5.0 User Guide

C/S Event Scheduling Manager

www.goTeamWORKS.com

Email: support@goTeamWORKS.com

Toll Free Phone: 866-892-0034

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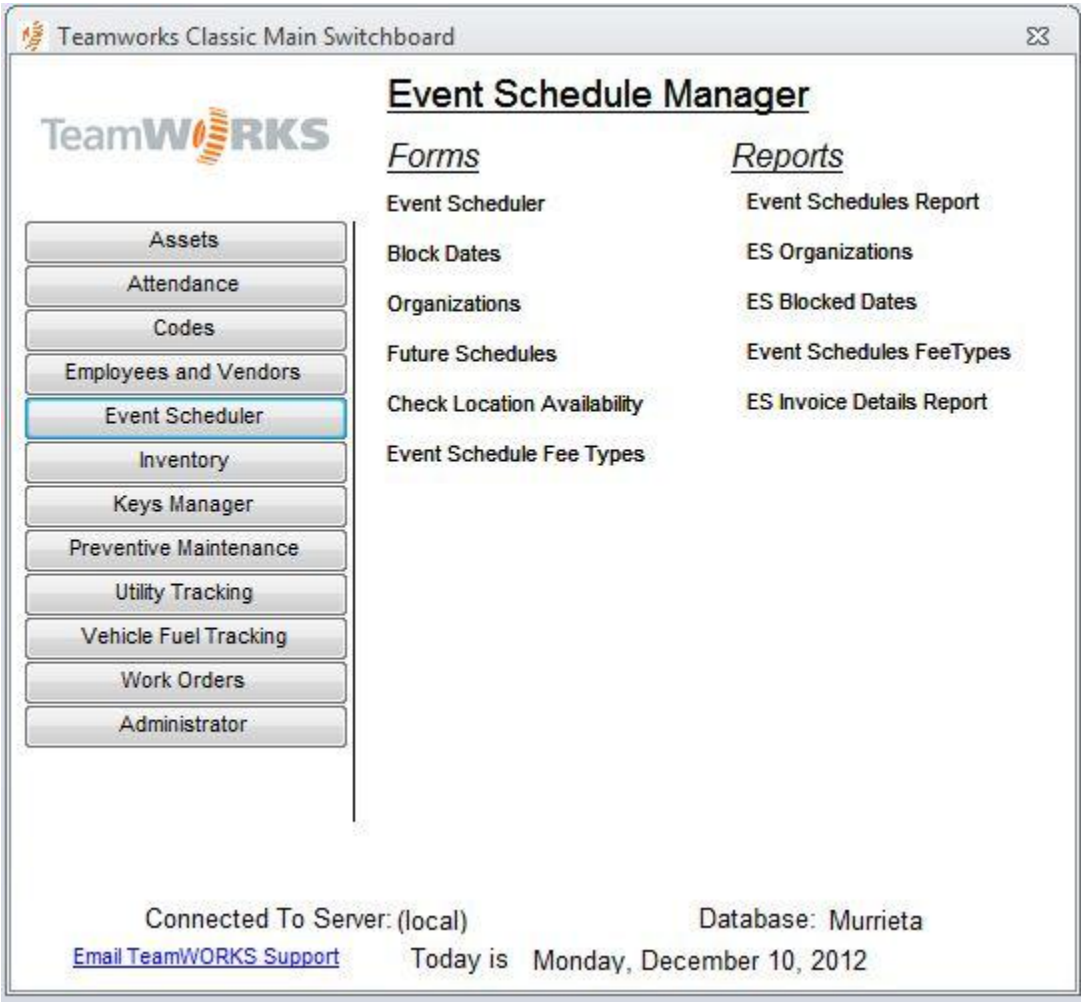
Event Scheduling Manager

The Event Scheduler is used for managing events scheduled at your facilities. You can track events such as:

- Athletic events
- Church functions
- PTA and other school functions
- Scouting events

The Event Scheduling (ES) module can also be set up for Location Security so the **client module** will only show locations specified by the System Administrator. It uses the same concept for the Remote Request applications and should be set up in the same manner. For instance, you may have a user who should be only allowed to make requests for a specific campus (using the client). When that user logs into TeamWORKS, those paths are the only ones that show in the drop down list. If the user is able to generate Work Orders from the Event Scheduling module, then the same path access rights will apply on the work order form.



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Setting up Locations

Setting up Location Security for Event Scheduler

You must be a TeamWORKS System Administrator to set up this functionality and is a global setting (can't be set up to be user specific). This is a three step process.

1. Make sure the user has rights to the Event Schedule module using the TeamWORKS Control Panel
2. Under the Administrator/System Configuration Button, click the check box by Use Event Scheduling Location Security. Save and Close
3. Under Administrator/Path Access, select the Username, Location for Event Scheduling (will inherit children paths) and select TeamWORKS Client-Server in the last drop down.

If ALL ES users will be allowed to submit for ALL locations, no security will need to be set up. If you have some users that will have rights to some paths and other with rights to all paths, then each user that is NOT a TeamWORKS System Administrator will need to be set up for Path Access. Those users with rights to all locations can be given the highest parent path.

Block Dates will check to see if there are any approved schedules prior to saving blocks.

Before you 'reserve' your facilities for events, you must set up your path structure accordingly.
Example: If you want to be able to reserve a Gymnasium, then the Gymnasium must be added to your path structure through the Location Editor.
The Location Editor is used to create, modify or move locations in your path tree. Path Structure can be built to only specific campuses or all the way down to the room level. Although it is more tedious to go to the room level, there are advantages in doing so. Going to room level in your path structure will allow you to track attributes such as assets, building requests or work orders to a specific location. Location Editor is only available as a WEB application.

NOTE: The Location Editor is an Administrative function, therefore must be entered by a TeamWORKS Administrator.

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Note: See WEB Location Editor Quick Guide for detailed instructions.

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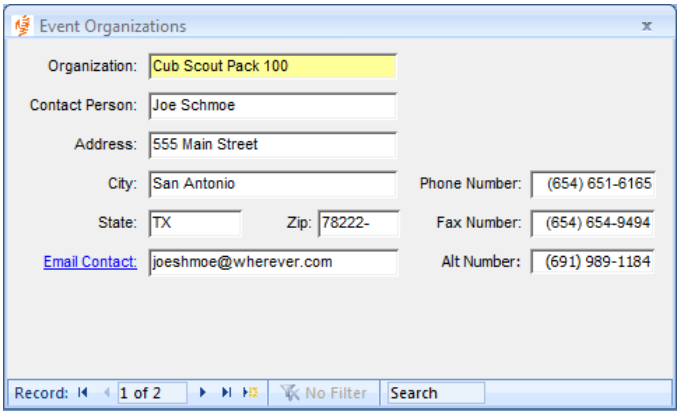
Forms

Organizations



By setting up your organizations first, you will be able to repeatedly select this organization from a drop-down list, rather than entering it each time that organization schedules an event.

Organization – enter the name of the organization you wish to set up.

Contact Person – enter the name of the primary contact for this organization.

Address – enter the address for this organization.

City – enter the city for this organization.

State – enter the state for this organization.

Zip – enter the zip code for this organization.

Email Contact – enter the email address for the primary contact. Clicking the Email Contact Link will open your default email client, allowing you to email this person.

Phone Number – enter the phone number for this organization.

Fax Number – enter the fax number for this organization.

Alt. Number – enter an alternate phone number for this organization.

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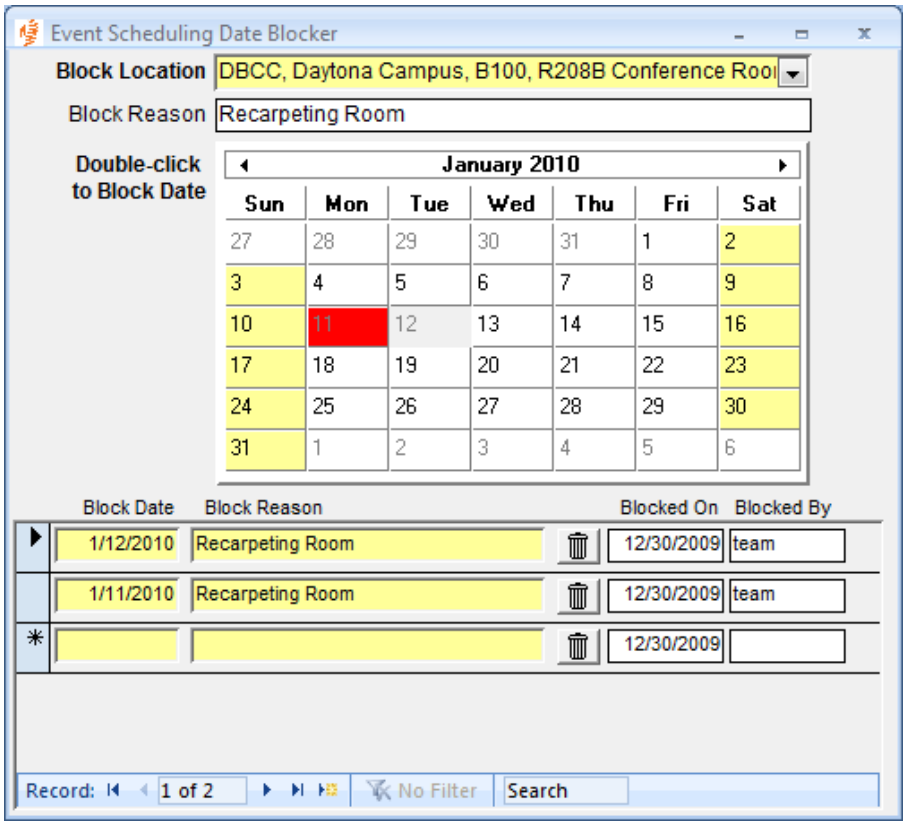
Block Dates

There may be times when you want to make sure no events are scheduled for a particular location for reasons such as a holiday, putting new floor down in a gym or painting. A great feature of the Event Scheduler is that it gives you the ability to block dates for specific locations so NO events can be scheduled for that date. Blocks for each location must be created.

*** This block date occurs for the entire day (24 hour period)**



You can add blocked date records by using the top portion of this form or the bottom portion of this form. If you are blocking multiple dates for the same reason, it is suggested you use the Block Location, Block Reason and Calendar for this.

Block Location – enter or select the location you want to block.

Block Reason – enter the reason you are blocking this location on this date.

Date Calendar – double-click the date you are blocking. If blocking multiple (or consecutive) dates, double-click each date.

Block Date – enter the date you are blocking for this location. If you double-clicked the calendar, this field auto populates.

Block Reason – enter a reason for the block. If you entered a Block Reason on the top portion of the form, this will auto populate if you used the calendar.

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'Trash Can Icon' – click this icon if you want to remove or delete a block.

Blocked On – auto populated field indicating the date the location was blocked.

Blocked By – auto populated field indicating the person (username) who blocked the location.

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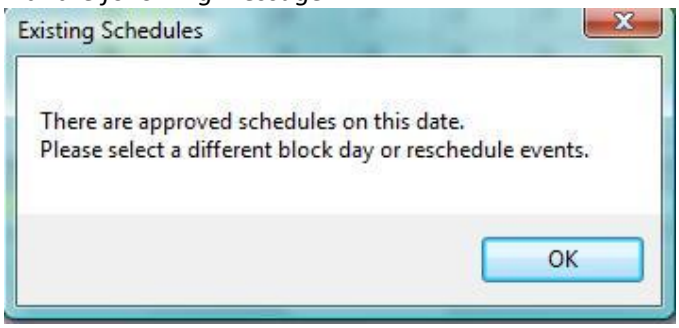
*NOTE: if you try to block a date for the selected location that has an existing **Approved** schedule, the system will prompt you with the following message:*



At this point, you will need to reschedule this block for another date or change your existing approved schedule in the Event Schedule Main form.

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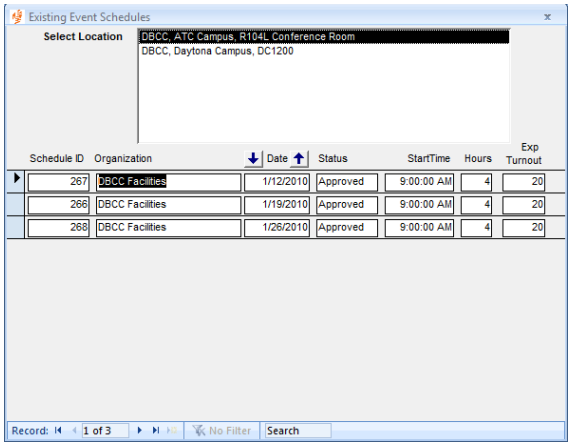
Future Schedules

This read-only form is a quick way to view future scheduled events for a location. Select from the location windows and the corresponding upcoming events will display in the grid.



Select Location – click on the location you want to look at. You can only select one location at a time.

Schedule ID – indicates the Schedule ID of the event.

Organization – indicates the Organization for the event.

Date – indicates the date of the event. Click the 'down' arrow to sort Oldest to Newest and click the 'Up' arrow to sort Newest to Oldest.

Status – indicates the Status of the event.

Start Time – indicates the start time of the event.

Hours – indicates the number of hours requested for the event.

Exp Turnout - indicates the expected turnout for the event.

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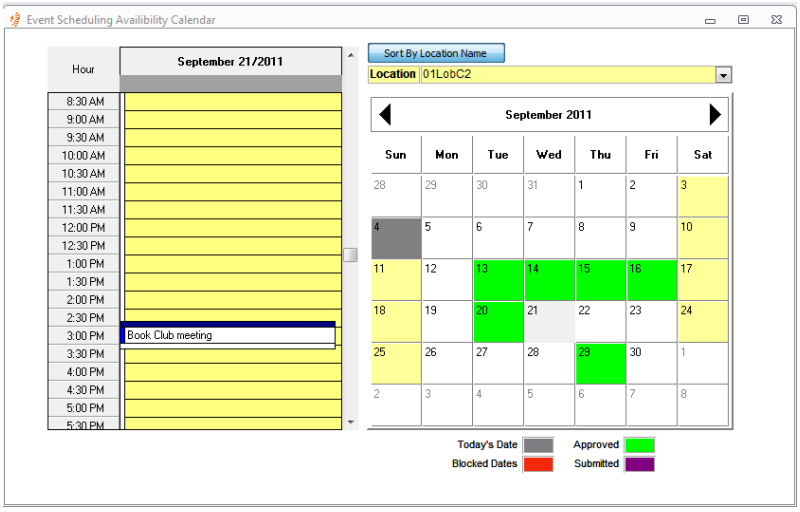
Check Location Availability

This form gives you a calendar view of all events schedules for any given location.



Sort By Location ID – click this button to sort by Location ID or Location Name.

Locations – select or enter the Location for which you want to view existing schedules
After you select your location (you may need to click on the calendar to refresh), the calendar indicates by color all of the existing schedules for that date. If you click on a 'colored' date, the 24 hour calendar on the left shows the time(s) for the scheduled event(s) for that date.

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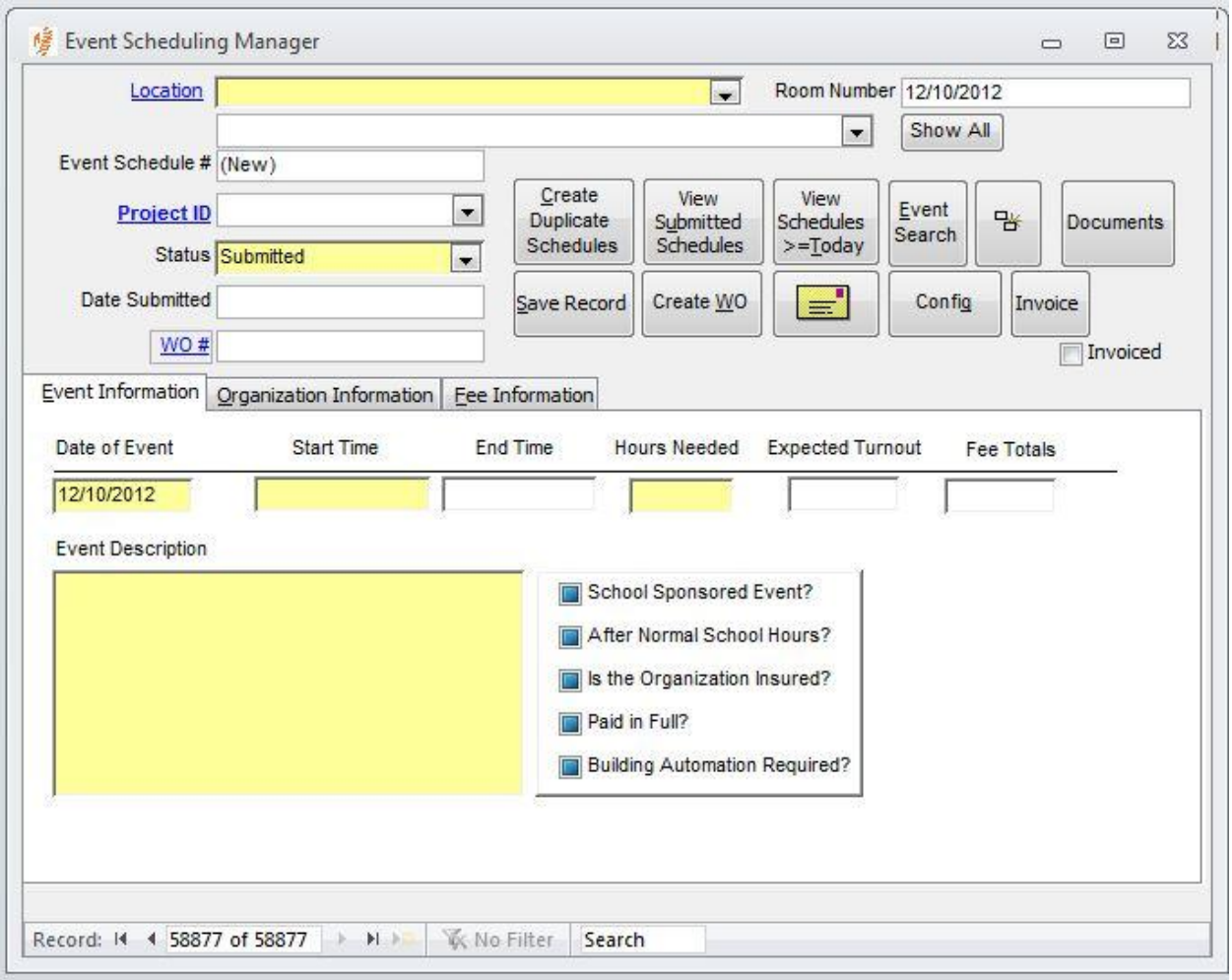
Event Scheduler – Main Form



Location – enter or select the Location for this event.

Room Number –enter the room number for the event.

Event Schedule # - auto populated field indicating the assigned number for this schedule.

Show All Button – click this button to show all (unfilter) records for Event Schedules future and past.

Project ID – enter or select the Project for which you want to tie this event schedule to.

NOTE: If you don't have a Project specifically for event schedules, you may want to create one.

This will allow you to separate all work order created specifically for Event Schedules.

Status – enter or select the status for this request. If you use the Event Schedule Groups (levels of approval) in the Remote Request, you will see ESLVL(X) statuses in your status drop-down.

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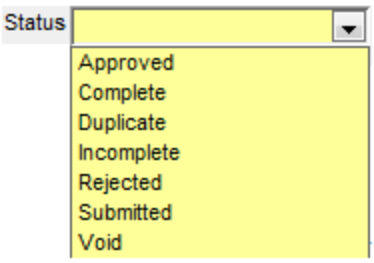
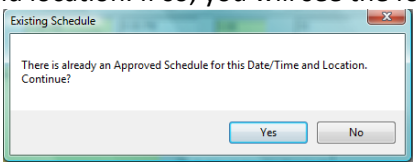


If you create a new schedule with an Approved status, the system checks to make sure no other events are scheduled for this time, date and location. If so, you will see the following screen:

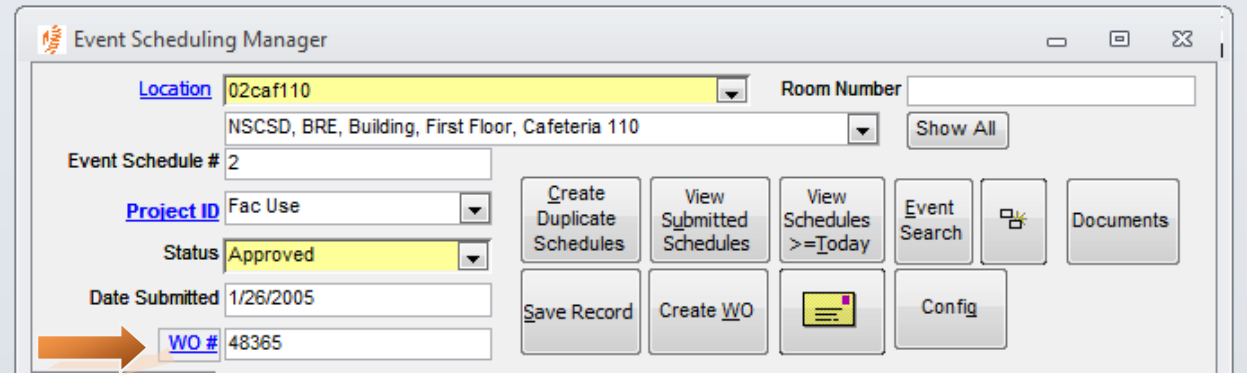


If you select the **No** button, the schedule will not be saved, but all data will remain on the form and the status will change to Submitted. If you select the **Yes** button, the schedule will automatically be saved **regardless of the other Approved schedule**.

NOTE: You may want to do this if you have a gymnasium that can accommodate multiple events at the same time. This will allow you to schedule the Gym more than once for separate events.

Date Submitted – enter the date the request was submitted (NOT THE EVENT DATE). Default is the current date

WO # Link – click this link if you want to open the work order(s) tied to this Event Schedule. All work orders created for the given schedules will be filtered out on the work order form.



Create Duplicate Schedules Button – Click this button to create duplicate schedules for the existing schedule.

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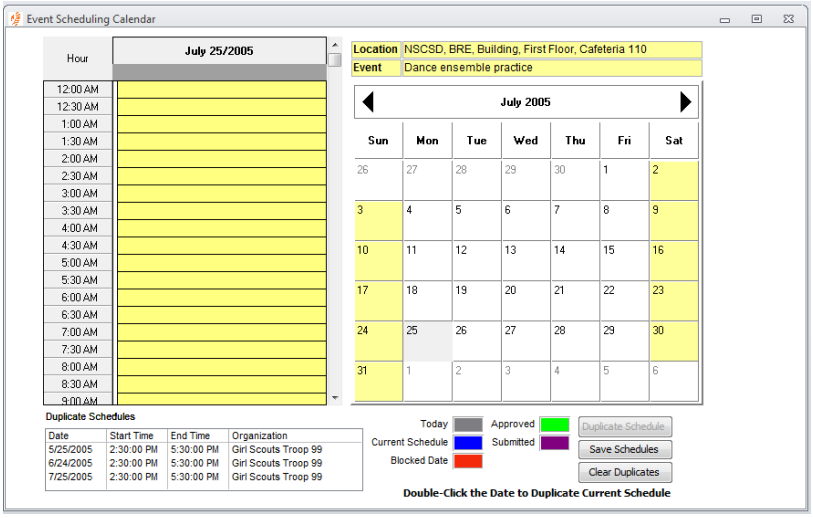
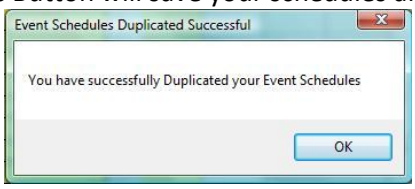


If you need to create a schedule for the Gymnasium for more than 1 date, you can use the *Create Duplicate Schedules* button to do this. You will need to create your first schedule, then use the Create Duplicate Schedules button to select the other dates. (i.e. The Cub Scout Pack 507 needs to reserve the gymnasium for the next 5 consecutive Fridays)

Steps to Creating Duplicate Schedules

1. Click the Duplicate Schedule Button.
2. Double-click the Date(s) you want to duplicate a schedule for this Location and Event
   For each date you double-click, you will see your dates added to this Duplicate Schedules List. The system duplicates **ALL** information from the existing schedule you are duplicating, including Organization and Fees Information.
3. If you want to clear your schedules, simply click the Clear Duplicates Button **BEFORE** clicking the Save Schedules Button.
4. Clicking the Save Schedules Button will save your schedules and confirm your save.



5. Click the OK button and close form when finished duplicating schedules.
6. From the ES Main form on your toolbar, click the Requery Form button and you will see them as new schedules in the Event Schedules Main form.

View Submitted Schedules Button – click this button to show ONLY those event schedules with a Submitted Status.

View Schedules >=Today Button – click this button to show ONLY event schedules that are in the future, including today.

Event Search Button – click this button to show a specific Event Schedule by Event Schedule ID.

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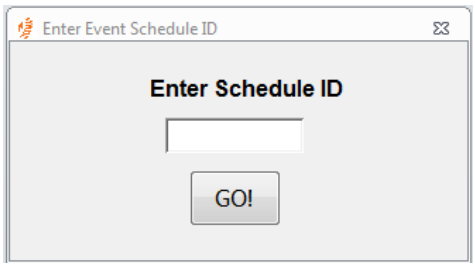
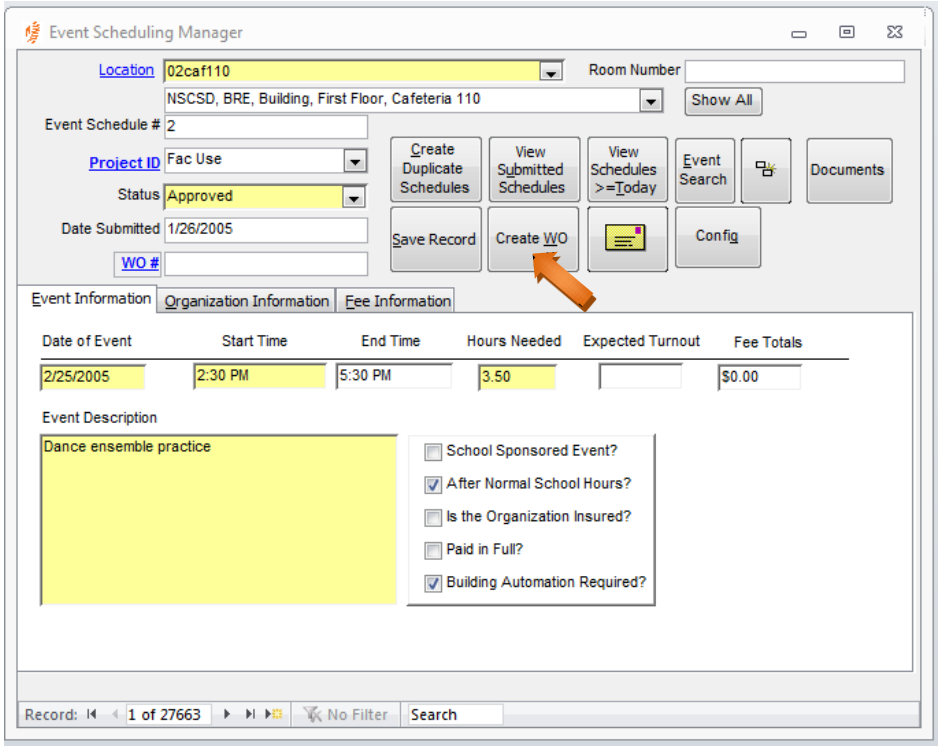


Duplicate Event Schedule - click this button to duplicate this schedule for a ***different*** location. Alt+R is the shortcut

Documents Button – Users can attach documents related to the event request.

Save Button – click this button to Save the Event Schedule.

Create WO Button – once a schedule is created and saved, you can generate Work Orders based off of this event schedule. The work order created is linked to this Event Schedule ID by the RequestID field on the Work Order Form. You can create multiple work orders for any given request.



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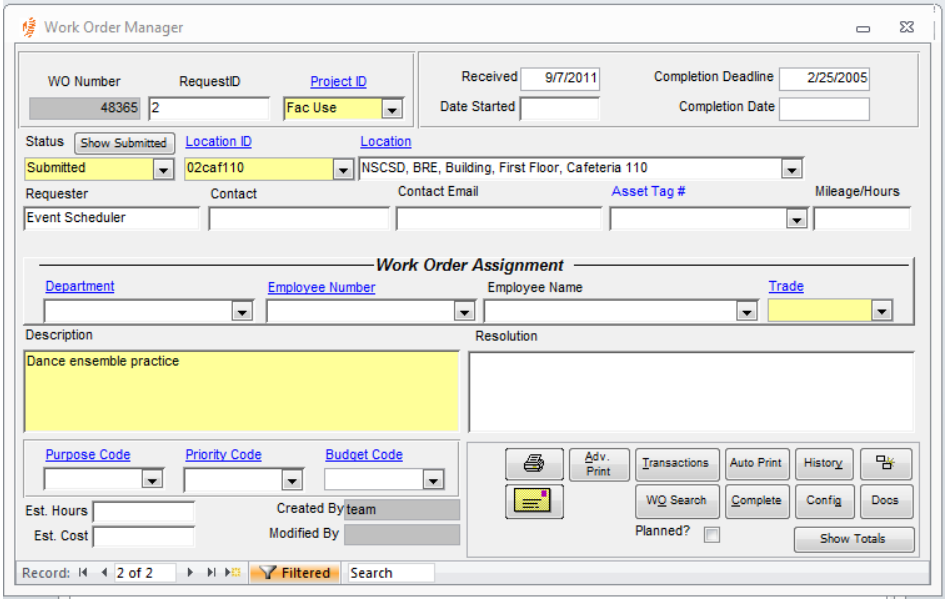

Once the Work Order is created, the user can type more information in the Description field as to what needs to be done and assign it a trade. At this point, it can be treated as a normal work order.

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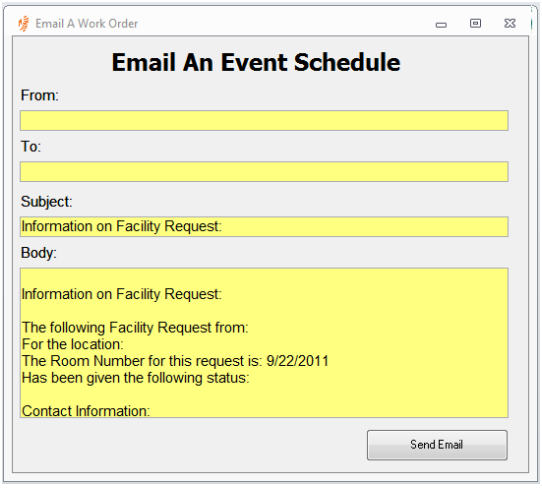
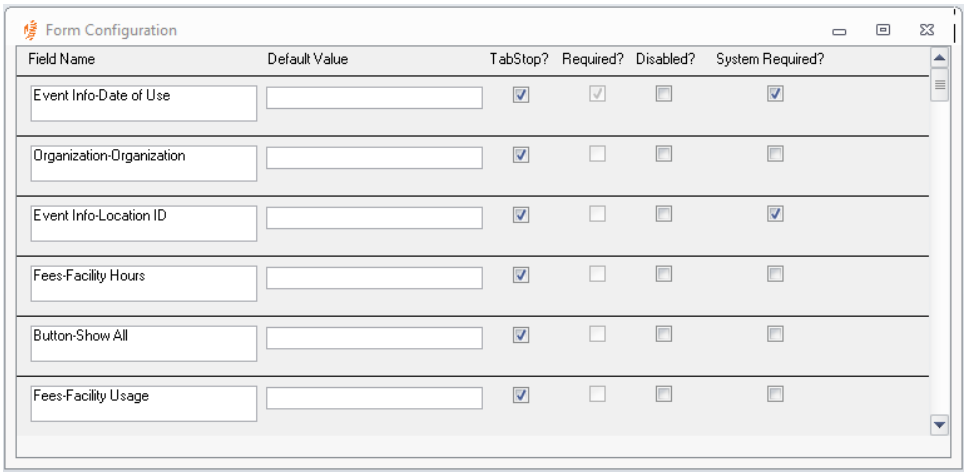
Email Button – ability to email an event schedule to anyone. This uses your default email application whether you use Outlook, Outlook Express, Lotus Notes, or GroupWise or you may choose to use the TeamWORKS Emailer. *(See System Configuration)*



Config Button – click this button to open the Configuration Form for the Event Schedule main form. On this form, the user can set Default values for new records, set tab stops, make specific fields required and disable fields. Closing the form will save the data.



NOTE: after closing this form, the user will need to close the Event Schedule Main form then reopen the form for the changes to take effect.

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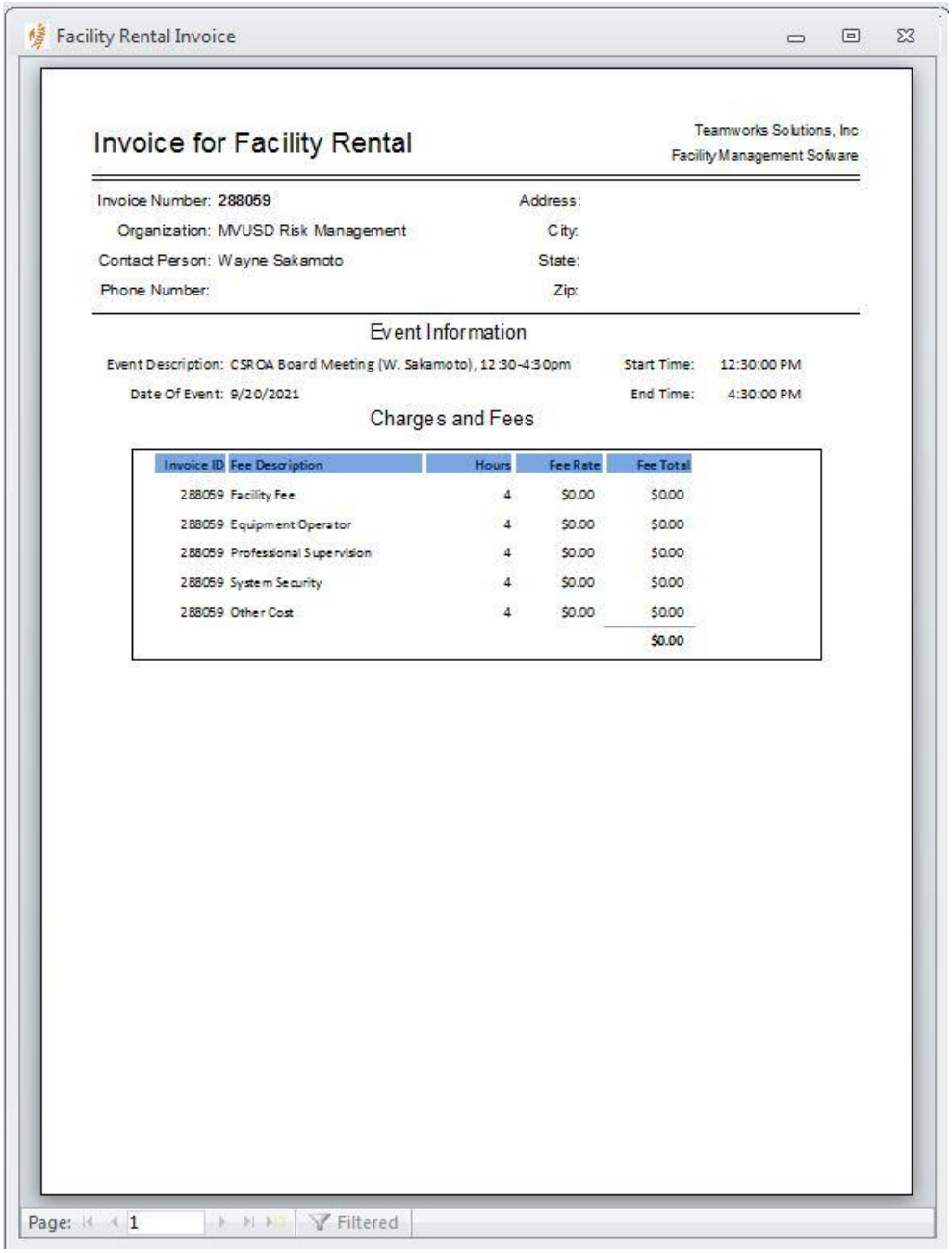
Invoice Button – click this button to open a printable Invoice that you can send out.



Facility Rental Invoice

Invoice for Facility Rental

Teamworks Solutions, Inc
Facility Management Software

Invoice Number: 288059
Organization: MVUSD Risk Management
Contact Person: Wayne Sakamoto
Phone Number:

Address:
City:
State:
Zip:

Event Information

Event Description: CSROA Board Meeting (W. Sakamoto), 12:30-4:30pm
Date Of Event: 9/20/2021

Start Time: 12:30:00 PM
End Time: 4:30:00 PM

Charges and Fees

Invoice ID	Fee Description	Hours	Fee Rate	Fee Total
288059	Facility Fee	4	$0.00	$0.00
288059	Equipment Operator	4	$0.00	$0.00
288059	Professional Supervision	4	$0.00	$0.00
288059	System Security	4	$0.00	$0.00
288059	Other Cost	4	$0.00	$0.00
				$0.00

Page: 1 Filtered

Invoiced – Check this box to show that the Invoice has been sent.

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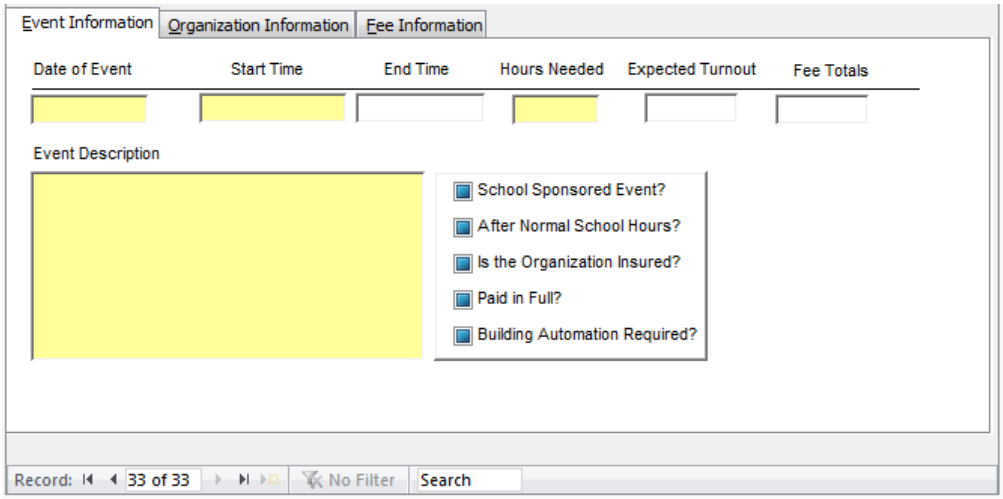
Event Information Tab



Date of Event – enter the date of the event.

Start Time – enter the start time of the event. Needs to be entered in Standard Time (i.e. 03:00PM), not Military Time.

End Time – enter the end time of the event. The time needs to be entered in Standard Time (i.e. 03:00PM), not military time. Entering a time here will auto populate the Hours Needed field.

Hours Needed – if you enter a start time, you can have the system auto populate the End Time by adding the Hours needed for this event. You can enter decimal places for ½ hour or ¼ hour increments.

Expected Turnout – enter the number you are expecting for this event.

Fee Totals – total of all the fees.

Event Description – enter a Description for this event taking place.

School Sponsored Event? – click here if this is a School sponsored event.

After Normal School Hours? – click here if the time is after normal schools hours.

Is the Organization Insured? – click here if this organization has insurance.

Paid in Full? – click here if the organization has paid in full.

Building Automation Required – click here if you will need to schedule your BAS system for heating or A/C.

NOTE: TeamWORKS can provide an integration piece with your existing Building Automation System that will create a schedule in the BAS system when an Event Schedule is marked with Building Automation Required.

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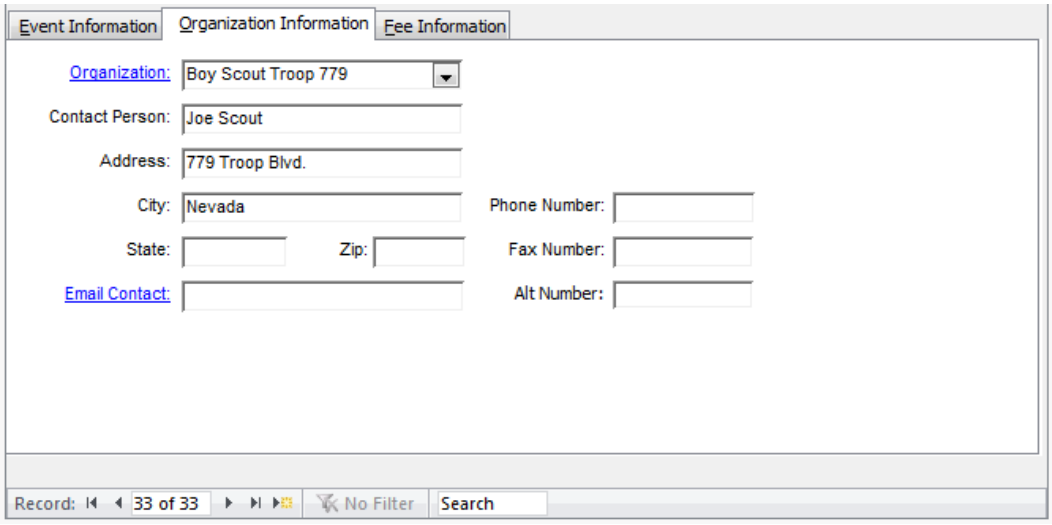
Organization Information Tab



NOTE: if you set up your organization first, you can enter or select the organization from this drop-down list and all information will auto-populate. If you do this, you will still be able to make changes to the information on this form.

Organization – enter the name of the organization you wish to set up. Click the Organization link to open the Organization Form.

Contact Person – enter the name of the primary contact for this organization.

Address – enter the address for this organization.

City – enter the city for this organization.

State – enter the state for this organization.

Zip – enter the zip code for this organization.

Email Contact – enter the email address for the primary contact. Clicking the Email Contact Link will open your default email client, allowing you to email this person.

Phone Number – enter the phone number for this organization.

Fax Number – enter the fax number for this organization.

Alt. Number – enter an alternate phone number for this organization.

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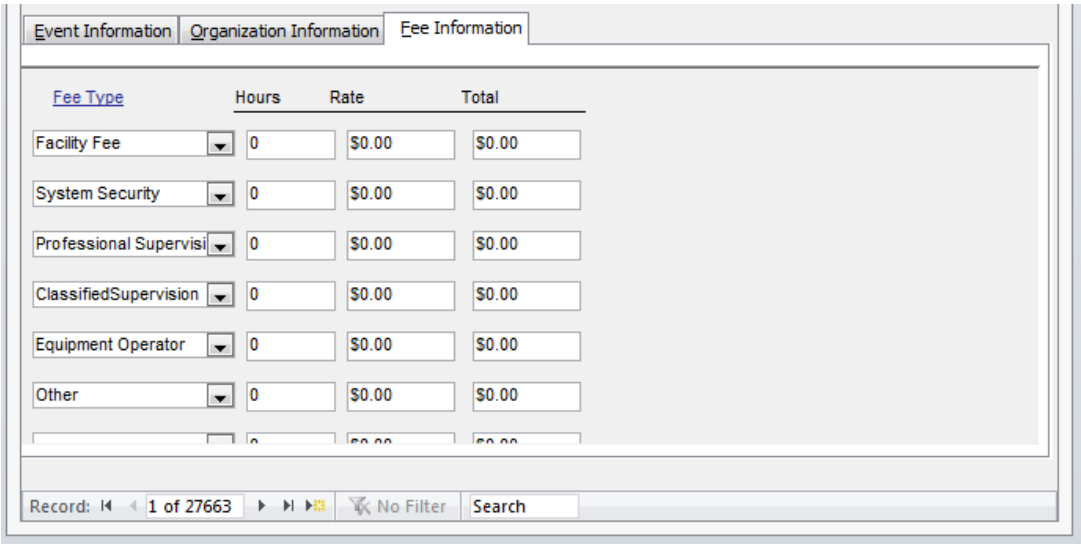
Fees Information



Facility Fee – enter the number of hours and fee you will charge for the facility for this schedule.

System Security Fee – enter the number of hours and fee you will charge for Security for this schedule.

Professional Supervision – enter the number of hours and fee you will charge for any professional supervision for this schedule**.** (I.e. Lifeguards)

Classified Supervision – enter the number of hours and fee you will charge for any classified supervision for this schedule.

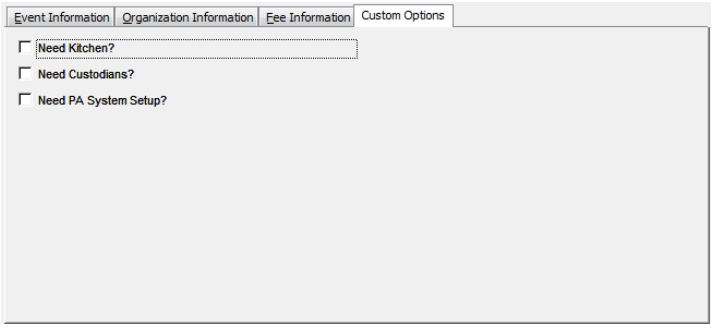
Equipment Operator – enter the number of hours and fee you will charge for equipment operators

(I.e. scoreboard keepers) for this schedule.

Other Fees – enter the number of hours and fee you will charge for any other fees for this schedule.

Totals – auto populated fields indicating the total number of hours and dollars tied to this schedule.

Custom Options



TeamWORKS System Administrators can create custom check box fields in the Remote Request portion for Event Scheduling. Any custom fields created there will automatically show in a Custom Options Tab in the client.

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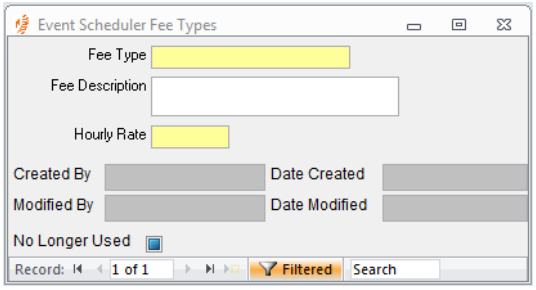
ES Fee Types



Fee Type – enter the name for this fee type.

Fee Description – this is a description of the fee.

Hourly Rate – the hourly rate for this fee.

Created By – shows who created this fee.

Date Created – shows the date this fee was created.

Modified By – displays who last modified the fee.

Date Modified – displays the last date this fee was modified.

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Reports

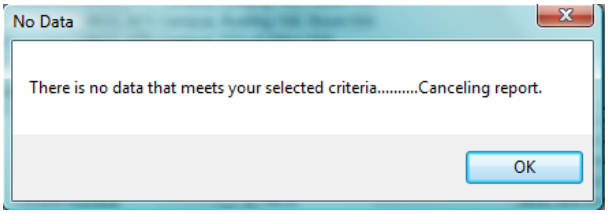
Reporting is the main reason you are using a CMMS System. Reporting gives you bottom line numbers which are updated daily as transactions and data are entered on a daily basis. These bottom line numbers should help you justify your business decisions.

Key Notes on using the TeamWORKS Report Fronts (where you select your criteria before you click the Preview Button):

- If you **don't** select an item from a list, it will include **everything** from that list on the report. If you want to run a report with filtered data, simply click the desired criteria from the boxes.
- You can multi-select options by using the Ctrl+ (Click) option.
- You can select a 'range' (everything between your two clicks) of criteria by using the Shift+ (Click) option.

- To de-select your criteria, click on the button above the selection box.
- Sorting allows you to arrange your report in order based on what you have entered in your Sort Report By box
    - **First** – select your first sort option in this box. If you want to sort alphabetically from A – Z, then leave this button at. If you want to sort Z – A, then click this button and it will change to.
    - **Page Breaks** – some report fronts allow for a page break based on the Criteria selected in the First option. Click the button for a page break. Example: in the screen shot above, the report sill print Alphabetically by Location and clicking the button will skip to a new page for each new location.
    - **Second** – select from this list if you want a second line of sorting. For instance, perhaps you may want your report to be shown Alphabetically by Location (First) then by Received Date next. So your second option would be Received Date.
    - **Third** – select from this list if you want a third line of sorting. Will work the same as the Second Sorting option.
    - When sorting by Date Ranges, leaving the Sort button A – Z will show the **oldest** dates at the top of the report and the most current dates at the end. Changing the sort option from Z – A will put the most current dates at the front or top of the report and the oldest ones at the end of the report
- All report fronts will remain 'Open' after clicking the Preview Button until you click the X or Cancel button. This comes in handy if you are running the same report, but would like to re-run the same report but with maybe slightly different criteria selected.

- Selecting criteria that returns no data will yield the following message



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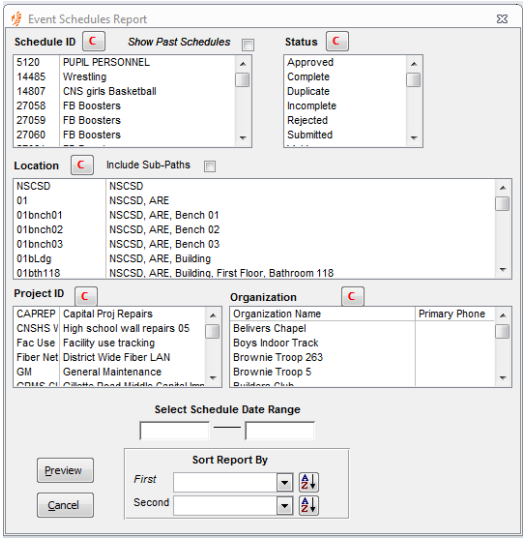
Event Schedules Report

This report shows the events that have been scheduled for any given location and time period either past or future.



- **Schedule ID –** select the Event Schedule ID for which you would like to run the report. Only future schedules are populated in this box, unless the Show Past Schedules check box is checked.
- **Show Past Schedules –** check this box to show all prior schedules. By default it is unchecked.
- **Status –** select the status(es) of the Event Schedules for your report.
- **Location –** select the location(s) for your report.
- **Include SubPaths –** checking this box will also show schedules on the report for the 'child' paths of selected location.
- **ProjectID –** select the ProjectID for which you would like to run the report.
- **Organization –** if you pre-setup your organizations, this box will populate allowing you to run this report for a specified organization.
- **Select Schedule Date Range –** enter the date range for the desired schedules on the report. Double click the fields to open a calendar for selection.
- **Preview –** click here to preview your report.
- **Cancel** – click here to cancel (Close) your report front.

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Event Schedules Report Example

Event Schedules Report

DBCC
Facilities Services

Location / FS ID	Status	Project ID	Schedule Date	Start Time	Hours	Exp. Turnout	Organization	Contact Person	Total Cost
DBCC, ATC Campus, R103 Stairs									
15	Approved	15	2/26/2008	1:00:00 PM	4	150	Methodist Church	Richard Moralez	$0.00
ATCR103		Banquet							
16	Approved	15	2/28/2008	1:00:00 PM	4	150	Methodist Church	Richard Moralez	$0.00
ATCR103		Banquet							
17	Approved	15	2/29/2008	1:00:00 PM	4	150	Methodist Church	Richard Moralez	$0.00
ATCR103		Banquet							
DBCC, Daytona Campus									
33	Approved	ES	3/14/2008	2:00:00 PM	3	50	Methodist Church	Richard Moralez	$0.00
DC		Something going on							
DBCC, Daytona Campus, B12/500, R309 Classroom									
24	Approved	ES	3/10/2008	5:00:00 PM	3	30	Methodist Church	Richard Moralez	$0.00
DC500R309		Church Meeting							
25	Approved	ES	3/14/2008	5:00:00 PM	3	30	Methodist Church	Richard Moralez	$0.00
DC500R309		Church Meeting							
26	Approved	ES	3/17/2008	5:00:00 PM	3	30	Methodist Church	Richard Moralez	$0.00
DC500R309		Church Meeting							
27	Approved	ES	3/21/2008	5:00:00 PM	3	30	Methodist Church	Richard Moralez	$0.00
DC500R309		Church Meeting							
DBCC, Daytona Campus, B37/100, R208B Conference Room									
5	Submitted	ES	3/3/2008	8:00:00 AM	6	100	Methodist Church	Richard Moralez	$0.00
DC100R208B		Staff meetings							

Friday, April 18, 2008 *Event Schedules Report* *Page 1 of 2*

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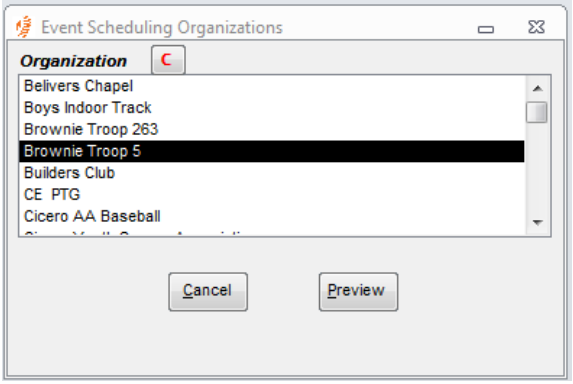
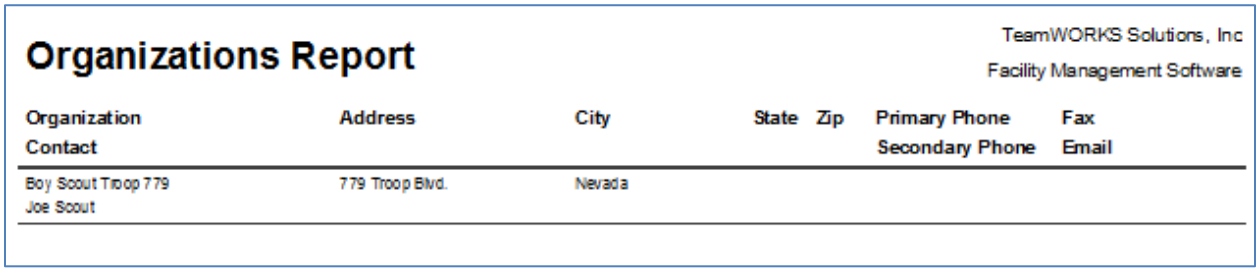
ES Organizations

This report shows contact information for the organizations that have been scheduled for any given location and time period either past or future.





Organizations Report

TeamWORKS Solutions, Inc
Facility Management Software

Organization Contact	Address	City	State	Zip	Primary Phone Secondary Phone	Fax Email
Boy Scout Troop 779 Joe Scout	779 Troop Blvd.	Nevada				

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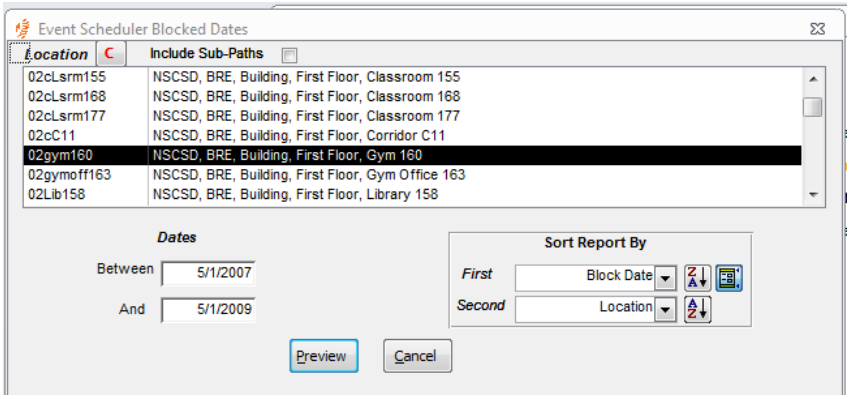
ES Blocked Dates

This report shows block dates for specific locations so NO events can be scheduled for that date within a specified date range.



Event Schedules Fee Types

This report shows Fee Types, Fee Descriptions and Fee Rates for Event Scheduling

Event Schedule Fee Types Report

TeamWORKS Solutions, Inc
Facility Management Software

Fee Type	Description	Fee Rate
ClassifiedSupervision	ClassifiedSupervision	$0.00
Equipment Operator	Equipment Operator	$0.00
Facility Fee	Facility Fee	$0.00
Other	Other Cost	$0.00
Professional Supervision	Professional Supervision	$0.00
System Security	System Security	$0.00

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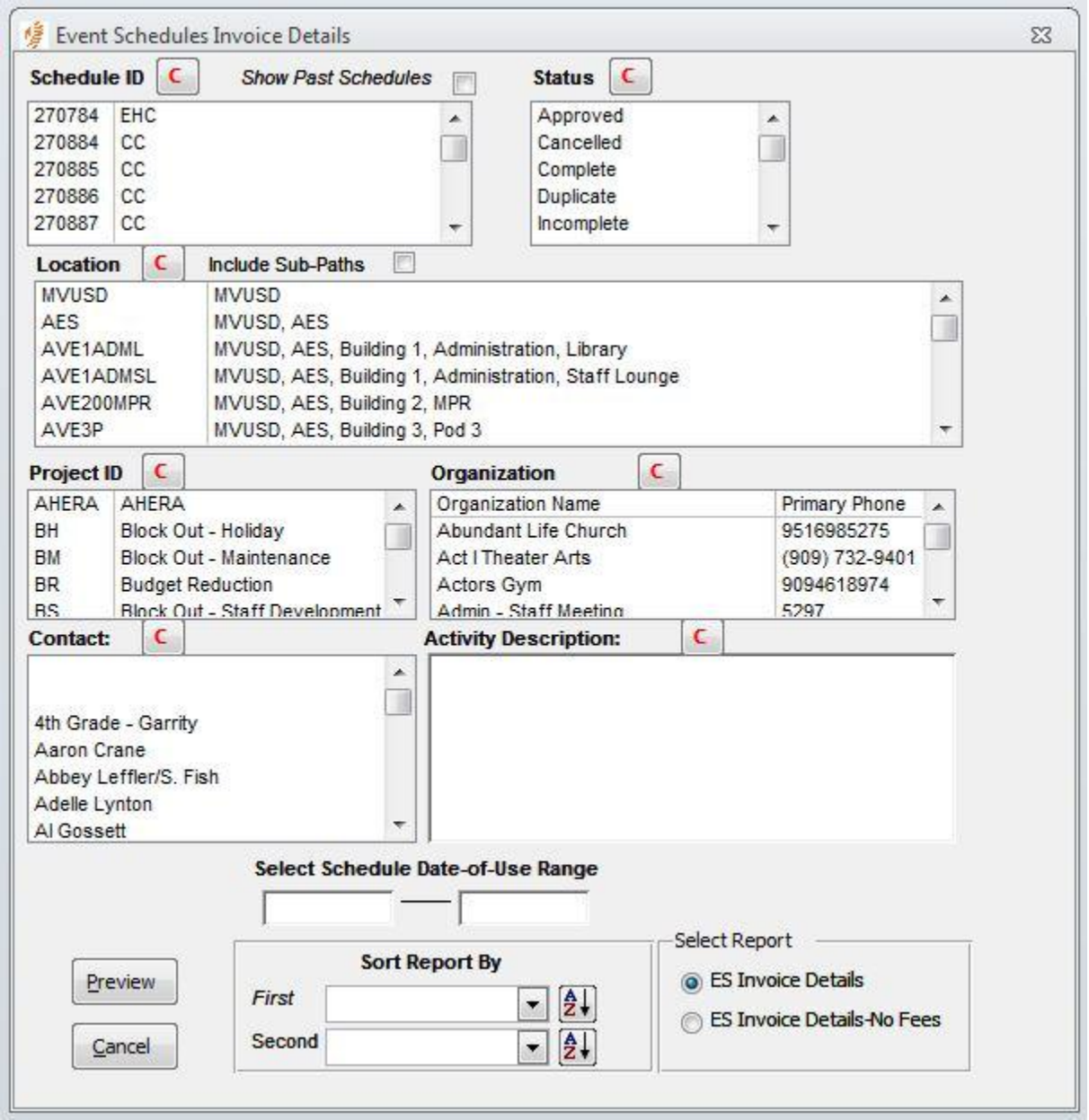
ES Invoice Details Report

This report will give details of the invoice(s) for the selected criteria.



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MVUSD Invoice Details

Civic Center Department
41870 Mc Alby Court
Murrieta, CA 92562
(951) 696-1600 ext. 1136 Fax (951) 304-1532

Admin - Staff Meeting

( ) -5297

Monday, December 10, 2012

Date of Use	Event	Hours	Cost	Amount
Location:	MVUSD, MMHS, Bldg B, B112, Auditorium			
8/10/2012 290066	Administrative Retreat. (Superintendents Office), ALSO USING: Rams Den (MPR), Room 200-202, 213-215			
	Classified Supervision	8.5	$0.00	$0.00
	Equipment Operator	8.5	$0.00	$0.00
	Facility Fee	8.5	$0.00	$0.00
	Classified Supervision	8.5	$0.00	$0.00
	Classified Supervision	8.5	$0.00	$0.00
	Other	8.5	$0.00	$0.00
	System Security	8.5	$0.00	$0.00
	Professional Supervision	8.5	$0.00	$0.00
		68		$0.00
Location:	MVUSD, MMHS, Bldg E, E100, MPR			
8/10/2012 290068	Administrative Retreat. (Superintendents Office), ALSO USING: Rams Den (MPR), Room 200-202, 213-21, Need Tables/Chairs for 100 for lunch in MPR, 2 Long Tables for buffet, Ovation Crt- 3 Tables 2 Chairs for registration & 2 Tables Coffee/Food			
	Facility Fee	8.5	$0.00	$0.00
	System Security	8.5	$0.00	$0.00
	Classified Supervision	8.5	$0.00	$0.00
	Classified Supervision	8.5	$0.00	$0.00
	Classified Supervision	8.5	$0.00	$0.00
	Other	8.5	$0.00	$0.00
	Equipment Operator	8.5	$0.00	$0.00
	Professional Supervision	8.5	$0.00	$0.00
		68		$0.00
Location:	MVUSD, MMHS, Bldg D, D200			
8/10/2012	Administrative Retreat. (Superintendents Office), ALSO USING: Rams Den (MPR), Room 200-202, 213-215			

Customer Support

Email: Support@goTeamWORKS.com

Telephone: Toll Free (866) 892-0034

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