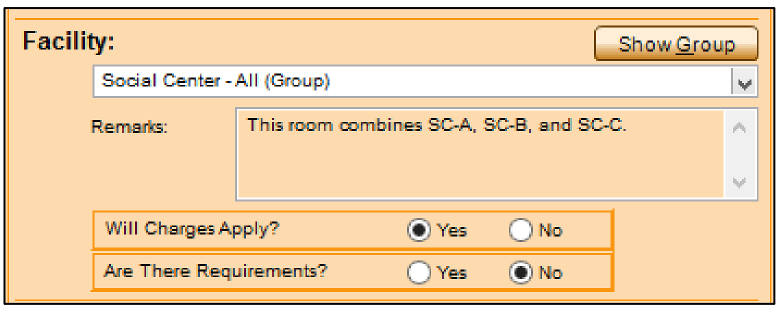


Figure 6-c. Charges will apply for this event at Social Center - All

When you click **Next**, there's an additional step in the wizard where you can enter charges for this event. If the facility already has charges, they're listed here. Paula deletes the line for the normal charge, and inserts the discount for the Retired Ladies. She adds a comment that lets others know why the fee is reduced.

If you're scheduling multiple dates, you can select how to apply the charges:

- **Apply to first date** — Posts all charges to the first event, using the date of the first event.
- **Apply to each date** — Posts a charge to each event in the list.
- **Custom billing (Enter individually)** — Use this if each event has a different charge or when the charge should be billed to the last event.

Schedule a Group or Multiple Facilities

When Paula schedules the Social Center - All facility, the process schedules an event for each of the subgroup facilities (SC-A, SC-B, and SC-C). But sometimes Paula only needs rooms B and C for an event. During the scheduling process, she can click **Show Groups** to see all the facilities in that group and select only those she needs.

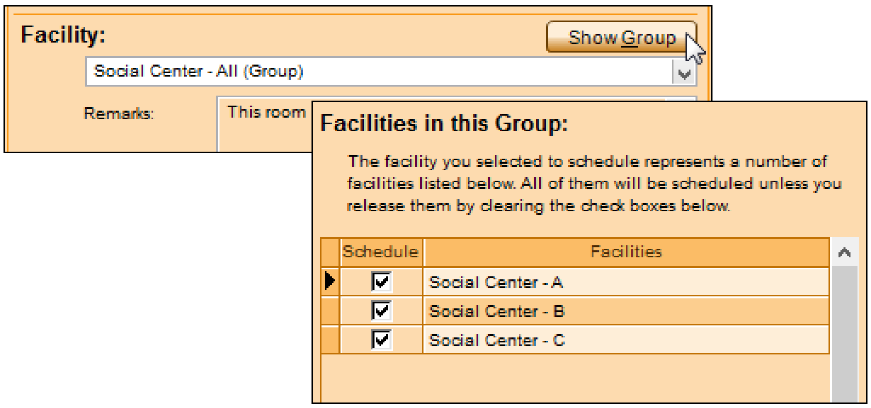


Figure 6-d. Social Center - All (Group) is made up of facilities A, B, and C

Alternatively, she doesn't have to set up groups in order to schedule multiple facilities at one time. During the scheduling process, she can click **Multiple Facs** to select the facilities that need to be scheduled together for an event.

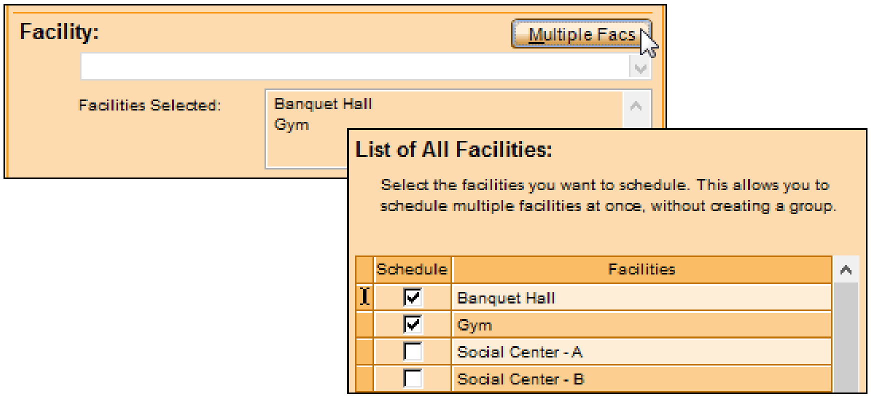


Figure. 6-e. Choose multiple facilities, even if they aren't grouped together

Event Request Details

Paula is very detail oriented. She wants to know the date of each request, who asked for an event, and any other comments. Lucky for her, she can conveniently add request details during scheduling.

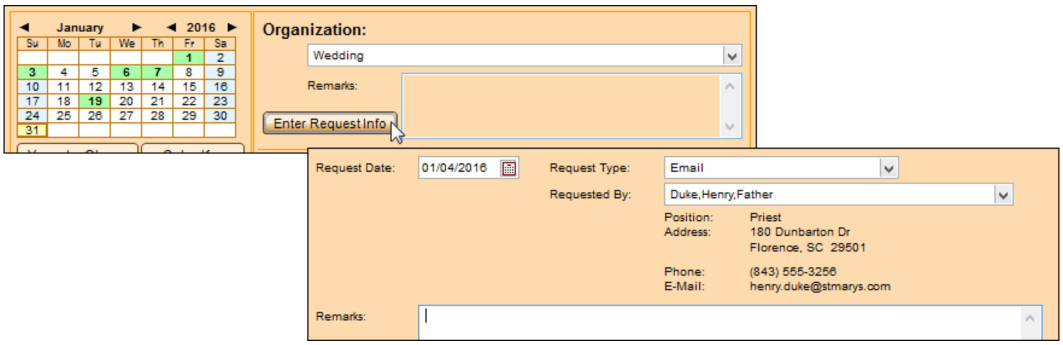


Figure 6-f. Enter request info from the scheduling process

To add request details during scheduling

1. Click **Enter Request Info**.
2. Enter the request date, and select the request type.
3. In the Requested By field, select the contact's name. The names in this list come from the Contacts window for the organization that scheduled the event.
4. Enter any additional remarks about the request.
5. Click **Apply/OK**.

You can also add request details directly on the event record.

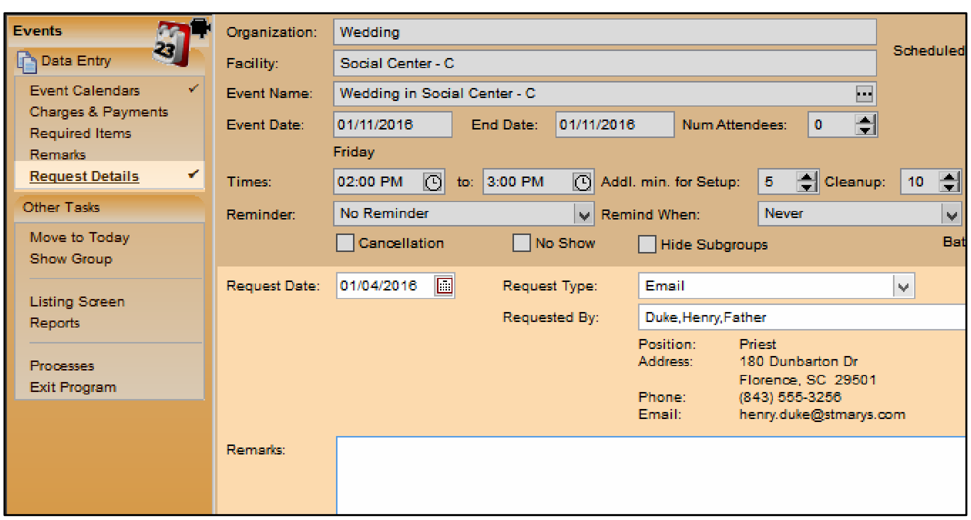


Figure 6-g. Enter request info in the Events window

Alter an Existing Schedule

Paula is starting to feel a little overwhelmed, but she's still hanging on. However, if she happens to make a mistake along the way, there's an easy way to fix it.

She can make changes to a group of previously scheduled events, if needed.

To alter an existing schedule

Important Note

This process alters data. We recommend backing up your data before proceeding.

1. On the Information tab, click **Events**.
2. In the navigation pane, click **Processes**.
3. Click **Alter Existing Schedule**.
4. Select the criteria to use for the events you want to change. For example, you can alter all events within a certain batch, alter events marked to be rescheduled, alter all scheduled events for a particular facility, and so on.
5. Select an option for event calendars. If needed, select the calendar(s). Click **Next**.
6. Select the check box beside the events you want to alter, then click **Next**.
7. Select the event information you want to alter. As you select each option, make any necessary changes at the bottom of the window. Click **Next**.
8. Review the alteration criteria, then click **Next**.

Useful Information

You can schedule conflicting events and resolve the conflicts later. When you click **Finish**, you must confirm that you want to schedule the conflicting events.

9. Click **Finish**.

Action Plan

We've gone over a lot so far! Since our last Action Plan stopping point, we've learned how to set up event calendars and mass schedules, as well as how to schedule events at your facilities.

Take this time to write down anything you need to before we continue on to the next unit, such as:

- What additional tasks you need to do when training is finished.
- Tips that you learned along the way.
- Areas or situations you still have questions about.

Unit 7: Viewing & Printing Information

During office hours, Paula generally just needs to see a quick view of this week's events. But she does print out the monthly calendar for several volunteers and congregants who like to see upcoming events. And often times, Father "Last Minute" Philip swings by her office and asks if his meeting room is available the next day.

By the end of this unit, you'll know how to:

- View and print daily, weekly, monthly, and yearly calendars
- See and print a list of scheduled events
- Publish calendars to your website for parishioners to view
- Export your event calendars and events to Google Calendar
- Check whether a facility is available for use

View & Print Calendars

Many times, Paula just needs a quick look at her events or a calendar. There are several ways to that in Facility Scheduler without printing out a calendar or list.

On the Information tab, click **Calendars**. In the navigation pane, you can get to the events listing screen and four schedules/calendars.

List of Scheduled Events

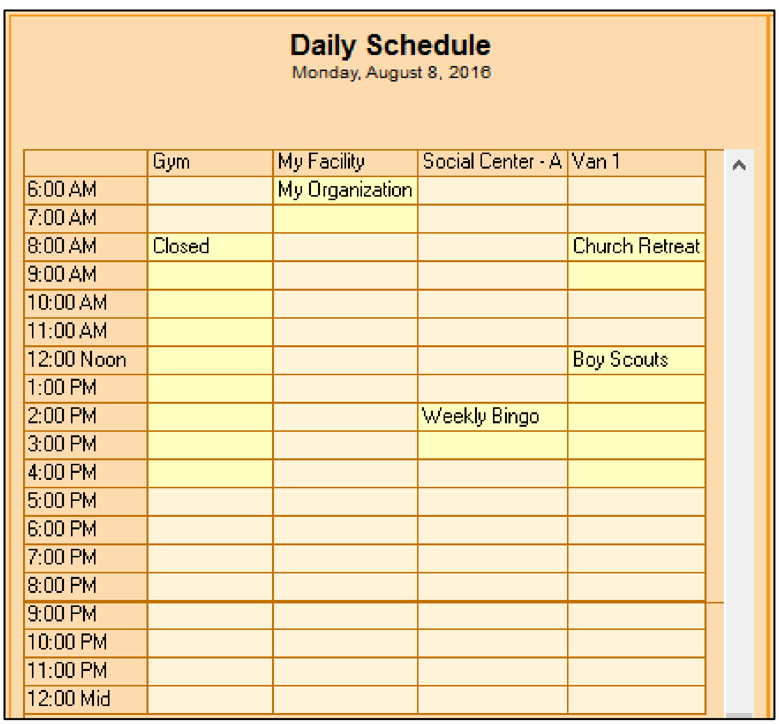
The List of Scheduled Events displays a complete list of events in date and time order. Current and future events display in black text, and previous events display in blue.

By default, the focus is on today's date. When scrolling through this list, click **Move to Today** to get back to today's events.

Schedules

In the navigation pane, click **Daily Schedule** to see a daily calendar of events in order by time.

Each column displays a different facility, and each row shows a different time period. Organizations using the facility during that time appear in yellow event blocks.



Daily Schedule
Monday, August 8, 2016

	Gym	My Facility	Social Center - A	Van 1
6:00 AM		My Organization		
7:00 AM				
8:00 AM	Closed			Church Retreat
9:00 AM				
10:00 AM				
11:00 AM				
12:00 Noon				Boy Scouts
1:00 PM				
2:00 PM			Weekly Bingo	
3:00 PM				
4:00 PM				
5:00 PM				
6:00 PM				
7:00 PM				
8:00 PM				
9:00 PM				
10:00 PM				
11:00 PM				
12:00 Mid				

Figure 7-a. Daily events for August 8,2016

In the navigation pane, click **Weekly Schedule** to see all scheduled events for a week.

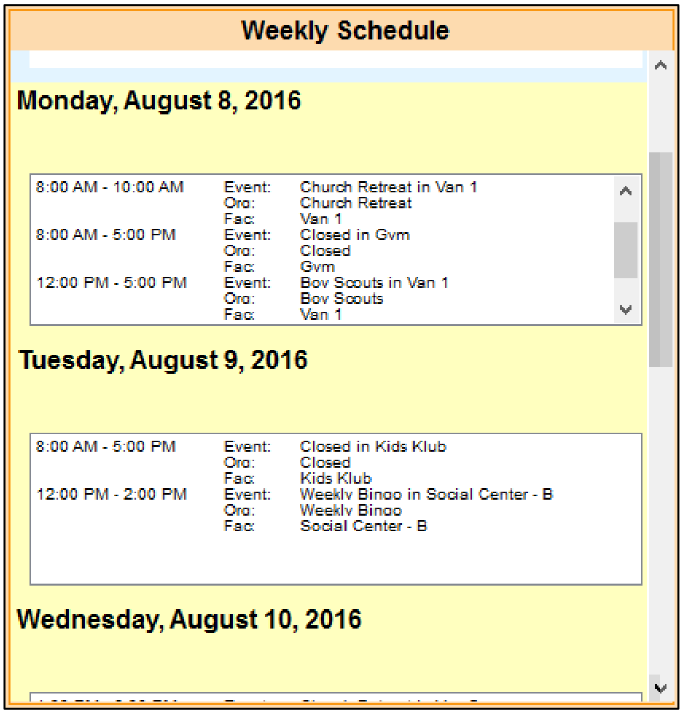


Figure 7-b. Events for the week of August 7, 2016

In the navigation pane, click **Monthly Calendar** to view a monthly overview of scheduled events. If the day has multiple events, use the small scroll bar next to the day to view all the events.

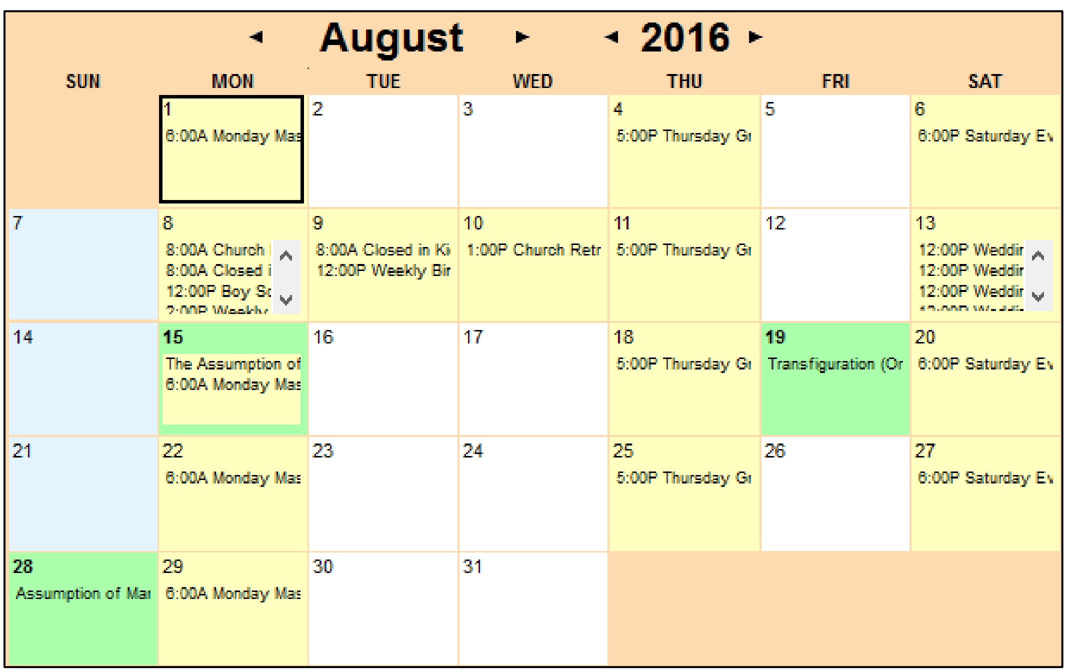


Figure 7-c. Events for the month of August 2016

In the navigation pane, click **Yearly Calendar** to see a yearly overview of scheduled events. No details about individual events are shown on this calendar, but you can use the filter to identify dates used by a specific organization or events scheduled in a certain facility.

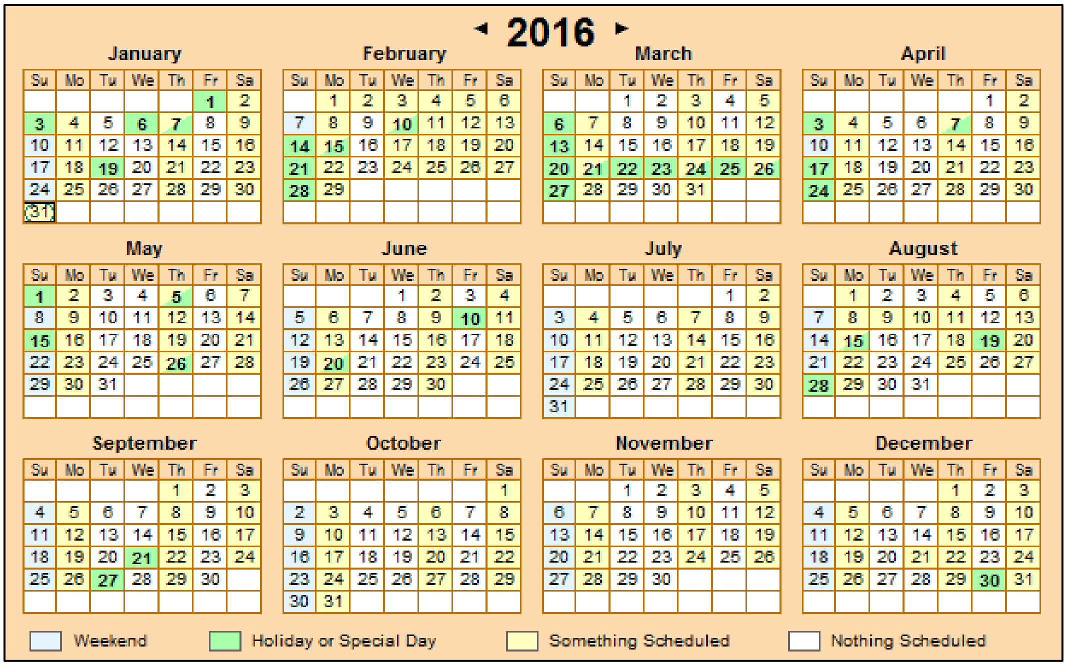


Figure 7-d. Yearly view of events in 2016

You can also click the **Year at a Glance** button when available in a window to display the yearly calendar.

Print Calendars

You can print the calendars as display in these windows.

If you want to customize calendar settings or define only specific information, print the calendars as reports:

- To locate reports, click the Reports tab or click **Reports** in the navigation pane.
- The Event Reports, Organization & Individual Reports, Facility Reports, and Event Packages Reports windows contain a report section called "Calendars".
- Expand this listing to see the preinstalled calendar reports.

Fit More on Your Monthly Calendar

If only a piece of paper could be the size of your office wall! The best possible monthly calendar would print all events for every day, but somehow fit the entire month on a single sheet of paper.

In reality, you will find that there is a limit to how many events can comfortably print on your calendar. Here are a few suggestions for adjusting your calendar:

- Reduce the font size. A font size of 6pt is legible and conserves space on your calendar. Click **Modify the Layout of the Event Information**, highlight the text, then change the font size.
- Print events by category, using the event calendar categories you defined during setup. This reduces the size of a single calendar. For example, you can print separate monthly calendars for events on the Wedding calendar, the School calendar, the Maintenance calendar, and so on.
- If you have a group facility for facilities that are routinely scheduled together, select to only print the group name on the calendar. On the Facility selection tab, select an option under **How to Handle Events Connected to a Group Facility**.
- Do not print pictures. While attractive, they take up space on your calendar.
- In the Calendar Layout window, reduce the minimum height. The day will expand to fit all events. So, if it's set to 0.50 inch, but the events do not fit in that space, the box automatically adjusts to fit the events.

At some point, even after following these suggestions, you may find you can’t fit everything on a single page. The monthly calendar allows an unlimited number of events to print on a single day and expands the calendar to multiple pages when necessary.

Online Calendars

Along with the online request system, Paula wants to add a calendar of events that parishioners can view on Saint Mary's website. She has two options: create a customized web calendar or upload her events to the parish's Google Calendar.

For now, Paula has to deal with the limitations of the parish website. But, after talking it through with her web admin, she is hopeful that they'll be able to use Google Calendar in harmony with the website.

Build a Calendar for Your Website

Web Page calendars create a file you can upload to your website. Instead of printing, you click **Build** to create the necessary file. Under Event Reports, click **Calendars**, then select one of the calendars.

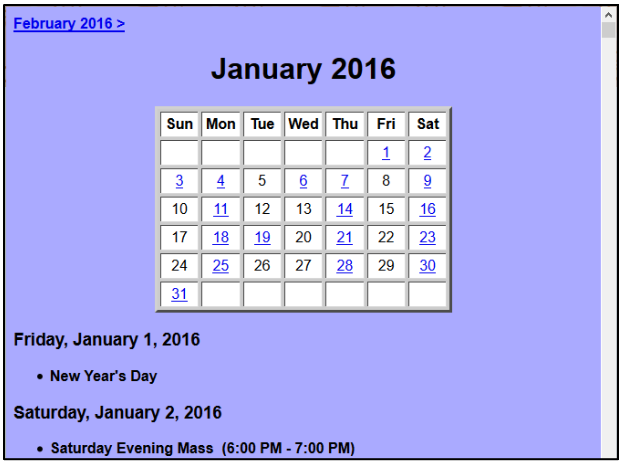


Figure 7-e. Web Page Calendar

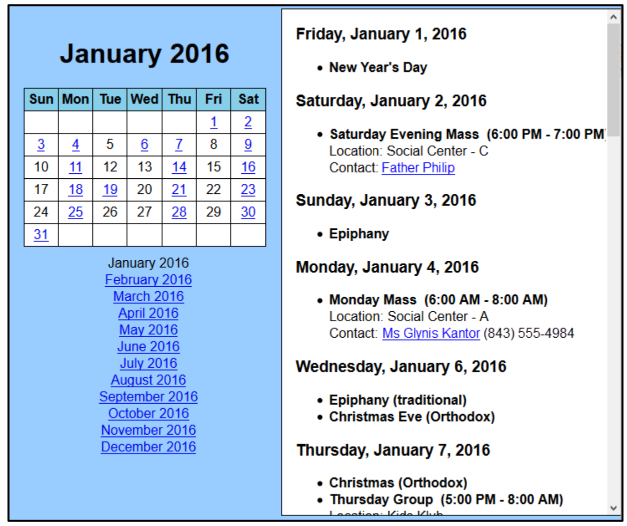


Figure 7-f. Web Page Calendar with Scrolling

To set up and build your web calendar files

1. Select the web page calendar you want to create.
2. In the Web Page Properties window, enter the path where you want to build your .htm files.
3. Make any additional selections you want to include on your web calendar.
4. If you use FTP to transfer files, select **Use FTP Transfer**, and enter your FTP information. Otherwise, leave this section blank. Click **Next**.
5. Select which event information to include on the web calendar using the selection tabs.
6. When you're finished, click **Build**.
7. To view the webpage, click **View File**.

Export Events to Google Calendar

You can upload Facility Scheduler calendars and events to your parish's Google calendar. You must have a Gmail account set up for your facility before exporting calendars and events.

Be sure the user settings for your parish's Google Sites account are set to your time zone.

To edit your time zone in Google Sites

1. In your Internet browser, go to http://sites.google.com and log in.
2. Click the gear icon, and select **User Settings**.
3. Change the time zone to reflect your time zone, then save your changes.

Before uploading events, you must allow PDS to access your parish's Google calendar.

To authorize access to your Google calendar

1. On the Reports tab, click **Event Reports**.
2. Expand the Calendars heading, select **Export to Google Calendar**, and click **Next**.
3. Click **Next**.
4. Click **Authorize Access**.
5. Enter your parish's Gmail address and password, then click **Sign in**. Your parish's account information is saved after you complete the upload process for the first time.
6. A code displays automatically in the field. Click **Continue**.
7. If you agree to give permission, click **Accept**.

After you allow access, you can upload calendars and events anytime.

To upload calendars and events to Google

1. Open the Export to Google Calendar report wizard.
2. Select the upload options and any optional selections you want.
   - **Upload Options** — Select from these to specify which calendar(s) the selected events are uploaded to. You can create a calendar for specific Facility Scheduler topics like church events and school events. In the options, "Facility Scheduler Calendars" refers to any calendars you create for this purpose.
   - **Optional Selections** — Select any of these actions to perform during the upload. If you made changes in Facility Scheduler and want to upload events with the new information, select a Delete option.
3. Click **Next**.
4. Use the Select Events window to specify an event date range, times, and any other specifications. When you're finished, click **Upload**. You can preview the events before uploading.
5. To post the selected events to your parish's Google calendar, click **Upload**.
6. When the upload is complete, click **View Summary** to print a list of the uploaded events.

You can then view your events in your parish's Google calendar.

To view your parish's calendars on Google

1. In your Internet web browser, go to www.google.com.
2. Click **Calendar** at the top of the page.
3. Click an event to view or edit details.
4. See Google Calendar Help on editing your events for additional tips.

You can also share your calendars with your parishioners. For assistance, consult Google Calendar Help.

View Listing Screens

When Father Philip stops by, asking about his meetings for the week, Paula needs a quick way to see his list. She can go to the Events listing screen and filter it by the "Fr. Philip's Meetings" event calendar she set up. She can also see listing screens of the organizations/individuals, facilities, and event packages.

Each listing screen has default columns, but you can customize them. You can also print the list.

This list is for viewing only. A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Date	Event Name	Starting	Ending	Facility
01/14/2016	Thursday Group	5:00 PM	8:00 AM	Kids Klub
01/16/2016	Saturday Evening Mass	6:00 PM	7:00 PM	Your Facility
01/18/2016	Monday Mass	6:00 AM	8:00 AM	My Facility
01/21/2016	Thursday Group	5:00 PM	8:00 AM	Kids Klub
01/23/2016	Saturday Evening Mass	6:00 PM	7:00 PM	Your Facility
01/25/2016	Monday Mass	6:00 AM	8:00 AM	My Facility
01/28/2016	Thursday Group	5:00 PM	8:00 AM	Kids Klub
01/30/2016	Saturday Evening Mass	6:00 PM	7:00 PM	Your Facility
01/31/2016	Interview - Holmes & Johnson Wedding	1:00 PM	2:00 PM	Kids Klub
01/31/2016	My Organization in Social Center - All	2:00 PM	4:00 PM	Social Center - All (Group)
01/31/2016	My Organization in Social Center - All	2:00 PM	4:00 PM	Social Center - A
01/31/2016	My Organization in Social Center - All	2:00 PM	4:00 PM	Social Center - B
01/31/2016	My Organization in Social Center - All	2:00 PM	4:00 PM	Social Center - C
01/31/2016	Basketball - My Other Event Package	5:00 PM	6:00 PM	Your Facility
02/01/2016	Monday Mass	6:00 AM	8:00 AM	My Facility
02/01/2016	Weekly Bingo in Social Center - C	12:00 PM	12:00 PM	Social Center - C
02/03/2016	Saturday Evening Mass	6:00 PM	7:00 PM	Your Facility
02/04/2016	Thursday Group	5:00 PM	8:00 AM	Kids Klub

Figure 7-g. The Events Listing Screen

Inactive records and events marked as "Reschedule" display in red text. Events with a date that has passed appear in blue. An ellipsis (…) at the end of an entry means you are seeing incomplete information. When you hover over the ellipsis, the complete information displays.

Check a Facility's Availability

As previously expressed, Father Philip likes to schedule his meetings, oh… ten minutes in advance. Paula needs to be able to see if a facility is available at the time he needs it.

Fortunately, she can do that with the Check Availability wizard. This doesn't only see if a certain facility is available. Paula can also:

- Find any facility that is available on a particular date and time.
- Find any facility with certain facility features that is available on a particular date and time.
- Check all days, weekends only, weekdays only, or selected days of the week.

To check for availability and schedule an available facility

1. On the Information tab, click **Check Availability**.
2. Select a method for checking facilities.
   - If you check by name, select a facility name.
   - If you check by features, select any features you want, then click **Apply/OK**.
3. Click **Next**.
4. Enter the hours of facility availability to check, the number of minutes that the facility must be available (including setup and cleanup time), and the date range of facility availability to check.
5. Click **Next**.
6. In the grid, select the facility or facilities you want to schedule, and click **Next**. You can select one facility per day. The scheduling wizard for the event displays.
7. Complete the wizard for the event you want to schedule.

Now it's your turn

1. Father Philip comes running into Paula's office. He needs to know where he can meet with his team in 30 minutes. He needs space for 10 people, and he wants a white board and laptop connection. He'll need the room for one hour. How can Paula find a suitable meeting room?

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2. Can you think of any other ways Paula could do this? Be creative…

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3. Come on, you can come up with one more way. Think outside of the box here!

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Unit 8: Working with Reports

Reports are essential, in Paula's opinion. She's excited to learn that PDS can pull together any fields she wants, and she doesn't have to go searching through all of her spreadsheets and emails!

At the end of this unit, you'll know how to:

- Select, preview, and print a predefined report
- Build your own custom report with the information you want to see
- Export data to a file that you can use in a word processor, a spreadsheet, Microsoft® Outlook®, Calendar Creator, or another program

Find Those Reports!

You can get to reports from different locations in Facility Scheduler. In the major areas (Events, Organizations & Individuals, Facilities, and Event Packages), you'll see the link to **Reports** in the navigation pane. Or, you can view all reports from the Reports tab.

Select, Preview, & Print Predefined Reports

Here's a brief outline of the report process.

1. Select the report.
2. Review the report overview.
3. Select the printer.
4. Select the report layout**.**
5. Select the data you want to print and the order to print it.
6. Preview and print the report.

First, you must select **WHICH** report you want to print. In the Select Report window, expand report sections by clicking the triangles. To select a report, click it and click **Next**.

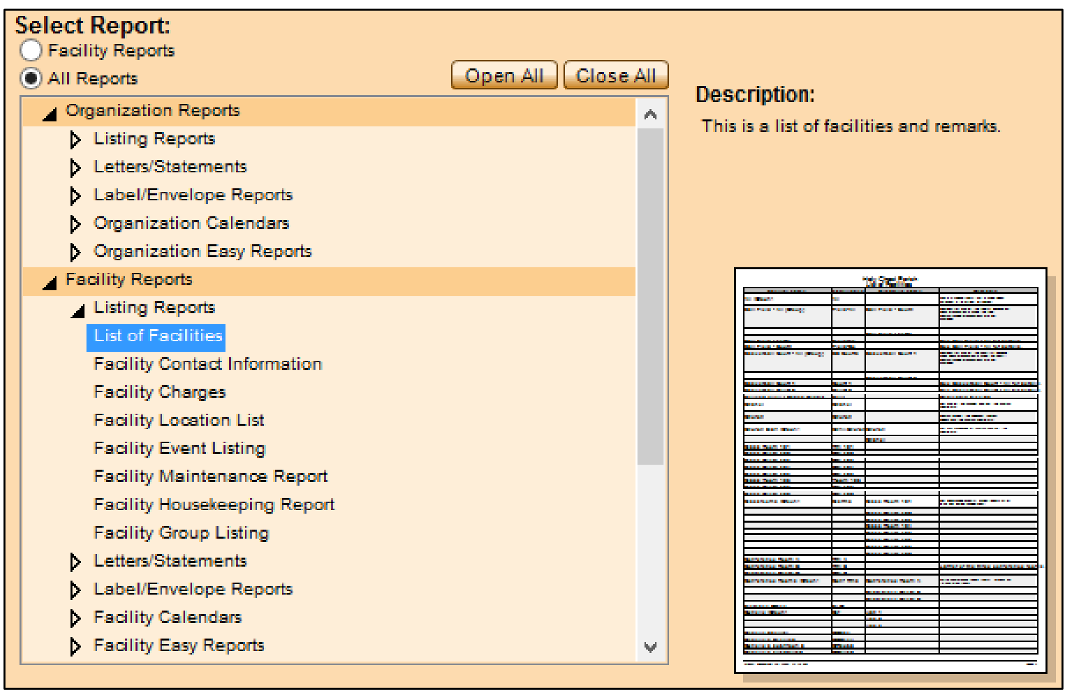

Figure 8-a. Selected List of Facilities report under Facility Reports section

In the Overview window, you can view the basic settings for the selected report. Click **Next** and proceed through the report wizard.

Next, you must indicate **WHERE** the report will print. In the Select Printer window, you can select the printer to use, the paper size, and the paper source. You can also switch the page orientation from portrait to landscape mode, which is helpful if you have a report with many columns.

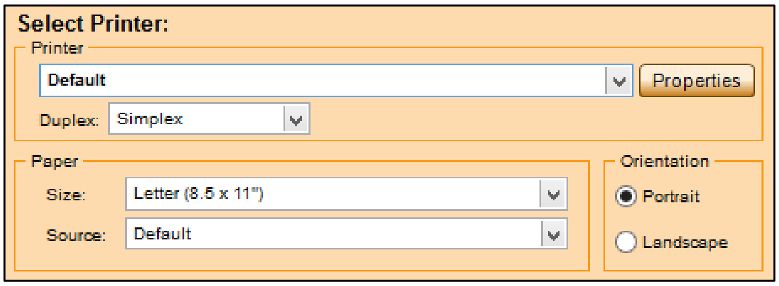

Figure 8-b. Default printer options

To change the printer-driver controlled properties of the selected printer, click **Properties**. The options available in the Size and Source drop-down lists depend on the selected printer. For example, an Inkjet printer may only have one or two tray sources, whereas a Xerox copier may have multiple tray sources, such as tray 1, tray 2, tray 3, High Capacity tray, Bypass tray, and so on. Once you make your selections, click **Next** to continue.

The third step is to indicate **HOW** the report will print. In the Layout window, select layout options for page style, margin style, and the various parts of the report. These options depend on the type of report you're printing.

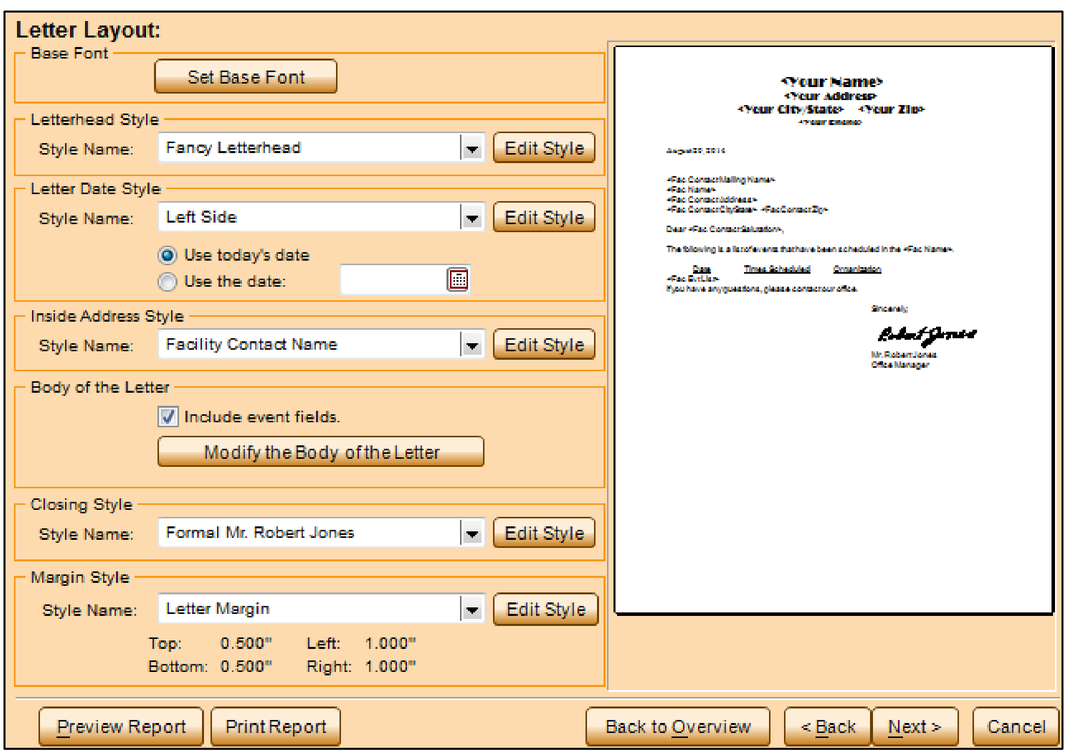

Figure 8-c. The Layout window for a letter report

Once you select your layout options, click **Next**.

Now it's time to indicate **WHICH** data you want to print. In the Selection window, enter the criteria you want to determine which records print. For example, if you want to send a letter to specific organizations, you can define a "selection" for those organizations based on certain conditions, or you can select individual records from a list.

The Selection window is divided into two parts:

- The List of Selections on the left shows saved selections previously created for this report.
- The Selection tabs across the top have options for what information prints on the report. Depending on the type of report, the following tabs may display: **Selection Information**, **Contact**, **Org**, **Facility**, **Event**, **Other Event Info**, **Package**, and **Additional Selections**.

If you create selection criteria that you will use over and over again, you can save it under the List of Selections. Sometimes Paula needs to print information for just the Social Center facilities, so she adds a Social Center Only selection, as shown in Figure 8-d.

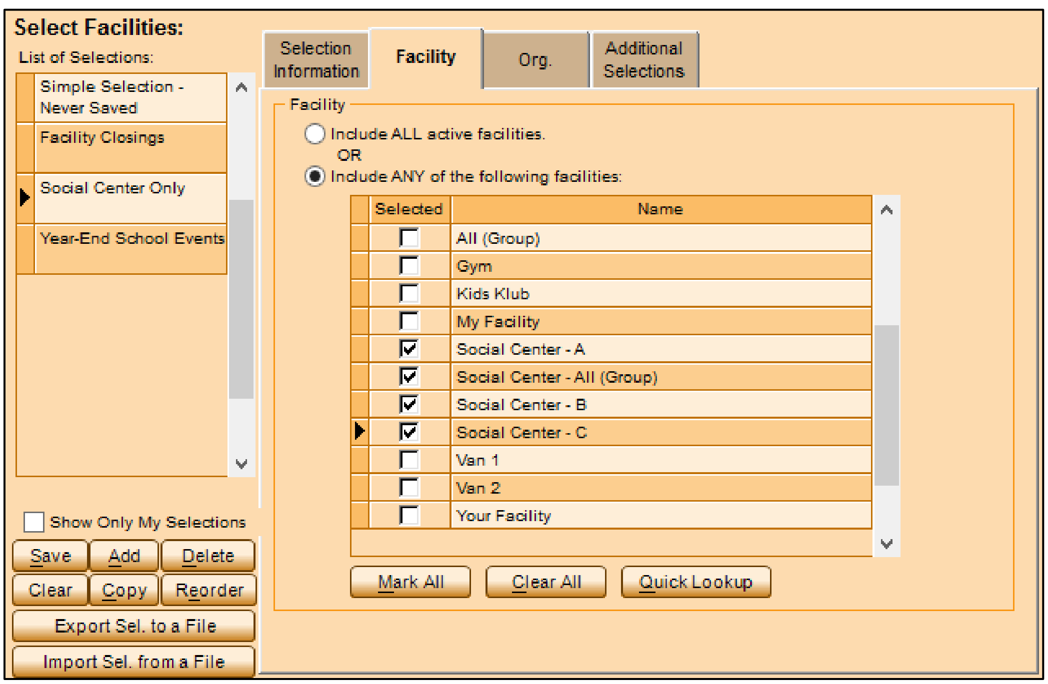

Figure 8-d. Selection for the Social Center facilities only

Once you have selected the information to include in the report and the order you want it to print, click **Preview**. Here, "what you see is what you get". Examine the report and ask yourself:

- Are the margins set as intended? If you select **Smallest Margins**, the report prints very close to the edge of the page. You probably wouldn't want this for a letter.
- Are the styles (fonts, letterheads, closings, page numbers, and dates) set as intended?
- Does the report include selected information as intended?

When you like what you see and you're ready to print the report, click **Print**. Make your selections, and click **OK** to send the document to the selected printer.

Build Custom Reports

Paula is pretty good at pulling information together from her records and email into a report, but she's nervous about how to do that in PDS.

One helpful tip to alleviate some of this anxiety is to copy an existing report that's similar to what you need, then shape it to meet your needs. That's much easier than creating a new one from scratch.

To copy a report

1. On the Reports tab, click the button related to the type of report you want. Click the triangle next to each group of reports to expand it and see the individual reports.
2. Select a report, and click **Copy**. The report is added to the appropriate Easy Reports section, with the report name preceded by "(COPY)".
3. Click **Next**. Edit the name and description to describe the purpose of the report.
4. Select a report owner, and designate report access.
5. Click **Next** and follow the report wizard to define and customize the report.

If you can't locate a report similar to what you need, add a new report.

Before Paula adds a new report, she outlines the information to include and makes notes about the formatting she wants. This way, she'll have something to work from when adding her new report, which are called "Easy Reports" in PDS. Paula smirks… yeah, we'll see how "easy" they are. Don't be so pessimistic, Paula! This name just refers to the fact that you can add a custom report.

To add a custom report

1. On the Reports tab, click the button for the type of report you want. Click the triangles to expand each group where you want your report to live. For example, if you're adding a letter to the parents of a bride, expand Event Package Reports.
2. Once you're in the appropriate report group, click **Add**. The Add Report dialog box displays.
3. On the Simple Reports tab, click the type of report you want to create. The new report called "New <type> Report" is added to Easy Reports section of the group you selected.
    - For some reports (list and export reports, for example), the List of Fields to Print dialog box displays, and you can define the fields you want to include in your report.
    - For other reports (letter, label, and envelope, for example), the Editing window displays, and you can define the content of your correspondence.
4. Edit the name and description of the report. Select a report owner, and designate report access.
5. Save your changes, and continue the report wizard to print your report.

When adding a new report or copying an existing report, you have ownership of that report and can specify if only you and the administrator have access, if you want to share it but not allow anyone to modify it, or if everyone should be able to print and modify it.

You can save your Easy Reports to a reusable storage device or hard drive to protect them from loss. You can also install your Easy Reports on other computers in your office or share them with other organizations that use PDS.

To save an Easy Report

1. In the Select Report window, select the report that you created.
2. Click **Save as Custom Report**.
3. In the Save Custom Report Files dialog box, find the location where you want to save the report.
4. Enter a file name, and click **Save**.

Now it's your turn

1. What kind of custom reports would be helpful for your daily work?

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Export Data to a File

Paula is feeling good about Facility Scheduler, but it may be a while before she can let completely go of her spreadsheets. That's all she's known up to this point – she can't just toss it all!

One of the most common custom reports is an export report. Export reports are similar to list reports, but the data is sent to a file rather than a printer. So Paula can export information to a word processor, a spreadsheet, Microsoft® Outlook®, Calendar Creator, or another program.

To define an export report

1. In the Select Report window, select the report category where you want to add the export.
2. Click **Add** > **Export**. The List of Fields to Print dialog box displays.
3. Select the field names you want to include and click the right arrow button to move them to **Fields you want to print**. Click **Save/OK**.
4. In the Overview window, click **Edit** to enter the report's name and description. If you have access to designate reports, select a report owner and report access. Click **Next**.
5. In the Export Properties window, click the **File Format** drop-down list to select one of the following file formats:

- **Comma Separated Values (CSV)** — Creates a text file with data items separated by commas. This format includes headings.
- **XML** — Creates an Extensible Markup Language file for sharing data on the web.
- **Line/Form Delimited** — Creates a file with a line feed at the end of each field and a form feed at the end of each record.
- **Line/Form Delimited With Headings** — Creates a file with column headings, a line feed at the end of each field, and a form feed at the end of each record.
- **Tab Delimited** — Creates a text file with data items separated by tabs.
- **Tab Delimited With Headings** — Creates a text file with column headings and data items separated by tabs.
- **Fixed Width** — Creates a file that always prints the same number of characters for a field. So, if you print Org Name (75 characters)**,** Contact Name (30 characters)**,** and ZIP Code (15 characters), the file always contain exactly that number of characters for those fields. If it has more than these, it's clipped. If it's shorter, the length is filled with spaces.
- **CSV Without Headings** — Creates a text file with data items separated by commas, but does not include headings.

6. Enter the name of the file you're creating.
7. To alter the list of selected fields, click **Modify the List of Fields to Export**.
8. Click **Next**.
9. Make any additional selections you want. Click **Build** to export the data to a file.

After exporting, you can send the file to a coworker, and they can import it into PDS using the Add > Custom Report option.

Action Plan

Quick! Before you lose all those great ideas floating around in your head, jot them down here.
Write down any details you need to think about or things to do when you get back to your parish.

Unit 9: Protecting Your Work

Before he moved on from managing facilities, Jim told Paula about a tornado that happened 10 years ago. It damaged part of the church, and Jim's computer was ruined. The last backup he made was over 2 weeks old, so he lost all his changes and emails during that time.

At the end of this unit, you'll know how to:

- Schedule automatic backups for particular days of the week
- Back up your data manually before a big change

Back Up Your Data

Guarding against loss due to a natural disaster, like the tornado at Saint Mary's, or a database corruption is important.

Automatic Backups

If you use OnDemand, your data is backed up automatically each night and stored on the server, so you don't need to schedule automatic backups. Otherwise, you can set PDS Facility Scheduler to perform backups automatically on selected days.

Before you set up automatic backups, make sure that:

- PDS is installed on the computer or server that stores the data.
- The computer or server is on at the time when the automatic backup is scheduled to run.
- All other PDS users are logged out.
- You entered your email address in the License Information window. If there's a problem with the backup, you'll get an email.

To set up automatic backup options

1. On the File menu, click **Backup/Restore** > **Backup Options**.
2. Select the day(s) you want to run an automatic backup of your data.
3. Enter the path for the location of your internal archive folder where your backups will live.
4. Select a level of protection for your data.
5. Click **Close**.

Paula sets her automatic update to run every week on Tuesday and Friday. However, she'd also like to back up her data before she makes major changes. She can run a manual backup at any time.

Manual Backups

Before you manually back up your data, make sure:

- You have at least 0.5 MB of free space to complete the backup.
- You disable your computer's Hibernate, Sleep, or Stand By options.
- All PDS users are logged out.
- Your backup media is preformatted.

To back up your data manually

1. On the File menu, click **Backup/Restore** > **Backup Data**.
2. Enter a backup reason. This prints on the report and displays if you need to restore the data.
3. Select a backup method. You can:
   - **Back up to a selected drive** such as a floppy disk.
   - **Back up to a specific folder** such as the hard drive, CD-ROM, or any other drive.
   - **Back up to an Internet FTP Server** send the data to a website (File Transfer Protocol).
4. Select a backup location, or enter your FTP Server information.
5. Click **Start Backup**.

Now it's your turn

1. When should you use automatic backups? What day(s) are best for your parish to back up data?

❑ Sunday ❑ Monday ❑ Tuesday ❑ Wednesday ❑ Thursday ❑ Friday ❑ Saturday

2. At your parish, when would you need to back up your data manually?

Keep Your Backups Safe

We recommend that you back up your data each day and store it in a secure, off-site location. After all, what's the point of backing up your data if it's destroyed during a disaster?

Jim was lucky that his backups stayed safe during the tornado. But as an extra precaution, Paula is going to ask Saint Mary's diocese if she can keep her flash drives at their weatherproof storage building.

When planning for the budget next year, Paula may even consider moving to PDS OnDemand so that Saint Mary's data can be hosted on a secure server.

Now it's your turn

1. What's your parish's backup plan? If you don't have one or need to improve on the current plan, write it here.

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