Facility Scheduler User Guide

2013

ACS Facility Scheduler™ is a Web-based calendar and scheduling solution designed specifically to help you manage facilities and equipment. With ACS Facility Scheduler, you can ensure that events are always marked on the calendar and that resources are never double-booked. And since Facility Scheduler is a Web-based application, you can access it from anywhere, at any time.

With Facility Scheduler, you can:

- Create multiple calendars; organize events into designated calendars.
- Prevent booking conflicts by adding your equipment, locations, and people as Resources to be scheduled for events.
- Create Event Types to require information input, create request forms, and select or sort events.
- Arrange meetings, reserve rooms, and book equipment and resources quickly.
- Schedule multiple locations per event.
- Add recurring events, such as a finance committee that meets every second Tuesday or VBS that runs five consecutive days.
- Run reports and create queries on your scheduling data.
- Customize the permissions of Facility Scheduler users to suit the personnel structure of your organization.

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➡ Getting Started

If you need to install Facility Scheduler on your computer, check out the installation instructions. If you are considering purchasing Facility Scheduler, or if you are getting new computers, you may be interested in the system requirements.

If you are setting up Facility Scheduler for the first time, see the Startup Checklist. If you simply need to get familiar with using Facility Scheduler, see Logging In, Changing Your Password, Managing E-mail Notifications, Viewing the Dashboard, and Viewing Calendars.

Facility Scheduler System Requirements

Your computer performance will vary based on hardware configurations, network traffic, and local workstation settings.

Single Computers

Component	Minimum Requirements	Recommended
Operating System	Windows® XP Professional, SP3	Windows 7® (32-bit and 64-bit compatible)
CPU (Processor)	Pentium® 4 class	Multi-core
RAM (Memory)	1 GB (for Windows XP) 2 GB (for Windows Vista or 7)	4 GB or greater
Internet Connection	Required	Required
Screen Resolution	1024 x 768	1024 x 768

Printers

ACS Technologies recommends using a tray-fed laser printer. Facility Scheduler is compatible with laser and inkjet printers, if driver support is available for the associated operating system. We do not recommend specific printers, nor do we guarantee that all printers will work with Facility Scheduler.

Video and Sound Cards

Facility Scheduler requires at least 32 MB of video memory. For all software, ACS Technologies recommends a 17-inch monitor, which is designed at 96 dpi. Wide screen monitors may cause Facility Scheduler to look different on a 17-inch monitor, unless dpi settings are modified.

Internet Considerations & Browsers

As ACS Technologies moves more of our products and services to the Web, we recommend a high speed Internet connection. While an Internet connection is not required for using the basic features of the ACS desktop products, some features are not available without an Internet connection.

These features include, but are not limited to, the following:

- Access ACS™
- Facility Scheduler™
- ACS Sync
- Sending E-mails via Constant Contact
- Remote Deposit Capture
- Safeguard Background Check processing
- Downloading product upgrades
- Downloading tax updates
- ACS LiveStor™
- CASS It!/MAX It!®
- User guides and release notes

ACS Technologies requires installation of Internet Explorer® 8.0 or later to view help topics in Facility Scheduler. However, Internet Explorer is not required to be the default browser.

Network Requirements

Facility Scheduler can be installed and operated on a dedicated server, a terminal server, or on a peer-to-peer network. ACS Technologies does not recommend Internet-based servers, nor do we support them.

Wireless Networks

Facility Scheduler and ACS 10.6 and higher can function properly in a wireless network environment. However, due to the wide variance of connection speeds, the performance and reliability of the software can be negatively affected.

Microsoft End-of-Life

ACS Technologies adheres to Microsoft's life-cycle policy for operating systems. As a system approaches its end-of-life date, ACS Technologies recommends upgrading your operating system. Once an operating system is no longer supported by Microsoft, we can no longer support that system. This does not mean that products will not work on a retired operating system, but it does mean that, should a problem occur that would require an update for a retired operating system, we cannot provide support assistance for clients using those operating systems.

Installing Facility Scheduler

With Facility Scheduler, your data is stored on a remote server. This way, you can access your Facility Scheduler data from multiple computers at the same time. However, to use Facility Scheduler on a computer, you must complete a few setup steps first. You must review the system requirements and ensure that your computer meets the minimum specifications.

Reviewing the System Requirements

Review the Facility Scheduler System Requirements. If your computer meets all of the minimum requirements, it can run Facility Scheduler. However, you may not be able to run multiple other applications at the same time. We encourage using Facility Scheduler on computers that meet the recommended specifications.

Once you have confirmed that your computer meets the minimum requirements, you can install .NET Framework.

Installing Microsoft .NET Framework 3.5

For Facility Scheduler to run, you must download and install .NET Framework 3.5 with Service Pack 1.

To install .NET Framework 3.5 with Service Pack 1

1. Open the .NET Framework downloads page.
2. On the download page, under **Quick details**, click **Download**.
3. Once the file is downloaded, open and run it.
4. In the setup window, follow the instructions.

If you have questions, see the Microsoft instructions. Once you have installed .NET Framework, you can install Facility Scheduler.

Install Facility Scheduler

To start using Facility Scheduler on your computer, you must download and install it.

To install Facility Scheduler

1. Open the Client Portal downloads page.
2. Log in to the downloads page using your e-mail address, site number, and PIN. To locate your site number, reference your Facility Scheduler welcome e-mail.
3. Under **Downloads**, click **ACS Facility Scheduler**.
4. Under **Links**, click **Download**.
5. Once the file is downloaded, open and run it.
6. In the setup window, follow the instructions.

Once you have installed Facility Scheduler, you can open it.

Opening Facility Scheduler

If you installed a desktop shortcut, simply double-click it to open Facility Scheduler. If not, click Start > AllPrograms > ACS Technologies > ACS Facility Scheduler. In the Log On window, enter the user name and password given to you in the Facility Scheduler welcome e-mail. (If you have trouble, see Logging In.) Once you are logged in, you are required to set a new password. (See Updating Your Password for details.)

Now you are ready to set up Facility Scheduler! To assist you, see the Startup Checklist.

Upgrading from Ministry Scheduler

If you are upgrading from Ministry Scheduler, you can use the Facility Scheduler (FS) Conversion utility to move your data from Ministry Scheduler to Facility Scheduler. The FS Conversion utility allows you to select what data is moved, and how it is moved, to Facility Scheduler. Please note that this is not a requirement: you are free to start over with a new dataset instead.

The FS Conversion utility transfers all of your Ministry Scheduler data *except* roles and users. You must add new roles and users when you start using Facility Scheduler.

All Facility Scheduler Data is Erased
When you use the FS Conversion utility, all current data in Facility Scheduler is erased. It is replaced with the data from Ministry Scheduler. If you or another person at your organization has already been using Facility Scheduler, make sure that erasing your data will not cause problems.

To install and run the FS Conversion utility

1. Open the Client Portal downloads page.
2. Log in to the downloads page using your e-mail address, site number, and PIN. To locate your site number, reference your Facility Scheduler welcome e-mail.
3. Under **Downloads**, click **ACS Facility Scheduler Conversion Utility**.
4. Under **Links**, click **Download**.
5. Once the file is downloaded, open and run it.
6. In the conversion window, follow the instructions.

When the conversion process is complete, you receive a confirmation e-mail.

Uninstalling Facility Scheduler

With Facility Scheduler, your data is stored on a remote server. So, if you are not using Facility Scheduler on a particular computer, you can uninstall it from that computer without affecting your data. Uninstalling Facility Scheduler removes the start-menu and desktop shortcuts as well as the Facility Scheduler program files.

To uninstall Facility Scheduler (Windows XP)

1. Close Facility Scheduler on your computer.
2. Click **Start** > **Control Panel**.
3. Click **Add or Remove Programs** in the the Control Panel window.
4. Select **ACS Facility Scheduler** in the Add or Remove Programs window.
5. Click **Remove**.
6. Click **Yes** to confirm.

To uninstall Facility Scheduler (Windows 7 and Vista)

1. Close Facility Scheduler on your computer.
2. Click **Start** > **Control Panel**.
3. Click *Uninstall a Program *in the the Control Panel window. If you don't see this option, click **Programs and Features** first.
4. Select **ACS Facility Scheduler**.
5. Click **Uninstall**.
6. Click **Yes** to confirm.

Logging In

To log in to Facility Scheduler

1. On your computer, click **Start** > **All Programs** > **ACS Technologies** > **ACS Facility Scheduler**.
2. Enter your user name and password.
3. Click **Log On**. Refer to the other topics in this section if you encounter problems logging in

.

Forgot Your Password?

If you forgot your Facility Scheduler password, you can reset it from the log in window. If you entered incorrect passwords five or more times, your account is locked.

To reset your Facility Scheduler password

1. Open Facility Scheduler.
2. In the log in window, enter your user name.
3. Click **Forgot your password?**

An e-mail with instructions for resetting your password is sent to the e-mail address associated with your user name. The e-mail includes a link for resetting your password. For security reasons, the link is only valid for 24 hours. After 24 hours, you must follow these instructions again to have a new reset e-mail sent to you.

You should receive the e-mail within 15 minutes. If you don't, check your spam/junk folder for the e-mail. If all else fails, contact one of your Facility Scheduler administrators to have them reset your password.

> Access ACS Password
> If your Facility Scheduler user account is linked to your Access ACS account, the password for *both* accounts is changed.

Forgot Your User Name?

If you forgot your Facility Scheduler user name, you can have a reminder e-mail sent to you.

To retrieve your Facility Scheduler user name

1. Open Facility Scheduler.
2. Click **Forgot your username?**
3. Enter the e-mail address associated with your user name.
4. Click **OK**.

An e-mail with your user name information is sent. It includes *all* user names associated with the address. If you do not receive the e-mail within 15 minutes, check your spam folder. If necessary, contact one of your Facility Scheduler administrators to have them retrieve your user name.

Logging Into Another Site

By default, Facility Scheduler remembers the last site (dataset) you logged in to. If your organization has more than one site, you will need to switch between them. To switch sites, you must log out of Facility Scheduler.

To log in to another site

1. Open Facility Scheduler.
2. In the log in window, click your site name.
3. Enter the site number of the site you want to access.
4. Click **OK**. Facility Scheduler restarts.
5. Enter your user name and password for the site.
6. Click **OK**.

Updating Your Expired Password

To increase security, your Facility Scheduler administrators may force your password to expire after a certain period of time. When your password expires, you are required to update it after logging in. If you are prompted to reset your password, simply enter a new password (twice, to confirm it).

Passwords must be between 6 and 15 characters long. They cannot contain any part of the user name, and cannot have consecutive letters, numbers, or other characters. We recommend that passwords include at least two letters and two numbers, and are at least eight characters long. Administrators may set additional password requirements for Facility Scheduler users.

Changing Your Password

Passwords must be between 6 and 15 characters long. They cannot contain any part of the user name, and cannot have consecutive letters, numbers, or other characters. We recommend that passwords include at least two letters and two numbers, and are at least eight characters long. Administrators may set additional password requirements for Facility Scheduler users. If you are an administrator, you may want to change another user's password.

To change your password

1. Click the **ACS Button**.
2. Click **Change Password**.
3. Enter your new password.
4. In the **Confirm New Password** field, enter your password again.
5. Click **OK**.

Using Keyboard Shortcuts

Keyboard shortcuts allow you to navigate tabs and launch commands without removing your fingers from the keyboard. Available keyboard shortcuts display as hovering letters on tabs and menus.

Keyboard Shortcuts Display on the Dashboard

To Use Keyboard Shortcuts

1. To display available shortcuts, press the **Alt** key.
2. To navigate to a tab, press the key that corresponds to the shortcut letter. The menu will display additional keyboard shortcuts if they are available.
3. To launch a menu command, press the key that corresponds to the shortcut letter. To view command shortcuts on an open tab, you must first press **Alt**, and then press the tab's shortcut key. For example, if you are on the Reports tab, press **Alt** and then press **R** to view the command shortcuts.

✅ You must press two letters simultaneously to activate some keyboard shortcuts. For example, you must press both **A** and **D** together to navigate to the **Administration** tab.

Viewing the Dashboard

The dashboard provides a list of any action items that require your attention, a list of upcoming events, and a notification area where we can let you know about new features or scheduled maintenance.

To edit an action item or upcoming event on the dashboard

1. Double-click the item.
2. Make the changes.
3. In the **Actions** group, click **Save and Close**.

Viewing Calendars

You can view one or more calendars at the same time. You can view daily, weekly, or monthly calendars. You can view separate grids for each calendar or a combined grid with events color-coded by calendar.

If you hover over an event, a tooltip displays the following:

- Event Name
- Primary Location
- Event Description
- Start Time and End Time
- Setup Time and Teardown Time

If you select an event, the following information displays in the Event Details pane in the lower-left corner:

- Event Name
- Start Time and End Time
- Setup Time and Teardown Time
- Calendar
- Primary Location
- Bookings

You can also print a calendar based on what is displayed on the screen.

To view a calendar

1. On the **Calendar** tab, click **Calendar**.
2. To filter which calendars display in the grid, select the calendars you want to view in the **Calendars** filter on the left-hand side of the page.
3. To view a daily calendar, click the **Day** button.
4. To view a weekly calendar, click the **Week** button.
5. To view a monthly calendar, click the **Month** button.
6. To view all calendars in a single calendar grid, click the **By Date** button.
7. To view each calendar in a separate calendar grid, click the **By Calendar** button.

To print a calendar

1. On the **Calendar** tab, click **Calendar**.
2. In the **Actions** group, click **Print**.
3. Select the **Format Paper** and **Resources** options you want.
4. Click **Print**.

To export a calendar

1. On the **Calendar** tab, click **Calendar**.
2. Manage the view of the calendar to your liking.
3. In the **Actions** group, click **Print**.
4. In the bottom left, click **Print Preview**.
5. On the toolbar, click **Export Document**.
6. Select to export as either a **PDF** or **Image** file.
7. An options window displays. The available options differ depending on your selection. Select your settings and click **OK**.
8. Navigate to the location where you want to save the file.
9. Click **Save**. 

Event Counter

When viewing the calendar homepage in Monthly View, a counter displays at the bottom of the window. The counter displays the total number of events the user can view for the month. Only events contained within the current month display; events from the previous and following months can be viewed but are not included in the count.

> **Event Counts Vary by Permissions**
> The number of counted events varies from user to user depending on the security permissions of each. For example, if you have security rights to view only the Youth calendar then only Youth calendar events are counted.

Viewing Bookings

If an event is dependent upon a specific resource, you can view when the resource is available. For example, you might need to see when the church van is available to take the Sr. High Youth Group to a retreat. In the Bookings view, you can select the van in the list of resources. This shows you all the events that the van is booked for, as well as the times it is available.

To check the availability of a resource

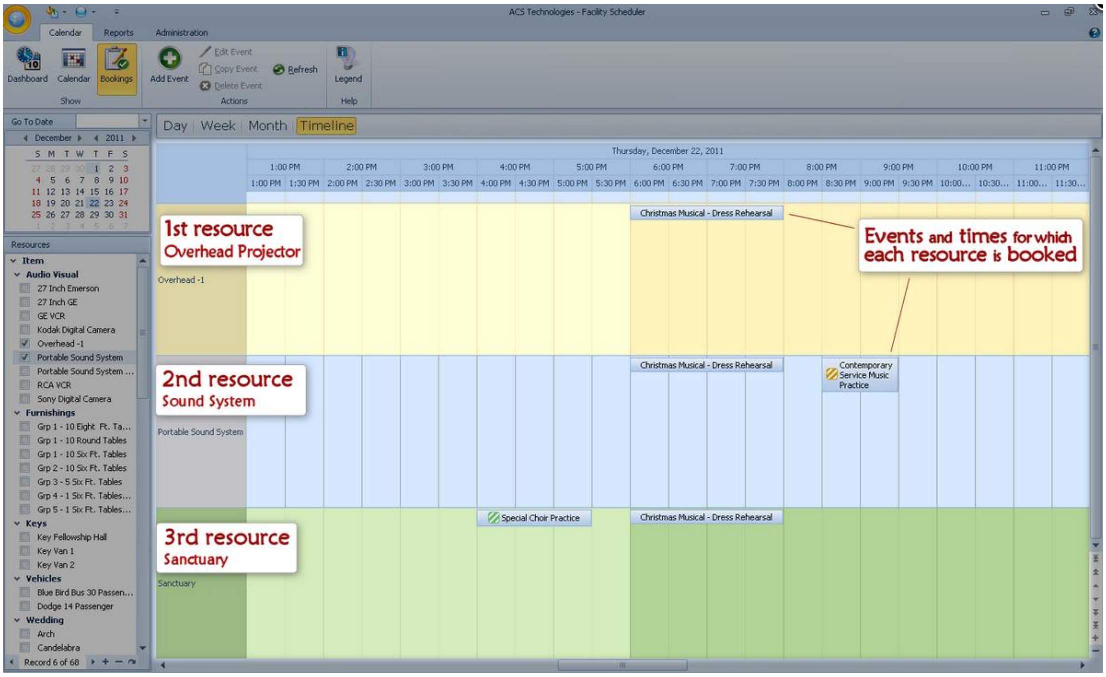
1. On the **Calendar** tab, click **Bookings**.
2. In the Resources list, select the resource(s) you want to view. By default, all resources are selected.
    a. To clear all resources, right-click anywhere in the list and click **Clear All**.
    b. To select all resources, right-click anywhere in the list and click **Select All**.
    c. To clear all resources in a category, right-click within the category and click **Clear All in <Category>**.
    d. To select all resources in a category, right-click within the category and click **Select All in <Category>**.
3. Above the calendar, select **Day, Week, Month,** or **Timeline**. By default, resources are shown in the Timeline view.

The times displayed are the total time that the resource is booked, including setup and teardown time. All events that have booked the resource display, no matter their status (pending, confirmed, and so on). If an event requires more than one resource, you can view multiple resources at once and find a time when they are all available.

> **Create Events and Book Resources**
> In the Bookings view, you can create events and book resources for them. To create an event, in the **Actions** group, click **Add Event**. When you create an event, the resource(s) currently selected is automatically booked for the event.

View by Day, Week, Month, or Timeline

The Timeline is the default view of the Bookings window. The Timeline view is detailed: it shows resource bookings by the half-hour. It is especially helpful for viewing multiple resources at once.



Example — multiple resources in Timeline view

As with calendars, you can also view bookings by day, week, or month.

Example — viewing sanctuary bookings by month

➡ Startup Checklist

When you install Facility Scheduler and log in for the first time, you already have a main calendar that you can add events to immediately. However, to get the most out of the program, you should add resources to manage your facilities, calendars to organize your events, event types to manage the information required for each event, and roles and user accounts so that other people can view and add events.

To-do Checklist

Once you have installed Facility Scheduler, complete the following tasks to set it up.

- ☑ Define resource type custom fields.
- ☑ Add resource categories.
- ☑ Add resources.
- ☑ Add calendars.
- ☑ Add event types.
- ☑ Add roles.
- ☑ Add users.
- ☑ Add events.

➡Events

Events are scheduled activities. Examples of events include:

- Worship
- Vacation Bible School
- Weddings
- Weekly meetings
- Special programs
- Athletic events

You must add events to a specific calendar. You can also publish events so that they are viewable to all Facility Scheduler (and Access ACS) users.

Date and Time

Events must have a start date and an end date. They can contain start and end times or be all-day events. Events usually take place on a single day, but they can span two or more days. You can also add recurring events, such as a staff meeting that occurs every Tuesday at 9:00 am.

Scheduling

You can book resources for an event, such as a location or specific equipment. You can schedule an event tentatively and then have it approved and confirmed by designated users.

Details

You can add specific details to an event, depending on the event type. Events can also contain attachments and notes. You can assign an image to an event. The image displays in the event details and on the List of Events report in Facility Scheduler, and in the event details in Access ACS.

Event Registration

You can set up events so that your members and their guests can register for them. For example, if you schedule a youth trip to an amusement park, you can set it up so that your members can register and pay for the event using Access ACS.

Adding Events

Events contain a name, date, and time and are assigned to a specific calendar. You can also specify an event type, which usually requires additional information. By default, events are added with a pending status.

To add an event

1. On the **Calendar** tab, click **Calendar**.
2. In the **Actions** group, click **Add Event**, then select an event type and click **OK**.
3. In the **Name** field, enter the name of the event.
4. In the **Calendar** list, select the calendar for the event.
5. If you want all Facility Scheduler and Access ACS users to be able to view the event, select **Published**.
6. In the **Primary Location** field, click **Browse** to select a location for your event.
7. Enter a **Start Time** and **End Time**. To add an all day event, select **All Day**.
8. Select the appropriate **Tags** for the event. You must have rights to select or add tag. Fill in the other fields as necessary.
9. In the **Actions** group, click **Save and Close**.

To add a recurring event

1. On the **Calendar** tab, click **Calendar**.
2. In the **Actions** group, click **Add Event**, then select an event type and click **OK**.
3. In the **Name** field, enter the name of the event.
4. In the **Calendar** list, select the calendar for the event.
5. If you want all Facility Scheduler and Access ACS users to be able to view the event, select **Published**.
6. In the **Primary Location** field, click **Browse** to select a location for your event. Enter a **Start Time** and **End Time**. To add an all day event, select **All Day**.
7. In the **Options** group, click **Recurrence**, then set the **Recurrence pattern** and **Range of recurrence**. Click **OK**, and then fill in the other fields as necessary.
8. In the **Actions** group, click **Save and Close**.

After you've added an event, you can also book resources for it. If you want people to register for this event, see Event Registration.

Setting and Changing a Primary Location

You can confirm a location's availability and reserve it as a primary location during event creation. You can also book the event's primary location after you've created the event.

To book a primary location

1. On the **Calendar** tab, click **Calendar**.
2. To create a new event, click **Add Event**. To edit an existing event, double-click the event on the calendar.
3. Under **Event Details**, in the **Primary Location** field, click **Browse**
4. Select the location. The locations available for this time display.
    a. To also display booked locations, select **Include Booked Resources**.
5. Click **OK**.
6. Click **Save & Close**.

You can change the existing primary location at any time.

To change a primary location

1. On the **Calendar** tab, click **Calendar**.
2. To edit an existing event, double-click the event on the calendar.
3. Under **Event Details**, in the **Primary Location** field, click **Browse**
4. To delete the existing primary location, click **Yes**. Alternatively, you can choose to leave the existing primary location as a resource for this event.
5. Select the location. The locations available for this time display.
6. Click **OK**.
7. Click **Save & Close**.

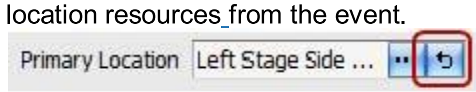
If you have booked more than one location for this event, you can also switch between them to select a new primary location.

To switch to a new primary location

1. On the **Calendar** tab, click **Calendar**.
2. To edit an existing event, double-click the event on the calendar.
3. Under **Event Details**, in the **Primary Location** field, click the list arrow.
4. Select the location from the drop-down list.
5. Click **Save & Close.**

On the **Bookings** window, you will receive an error if you try to delete a primary resource location. You must first remove all other locations, then remove the primary location from **Event Details**.

To remove a primary location from an event

1. On the **Bookings** window, remove all other location resources from the event.
2. Under **Event Details**, click the arrow button 

to remove this location as your primary location.
3. On the **Bookings** tab, repeat steps 1 and 2 to remove the location from the event.
4. Click **Save**, and then **Close**.

Setting Recurrence

When you add an event, you can have it recur at different intervals. For example:

- A weekly bible study or choir practice.
- A monthly session or committee meeting.
- A yearly festival planning meeting

To set up recurrence

1. On the **Calendar** tab, click **Calendar**.
2. Add a new event.
3. In the **Options** group, click **Recurrence**.
4. Select the event **Start** and **End** times.
5. Select the **Recurrence Pattern** for the event.
6. Select how long you want the recurrence to last from the **Range of recurrence** options.
7. Click **OK**.
8. In the **Actions** group, click **Save & Close**.

To add recurrence to an existing event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to set up recurrence for.
3. In the **Options** group, click **Recurrence**.
4. Select the **Recurrence Pattern** for the event.
5. Select how long you want the recurrence to last from the **Range of recurrence** options.
6. Click **OK**.
7. In the **Actions** group, click **Save & Close**.

To edit event recurrence

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to edit recurrence for.
3. In the **Options** group, click **Recurrence**.
4. Make the necessary changes to the recurrence pattern.
5. Click **OK**.
6. In the **Actions** group, click **Save & Close**.

Recurrence Pattern

There are several recurrence pattern options available:

No Recurrence — Select this option if the event occurs only once. **Daily** — Select this option if the event occurs for multiple consecutive days. In the field, enter the number of days the event repeats.

Weekly — Select this option if the event occurs once during a set period of weeks, and the event repeats on the same day of the week as the original event. For example, if you issue payroll checks every two weeks, you can create an event for the payroll on Friday and set it to repeat every two weeks.

Monthly — Select this option if you want the event to repeat on a monthly basis. Two options are available for setting the monthly occurrence:

- **Day <num> of every <num> month(s)** — Select this option if the event occurs on the same date each month. For example, you create an event on June 20th and set it to repeat twice. The calendar displays the event on June 20th, July 20th, and August 20th.

- **The <num><day> of every <num> month(s)** — Select this option if the event occurs on the same day of the week each month. For example, your organization schedules a meeting for the second

Tuesday of each month. You can set the event to repeat on the second Tuesday of each month for a set number of occurrences.

Yearly — Select this option if you want the event to repeat on a yearly basis. Two options are available for setting the yearly occurrence:

- **Every <month><num>** — Select this option if the event occurs on the same date each year. For example, your church anniversary is September 7th. You can set the church anniversary event to repeat on September 7 for a set number of years.

- **The <num> <day> of <month>** — Select this option if the event repeats once each year on the same day of the week during a specified month. For example, Thanksgiving occurs on the fourth Thursday in November each year. You can set the event to repeat once each year on the fourth Thursday of November for a set number of occurrences.

Range of Recurrence

Set the date range you want the recurrence to run for.

Start — Enter the start date for the recurrence range. To select the date from a calendar, click
End after <num> occurrences — Select this option if you want the event to end after a set number of occurrences.
End by — Select this option if you want the event to end after a specific date. Enter the end date in the field. To select the date from a calendar, click

Adding and Managing Dates

The Add/Manage Dates button lets you add more dates or remove existing ones from the recurrence. This lets you vary the dates of the event beyond the available recurrence options.

To add dates

1. On the **Calendar** tab, click **Calendar**.
2. Select the recurring event you want to add to or manage dates for.
3. In the **Actions** group, click **Edit Event**.
4. Select **Edit the series**, then click **OK**.
5. In the **Options** group, click **Recurrence**.
6. Click **Add/Manage Dates**.
7. Locate and select the date to add, right-click and select **Add Date**. Continue doing so until you have all the dates you require.
8. Click OK to exit the **Add/Manage Dates** window.
9. Click OK to exit the **Recurrence** window.
10. In the **Actions** group, click **Save & Close**.

To delete dates

1. On the **Calendar** tab, click **Calendar**.
2. Select the recurring event you want to add to or manage dates for.
3. In the **Actions** group, click **Edit Event**.
4. Select **Edit the series**, then click **OK**.
5. In the **Options** group, click **Recurrence**.
6. Click **Add/Manage Dates**.
7. Locate the date you want to delete, right-click the date and select **Delete Date**.
8. Confirm the deletion.
9. Click **OK** to exit the **Add/Manage Dates** window.
10. Click **OK** to exit the **Recurrence** window.
11. In the **Actions** group, click **Save & Close**.

> **Tip**
> To remove all of the dates listed, click **Clear All Dates**. However, you must select at least one date for the event before you can approve and save.

Multiple Calendars

When you create an event, you must select the calendar you want to display the event on. But, what if you want to display the event on more than one calendar? For example, a wedding should display on both the Wedding and Main calendars. With the Multiple Calendars option, you can post an event to as many calendars as you have rights to add to.

To add an event to multiple calendars

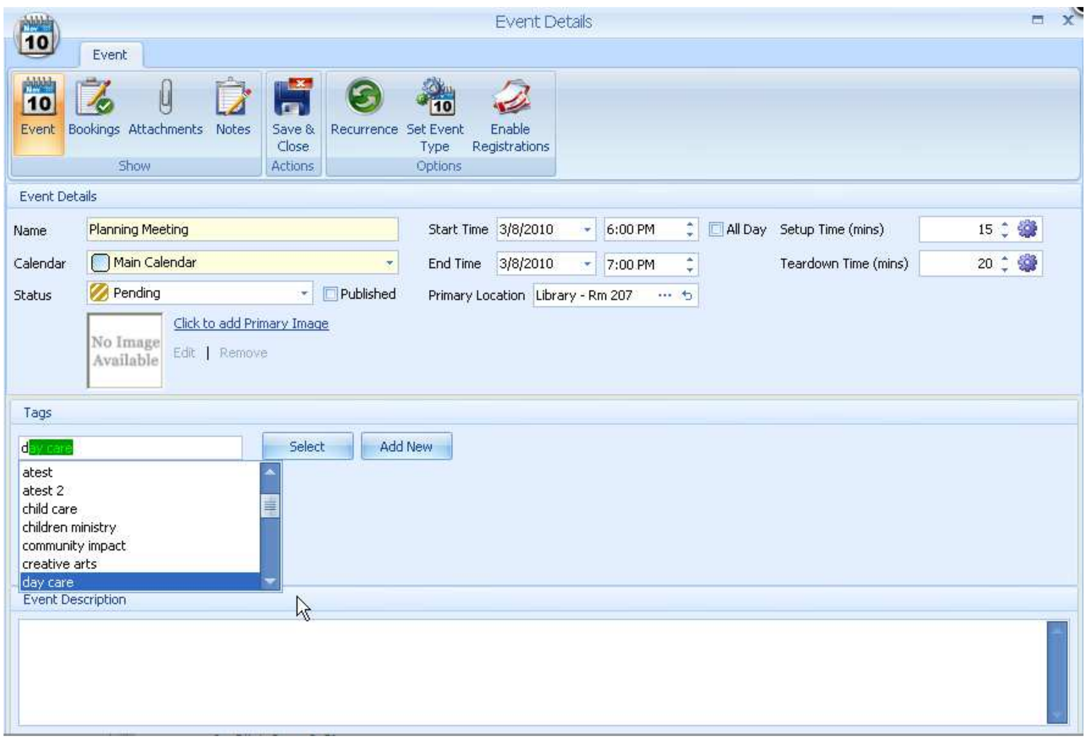
1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to edit.
3. In the **Actions** group, click **Edit Event**.
4. In the **Options** group, click **Multiple Calendars**.
5. Select the calendars you want the event to display on.
6. Click **OK**.
7. In the **Actions** group, click **Save & Close**.

Assigning Tags to Events

Use tags provide to describe and categorize events. You can add tags when you create an event or at a later date. To add tags to a past event or an event that has already been created, you must edit the event.
Tags can be added to a single event or a series of recurring events.

To add tags to an established event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to add tags to.
3. In the **Actions** group, click **Edit Event**. If the event is part of a series, select to edit just the occurrence or the entire series.
4. In the **Tags** section, enter the first letter of the tag in the **Tags** field. A drop-down list displays with the first tag that begins with the letter you entered highlighted.
5. If the highlighted tag is the one you want, click **Select**. If not, scroll through the list until you find the correct one, then click **Select**.
6. Continue adding tags until you are finished.
7. Click **Save & Close**.



If the tag you want to add is not in the tag list, you will need to create it. You must have the appropriate rights to create a new tag from the Event Details window.

To create a new tag for an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to add tags to.
3. In the **Actions** group, click **Edit Event**. If the event is part of a series, select to edit just the occurrence or the entire series.
4. Click **Add New**.
5. Enter a **Tag Name**.
6. Click **Save & Close**.

To create a new tag in the Event Details window

1. In the **Tags** section of the **Event Details** page, click **Add New**.
2. Enter a **Tag Name**.
3. Click **Save & Close**.

> **Caution**
> Make sure you **Save & Close** the *event*, otherwise the tags you added are not saved.

After you save the tag, it is automatically added to the event and displays in the tag list.

Additional Information

- Tags cannot contain apostrophes.
- Tags have a 30-character limit.
- Spaces are allowed in tags, but do count in the 30 character limit.
- All tag names are automatically converted to lowercase.
- There is a limit of 20 tags per event.
- The permission to select tags for an event must be turned on for each role for each calendar.
- The permission to add, edit, and delete tags must be turned on in the Edit Permissions window for each role.
- The permission to add/edit tags is a pre-requisite to deleting tags. You can have permission to add/edit tags but not have rights to deleting tags.

Removing Tags from Events

At some point, it may be necessary to remove a tag from an event. This may be because the tag no longer adequately describes what the event is about, or your organization may be phasing that specific tag out of the system.

To remove a tag from an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to edit the tags for.
3. In the **Actions** group, click **Edit Event**. If the event is part of a series, select to edit just the occurrence or the entire series.
4. In the **Tags** section, click the tag you want to delete.
5. Click **OK**.

Publishing Events

By default, you can only view events on the calendar that they are added to. However, you can publish events so that they are viewable to all Facility Scheduler (and Access ACS) users.

To publish an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** area, select **Published**.
5. In the **Actions** group, click **Save & Close**.

> ✅ You can change the **Published** setting on a canceled event if you want to show or hide it on a calendar.

Approving and Confirming Events

Facility Scheduler enables you to have an event confirmation process. There are three statuses in this process:

- **Pending** — A pending event is on the calendar, but booked resources are not reserved for it, and the event has not been approved by the designated people. By default, new events are added with a status of pending.
- **Approved** — A status of approved means that someone with the authority has determined that the event is appropriate for the church.
- **Confirmed** — A status of confirmed means that all booked resources for the event have been reserved.

If a user makes changes to an event after the status changes, conflicts may occur that require the event to go through approval and confirmation again.

> ⚠ **Permissions**
> Only users with the appropriate rights can approve and confirm events. Users with edit rights can only edit events in a pending status, unless they also have rights to approve or confirm the event. To learn more, see Assigning Permissions.

To approve an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to approve.
3. In the **Actions** group, click **Edit Event**.
4. In the **Status** list, select **Approved**.
5. In the **Actions** group, click **Save and Close**.

To confirm an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to confirm.
3. In the **Actions** group, click **Edit Event**.
4. In the **Status** list, select **Confirmed**.
5. In the **Actions** group, click **Save and Close**.

Editing Events

Wednesday night fellowship starts at 6:00pm, not 6:30pm — woops! For whatever reason, you can edit events in Facility Scheduler. If you are also an Access ACS user, changes you make to Facility Scheduler events are also updated in Access ACS. However, keep in mind that users who copied events to their personal calendars are not notified of changes.

To edit an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to edit.
3. In the **Actions** group, click **Edit Event**.
4. Make the changes to the event.
5. In the **Actions** group, click **Save & Close**.

To edit a recurring event

1. On the **Calendar** tab, click **Calendar**.
2. Select the recurring event you want to edit.
3. In the **Actions** group, click **Edit Event**.
4. Select to edit the single occurrence or the event series.
5. Click **OK**.
6. Make the changes to the event.
7. In the **Actions** group, click **Save & Close**.

Editing an Event Type

Whether it was incorrectly entered from the start or the nature of the event changed, you can change the event type.

Warning
If you change the event type, all information specific to that event type is deleted.

To edit an event type within an event

1. In the **Show** group, click **Calendar**.
2. Double-click the event with the event type to edit. If the event is part of a series, select to edit only the selected occurrence or the entire series.
3. Click **OK**.
4. In the **Options** group, click **Set Event Type**.
5. Select the new **Event Type**.
6. Click **OK**.

Copying Events

There are a variety of reasons for copying events. For example, say that you periodically host youth lock-in retreats that always occur at the same location and require the same equipment. To save time, you can simply copy the most recent retreat event and change the information you need, such as the date and time.

Only users with the rights to edit an event can copy it. When you copy an event, all of the event information is duplicated. After copying the event, you can edit all of the information freely. When you copy an event, the copied event is unpublished (even if you copied a published event). You must manually publish the copied event. The person who copied the event is listed as the user who added it.

> **Pending Status**
> All copied events have a pending status until they have been approved and confirmed.

To copy an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to copy.
3. In the **Actions** group, click **Copy Event**

The new event displays as **Copy of <Event Name>** on the same date as the original event. You can now edit the event as you see fit.

Canceling Events

Canceling an event frees up any booked resources, but leaves a record of the cancelled event on the calendar. This is different from deleting an event, which frees up any booked resources *and* removes it from the calendar.

If you cancel an event that people have registered for, all registrations are canceled. However, you must process any refunds in Access ACS.

> **Access ACS Permissions Required**
> To cancel events with registrations, you must have rights to **Event Registration Setup** in the **Ad ministration** area.

To cancel an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to cancel.
3. In the **Actions** group, click **Edit Event**.
4. In the **Status** list, select **Canceled**.
5. In the **Actions** group, click **Save and Close**.

> If you are canceling a published occurrence of an event, a prompt will ask if you want to remove the published setting. If you choose to leave the occurrence published, it will remain visible to other people on the calendar.

Why Can't I Cancel or Delete an Event?

Not all cancel and delete options are available at all times. This varies depending on the Access ACS and Facility Scheduler security settings, and the type of money associated with an event. If you cannot perform one of the cancel or delete functions, refer to the table below to determine the cause.

	Cancel Event Registration	Delete Event Registration	Delete Entire Event
Event is either free or no online money is associated with it. **Access ACS**: Event Registration Events security bit and Event Registration Setup security bit set to Grant. **Facility Scheduler**: Delete Event security bit set to Grant.	In **Access ACS**, the event displays in the Canceled Events section; cancellation e-mails are sent to participants. In **Facility Scheduler**, the event displays as Canceled; connection to the event registration is lost.	In **Access ACS**, the event is deleted. In **Facility Scheduler**, the connection to Access ACS is lost so there is no status change.	In **Access ACS**, the event is deleted. In **Facility Scheduler**, the event is deleted.
Event has only online money associated with it. **Access ACS**: Event Registration Events security bit, and Event Registration Setup security bit set to Grant. **Facility Scheduler**: Delete Event security bit set to Grant.	In **Access ACS**, the event displays in the Canceled Events section; cancellation e-mails are sent to participants. In **Facility Scheduler**, the events displays as Canceled and connection to the event registration is lost.	This option is not available in this specific situation because online money is associated with the event.	This option is not available in this specific situation because online money is associated with the event.
Access ACS: Event Registration Events security bit set to Deny; Event Registration Setup security bit set to Grant. **Facility Scheduler**: Delete Event security bit set to Grant.	In **Access ACS**, the event displays in the Canceled Events section; cancellation e-mails are sent to participants. In **Facility Scheduler**, the events displays as Canceled and connection to the event registration is lost.	This option is not available in this specific situation because of the selected security bit settings.	This option is not available in this specific situation because of the selected security bit settings.
Access ACS: Event Registration Events security bit set to Grant; Event Registration Setup security bit set to Deny. **Facility Scheduler**: Delete Event security bit set to Grant.	This option is not available in this specific situation because of the selected security bit settings.	This option is not available in this specific situation because of the selected security bit settings.	This option is not available in this specific situation because of the selected security bit settings.
Access ACS: Event Registration Events security bit set to Deny; Event Registration Setup security bit set to Deny. **Facility Scheduler**: Delete Event security bit set to Deny.	This option is not available in this specific situation because of the selected security bit settings.	This option is not available in this specific situation because of the selected security bit settings.	This option is not available in this specific situation because of the selected security bit settings.

➡Booking Resources

In Facility Scheduler, you can book resources for specific events. This reserves the resource and prevents scheduling conflicts. For example, you can book the fellowship hall for the luncheon, the van for a youth trip, or the pastor for a wedding. When a resource is booked, no other event can schedule that resource for the same time.

Setup and Teardown Time

When a resource is reserved for an event, it often has to be reserved for longer than the actual event. For example, if the fellowship hall is booked for a luncheon, you will need to reserve it for several hours before and after the event to set up the room before the luncheon or clean up afterward. In ACS Facility Scheduler, these are called setup time and teardown time. When booking resources, you can add setup and teardown times to the event. These times can be calculated based on the default setup and teardown times for the resources you have booked, or be unique to the event.

When you enter a setup and/or teardown time manually, and then add one or more resources to the event one of the following happens:

- If the total time of the resources is **less** than the manually entered time, no changes are made.
- If the total time of the resources is **greater** than the manually entered time, the manually entered time changes to match the resource time.

Booking Multiple Locations

Some events make use of more than one location. For example, a wedding might take place in the main sanctuary, but the event also requires that several other rooms be booked for the wedding parties to prep and for the reception. In this case, you can designate the main sanctuary as the primary location.

Resource Notes

Booked resources can contain notes specific to the event. Each resource has a default note, which contains the resource’s description. This note can be customized for each event. For example, when booking chairs, you can include instructions for setting up the chairs.

Checking Resource Availability

If an event is dependent upon a specific resource, you can view when the resource is available. For example, you might need to see when the church van is available to take the Sr. High Youth Group to a retreat. In the Bookings view, you can select the van in the list of resources. This shows you all the events that the van is booked for, as well as the times it is available.

To check the availability of a resource

1. On the **Calendar** tab, click **Bookings**.
2. In the Resources list, select the resource(s) you want to view. By default, all resources are selected.
3. To clear all resources, right-click anywhere in the list and click **Clear All**.
4. To select all resources, right-click anywhere in the list and click **Select All**.
5. To clear all resources in a category, right-click within the category and click **Clear All in <Category>**.
6. To select all resources in a category, right-click within the category and click **Select All in <Category>**
7. Above the calendar, select **Day, Week, Month,** or **Timeline**. By default, resources are shown in the Timeline view.

Events with the booked resource display.

The times displayed are the total time that the resource is booked, including setup and teardown time. All events that have booked the resource display, no matter their status (pending, confirmed, and so on). If an event requires more than one resource, you can view multiple resources at once and find a time when they are all available.

> ✅ **Create Events and Book Resources**
> In the Bookings view, you can create events and book resources for them. To create an event, in the **Actions** group, click **Add Event**. When you create an event, the resource(s) currently selected is automatically booked for the event.

View by Day, Week, Month, or Timeline

The Timeline is the default view of the Bookings window. The Timeline view is detailed: it shows resource bookings by the half-hour. It is especially helpful for viewing multiple resources at once.

Adding Resources to Existing Events

After an event has been added, you can book additional resources for it. If the event has already been confirmed, the resource is booked immediately.

To add a resource to an existing event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event.
3. In the **Actions** group, click **Edit Event**.
4. In the **Show** group, click **Bookings**.
5. In the **Actions** group, click **Add Resource**. The resources available for this time display. To also display booked resources, select **Include Booked Resources**.
6. Select the resource and click **OK**.
7. To change the quantity that you are booking, click in the quantity field and enter the number.
8. To enter a note for the resource, click the **Note** field.
9. Change the **Setup Time** and **Teardown Time** as necessary. You can click to calculate the setup and teardown times based on the defaults for the resources you have booked, or you can enter different setup and teardown times.
10. Click **Save and Close**.

When you enter a setup and/or teardown time manually, and then add one or more resources to the event one of the following happens:

- If the total time of the resources is **less** than the manually entered time, no changes are made.
- If the total time of the resources is **greater** than the manually entered time, the manually entered time changes to match the resource time.

If you are assigning the primary location of an event, follow these instructions instead.

To book a primary location for an existing event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event.
3. In the **Actions** group, click **Edit Event**.
4. Under **Event Details**, in the **Primary Location** field, click **Browse**
5. Select the location. The locations available for this time display. To also display booked locations, select **Include Booked Resources**.
6. Click **OK**.
7. Click **Save & Close**.

Booking Availability Status

Icon	Indicates
	The resource is available for use during this time.
	The resource is either partially booked (if you have two vans, one is available and one has been booked) or has been requested for another event that is pending or approved, but not yet confirmed.
	Not available — the resource is booked by an event that is confirmed.
	The resource is requested by an event that has been canceled.

You can request resources that are already booked, but the event cannot be confirmed unless the resource is removed from the other event. If the resource is an item, the number of items available displays in the Available Quantity column. For example, if you have three vans, and one has been booked for a youth group trip, the Available Quantity column shows "2 of 3."

Adding Events with Bookings

You can book resources at the same time that you add an event. When the event is confirmed, the resources will be reserved and cannot be booked by another event unless the first event is cancelled or deleted.

To add an event with bookings

1. On the **Calendar** tab, click **Calendar**.
2. In the **Actions** group, click **Add Event**.
3. Select an event type and click **OK**.
4. In the **Name** field, enter the name of the event.
5. In the **Calendar** list, select the calendar you want to add the event to.
6. Enter a **Start Time** and **End Time**. To add an all day event, select **All Day**.
7. Fill in the other fields as necessary.
8. In the **Show** group, click **Bookings**.
9. In the **Actions** group, click **Add Resource**. The resources available for this time display. To also display booked resources, select **Include Booked Resources**.
10. Select the resource and click **OK**.
11. To change the quantity that you are booking, click in the quantity field and enter the number.
12. To enter a note for the resource, click the **Note** field.
13. Change the **Setup Time** and **Teardown Time** as necessary. You can click to calculate the setup and teardown times based on the defaults for the resources you have booked, or you can enter different setup and teardown times.
14. Click **Save and Close**.

When you enter a setup and/or teardown time manually, and then add one or more resources to the event one of the following happens:

- If the total time of the resources is **less** than the manually entered time, no changes are made.
- If the total time of the resources is **greater** than the manually entered time, the manually entered time changes to match the resource time.

If you are assigning the primary location of an event, follow these instructions instead.

To add an event with a primary location

1. On the **Calendar** tab, click **Calendar**.
2. In the **Actions** group, click **Add Event**.
3. Select an event type and click **OK**.
4. In the **Name** field, enter the name of the event.
5. In the **Calendar** list, select the calendar you want to add the event to.
6. Enter a **Start Time** and **End Time**. To add an all day event, select **All Day**.
7. Fill in the other fields as necessary.
8. Under **Event Details**, in the **Primary Location** field, click **Browse**
9. Select the location. The locations available for this time display. To also display booked locations, select **Include Booked Resources**.
10. Click **OK**.
11. Click **Save and Close**.

Booking Availability Status

Icon	Indicates
	The resource is available for use during this time.
	The resource is either partially booked (if you have two vans, one is available and one has been booked) or has been requested for another event that is pending or approved, but not yet confirmed.
	Not available — the resource is booked by an event that is confirmed.
	The resource is requested by an event that has been canceled.

You can request resources that are already booked, but the event cannot be confirmed unless the resource is removed from the other event. If the resource is an item, the number of items available displays in the Available Quantity column. For example, if you have three vans, and one has been booked for a youth group trip, the Available Quantity column shows “2 of 3.”

Removing Booked Resources from Events

If a resource is no longer required for an event, you can remove it from the event. If the event was confirmed, the resource becomes available for other events.

To remove a booked resource from an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to remove the resource from.
3. In the **Actions** group, click **Edit Event**.
4. In the **Show** group, click **Bookings**.
5. Select the resource you want to remove from the event.
6. In the **Actions** group, click **Remove Resource**.
7. Change the **Setup Time** and **Teardown Time** as necessary. You can click  to calculate the setup and teardown times based on the defaults for the resources you have booked, or you can enter difference setup and teardown times.
8. In the **Actions** group, click **Save and Close**.

When you enter a setup and/or teardown time manually, and then add one or more resources to the event one of the following happens:

- If the total time of the resources is **less** than the manually entered time, no changes are made.
- If the total time of the resources is **greater** than the manually entered time, the manually entered time changes to match the resource time.

To remove a primary location from an event

1. Remove all other location resources from the event.
2. Under **Event Details**, click 

to remove this location as your primary location.
3. On the **Bookings** tab, repeat steps 1 and 2 to remove the location from the event.
4. Click **Save**, and then **Close**.

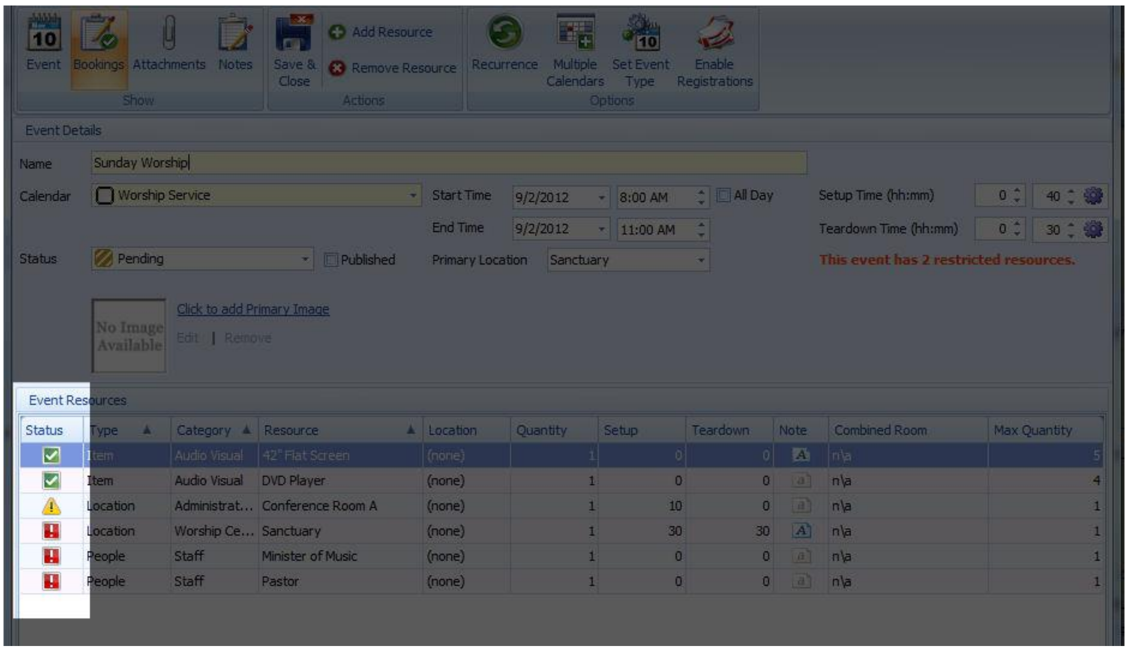
Resolving Conflicted Bookings

When you book resources for an event, you can view the availability status of each resource. You can also determine which event has booked the resources you need, allowing you to make arrangements to share resources or adjust scheduling. While you can still create and save an event that contains a resource conflict, you can not confirm the new event until you resolve the conflict.

> Facility Scheduler takes into consideration the setup and tear down times when calculating resource conflicts.

Determining Resource Availability Status

When you [add a new resource](#) to an event on the **Bookings** window, the **Event Resources** section displays an availability status icon. You can use this icon to determine the resource availability.

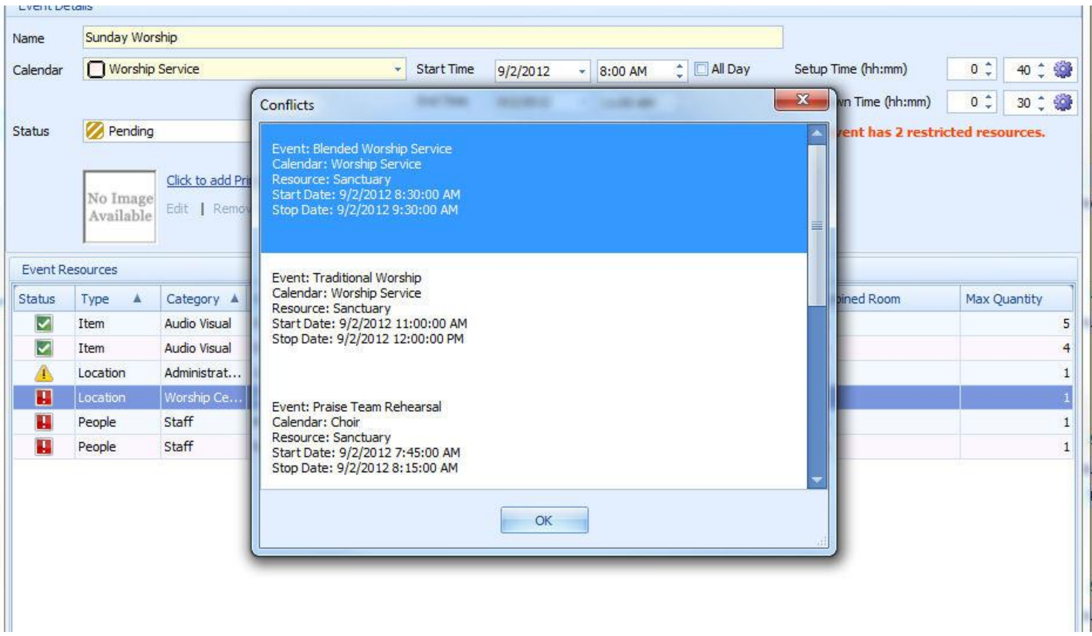


Icon	Indicates
	The resource is available for use during this time.
	The resource is either partially booked (if you have two vans, one is available and one has been booked) or has been requested for another event that is pending or approved, but not yet confirmed.
	Not available — the resource is booked by an event that is confirmed.
	The resource is requested by an event that has been canceled.

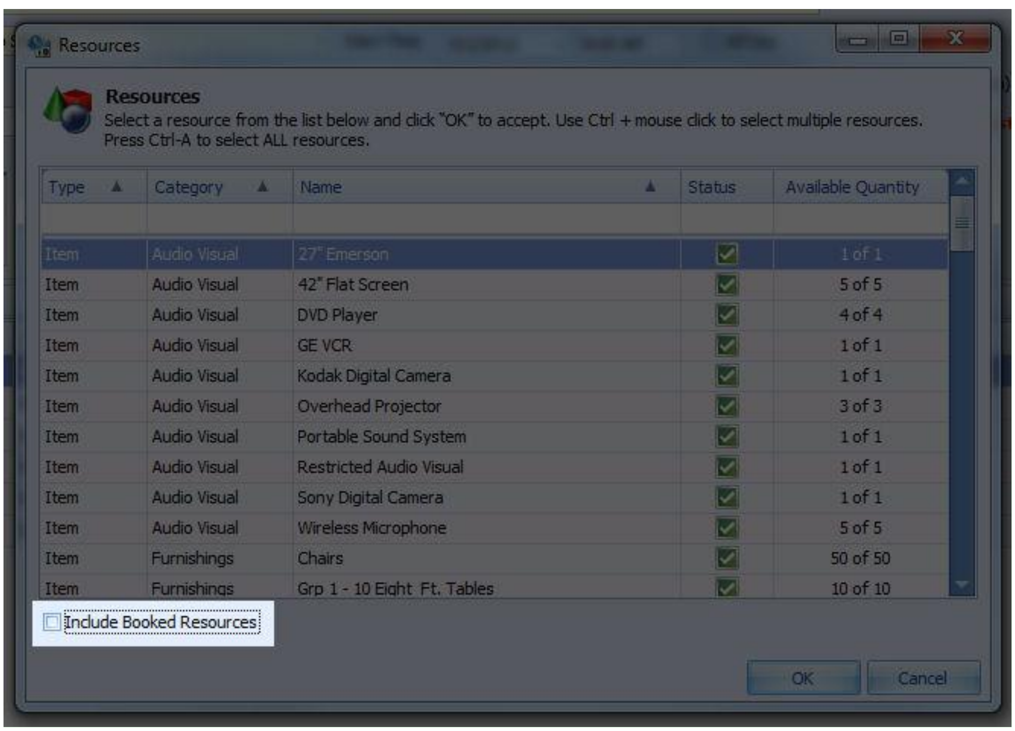
If the resource is an item, the number of items available displays in the Available Quantity column. For example, if you have three vans, and one has been booked for a youth group trip, the Available Quantity column shows “2 of 3.”

Viewing Conflict Details

If you want more information about a conflicted resource, double-click the red or yellow status indicator on the **Bookings** window. This opens the **Conflicts** window and provides further details about other events that have booked a specific resource.



To prevent accidentally selecting unavailable resources while booking resources for your event, clear the **Include Booked Resources** option. This will hide unavailable resources.



Attachments

You can attach an unlimited number of media files, such as documents and images, to events. For examples, you might attach specific setup instructions, images of the room layout, or spreadsheets with lists of attendees. You can attach files that are already stored in your Facility Scheduler dataset as media files. Or, you can attach files that are stored on your computer or network.

To attach a file to an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to add an attachment to.
3. In the **Actions** group, click **Edit Event**.
4. In the **Show** group, click **Attachments**.
5. In the **Actions** group, click **Add Attachment**.
6. If the file has not been uploaded yet, do the following:
    - Click **Add File**.
    - Enter a **Name** for the media file. This is a friendly name and doesn't have to match the file name.
    - In the **Media Category** list, select the category to which you want include this file. If you don't see an appropriate category, click **Add** to add a new category.
    - Enter a **Description** for the file.
    - Click the **Upload File** link.
    - Navigate to the directory that contains the file you want to upload.
    - Select the file you want to upload and click **Open**.
    - In the **Actions** group, click **Save and Close**.
7. In the **Select Media Files** list. Select the file you want to attach to the event and click **OK**.
8. In the **Actions** group, click **Save and Close**.

Viewing Attachments

You can view all attachments by downloading them to your computer and opening them with the appropriate application. For example, if the attachment is a Microsoft Word document, you can download the attachment and view it with Microsoft Word.

To download an attachment

1. On the **Calendar** tab, click **Calendar**.
2. Select the event that has the attachment you want to view.
3. In the **Actions** group, click **Edit Event**.
4. In the **Show** group, click **Attachments**.
5. Select the attachment you want to view.
6. In the **Actions** group, click **Download Attachment**.
7. Navigate to the folder you want to save the attachment in and click **Save**.

> **Tip**
> If the file is a text file (with a .txt extension) you can view the attachment by double-clicking the file in the Attachment grid.

Editing Attachments

When you edit an attachment, you can change the properties of the selected media file. You can change the friendly name, media category, description, or replace the file with a new one. These changes are applied to the file itself, and can affect other events where the file is attached.

To edit an attachment

1. On the **Calendar** tab, click **Calendar**.
2. Select the event that has the attachment you want to edit.
3. In the **Actions** group, click **Edit Event**.
4. In the **Show** group, click **Attachments**.
5. Select the attachment you want to edit.
6. In the **Actions** group, click **Edit Attachment**.
7. Make the desired changes.
8. In the **Actions** group, click **Save & Close**.

Removing Attachments

When you can remove an attachment from an event, the file is removed from the event but it is still in your ACS Facility Scheduler media file repository for future use.

To remove an attachment from an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to remove the attachment from.
3. In the **Actions** group, click **Edit Event**.
4. In the **Show** group, click **Attachments**.
5. Select the attachment you want to remove from the event.
6. In the **Actions** group, click **Remove Attachment**.
7. In the **Actions** group, click **Save and Close**.

➡ Event Registration

When you add registration to events in Facility Scheduler, people can sign up to attend an event using Access ACS. For example, the following events might allow online registration:

- Youth retreat
- Men of the church supper
- Vacation Bible School

Events can also have subevents. For example, you can create a main Vacation Bible School event and each class or session during Vacation Bible School could be a subevent.

> **Requires Access ACS**
> You cannot use Event Registration if Access ACS and Facility Scheduler are not linked.

When setting up event registration, you must create at least one registration period.

To set up registration for an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to set up registration for.
3. In the **Actions** group, click **Edit Event**.
4. In the **Options** group, click **Enable Registrations**.
5. In the **Period Details** dialog box, enter the **Period, Name, Start Date, End Date** and **Total Period Cost** for the registration period. Enter **Primary Contact Information**, as necessary.
6. Enter **Additional Information** as necessary.
7. To allow members to register themselves or their family members, under **lic**.
8. Select other registration options as necessary. For more information, see
9. In the **Actions** group, click **Save & Close**.

To edit an events registration setup

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to edit.
3. In the **Actions** group, click **Edit Event**.
4. Click the **Registrations** tab.
5. Make the desired changes.
6. In the **Actions** group, click **Save & Close**.

Additional Registration Options

When setting up event registration, you can configure the following components for each event.

Multiple registration periods and fees — Each event and subevent can have a single registration period or more than one, such as early and late registration, with a different fee structure for each period.

Online payments — You can configure events to accept online payments if you have an approved merchant account.

Member registration — You can configure events to allow members to register themselves or their family members.

Guest registration — On the **Information** tab, under **Guest Registration Options**, you can configure events to allow members to register guests, either with names or anonymously.

Contact information — Events can have a primary contact name, e-mail address, and phone number. To have e-mail updates sent to the contact person, select **Notify when registration changes occur**. The contact person receives a summary of event registrations and cancellations every 24 hours. (The notifications are sent only on days that changes occurred.) If a person is listed as the contact for several events, you can choose which events to receive updates on. A separate e-mail is sent for each event.

Location — Events can have a location. This is separate from the Primary Location. It does not have to be a location in your database, and it does not get booked. Each event can also be assigned to a campus or department.

Maximum number of attendees — Events and subevents can have a maximum capacity. When the capacity is reached, registration for the event is no longer available.

Rules — Each event can have its own set of special requirements.

Questions — Each event and subevent can have a set of questions that registrants can be required to answer when registering.

Supplies — Each event and subevent can have supplies, such as books or t-shirts, available for purchase when registering.

Forms — Each event and subevent can have documents, such as parental consent forms, that can be downloaded when registering.

Recurring events — Recurring events offer additional event registration options.

Event registration in Facility Scheduler is fully integrated with event registration in Access ACS. Security is controlled in Access ACS. If you don’t have access to event registration in Access ACS, you will not have access to event registration in Facility Scheduler. Furthermore, changes to event registration can be made in either Facility Scheduler or Access ACS. Individual cancellations and refunds are handled in Access ACS. If you cancel or delete an event in Facility Scheduler, all registrations are canceled, but you will need to process refunds in Access ACS.

Payment Information

In Facility Scheduler, you can allow people to pay for events using credit cards, electronic checks, or both. To **Accept Online Payments**, you must have a valid and current merchant account linked with Access ACS. To accept electronic checks, you must have a Sage merchant account.

You can also choose to **Accept Offline Payments** for events. This is useful if individuals want to pay in person or by mail. Even if you don't enable offline payments, Access ACS administrators can always override this and register people for events without paying online.

To help you track the revenue generated by events, you can designate the General Ledger fund or account code in the **GL Code** field. It applies to both events and sub-events; however, you cannot enter separate codes for sub-events. If you are an Access ACS user, the GL Code is also included in the Event Revenue Detail and Event Revenue Summary reports. If you are an ACS Financial Suite user, the GL Code is included in the Bank Deposit Report.

When you set up payment information for an event, you can choose to not allow refunds after a particular date.

To reject refunds after a specific date

1. On the **Registrations** tab for the event, in the **Show** group, click **Payments**.
2. Under **Payment Information**, select **Do not allow refunds after a specific date**.
3. Enter the **Refund Deadline** date.
4. Enter a refund deadline reminder message. For example, "Refunds are not available after May 1st." (The message displays when people register for events so that they are aware of the deadline.)
5. Click **Save & Close**.

Registration Periods

Registration periods are the time periods when people can register for events. You must set up at least one registration period; however, you can have more than one. Registration periods can overlap. You can assign a fee or cost to each registration period.

For example, you set up two registration periods — “Early Registration” and “Late Registration.” Early Registration is available from March 15 until March 20. During Early Registration, people who register for the event pay a discounted fee of $10.00. Late Registration is available from March 21 until March 25. During Late Registration, people who register for the event pay the full fee of $20.00.

You can edit or delete registration periods. If you edit a registration period, the changes only apply to future registrations.

You can delete a period as long as no one has registered for the event. You cannot delete the last registration period.

Subevents can have their own registration periods.

To set an additional registration period for an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to add the registration period to.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Periods**.
6. In the **Actions** group, click **Add Period**.
7. Enter the **Period Details**. All fields are required. If you want to offer a free registration period, enter **0** in the **Total Period Cost** field.
8. Click **Save**.
9. In the **Actions** group, click **Save & Close**.

Period Details Fields

To edit a registration period

1. On the **Calendar** tab, click **Calendar**.
2. Select the event with the registration period you want to edit.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Periods**.
6. Select the registration period you want to edit.
7. In the **Actions** group, click **Edit Period**.
8. Make the desired changes and click **Save**.
9. In the **Actions** group, click **Save & Close**.

To delete a registration period

1. On the **Calendar** tab, click **Calendar**.
2. Select the event with the registration period you want to delete.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Periods**.
6. Select the registration period you want to delete.
7. In the **Actions** group, click **Delete Period**.
8. In the **Actions** group, click **Save & Close**.

Available Period Details Fields

Allow Event Payments — Select this option to let users make payments towards the event registration cost instead of requiring the entire sum when registering.

Period Name — Enter title of the period. For example, “Ski Trip - Early Registration”.

Start Date — Enter the date you want the registration period to begin. The date format is **MM/DD/YYYY**. To select the date from a calendar, click .

End Date — Enter the date you want the registration period to end. The date format is **MM/DD/YYYY**. To select the date from a calendar, click .

Total Period Cost — Enter the total amount required for the registration period.

Deposit Cost — Only displays if you selected **Allow Event Payments**. Enter the total amount required for the registration period. Selecting this option causes a **Deposit Cost** column to display in the Periods grid.

Rules

Rules are special requirements for an event. For example, if you set up a youth retreat, you can create a rule that says "Participants must be between ages 14 & 18." The rule then appears on the registration page when a person signs up for the event. Rules are for information purposes only. ACS Facility Scheduler does not include an enforcement mechanism.

Rules can be edited and deleted at any time.

To add a registration rule to an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to add the rule to.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Rules**.
6. In the **Actions** group, click **Add Rule**.
7. In the **Name** field, enter the rule.
8. Click **Save**.
9. In the **Actions** group, click **Save & Close**.

To edit a rule

1. On the **Calendar** tab, click **Calendar**.
2. Select the event with the rule you want to edit.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Rules**.
6. Select the rule you want to edit.
7. In the **Actions** group, click **Edit Rule**.
8. Make the desired changes and click **Save**.
9. In the **Actions** group, click **Save & Close**.

To delete a rule

1. On the **Calendar** tab, click **Calendar**.
2. Select the event with the rule you want to delete.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Rule**.
6. Select the rule you want to delete.
7. In the **Actions** group, click **Delete Rule**.
8. Confirm that you want to delete the rule.
9. In the **Actions** group, click **Save & Close**.

Questions

If you want to collect information from registrants before the event, you can create custom questions that appear on the registration form. When people register for the event, they answer the questions. Questions can be required or optional. Only active questions appear on the registration form.

When creating questions, you can select the following answer types:

Date of Birth — If a person's date of birth is stored in your records, it is automatically entered as the person registers. If a person updates the date of birth while answering, a change request is automatically created. (This answer type is not available for sub-events.)

Gender — If a person's gender is stored in your records, it is automatically entered as the person registers. If a person updates the gender while answering, a change request is automatically created. (This answer type is not available for sub-events.)

Single Line Text — can be a maximum of 20 characters.

Paragraph Text — can span multiple lines.

List of Options — Allows you to enter multiple answer choices. To designate each option, put them on separate lines. (Press **Enter**.) You can enter an unlimited number of options. (However, to ensure they're easy to read, we recommending keeping it under 15.)

Yes or No — Questions requiring yes or no answers.

Questions display in the order you enter them. Subevents can have their own questions.

Editing Questions
If you edit a question, the change only applies to future registrations. If you edit a question significantly, this can make previous answers misleading. Once a registrant answers a question, you cannot delete it. However, you can take it off the registration form by marking it inactive.

To add a question

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to add the question to.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Questions**.
6. In the **Actions** group, click **Add Question**. The Question Details window displays.
7. Enter the question.
8. Select the **Answer Type**.
9. If you are creating a list of options, enter the answer choices in the **Options** field. To designate each option, put them on separate lines. (Press **Enter**.) See the example below.
10. To require the registrant to answer the question before completing registration, select **Required**.
11. Click **Save**.
12. In the **Actions** group, click **Save & Close**.

To edit a question

1. On the **Calendar** tab, click **Calendar**.
2. Select the event with the question you want to edit.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Questions**.
6. Select the question.
7. In the **Actions** group, click **Edit Question**.
8. Make the changes and click **Save**.
9. In the **Actions** group, click **Save & Close**.

To change the order of the questions

1. On the **Calendar** tab, click **Calendar**.
2. Select the event with the question you want to edit.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Questions**.
6. Select the question to highlight it.
7. Click the up or down arrow to change the order of the questions.
8. In the **Actions** group, click **Save & Close**.

To inactivate a question

1. On the **Calendar** tab, click **Calendar**.
2. Select the event with the question you want to deactivate.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Questions**.
6. Select the question you want to deactivate.
7. In the **Actions** group, click **Edit Question**.
8. Clear the **Active** checkbox
9. Click **Save**.
10. In the **Actions** group, click **Save & Close**.

To delete a question

1. On the **Calendar** tab, click **Calendar**.
2. Select the event with the question you want to delete.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Questions**.
6. Select the question.
7. In the **Actions** group, click **Delete Question**.
8. Confirm that you want to delete the question.
9. In the **Actions** group, click **Save & Close**.

Supplies

For some events, you might have items that the participants can purchase or reserve for use during the event. Suppose you are planning a youth trip and have t-shirts for sale that everyone can wear. When a registrant signs up for the trip, they can choose to buy a shirt.

You can assign a price for each item. If you are required to collect sales tax on the item, you can assign a tax rate also. You can also set the available quantity. When you reach that number, the item will not be available for new registrants.

If you edit a supply, the change only applies to future registrations. Once a registrant purchases or reserves an item, it cannot be deleted; however, it can be deactivated to keep it from appearing on the registration form. Subevents can have their own supplies.

To add a supply item to an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to add the supply to.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Supplies**.
6. In the **Actions** group, click **Add Supply**.
7. In the **Description** field, enter the name of the item.
8. In the **Capacity** field, enter the quantity of the item you have available. If you have an unlimited quantity, enter a very large number.
9. In the **Cost Per Unit** field, enter the amount you will charge for each item. If the item is free, enter **$0.00**.
10. In the **Tax Rate** field, enter the tax rate in decimal format. For example, if the tax rate is 7%, enter **.07**.
11. To upload an image, click **Browse**, double-click the image in the browsing window, and then click **Open**. To remove an image, click the **Delete Image** link.
12. Click **Save**.
13. In the **Actions** group, click **Save & Close**.

To edit a supply item

1. On the **Calendar** tab, click **Calendar**.
2. Select the event with the supply item you want to edit.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Supplies**.
6. Select the item you want to edit.
7. In the **Actions** group, click **Edit Supply**.
8. Make the desired changes and click **Save**.
9. In the **Actions** group, click **Save & Close**.

To deactivate a supply item

1. On the **Calendar** tab, click **Calendar**.
2. Select the event with the supply item you want to deactivate.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Supplies**.
6. Select the item you want to edit.
7. In the **Actions** group, click **Edit Supply**.
8. Clear the **Active** check box and click **Save**.
9. In the **Actions** group, click **Save & Close**.

To delete a supply item

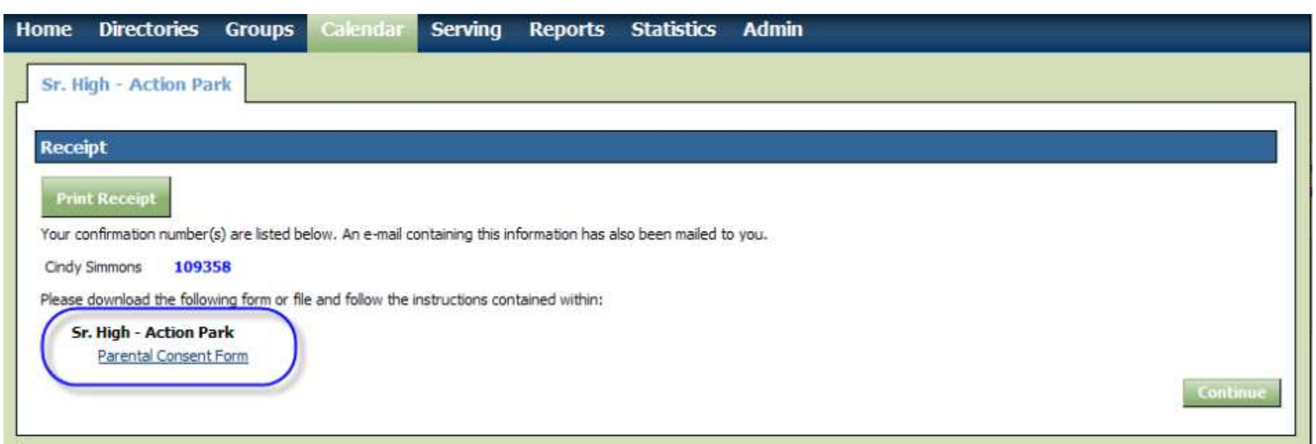
1. On the **Calendar** tab, click **Calendar**.
2. Select the event with the supply item you want to delete.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Supplies**.
6. Select the item you want to delete.
7. In the **Actions** group, click **Delete Supply**.
8. Confirm that you want to delete the supply item.
9. In the **Actions** group, click **Save & Close**.

Forms

You can upload forms and documents for the event or subevent. Registrants can download the file when they print their receipts. For example, if you set up an event for children, you can upload a permission form for parents to sign. You can upload multiple documents for each event.

Note
Access ACS does not provide a viewer for the form. The registrant must have an appropriate application for the type of file that the form is.

Forms can be edited or deleted at any time.



To add a form to an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to add the form to.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Forms**.
6. In the **Actions** group, click **Add Form**.
7. In the **Description** field, enter the name of the form. This is a friendly name and doesn't have to match the file name.
8. Click the **Browse**.
9. Navigate to the directory that contains the file you want to upload.
10. Select the file you want to upload and click **Open**.
11. Click **Save**.

To edit a form

1. On the **Calendar** tab, click **Calendar**.
2. Select the event that has the form you want to edit.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Forms**.
6. Select the form you want to edit.
7. In the **Actions** group, click **Edit Form**.
8. In the **Description** field, enter a new name for the form. This is a friendly name and doesn't have to match the file name.
9. Click the **Browse** button.
10. Navigate to the directory that contains the new file you want to upload.
11. Select the file you want to upload and click **Open**.

12. Click **Save**.

To delete a form

1. On the **Calendar** tab, click **Calendar**.
2. Select the event that has the form you want to delete.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Registration** tab.
5. In the **Show** group, click **Forms**.
6. Select the form you want to delete.
7. In the **Actions** group, click **Delete Form**.
8. Confirm that you want to delete the form.

Event Registration for Recurring Events

Depending on how an event was created or if it is part of a recurrence, different actions occur. The following list details what happens when you start working with recurring events with event registrations:

Enable registration on a new recurring event — When a recurring event is created, the Enable Registrations option is available.

Edit a recurring event with Event Registration Depending on selections you make, one of the following will occur:

- **Event is part of a series and you select to edit the series** — All changes made are updated to the Events database.
- **Event is part of a series but you select to edit the occurrence only** — Only changes made to Event Registration sections are updated.
- **Event is not part of a series and you edit it** — Only changes made to Event Registration sections are updated.
- **Enable registrations for existing recurring events** — When you select to edit an event, two options are available: **Edit this occurrence** or **Edit the series**.
- **Edit this occurrence** — You cannot enable registrations for a single occurrence in a series.
- **Edit the series** — You can enable registrations. If you enable registrations, all events in the series will have registration enabled.

> **Note**
> If the event is already an exception from the series, you cannot enable registrations.

Cancel recurring events with event registrations — Depending on selections you make, one of the following will occur:

- **Cancel the series** — The series is canceled along with all exceptions., and e-mail notifications are sent to registrants. The event is no longer linked to event registration.
- **Cancel a single event in a series** — Only the event is canceled. No e-mail notifications are sent to registrants, and the event is still linked to event registration.

Delete recurring events with event registrations — Depending on selections you make, one of the following will occur:

- **Delete an exception** — Only the exception is deleted, not the entire series.

Delete the series — The following should occur:

- **Delete last occurrence of a recurring event** — The event registration is deleted.

Cancel Event Registration — All events including the exceptions are canceled, and e-mail notifications are sent to registrants.

Delete Online Registration — Event registration is removed from all events in the series, including exceptions.

Delete Entire Event — All events in the series, including exceptions, are deleted.

➡Subevents

After you set up an event, you can add subevents to it. You can only add subevents to existing events. You can set up prices for subevent registration periods. You can also offer free subevents. If you have an authorized merchant account, members can pay registration fees online.

For example, you set up a youth retreat as an event. During the retreat, you plan to offer multiple sessions for participants to attend. You can set each session up as a subevent. When members register for the youth retreat, they can also sign up for the sessions.

Subevents can have their own registrations periods, questions, and supplies
.
If you edit a subevent, the change only applies to future registrations. You can cancel a subevent as long as no one has registered for the subevent. If someone has registered for a subevent, the individual subevent cannot be canceled; however, the entire event can be canceled.

To add a subevent to an event

1. On the **Calendar** tab, click **Calendar**.
2. Select the event you want to add the subevent to.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Subevents** tab.
5. In the **Actions** group, click **Add Subevent**.
6. If you want to accept deposits for the subevent, select the **Allow Payments** option.
7. Enter the **Period Name, Start Date, End Date,** and **Total Period Cost** for the registration period. If you selected **Allow Payments**, enter the **Deposit Cost**
8. Enter **Additional Information** as necessary.

To edit a subevent

1. On the **Calendar** tab, click **Calendar**.
2. Select the event with the subevent you want to edit.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Subevent** tab.
5. Select the subevent you want to edit.
6. In the **Actions** group, click **Edit Subevent**.
7. Make the desired changes and click **Save**.
8. In the **Actions** group, click **Save & Close**.

To cancel a subevent

1. On the **Calendar** tab, click **Calendar**.
2. Select the event with the subevent you want to cancel.
3. In the **Actions** group, click **Edit Event**.
4. In the **Event Details** window, click the **Subevent** tab.
5. Select the subevent you want to cancel.
6. In the **Actions** group, click **Cancel Subevent**.
7. Confirm that you want to cancel the subevent.
8. In the **Actions** group, click **Save & Close**.

Subevent Areas

Event Details — Displays the primary information related to the full event.

Subevent Details — Displays the name, dates, and times associated with the subevent. Use the Subevent
Description text box to provide a brief synopsis about the subevent.

Allow Event Payments — If selected, a deposit cost is associated with the subevent. Selecting then clearing the **All Payments** option toggles the option for all periods, not just the individual period displayed. If you clear the option and save, the deposit cost is set to zero.

Periods — Displays information associated with the periods created for the subevent. Information covered includes name, start and end date, total period cost and, if **Allow Event Payments** is selected, deposit cost.

➡Reports

ACS Facility Scheduler provides a set of standard reports that you can print or export to a file. You can filter reports based on dates, calendars, event type, and booked resources where appropriate.
The data that prints is based on the permissions assigned to your user account. You only print events and other data if they are on calendars you have access to.

The following reports are available in ACS Facility Scheduler: Weekly Calendar Prints a weekly calendar of events (event name, start time, end time).

Name	Description
3 x 5 Card	Prints each event (date, event name, start and end times, calendar, resources, event information based on event type) on an individual 3 x 5 index card.
List of Events	Prints a list of events (event name, start and end times, calendar, tags, booked resources, event information based on event type, primary image) sorted by date. If there are no Attachments or Bookings, the columns do not display.
List of Events by Resource	Prints a list of events (event name, date, start and end times) grouped by resource type, resource category, and resource.
List of Events by Single Resource	Prints a list of events (event name, date, start and end times) grouped by resource. Each resource prints on its own page.
List of Resources	Prints a list of resources (resource name, custom fields) grouped by resource type and resource category.
Monthly Calendar	Prints a monthly calendar of events (event name, start time).
Planning Calendar	Prints a blank calendar.
Request for Use	Prints a blank form based on the selected event type.
Simple List of Events	Prints a list of events by date and displays the event name, time, and location of the event. If an event lasts an entire day, All Day displays instead of the time.
Simple List of Events by Time	Prints the date/time, event name, and primary location for events on the selected calendars by time.

Changing Report Settings

On most reports, you can customize how the data is printed on the report. For example, when printing a list of events, you can specify only confirmed events for a specific week or month.

You can customize the report title of all the reports. Reports and calendars that list events can filter events by date, calendar, and status. Other reports have similar filters based on the their contents.

If the standard filters are not adequate, you can filter events based on a saved query.

To change the report settings

1. Click the **Reports** tab.
2. In the left pane, select the type of report you want to print.
3. Select the specific report you want to print.
4. In the **Actions** group, click the **Report Settings** button.
5. Change the settings as desired, and then click the **Print** button.

To base a report on query results

1. Select the report you want to print.
2. In the **Use Advanced Query** list, select the saved query you want to use.
3. Print or preview the report.

To clear an advanced query from a report

- In the **Use Advanced Query** list, click **Clear**. 

Changing the Page Setup

You can change the page setup of report. You can change the size of the paper, set the page layout to either landscape or portrait, change the size of the margins, and change the scale of the output.

To change the scale of a report

1. Select the report you want to print.
2. In the **Page Setup** group, click **Scale**.
3. Set the scaling you want and click **OK**.

To change the report's margins

1. Select the report you want to print.
2. In the **Page Setup** group, click **Margins**.
3. Click one of the standard margin settings.

To change the reports' orientation

1. Select the report you want to print.
2. In the **Page Setup** group, click **Orientation**.
3. Click either **Portrait** or **Landscape**.

To change the paper size

1. Select the report you want to print.
2. In the **Page Setup** group, click **Size**.
3. Click the page size you want.

Tip

- When changing the report's orientation, you should also change the scale so that the entire report fits the new page width.
- You can also change the paper size and source, orientation, and margins at the same time in the Page Setup dialog box. To access the Page Setup dialog box, click in the lower-right corner of the Page Setup group.

E-mailing and Exporting Reports

Once you have generated a report, you can export it as a different file type, such as a PDF or spreadsheet. You can also export and email the report in a single series of steps.

To export a report

1. On the **Reports** tab, click **Reports**.
2. In the left pane, select the report.
3. In the **Print** group, click **Report Preview**.
4. In the **Export** group, click **Export To**.
5. Select the file format you want to export to.
6. An options window displays. The available options differ depending on your selection. Select your settings and click **OK**.
7. Navigate to the location where you want to save the file.
8. Click **Save**.

The file is exported in the format and to the location that you specified.

To email a report

1. On the **Reports** tab, open the query.
2. In the **Export** group, click **E-mail As**.
3. Select the file format in which to email the file.
4. An options window displays. The available options differ depending on your selection.
5. Enter the necessary information, then click **OK**.
6. Save the file to your computer.
7. After you save the query, your default e-mail client opens.
8. Enter the **To** and text body information, then send the e-mail.

Printing Reports

You can quickly print reports to your default printer or preview reports on the screen. Many reports can be filtered by date, event status, or other data. You can also print the report using a different printer or print settings, such as the number of copies, the number of pages to print, or whether to print single-sided or double-sided.

To print a report using the default printer and settings

1. Click the **Reports** tab.
2. On the **Reports Menu**, select the report you want to print.
3. On the **Report Settings** tab, customize the report as necessary.
4. In the **Print** group, click **Quick Print**.

To print a report using custom printer settings

1. Click the **Reports** tab.
2. On the **Reports Menu**, select the report you want to preview.
3. On the **Report Settings** tab, customize the report as necessary.
4. In the **Print** group, click the **Print** button.
5. In the **Select Printer** list, select the printer you want to print to.
6. To change the printer properties, such as paper size and output tray, click available are determined by the printer's capabilities.
7. Click **Print**.

To preview a report

1. Click the **Reports** tab.
2. On the **Reports Menu**, select the report you want to preview.
3. On the **Report Settings** tab, customize the report as necessary.
4. In the **Print** group, click the **Print Preview button**.

Note
The options available in the Printing Preferences dialog box are based on the selected printer. For example, the option to print double-sided reports is only available with duplex (double-sided) printers.

➡ Advanced Queries

While you can usually filter events based on a combination of the calendars, dates, and report settings you choose, you might need to filter your events based on more advanced criteria. In these situations, you can use advanced queries.

Creating Advanced Queries

While you can usually filter events based on a combination of the calendars, dates, and report settings you choose, you might need to filter your events based on more advanced criteria. In these situations, you can use advanced queries. Advanced queries contain one or more conditions. Queries with more than one condition use keywords to determine whether any or all of the conditions must be met. Complex queries can be built by putting conditions into groups.

When you process the query, ACS Facility Scheduler looks at every event in your database and returns those events that match the conditions you specified. After processing a query, you can print the results or export the results to a file.

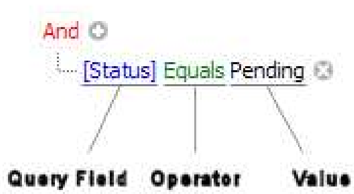
To create an advanced query

1. On the **Reports** tab, click **Advanced Queries**.
2. In the **Actions** group, click **New Query**.
3. To add conditions, click
4. Proceed with adding and deleting conditions, changing keywords, and adding and deleting groups. For more information on each, see below.
5. To process the search, in the **Actions** group, click **Run**.
6. To save the query for future use, in the **Actions** group, click **Save**.
7. Enter a **Name** for the query and click **OK**.

Conditions

With advanced queries, you create conditions that look for specific data. For example, you can create a condition that looks for all events that are flagged as "All Day" events. Conditions contain a query field, an operator, and a value.

The figure below shows the parts of a condition statement. In this example, the query returns all events that have a status of pending.



The query field is the type of data by which you want to filter events. For example, an event start time or booking name.

The operator is a mathematical operator that determines how you want to compare the data with the value. If you want to find events with a start time of 11:00 a.m., you would use the **Equals** operator. If you want to find events that start on or after 11:00 a.m., you would use the **Is greater than or equal to** operator.

You can use the following operators to search by event date and time:

- Equals
- Does not equal
- Is greater than
- Is greater than or equal to
- Is less than
- Is less than or equal to
- Is between
- Is not between

You can use the following operators to search by all other criteria, such as event or calendar name:

- Contains
- Does not contain
- Begins with
- Ends with
- Is like
- Is not like
- Is blank
- Is not blank
- Is any of
- Is none of

The value is the specific value by which you want to filter events. For example, the church van, the sanctuary, or 11:00 a.m.

To create a condition

1. On the Query tab, click . A generic conditions appears.
2. Click **All Day to** select a query field.
3. Click **Equals to** select an operator. The operators available depend on the query field selected.
4. Click **<enter a value>** to enter a value. The values available depend on the query field selected.

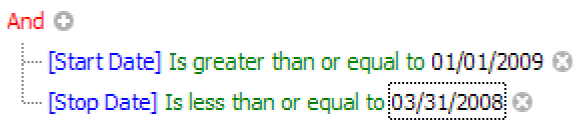
To delete a condition

- On the **Query** tab, click next to the condition you want to delete.

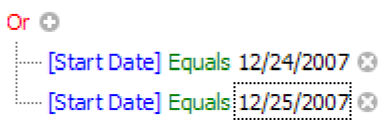
Keywords

Queries can contain multiple conditions. You can use the **And** keyword if you want to find events that match all the conditions in the query. You can use the **Or** keyword to find events that match any of the conditions in the query.

The figure below shows an advanced query that returns all events that occur in the first quarter of 2010. This query has two conditions: a start date that is on or after January 1, 2011, and an end date that is on or before March 31, 2011. Because the **And** keyword is used, events must meet both conditions to be included in the results. For example., an event that starts and ends on March 30, 2010 will be included in the results, but an event that starts on March 30, 2011 and ends on April 2, 2011 will not.



The figure below shows an advanced query that returns all events that occur on Christmas Eve or Christmas. This query has conditions: a start date that is December 24, 2011 and a start date that is December 25, 2011. Because the **Or** keyword is used, events can meet either condition to be included in the results.



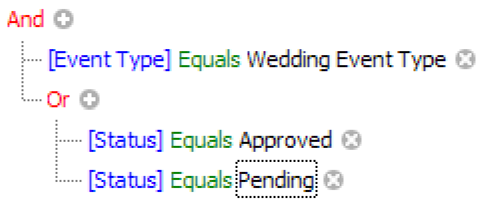
To change a keyword

1. On the **Query** tab, click the keyword you want to change.
2. Select the keyword you want to use.

Groups

Conditions can be grouped together to form complex queries. By creating groups of conditions, you can use both the**And** and **Or** keywords in the same query.

The figure below shows an advanced query that returns all events that use the wedding event type, and have a status of approved or pending. The two status conditions are in a group so that they can use the **Or** keyword. The And keyword is used at the top level to ensure that the event type condition is matched and that at least one of the statuses is matched.



To add a group

1. On the **Query** tab, click the keyword under which you want to add a group.
2. Click **Add Group**.

To delete a group

1. On the **Query** tab, click the keyword for the group you want to delete.
2. Click **Remove Group**.

Modifying Columns in Query Results

With our December 2010 release of ACS Facility Scheduler we have included new Advanced Query functions, including modifying columns.

To add a query column

1. In Facility Scheduler, click the **Reports** tab.
2. In the **Show** section, click **Advanced Queries**.
3. In the **Report Menu**, select the query you want.
4. In the **Actions** section click **Run**.
5. The query results display.
6. Right-click inside the column header, and click **Column Chooser**.
7. The Customization window displays in the bottom right-hand corner of the page.
8. Double-click the column name you want, or drag and drop the column name to the correct position in the grid.
9. To close the Customization window, click X.

You can drag and drop any column header to any position in the grid.

To expand a query column

1. In Facility Scheduler, click the **Reports** tab.
2. In the **Show** section, click **Advanced Queries**.
3. In the Report Menu, select the query you want.
4. In the **Actions** section click **Run**.
5. The query results display.
6. Hold your mouse cursor over the section divider of the column you want to expand. The ↔ displays when you have done this correctly.
7. Drag the column to the desired size.

Best Fit

The new best fit function resizes the columns to best fit the information entered.

- To size a single column, right-click inside the desired column header, then click **Best Fit**.
- To size all of the columns at once, right-click inside the desired column header, then click **Best Fit (all columns)**.

Moving Columns

You can drag and drop any column header to any position in the grid.

Removing Columns

To remove a query column

1. Hold the mouse cursor over the column header to remove and left-click.
2. Drag the column header down or to a blank portion of the report. If you have the Customization window open, you can drag the header to the window.
3. The column is removed from the query results.

Copying Queries

You can copy an existing query. This is useful if you want to create a new search that is similar to an existing search.

For example, if you have a saved query that returns pending events, you can copy it and use it as the basis for a query that returns all confirmed events.

To copy a query

1. On the **Reports tab**, click **Advanced Queries**.
2. In the **Saved Queries** list, click the query you want to copy.
3. In the **Actions** group, click **Save As**. The **Search Properties** dialog box appears.
4. Enter the **Name** of the new query.
5. Click **OK**.

Saving Queries

You can save queries and then use them to filter the events that print on reports.

Additionally, you might have queries that you want to run on a regular basis. You can, for example, create a query that returns all events that book the church van. You can save the query and then process it at any time. After processing a query, you can print the results or export the results to a file.

To save a query

1. Create an advanced query.
2. In the **Actions** group, click **Save**. The **Query Properties** dialog box appears.
3. Enter the **Name** of the new query.
4. Click **OK**.

To process a saved query

1. On the **Reports** tab, click **Advanced Queries**.
2. In the **Saved Queries** list, click the query you want to process.
3. In the **Actions** group, click **Run**.

Printing Queries

With our December 2010 release of ACS Facility Scheduler, we have included new Advanced Query functions, including printing abilities.

Previewing Before Printing

You still have the option to export your query report to PDF. However, if you want more options when printing, we suggest you **Preview** your query before printing it.

Previewing the query lets you edit margins, page orientation, and export options.

Print Preview Menu Icons

Icon	Name
	Search
	Customize
	Open
	Save
	Print
	Quick Print
	Page Setup
	Header and Footer
	Scale
	Hand Tool
	Magnifier
	Zoom Out
	Zoom In
	Multiple Pages
	Color
	Watermark
	Export Document
	Send via E-mail
	Exit
	Add or Remove Buttons

Page Orientation

To change page orientation

1. In the **Print** section, click **Preview**.
2. On the **Preview** menu bar, click **Page Setup**.
3. In the **Orientation** section, select **Portrait** or **Landscape**.
4. Click **OK**.

Managing Print Options

To manage page margins

1. In the **Print** section, click **Preview**.
2. On the **Preview** menu bar, click **Page Setup**.
3. In the **Margins** section, enter your desired measurements. For example, **Left:.25 Right:.25 Top:.25 Bottom: .25**.
4. Click **OK**. The new margins display in the **Preview** window.

Alternatively, in the **Preview** window, hold the mouse cursor over the margin you want to adjust until  or  dis plays. Then drag the margin until you have your desired sizing.

Exporting and E-mailing Query Results

Once you have created and run a query, you can export the results as a different file type, such as a PDF or spreadsheet. You can also export and email the query in a single series of steps.

To export query results

1. On the **Reports** tab, click **Advanced Queries**.
2. In the left pane, select the saved query. You can export only *saved* queries.
3. In the **Actions** group, click **Run**.
4. In the **Results** group, click **Export To**.
5. Select the file format you want to export to.
6. An options window displays. The available options differ depending on your selection. Select your settings and click **OK**.
7. Navigate to the location where you want to save the file.
8. Click **Save**.

The query results are exported in the format and to the location that you specified.

To email a query

1. Navigate to the **Reports** tab and click **Advanced Queries**.
2. Create a new query or select a saved query from the **Saved Query** list.
3. Click **Run** in the **Actions** group.
4. Click the **Preview** button in the **Print** group.
5. Click the **Send via E-Mail** button. This launches an options window, which differs depending on your file format selection.
6. Enter the necessary information, then click **OK**.
7. Save the file to your computer.
8. After you save the query, the default e-mail client automatically opens.
9. Enter the **To** and text body information, then send the e-mail.

Mass Delete from Queries

With the mass delete feature, you can run an advanced query and delete multiple events from the query results. This is useful if you want to clean up old events or need to delete more than one event at once.

To mass delete events

1. Navigate to the **Reports** tab and click **Advanced Queries**.
2. In the **Actions** group, click **Advanced Queries**.
3. Create a new query or select a saved query from the **Saved Query** list.
4. In the **Actions** group, click **Run**.
5. To view the results of the query, navigate to the **Results** tab.
6. In the **Results** group, click **Mass Delete**.
7. To permanently delete the events, type DELETE in the text box and then click **Continue**.

Mass delete is permanent! Deleted events can't be restored.

- To preserve program performance, there is a fixed maximum number of events (2,500) you can delete at one time. If you need to delete more than the max number, you can run Mass Delete multiple times.
- Email notifications will not be sent to users when events are mass-deleted.
- You can't delete events with registrations. You must delete these events individually.
- If you don't have the delete permissions to an event, mass delete will not delete it.
- Please allow several minutes to several hours before deleting associated items, such as resources and calendars

Mass Deleting Spanning Events

In order to mass delete a spanning event, you must include the event's full range of dates in your query. For example, if you create an event that runs from August 1 to August 31, and you query for event dates from August 15 to August 31, your spanning event will not appear in the query results. However, if you query for dates between July 15 to September 15, the spanning event will appear in the query results, which allows you to include it in mass delete.

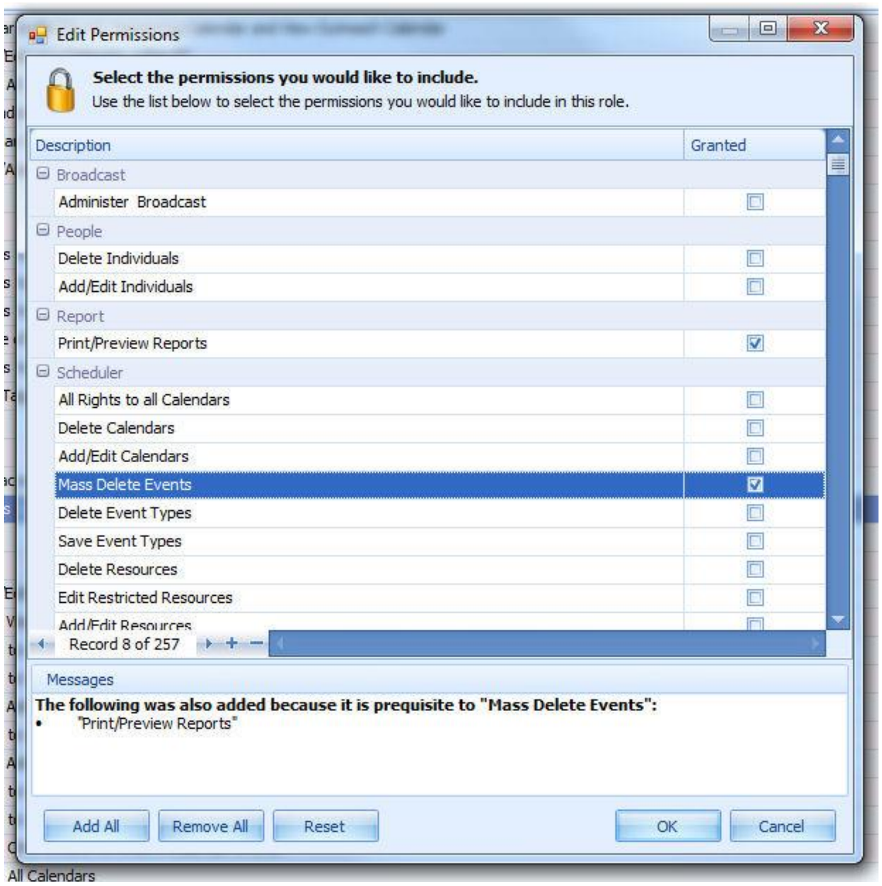
Mass Delete Permissions

You can choose which users can use mass delete by assigning roles to users. You must assign mass delete permissions to existing roles from the Administration tab.

To set mass delete permissions

1. Navigate to the **Administration** tab and click **Roles**.
2. Double-click the role you want to edit.
3. Under the **Permission Summary** section, click **Edit**
4. In the **Scheduler** section, select the check box next to the **Mass Delete Events** option.
5. To save the changes to the permissions click **OK**.

> Mass delete permissions require the ability to print and review reports. When you assign mass delete permissions to a role, this will automatically assign **Print/Preview Reports** permissions.
>
> Removing a user's Print/Preview Reports permissions will also remove their Mass Delete Events permissions.



> **Deleted Events Log**
> Navigate to the **Administration** tab and click **Deleted Events** to view information about events deleted individually and through mass delete. Any user who has rights to the Administration tab can view the delete log.

➡Administration

Although calendars, resources, event types, attachments, and contacts are used on a daily basis by many of the ACS Facility Scheduler users, the tasks involved in setting up and managing these items are usually performed by the system administrator and other select users.

These tasks include:

- Creating and deleting calendars
- Creating and managing resources
- Creating and managing campuses and departments
- Creating and updating event type templates
- Uploading and managing media files
- Adding and managing tags
- Adding and managing individuals
- Viewing deleted events

> ⚠ The Deleted Events Log will not list events created in Access ACS that are not linked to Facility Scheduler.

Resources

Resources are items, locations, or people that can be booked for events. When a resource is booked for one event, it cannot be booked for another event at the same time. For example, when you book the fellowship hall for a luncheon, no other event can reserve the fellowship hall for that time slot.

> ℹ By default, booked resources do not display when selecting resources. To view all resources, including booked resources, select **Include Booked Resources** in the **Select Resources** window.

There are three types of resources:

- Items
- Locations
- People

In addition to grouping resources by type, resources are also put into categories. Categories are then assigned to one or more calendars. Resources can only be booked for an event if the category it is in has been assigned to the calendar you are adding the event to.

Adding Resource Categories

Resource categories are used to organize similar resources. For example, you can create a category named A/V Equipment for all of your televisions, DVD players, sound equipment, and cameras. Other examples include vehicles, classrooms, and pastoral staff.

Categories are also used to control who can book specific resources. Categories are assigned to one or more calendars. Resources can only be booked for an event if the category it is in has been assigned to the calendar you are adding the event to. For example, if you assign the sanctuary to the Primary calendar but not the Youth calendar, you can only book the sanctuary when adding events to the Primary calendar, but not when adding events to the Youth calendar.

To add a resource category

1. On the **Administration** tab, click **Resource Categories**.
2. In the **Actions** group, click **Add Resource Category**.
3. Select a **Resource Type**.
4. Enter the **Name** of the category.
5. Enter a **Description** for the category.
6. In the **Actions** group, click **Save & Close**.

Adding Items

Items are resources that can be booked for events. For example:

- Van
- P.A. System
- Podium

After an item has been added, it can be reserved (booked) for an event. When an item is booked for an event, and subsequently confirmed, it can’t be booked for another event scheduled for the same time period.

To add an item

1. On the **Administration** tab, click **Resources**.
2. In the **Actions** group, click **Add Item**.
3. Enter the **Name** of the item.
4. In the **Resource Category** list, select the category the item belongs to. If you don’t have an appropriate category, click **+** to add a new category.
5. Enter the **Resource E-mail** address for the item. An e-mail is sent to this address when the event is confirmed, canceled, or deleted, and when the resource is requested.
6. In the **Setup Time** field, enter an estimated setup time, in hours and minutes. This is the default setup time for the item. It can be different for each event.
7. In the **Teardown Time** field, enter an estimated teardown time, in hours and minutes. This is the default teardown time for the item. It can be different for each event.
8. Enter a **Quantity** if there is more than one of the item, and each one can be booked separately. For example, if you have 300 chairs, you can enter 300 in the quantity field. Multiple events can then book chairs for the same time period as long as the total number of chairs is not more than 300.
9. Fill in the other fields as necessary.
10. Select **Restrict access to resource for certain users** if you do not want the item available to all users.
11. In the **Actions** group, click **Save & Close**.

Combining Locations

Locations can be combined so that rooms with dividers can't be double-booked by accident.
For example, suppose you have a large meeting room with a divider. When the divider is open, this is Room 100. When the divider is closed, it becomes Room 100-A and Room 100-B. If Room 100 is booked, neither rooms 100-A nor 100-B can booked. If Room 100-A is booked, room 100-B can still be booked, but Room 100 cannot.

To combine locations

1. Add and save the rooms that are subsets of a larger room
2. Create the larger room.
3. In the **Show** group, click **Combined Rooms**.
4. Click the **Add** button.
5. Select the rooms that make up the larger room and click **OK**.
6. In the **Actions** group, click **Save & Close**.

Adding People

Since people can't yet be in two places at once, you need to schedule them for events. In Facility Scheduler, you can enter people as resources so that they can be booked for events.
For example, you probably want to reserve the time of:

- Pastors
- Choir Directors
- Organists

After a person has been added, they can be reserved (booked) for an event. When a person is booked for an event, and subsequently confirmed, they can't be booked for another event scheduled for the same time period.

To add a person

1. On the **Administration** tab, click **Resources**.
2. In the **Actions** group, click **Add Person**.
3. Enter the **Name** of the person.
4. In the **Category** list, select the category the person belongs to. If you don't have an appropriate category, click **+** to add a new category.
5. Fill in the other fields as necessary.
6. In the **Actions** group, click **Save & Close**.

Restricting Resources

If restricted, a resource can only be booked by a user who has rights to book restricted resources for a specific calendar.

To restrict a resource

1. On the **Administration** tab, click **Resources**.
2. Select the resource you want to restrict.
3. In the **Actions** group, click **Edit Resource**.
4. Select **Restrict access to resource for certain users**.
5. In the **Actions** group, select **Save & Close**.

Deleting Resources

If a resource has never been added to an event, you can delete it. Resources added to events must be removed from them, or the events deleted, before deleting the resource.

To delete a resource

1. On the **Administration** tab, click **Resources**.
2. Select the resource you want to delete.
3. In the **Actions** group, click **Delete Resource**.
4. Click **Yes** to confirm.

Calendars

Calendars are the central focus of Facility Scheduler. You can create multiple calendars and restrict who can view and edit each. You can assign different resource categories to each calendar to restrict what resources are available for it. All calendars have an RSS news feed that you can view and subscribe to.
You can also assign a unique color to each calendar to differentiate events assigned to it.

Adding Calendars

You can have an unlimited number of calendars in Facility Scheduler. When you add a new calendar, you must select a color for it. Colors are useful when viewing more than one calendar at a time: they help you identify the calendar of events.

If you want to ensure that all Facility Scheduler and Access ACS users can view a calendar, mark it as **Published**. This does *not* mean that all events on the calendar are automatically viewable to all users: you can choose whether or not to publish each event on the calendar.

All calendars have an RSS news feed that you can view and subscribe to. If you want to customize the RSS feed link, you can do so when adding the calendar.

To add a calendar

1. On the **Administration** tab, click **Calendars**.
2. In the **Actions** group, click **Add Calendar**.
3. Enter the **Calendar Name**.
4. Select a **Color**.
5. To ensure that all users can view the calendar, select **Published**.
6. To customize the RSS feed link, select **Customize** and enter the new link.
7. Click **Save & Close**.

The calendar is added. Now you may want to assign resource categories to it so that you can book equipment for events on the calendar.

Assigning and Removing Resource Categories

Resource categories can be used to control who can book specific resources. Categories are assigned to one or more calendars. Resource categories are calendar dependent. For example, if you assign the sanctuary to the Primary calendar but not the Youth calendar, you can book the sanctuary when adding events to the Primary calendar, but not when adding events to the Youth calendar.

To assign a resource category to a calendar

1. On the **Administration** tab, click **Calendars**.
2. Select the calendar you want to assign the resource category to.
3. In the **Actions** group, click **Edit Calendar**.
4. In the **Show** group, click **Resource Categories**.
5. Click the **Add** button.
6. Select the resource category you want to add to the calendar and click **OK**.
7. In the **Actions** group, click the **Save & Close** button.

To remove a resource category from a calendar

1. On the **Administration** tab, click **Calendars**.
2. Select the calendar you want to remove the resource category from.
3. In the **Actions** group, click **Edit Calendar**.
4. In the **Show** group, click **Resource Categories**.
5. Select the resource category you want to remove.
6. Click the **Remove** button.
7. In the **Actions** group, click the **Save & Close**.

Deleting Calendars

To delete to calendar, you must delete all of the events on the calendar first.

To delete a calendar

1. On the **Administration** tab, click **Calendars**.
2. Select the calendar you want to delete.
3. In the **Actions** group, click **Delete Calendar**.
4. Click **Yes** to confirm that you want to delete the calendar.

Event Types

As an administrator, you can create event types to ensure that specific information is always entered for certain kinds of events. Event types are templates that contain specific fields for information. Event types can also require that certain fields are filled in before the event is created.

Some example of common event types include:

- Wedding
- Luncheon
- Baptism/Christening
- Community Meeting

Event types provide a standardized form of information for the event. For example, fields set up for a wedding event type might include:

- Bride’s Name
- Bride’s Phone Number
- Groom’s Name
- Groom's Phone Number
- Director’s Name
- Officiating Pastor
- Florist

In this scenario, you might require that the bride's name and groom's name are entered before the event is created.

On the other hand, the fields set up for a community meeting event type might include:

- Contact’s Name
- Contact’s Phone Number
- Organization Name
- E-mail Address
- Billing Address

> **Unlimited**
> You can create an unlimited number of event types.

Event Type Fields

Event types can contain up to 21 different fields. Fields can be required or optional. The following table lists the field types and their uses:

Field Type	Purpose	Example
Yes/No	A check box that can be used to answer a yes/no question.	**Church Member** check box for a Funeral event type.
Currency Field	A field that can be used to enter dollar amounts.	**Custodial Fees** field for a Community Event type.
Date Field	A field that can contain dates.	**Date of Birth** field for a Baptism event.
Individual Field	A lookup field that can contain a name from your list of users or your converted TMS individual database.	**Bride's Name** for a Wedding event type.
Integer Field	A field that can contain positive or negative whole numbers (e.g., 1, 4, 0, -3, 1000).	**Number of Bridesmaids** field for a wedding event type.
Decimal Field	A field that contain any number (e.g., 1, 4.2, 0, -2.2).	**Number of Servings** field for a luncheon.
Phone Field	A field that can contain any phone number.	**Contact's Phone Number** field for a luncheon event type.
Text Field	A field that can contain free text.	**Location of Reception** field for a wedding event type.
Time Field	A field that can contain times.	**Serving Time** for a luncheon event type.

Adding Event Types

When you can create an event type, you can set a default calendar and create up to 21 custom fields for events of that type. The default calendar can be changed when adding an event. The custom fields can be optional or required.

To create an event type

1. On the **Administration** tab, click **Event Types**.
2. In the **Actions** group, click **Add Event Type**.
3. Enter the **Name** of the event type.
4. In the **Calendar** list, select the calendar that events of this type will be added to by default.
5. To make the event type available in Access ACS, select **Published**.
6. Click the **Edit Event Type Fields** button.
7. In the field types list, click a field type. The pointer changes to crosshairs.
8. With the crosshairs, click the cell where you want to place the field. The field properties display.
9. In the **Caption** field, enter the name of the field.
10. To exit the field properties, click anywhere outside the field properties boundaries.
11. Click **OK**.
12. In the **Actions** group, click **Save & Close**.

Editing Event Types

You can change the name of an event type, the default calendar, and the description of an event type. You can also add new fields, delete fields, or relabel fields. If you relabel a field, existing events will reflect the new field label, but will contain the original data. This could result in a field label that doesn't accurately reflect the data in the field. If you delete a field, the field is removed from existing events and any data is lost.

To modify an event type

1. On the **Administration** tab, click **Event Types**.
2. Select the event type you want to modify.
3. In the **Actions** group, click **Edit Event Type**.
4. Make the necessary changes.
5. In the **Actions** group, click **Save & Close**.

Deleting Event Types

You can delete event types as long as there are no events using the event type that you want to delete.

To delete an event type

1. On the **Administration** tab, click **Event Types**.
2. Select the event type you want to delete.
3. In the **Actions** group, click **Delete Event Type**.
4. Click **Yes** to confirm that you want to delete the event type.

Media Files

You can upload an unlimited number of documents, images, and other files and attach them to events. These can be Word documents with specific setup instructions, images of the room layout, or spreadsheets with a lists of attendees.

Adding Media Categories

Media categories are used to group similar or related media files.

For example:

- Photos
- Setup Instructions
- Room Layouts

You can have an unlimited number of media categories.

To add a media category

1. On the **Administration** tab, click **Media Categories**.
2. In the **Actions** group, click **Add Media Category**.
3. Enter the **Name** of the media category.
4. Enter a **Description** for the media category.
5. In the **Actions** group, click **Save & Close**.

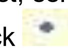
Adding Media Files

You can upload an unlimited number of media files. These can be attached to events. To make them easier to find, you can also group media files into media categories.

You can only upload certain types of media files to Facility Scheduler:

File Type	File Extension
Image	.bmp, .gif, .jpg, .png
Document	.pdf, .doc, .docx, .dot, .dotx, .xsl, .xslx, .xlt, .xltx, .ppt, .pptx, .pps, .ppsx, .rtf, .txt, .csv
Web Resource	.css, .ico, .js, .xml
Audio/Video	.wma, .wmv, .asx, .mpg, .mid, .mp3, .mov, .swf, .jpx
Compressed	.zip

To upload a media file

1. On the **Administration** tab, click **Media Files**.
2. In the **Actions** group, click **Add Media Files**.
3. Enter a **Name** for the file. This is a friendly name and doesn't have to match the file name.
4. In the [**Media Category**]() list, select the category to which you want include this file. If you don't see an appropriate category, click  to add a new category.
5. Enter a **Description** for the file.
6. Click the **Upload File** link.
7. Navigate to the directory that contains the file you want to upload.
8. Select the file you want to upload and click **Open**.
9. In the **Actions** group, click **Save & Close**.

Editing Media Files

When you edit a media file, you can change the properties of the selected media file. You can change the friendly name, media category, description, or replace the file with a new one. All events to which the file is attached will be updated with the new information.

To edit an attachment

1. On the **Administration** tab, click **Media Files**.
2. Select the media file you want to edit.
3. In the **Actions** group, click **Edit Media Files**.
4. Make the desired changes.
5. In the **Actions** group, click **Save & Close**.

Downloading Media Files

You can download a media file and open it with the appropriate application. For example, if the file is a Microsoft Word document, you can download the file and view it with Microsoft Word.

To download a media file

1. On the **Administration** tab, click **Media Files**.
2. Select the media file you want to download.
3. In the **Actions** group, click **Edit Media Files**.
4. Click the **Download Attachment** link.
5. Navigate to the folder you want to save the file in and click **Save**.
6. In the **Actions** group, click **Save & Close**.

Deleting Media Categories

You can delete media categories that do not contain any media files.

To delete a media category

1. On the **Administration** tab, click **Media Categories**.
2. Select the media category you want to delete.
3. In the **Actions** group, click **Delete Media Category**.
4. Click **Yes** to confirm that you want to delete the file.

Deleting Media Files

You can delete media files that are not attached to events.

To delete a media file

1. On the **Administration** tab, click **Media**.
2. Select the file you want to delete.
3. In the **Actions** group, click **Delete Media Files**.
4. Click **Yes** to confirm that you want to delete the file.

Tags

You can add tags to ACS Facility Scheduler. These tags can then be used to further describe and categorize calendar events. You can edit existing tags, or, if needed, you can delete a tag.

To create a new tag

1. On the **Administration** tab, click **Tags**.
2. In the **Actions** section, click **Add Tag**.
3. Enter a **Tag Name**.
4. Click **Save & Close**.

The new tag displays in the list in alphabetical order.

> **Note**
> You can only edit and delete tags in the **Administration** window.

To edit a tag

1. On the **Administration** tab, click **Tags**.
2. Click the tag you want to edit. To reorder the **Tag Name** list, click .
3. In the **Actions** section, click **Edit Tag**.
4. Make the necessary changes to the tag.
5. Click **Save & Close**.

The edited tag displays in the **Tag Name** list.

To delete a tag

1. On the **Administration** tab, click **Tags**.
2. Click the tag you want to delete. To reorder the **Tag Name** list, click .
3. In the **Actions** section, click **Delete Tag**.
4. Click **Yes**.

The tag is removed from the list.

Additional Information

- Tags cannot contain apostrophes.
- Tags have a 30-character limit.
- Spaces are allowed in tags, but do count in the 30 character limit.
- All tag names are automatically converted to lowercase.
- There is a limit of 20 tags per event.
- The permission to select tags for an event must be turned on for each role for each calendar.
- The permission to add, edit, and delete tags must be turned on in the Edit Permissions window for each role.
- The permission to add/edit tags is a pre-requisite to deleting tags. You can have permission to add/edit tags but not have rights to deleting tags.

Roles and People

In Facility Scheduler, you control the security of your dataset by assigning roles to users. You also store people's information in your dataset so that you can list them as event resources and contacts.

People

There are three ways that people's information is stored in your Facility Scheduler dataset. People can be entered as:

- Users
- Logins
- Individuals

Read more about each below.

Users
Users are people who can log in to and use Facility Scheduler. You can assign roles to users to control their permissions in Facility Scheduler. You can create an unlimited number of users. You can also unlock accounts for users who forgot their passwords. If someone is no longer an active user of Facility Scheduler, you can inactivate, disassociate, or delete their user account.

Logins
Logins are people who can log in to and use other compatible ACS Technologies software, but not Facility Scheduler. You can change a login account to a user account. This way, the person can log in to and use Facility Scheduler with the same user name and password they use elsewhere.

Individuals
Individuals cannot log in to or use Facility Scheduler. They are usually people that you list as contacts for your events, such as event coordinators and volunteers. You can create new user accounts for individuals.

Roles

In Facility Scheduler, you control the security of your dataset by assigning roles to users. Users are people who can log in to and use Facility Scheduler. Roles determine the permissions of users, including what calendars they can view and what actions they can perform. Roles are also a time-saving feature: you can assign the permissions to a role, and then assign that role to several users. This way, you don't have to tediously assign the permissions for each user one-by-one.

> **Create Roles Before Users**
> If you are setting up Facility Scheduler for the first time, we recommend creating roles before users. Doing so speeds up the process of assigning permissions to users. See Adding Roles.

Built-in Roles

Just as it includes built-in users, Facility scheduler includes three built-in roles: Administrator, Member, and Guest. These are common roles that you will probably assign to many of your users.

Administrator — The Administrator role is the only role that has permissions to manage roles and users. No other roles can manage roles and users. The Administrator role also gives access to all calendars. The Administrator role does *not* include permissions to unlock user accounts, manage resource labels, site information, and password requirements. For security purposes, you cannot edit or delete the Administrator role. (It doesn't appear in the Roles window for this reason.)

Member — By default, the Member role includes permissions to view published events and add new events. You can change these permissions and delete the Member role as you see fit.

Guest — The Guest role only allows the user to view published events. For security purposes, you cannot edit or delete the Guest role. (It doesn't appear in the Roles window for this reason.)

Adding Roles

You can create an unlimited number of roles to assign to users. Examples of roles include:

- Childcare Volunteer — add and edit permissions to nursery, child Sunday School, and VBS calendars
- Childcare Coordinator — all permissions to nursery, child Sunday School, and VBS calendars
- Calendar Operator — all permissions to all calendars, but no permission to reports or people

As we illustrate above, it is common to have both "volunteer" and "coordinator" roles for related calendars. Volunteer roles are usually limited to add and edit permissions for specific calendars. The corresponding coordinator roles usually have all permissions to the same calendars. You may also have calendar operators who make sure the your Facility Scheduler dataset is clean and up-to-date.

Role Types
In the role type list, you can select Member, Guest, or [Custom Role Type]. Unless you have advanced knowledge of Facility Scheduler, we strongly recommend selecting **[Custom Role Type]** for any roles you create. Selecting [Custom Role Type] means that the role functions independently of a role type. Roles types are handy if you know how to use them. However, if not set up properly, you can accidentally give roles and users more permissions than you intended. To learn more, see Role Types.

To add a new role

1. On the **Administration** tab, click **Roles**.
2. In the **Actions** group, click **Add Role**.
3. Enter the **Name** of the role.
4. In the **Role Type** drop-down list, select **Custom Role Type**. (Selecting any other role type is only recommended for advanced administrators of Facility Scheduler.)

You have created the role. However, the role isn't much use without permissions assigned to it.

Assigning Permissions

You can have an unlimited number of calendars in Facility Scheduler. you change the permissions for a role, the permissions for all users assigned to that role are updated.

You can manage permissions in the these areas:

- People — Add, edit, and delete individuals
- Reports — View and print reports (based on permissions to specific calendars)
- Scheduler (All Calendars) — Create and manage all calendars, event types, resources, resource categories, and tags
- Individual Calendars — Specific permissions for each calendar

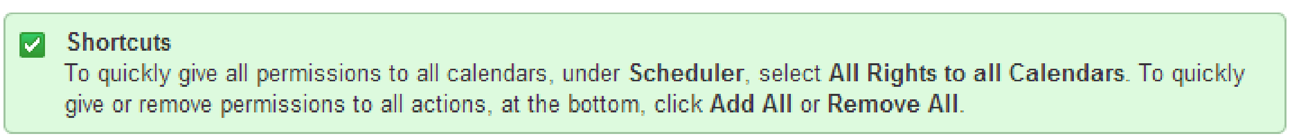
For each calendar, you can manage these permissions:

- Booking restricted resources
- Approving, canceling, and confirming events
- Publishing events
- Adding, deleting, viewing, and editing events
- Selecting tags

To assign permissions to a role

1. On the **Administration** tab, click **Roles**.
2. Select the role.
3. In the **Actions** group, click **Edit Role**.
4. Under **Permission Summary**, click **Edit**.
5. Select the permissions you want the role to have.
6. Click **OK**.
7. In the **Actions** group, click **Save & Close**.

Shortcuts To quickly give all permissions to all calendars, under **Scheduler**, select **All Rights to all Calendars**. To quickly give or remove permissions to all actions, at the bottom, click **Add All** or **Remove All**.



Editing Events Permissions

When you are assigning permissions, keep in mind that users with only *edit* permissions can only edit events with a *pending* status. They cannot edit an event once it has been approved or confirmed. To edit approved or confirmed events, users must also have approve and confirm permissions.

Deleting Roles

As long as the role is not assigned to any users, you can delete roles that you no longer need. You cannot delete the Administrator or Guest roles.

To delete a role

1. On the **Administration** tab, click **Roles**.
2. Select the role.
3. In the **Actions** group, click **Delete Role**.
4. Click **Yes** to confirm that you want to delete the role.

Users

Users are people who can log in to and use Facility Scheduler. You can assign roles to users to control their permissions in Facility Scheduler. You can create an unlimited number of users. You can also unlock accounts for users who forgot their passwords. If someone is no longer an active user of Facility Scheduler, you can inactivate, disassociate, or delete his or her user account.

> **Permissions to Manage Users and Roles**
> Unless otherwise noted, the tasks on this page require you to have permissions to manage users and roles in Facility Scheduler.

Built-in Users

Just as it includes built-in roles, Facility Scheduler includes a built-in Guest user account.
Guest — The Guest user only has permission to view published events.

For security purposes, you cannot edit or delete the Guest user accounts. (They don't appear in the Users window for this reason.) However, you can change and reset their passwords.

Creating User Accounts

Facility Scheduler administrators can create user accounts. You can create new user accounts from scratch. Or, if a person is already entered in Facility Scheduler as an Individual, you can create a user account from his or her individual information. You can also create new user accounts from people's logins in other compatible ACS Technologies products.

> **Create Roles Before Users**
> Roles are also a time-saving feature: you can assign permissions to a role, and then assign that role to several users. This way, you don't have to tediously assign the permissions for each user one-by-one. So, if you are setting up Facility Scheduler for the first time, we recommend creating roles before users. To learn more, see Roles.

To create a new user account

1. On the Administration tab, click Users.
2. In the Actions group, click Add Individual.
3. Enter the individual's information. (Last name and first name are required.)
4. Click Save & Close.
5. Click Add User.
6. Enter the last name of the person.
7. Click Search.
8. Select the individual and click OK.
9. Enter the user name, password, e-mail, and phone for the new user.
10. In the Actions group, click Save & Close.

You have created a new user account. Now you need to assign roles for the user.

To create a user account from an individual

1. On the Administration tab, click Users.
2. In the Actions group, click Add User.
3. Enter the last name of the individual.
4. Click Search.
5. Select the individual and click OK.
6. Enter the user name, password, e-mail, and phone information for the new user.
7. In the Actions group, click Save & Close.

You have created a user account for the individual. Now you need to assign roles for the user.

To create a user account from an existing login

1. On the Administration tab, click Users.
2. In the Actions group, click Add Individual.
3. Enter the individual's information. (Last name and first name are required.)
4. Click Save & Close.
5. Next to the search field, select Logins.
6. Select the login.
7. In the Actions group, click Associate Login.
8. Enter the last name of the person.
9. Click Search.
10. Select the person and click OK.

The person now has a user account to Facility Scheduler. Now you need to assign roles for the user.

Password Requirements

Passwords must be between 6 and 15 characters long. They cannot contain any part of the user name, and cannot have consecutive letters, numbers, or other characters. We recommend that passwords include at least two letters and two numbers, and are at least eight characters long. Administrators may set additional password requirements for Facility Scheduler users.

Assigning and Removing Roles

When you add users for the first time, you must assign them roles so that they have permissions to use Facility Scheduler. As a user's responsibilities evolve, you can change the roles assigned to that user. You should assign at least one role to each user; you may want to assign multiple roles to some users.

If a user has more than one role, and there is a conflict in the permissions, the most permissive setting is granted. For example, if a user is assigned a coordinator role that grants permission to approve events, and a member role that does not grant permission to approve events, the user will have permission to approve events because the coordinator role grants that permission.

> **Role Types**
> When you are assigning roles to a user, you have the option of selecting a role type. Unless you have advanced knowledge of Facility Scheduler, we strongly recommend selecting **[Custom Role Type]** for all users. Selecting [Custom Role Type] means that the user functions independently of a role type. Roles types are handy if you know how to use them. However, if not set up properly, you can accidentally give users more permissions than you intended. To learn more, see Role Types.

To assign a role to a user

1. On the Administration tab, click Users.
2. Select the user.
3. In the Actions group, click Edit User.
4. In the Show group, click Roles.
5. In the Role Type drop-down list, select [Custom Role Type]. (Selecting any other role type is only recommended for advanced administrators of Facility Scheduler.)
6. In the right pane, click **Add**.
7. Select the role and click **OK**.
8. Repeat steps 6 and 7 for each role you want to assign the user.
9. In the **Actions** group, click **Save & Close**.

You have assigned the role to the user.

To remove a role from a user

1. On the **Administration** tab, click **Users**.
2. Select the user.
3. In the **Actions** group, click **Edit User**.
4. In the **Show** group, click **Roles**.
5. Select the role you want to remove.
6. In the right pane, click **Remove**.
7. In the **Actions** group, click **Save & Close**.

You have removed the role from the user. You may want to follow the instructions above to assign a new role to the user.

Administrator Permissions

Giving administrator permissions to a user allows them complete control over your Facility Scheduler dataset. You should be selective and cautious when assigning administrator permissions.
To ensure that you don't give administrator permissions unintentionally, Facility Scheduler includes some safeguards. To give users permission to manage other users and roles, you must enable them to unlock user accounts. (Select **Login Admin**). assign them the system role of **Administrator**.

The Administrator role also provides system-wide access to all calendars and actions. To ensure that a user has complete system-wide permissions in Facility Scheduler, you must also designate them a **Site Admin**. This allows the user to manage resource labels, site information, and password requirements. Being a Site Admin does not include any additional permissions beyond these.

To ensure that a user has system-wide permissions in Facility Scheduler, follow the three sets of instructions below.

To give a user permissions to unlock user accounts

1. On the **Administration** tab, click **Users**.
2. Select the user.
3. In the **Actions** group, click **Edit User**.
4. In the **Show** group, click **Login**.
5. Select **Login Admin**.
6. In the **Show** group, click **Roles**.
7. In the **Role Type** drop-down list, select **[Custom Role Type]**. (Selecting any other role type is only recommended for advanced administrators of Facility Scheduler.)
8. In the right pane, click **Add**.
9. Select the role **Administrator** and click **OK**.
10. In the **Actions** group, click **Save & Close**.

You have given the user permissions to unlock user accounts. To ensure that the user has system-wide permissions, you must also give permissions to manage users and roles and to resource labels, site information, and password requirements.

To give a user permissions to manage roles and users

1. On the **Administration** tab, click **Users**.
2. Select the user.
3. In the **Actions** group, click **Edit User**.
4. In the **Show** group, click **Login**.
5. Select **Login Admin**.
6. In the **Show** group, click **Roles**.
7. In the **Role Type** drop-down list, select **[Custom Role Type]**. (Selecting any other role type is only recommended for advanced administrators of Facility Scheduler.)
8. In the right pane, click **Add**.
9. Select the role **Administrator** and click **OK**.
10. In the **Actions** group, click **Save & Close**.

You have given the user permissions to manage users and roles. To ensure that the user has system-wide permissions, you must also give permissions to resource labels, site information, and password requirements and to unlock user accounts.

To give a user permissions to resource labels, site information, and password requirements

1. On the **Administration** tab, click **Users**.
2. Select the user.
3. In the **Actions** group, click **Edit User**.
4. In the **Show** group, click **Login**.
5. Select **Site Admin**.
6. In the **Show** group, click **Roles**.
7. In the **Role Type** drop-down list, select **[Custom Role Type]**. (Selecting any other role type is only recommended for advanced administrators of Facility Scheduler.)
8. In the right pane, click **Add**.
9. Select the role **Administrator** and click **OK**.
10. In the **Actions** group, click **Save & Close**.

You have given the user permissions to manage resource labels, site information, and password requirements. To ensure that the user has system-wide permissions, you must also give permissions to manage users and roles and unlock user accounts.

Unlocking User Accounts

A user account is locked after five consecutive unsuccessful log-in attempts. Usually, this happens when users forget their passwords. When a user account is locked, no one can log in as that user.
User accounts are automatically unlocked after one hour. Users designated as Login Administrators are unlocked after 15 minutes. If a user needs to access an account sooner, a login administrator can unlock the user account manually.

To unlock a user account manually

1. On the **Administration** tab, click **Users**.
2. Select the use.
3. In the **Actions** group, click **Unlock**.

If users still cannot remember their password, you may want to also change their passwords for them. This way, they won't lock their accounts again. Or, you can instruct users to reset their passwords themselves.

Changing Other User's Passwords

If users have completely forgotten their passwords, you may want to change the passwords for them. Or, you can instruct users to reset their passwords themselves.

To change another user's password

1. On the **Administration** tab, click **Users**.
2. Select the user.
3. Click **Edit User**.
4. In the **Show** group, click **Login**.
5. Enter the new password (twice to confirm it).
6. Click **Save & Close**.

Password Requirements

Passwords must be between 6 and 15 characters long. They cannot contain any part of the user name, and cannot have consecutive letters, numbers, or other characters. We recommend that passwords include at least two letters and two numbers, and are at least eight characters long. Administrators may set additional password requirements f or Facility Scheduler users.

Changing User Names

Users cannot change their own user names. Another user with administrator permissions is required to change user names. To change a user name, you cannot be logged in as that user.

To change a user name

1. On the **Administration** tab, click **Users**.
2. Select the user.
3. In the **Actions** group, click **Edit User**.
4. Enter the new user name.
5. In the **Actions** group, click **Save & Close**.

The user name is changed. The user cannot log in with the previous user name.

Inactivating User Accounts

Inactivating a user account leaves the account in Facility Scheduler, but prevents the user from logging in. This security feature allows you to easily prevent a user from accessing Facility Scheduler, without having to delete the account entirely. Additionally, inactivating the account is a visual cue to other Facility Scheduler users that this person is unavailable to perform his or her normal tasks. You can activate user accounts again.

To inactivate a user

1. On the **Administration** tab, click **Users**.
2. Select the user.
3. In the **Actions** group, click **Edit User**.
4. Under **Login Information**, clear the **Active** box.
5. In the **Actions** group, click **Save & Close**.

Disassociating User Accounts

Disassociating a user account removes the user's access to Facility Scheduler, but allows the user to access to other ACS Technologies products.

To disassociate a user

1. On the **Administration** tab, click **Users**.
2. Select the user.
3. In the **Actions** group, click **Disassociate User**.
4. Click **Yes** to confirm.

The user's account is now listed as a Login. You can associate the Login again by creating a user account from it.

Deleting User Accounts

Deleting a user account means that the user no longer has access to Facility Scheduler. When you delete users' accounts, you also have the option to

- delete their Login records — the records of their user names and passwords for other compatible ACS Technologies software. They will still be able to access the other software.
- delete their Individual records — their personal information, name, address, etc.
- delete both their Logins and Individual records

To delete a user

1. On the **Administration** tab, click **Users**.
2. Select the user.
3. In the **Actions** group, click **Delete User**.
4. In the window, follow the instructions to also delete the Login or Individual record or both.

Linking User Accounts

Having to remember so many different user names and passwords can be frustrating. That's why, in some ACS Technologies software, we enable you to **link** user accounts. Linking user accounts connects the user names and passwords of the two accounts. This way, when you change the user name or password of one, the other changes as well. Currently, only **Access ACS** and **Facility Scheduler** can link user accounts.
Linking user accounts between Access ACS and Facility Scheduler varies depending on which program you added the user to first. We recommend adding new users to Access ACS first: this makes linking the accounts easier.

Linking Access ACS Users to Facility Scheduler

Once you have created a user account in Access ACS, and once the user has logged in to Access ACS at least once, the matching user account for Facility Scheduler is automatically created and linked. All you have to do is assign roles so that the user has permissions in Facility Scheduler.

If Access ACS users have not logged in before, you can manually link their user accounts to Facility Scheduler.

Linking Facility Scheduler Users to Access ACS

If you create a user account in Facility Scheduler first, you must manually link the account to Access ACS.

> **Permissions Required**
> To link users to Access ACS, you must have permissions to manage user accounts in Access ACS.

To link Facility Scheduler users to Access ACS

1. Log in to Access ACS.
2. On the toolbar, select **Admin** > **Security**.
3. On the **Users** tab, select **Other Users**.
4. Locate the user.
5. Under **Link Login**, for that user, click **Add**.
6. Enter the information of the user. Last name and e-mail address are required. (The user name and password are already entered from Facility Scheduler.) Note: If the user's personal information is already stored in Access ACS, click **Select user from People records**.
7. In the drop-down list, select the **Assigned Profile** for the user.
8. Click **Save**.

The user can now log in to Access ACS with the same user name and password from Facility Scheduler.

Managing Password Requirements

As an administrator, you can control the password settings of Facility Scheduler users. This includes:

- How strong a password must be
- How long before a password expires
- How long before a password can be used again

> **Site Admin Permissions Required**
> To control password settings, you must be a Site Admin.

To change password strength requirements

1. On the **Administration** tab, click **Options**.
2. Click the **Site Settings** tab.
3. Under **Password Strength**, select the password strength requirement. The weakest setting is to the far left; the strongest to the far right.
4. Click **OK**.

To force passwords to expire

1. On the **Administration** tab, click **Options**.
2. Click the **Site Settings** tab.
3. Under **Password Expiration**, clear the **Passwords Never Expire** option.
4. Select the number of days after which the password expires. The lower the number, the more secure your system.
5. Click **OK**.

To reject previous passwords

1. On the **Administration** tab, click **Options**.
2. Click the **Site Settings** tab.
3. Under **Saved Passwords**, select the number of previous passwords that are rejected when the user is setting a new password. The higher the number, the more secure your system.
4. Click **OK**.

Logins

Logins are people who can log in to and use other compatible ACS Technologies software, but not Facility Scheduler. You can change a login account to a user account. This way, the person can log in to and use Facility Scheduler with the same user name and password they use elsewhere.

You cannot add logins to Facility Scheduler. They are automatically detected by Facility Scheduler from other compatible software. If you are tired of seeing a login listed, you can delete it.

To change a login to a user account

1. On the **Administration** tab, click **Users**.
2. In the **Actions** group, click **Add Individual**.
3. Enter the person's information. (Last name and first name are required.)
4. Click **Save & Close**.
5. Next to the search box, select **Logins**.
6. Select the login.
7. Click **Associate Login**.
8. In the search box, enter the last name of the person.
9. Click **Search**.
10. Select the person and click **OK**.

The login is now a user account. You should now assign roles to the user so that he or she has permissions to use Facility Scheduler.

To delete a login

1. On the **Administration** tab, click **Users**.
2. Next to the search box, select **Logins**.
3. Select the login.
4. In the **Actions** group, click **Delete Login**.
5. Click **Yes** to confirm.

Individuals

In Facility Scheduler, individuals are people who are not users of Facility Scheduler or any other compatible ACS Technologies software. They are usually people that you list as contacts for your events, such as event coordinators and volunteers. You can create new user accounts for individuals. You can delete an individual who is not a contact for any event.

To add an individual

1. On the **Administration** tab, click **Users**.
2. In the **Actions** group, click **Add Individual**.
3. Enter the person's information. (Last name and first name are required.)
4. In the **Actions** group, click **Save & Close**.

To delete an individual

1. On the **Administration** tab, click **Users**.
2. Next to the search box, select **Individuals**.
3. Select the individual.
4. In the **Actions** group, click **Delete Individual**.
5. Click **Yes** to confirm.

Campuses

Campuses are user-defined locations that are associated with events when you set up registration. For example, you can set up a campus named Family Resource Building, and associate it with events at that location.

Campuses in ACS Facility Scheduler are fully integrated with campuses in Access ACS. Security is controlled in Access ACS. If you don't have access to campuses in Access ACS, you will not have access to campuses in ACS Facility Scheduler. Furthermore, changes to campuses can be made in either ACS Facility Scheduler or Access ACS.

To add a campus

1. On the **Administration** tab, click **Campuses**.
2. In the **Actions** group, click **Add Campus**.
3. Enter the **Name** of the campus.
4. In the **Show** group, click **Save & Close**.

Editing a Campus

When you edit a campus, all events that reference the campus will be updated with the new information.

To edit a campus

1. On the **Administration** tab, click **Campuses**.
2. Select the campus you want to edit.
3. In the **Actions** group, click **Edit Campus**.
4. Make the desired changes.
5. In the **Show** group, click **Save & Close**.

Deleting a Campus

If a campus has never been added to an event, you can delete it. If a campus has been added to events, you will need to remove it from the events or delete the events before deleting the campus.

To delete a campus

1. On the **Administration** tab, click **Campuses**.
2. Select the campus you want to delete.
3. In the **Actions** group, click **Delete Campus**.
4. Click **Yes** to confirm that you want to delete the campus.

Departments

Departments are user-defined areas within your organization that are associated with events when you set up registration. For example, you can set up a department named Youth and associate it with events for the youth.

Departments in ACS Facility Scheduler are fully integrated with Event Registration Departments in Access ACS. Security is controlled in Access ACS. If you don't have access to Event Registration Departments in Access ACS, you will not have access to Departments in ACS Facility Scheduler. Furthermore, changes to Departments can be made in either ACS Facility Scheduler or Event Registration Setup in Access ACS.

To add a department

1. On the **Administration** tab, click **Departments**.
2. In the **Actions** group, click **Add Department**.
3. Enter the **Name** of the department.
4. In the **Show** group, click **Save & Close**.

Deleting a Department

If a department has never been added to an event, you can delete it. If a department has been added to events, you will need to remove it from the events or delete the events before deleting the department.

To delete a department

1. On the **Administration** tab, click **Departments**.
2. Select the department you want to delete.
3. In the **Actions** group, click **Delete Department**.
4. Click **Yes** to confirm that you want to delete the department.

RSS Feeds

Use RSS news feeds with Facility Scheduler to keep your members, staff, and yourself up to date with events happening at your organization. When you subscribe to a news feed, Facility Scheduler sends you a summary of information about upcoming events.

You can subscribe to RSS feeds for all calendars, or you can select calendar feeds individually. If you don't want to subscribe to a feed, you can simply view it in your Internet browser. To encourage your members to subscribe, we recommend posting the feed links on your Web site. You can also manually edit the RSS links.

Viewing and Subscribing to RSS Feeds

When you subscribe to a news feed, Facility Scheduler sends you a summary of information about upcoming events, including the event name, date, time, primary location, description, and the link to event registration (if applicable). The RSS feed includes all events for the current day and the next seven days.* Facility Scheduler provides you with the links to add to the RSS reader of your choice. You can subscribe to events for all calendars, or you can select calendars individually.

> **Only Published Events**
> Facility Schedulers sends information only about *published* events. If you subscribe to the RSS feed of any *private* calendars, Facility Scheduler only sends the information of published events on that calendar.

To subscribe to an RSS news feed for all calendars

1. On the **Administration** tab, click **RSS Feeds**.
2. Select **All Calendars**.
3. In the **Actions** group, click **Copy Link**.
4. Add the link to the RSS reader of your choice.

To subscribe to an RSS news feed for a specific calendar

1. On the **Administration** tab, click **RSS Feeds**.
2. Select the calendar of your choice.
3. In the **Actions** group, click **Copy Link**.
4. Add the link to the RSS reader of your choice.
5. Repeat these steps for each calendar that you want to subscribe to.

If you want to see the RSS feed without subscribing to it, you can view the feed in your browser.

To view the RSS news feed for a calendar

1. On the **Administration** tab, click **RSS Feeds**.
2. Select the calendar you want to view the RSS feed of.
3. Click **View Feed**.

The RSS feed opens in your default Internet browser. For best results, we recommend viewing RSS feeds in Internet Explorer®.

Additional Information
*The maximum number of events displayed is 100. However, to ensure that you don't miss an event simply because it wasn't displayed in your RSS feed, Facility Scheduler always shows all events for the last day of your feed, even if it goes over 100.

Posting RSS Feed Links to Your Web Site

To encourage your members to subscribe to your RSS feeds, we recommend posting the feed links on your Web site. While we can't instruct you in updating your own Web site, we can tell you how to copy the RSS feed links so that you can post them.

To copy an RSS feed link for a calendar

1. On the **Administration** tab, click **RSS Feeds**.
2. Select the calendar.
3. In the **Actions** group, click **Copy Link**.

You have copied the RSS link. Now, you can paste it directly into another document, such as a webpage. You may also want to manually edit the RSS feed link.

Editing RSS Feed Links

By default, when you change the name of a calendar, the RSS feed link does not change. This is handy if your members subscribe to or bookmark your RSS feeds: it prevents their subscriptions and bookmarks from breaking when you change the calendar name. However, you can manually edit the last section of the link (the part that is specific to the calendar) if you so desire.

> **Changing the RSS Link Breaks All Current Subscriptions**
> If you change an RSS link, everyone who currently subscribes to it must manually update their subscriptions. They have to add the new RSS link to their RSS readers.

To edit the RSS feed link of a calendar

1. On the **Administration** tab, click **RSS Feeds**.
2. Select the calendar you want to change the link of.
3. In the **Actions** group, click **Edit Link**.
4. In the **RSS Link** field, change the link name.
5. Click **Save & Close**.

The RSS feed link of the calendar is updated.

Managing Your Site's Name and E-mail

In Facility Scheduler, you can change your site’s name and primary e-mail address. The site name appears on the login window to identify your organization. The site e-mail address is listed as the sender for e-mails sent by Facility Scheduler.

To change your site's name and e-mail address

1. On the **Administration** tab, click **Options**.
2. Click the **Site Settings** tab.
3. Edit the site information.
4. Click **OK**.

➡Facility Scheduler in OnDemand

Facility Scheduler is now available OnDemand! If you are using Facility Scheduler through OnDemand, you will notice a slight difference compared to using it on your local computer:

> **OnDemand Help**
> If you are looking for help about installing, logging in to, or using OnDemand, see the OnDemand User Guide.

The color scheme changed and I didn't change it!

Don't worry, there's no boogie man in Facility Scheduler or your computer. The custom colors that you select — also known as theme, skin, or paint scheme — are assigned to your OnDemand login. If you share your OnDemand login with other people, those other users can change the theme for you. So, if you set the theme to **Liquid Sky**, only to log in one day and see it set to **Black**, you might ask your fellow user if he or she is having a bad day.

E-mailing Files

Now you can e-mail reports in Facility Scheduler OnDemand.

To e-mail a report

1. On the **Reports** tab, click **Reports**.
2. In the left pane, select the report.
3. In the **Print** group, click **Report Preview**.
4. In the **Export** group, click **E-mail As**. An options window displays.
5. In the **Export Type** drop-down list, select the file format for the report.
6. Enter the e-mail addresses of the recipients. (Separate multiple addresses with semicolons.)
7. Enter the e-mail subject.
8. Enter the e-mail message.
9. Click **Send**.

➡Installing Microsoft Outlook Add-In

Use the Outlook Add-In to import your people and events from Access ACS™ and ACS Facility Scheduler™ into Microsoft® Outlook®.

> ⚠ Outlook Add-In only syncs **calendar** information entered in **Facility Scheduler**. Similarly, Outlook Add-In only syncs **contacts** entered in **Access ACS**.

Installation Requirements

In addition to the system requirements for Access ACS and ACS Facility Scheduler, the Outlook Add-In requires the following:

- **Operating System** — Windows XP SP2 or later
- **.NET Framework** — Version 3.5
- **Internet Connection** — High speed connection

Installing the Outlook Add-In

Before you install the Outlook Add-In, make sure you have loaded the Microsoft .NET Framework 3.5. On the workstation you want to install Outlook Add-In, make sure you close Microsoft Outlook and ACS Facility Scheduler before beginning the install process.

To install the Outlook Add-In

1. Open the Client Portal downloads page.
2. On the **Resources** menu, click **Downloads**.
3. Log in to the downloads page using your e-mail address, site number, and PIN. To locate your site number, reference your Facility Scheduler welcome e-mail.
4. Under **Downloads**, click **Outlook Add-In**.
5. Under **Links**, click **Download**.
6. Save the file to your desktop.
7. On the desktop, double-click the file you just saved and follow the instructions on the screen.
8. When the installation is complete, open Microsoft Outlook.
9. A small ACS Church Life About window displays. Close the window and drag it to your Outlook toolbar.
10. In Microsoft Outlook, on the **Tools** menu, click **Options**.
11. On the ACS Church Life tab, enter your **Site Number User Name** , , and **Password**.
12. To test your new username and password, click **Test Connection**
13. Click **Apply**.
14. To view your contacts and calendar data, you must first synchronize your events and people.

Under Calendars, you now have the option to include all calendars or select specific calendars to sync with Outlook.

To install the Outlook Add-In in Office 2010

1. Open the Client Portal downloads page.
2. On the **Resources** menu, click **Downloads**.
3. Log in to the downloads page using your e-mail address, site number, and PIN. To locate your site number, reference your Facility Scheduler welcome e-mail.
4. Under **Downloads**, click **Outlook Add-In**.
5. Under **Links**, click **Download**.
6. Save the file to your desktop.
7. On the desktop, double-click the file you just saved and follow the instructions on the screen.
8. When the installation is complete, open Microsoft Outlook.
9. A small ACS Church Life About window displays.
10. In Microsoft Outlook, on the **File** tab, then click **Options**.
11. Click Add-Ins in the left pane.
12. Select the AcsTech.Compact.OutlookAddin from the List of Installed Add-Ins.
13. Click the Add-In option button at the top of the page.
14. The ACS Church Life properties window displays, enter your **Site Number User Name** , , and **Password**.
15. To test your new username and password, click **Test Connection**
16. Click **Apply**.
17. To view your contacts and calendar data, you must first synchronize your events and people.

To include all calendars, click **OK**. Or, you can include only specific calendars.

To include only specific calendars

1. Select **Synchronize with the Selected Calendars Only**.
2. Click **Calendars**, then click **OK** to sign in to ACS Applications.
3. Select the calendars you want to include and click **Close**.
4. Click **Apply**, then **OK** to close the Outlook options dialog box.

Syncing Outlook

Once you've installed the Outlook Add-In, you can use it to synchronize your events and people in ACS Facility Scheduler and Access ACS with Microsoft Outlook.

Updating Your Outlook Calendar

To update your Outlook Calendar

1. Open **Outlook**.
2. Access your calendar in Outlook.
3. Select the ACS Church Life calendar, or the contacts list.
4. On the **Add-Ins** tab, under Custom Toolbars, click **Sync Events**.

Synchronizing events may take a few moments, but you should see the ACS Church Life Calendar in your calendar list when it is finished. If you do not see the ACS Church Life calendar under Calendars, you may need to add it.

To turn on the ACS Church Life Calendar

1. In Outlook, go to your folder list.
2. Click **+** beside **Calendar**.

The calendar should now display. The calendar displays all published events that are 60 days prior to the current date and 180 days into the future.

To refresh your events data, click **Sync Events**. This is a one-way synchronization from ACS Facility Scheduler to Outlook, so any changes to events should be made in Facility Scheduler. Events set up in Access ACS will not sync to Outlook.

Updating Your Outlook Contacts

To update your Outlook Contacts

1. Open **Outlook**.
2. Access your contacts in Outlook.
3. Select the ACS Church Life calendar, or the contacts list.
4. On the **Add-Ins** tab, under Custom Toolbars, click **Sync People**.

Synchronizing people may take a few moments, but you should see the ACS Church Life Contact group under Contacts when it is finished. If you do not see the group under Contacts, you may need to add it.

To add the ACS Church Life Contact group

1. In Outlook, go to your Folder List.
2. Click **+** beside **Contacts**.
3. Select **ACS Church Life Contact** group.

The contacts should now display.

To refresh your contacts data, click **Sync People**. This is a one-way synchronization from Access ACS to Outlook, so any changes to individual records should be made in Access ACS. Individuals entered in Facility Scheduler will not synchronize to Outlook.

Uninstalling Older Versions of Outlook Add-In

If you have an older version of the Outlook Add-In installed, you must uninstall it and delete a specific `.config` file before you can install the newest version. I know it sounds complicated. Hopefully, these step-by-step instructions should make the process pain free. If not, leave us a comment.

Close Outlook and Facility Scheduler
Make sure you close Microsoft Outlook and Facility Scheduler before beginning this process.

To uninstall the Outlook Add-In program (Windows XP)

1. On the Windows taskbar, click **Start**, then click **Control Panel**.
2. Click **Add or Remove Programs**.
3. Locate and select **ACS Technologies Outlook Add-In**.
4. Click **Remove**.
5. Click **Yes**.
6. Close the windows once the process has run.

To see how this process works, view the video below.

To uninstall the Outlook Add-In program (Windows Vista and Windows 7)

1. On the Windows taskbar, click **Start**, then click **Control Panel**.
2. Locate **Programs**, then click **Uninstall a program**.
3. Right-click **ACS Technologies Outlook Add-In**.
4. Click **Uninstall**.
5. Close the windows once the process has run.

After the program is uninstalled, you must locate and delete the **officeAddInSettings.config** file from your computer.

To unistall the OfficeAddInSettings.config file (Windows XP and Windows Vista)

1. On the Windows taskbar, right-click **Start**, then click **Explore**.
2. Navigate to **C:\Users\<your username>\AppData\Local\ACSTechnologies\officeAddInSettings.config**. For example, my user name is rebeccam so my path would be **C:\Users\rebeccam\AppData\Local\ACSTechnologies\officeAddInSettings.config**.
3. Right-click **OfficeAddInSettings.config** then click **Delete**.
4. Click **Yes**.
5. The .config file is moved to your Recycle Bin.

To unistall the OfficeAddInSettings.config file (Windows 7)

1. On the Windows taskbar, right-click **Start**, then click **Open Windows Explorer**.
2. Navigate to **C:\Users\<your username>\AppData\Local\ACSTechnologies\officeAddInSettings.config**. For example, my user name is rebeccam so my path would be **C:\Users\rebeccam\AppData\Local\ACSTechnologies\officeAddInSettings.config**.
3. Right-click **OfficeAddInSettings.config** then click **Delete**.
4. Click **Yes**.
5. The .config file is moved to your Recycle Bin.

> **Empty Your Recycling Bin**
> Make sure to empty your computer's recycling bin before installing a new version of Outlook Add-In.

➡Broadcast

ACS Broadcast is an application you can use to display your events in ACS Facility Scheduler on monitors throughout your facility. If you use overhead projectors in your sanctuary, you can use ACS Broadcast to flash events for the day or week on the screen while people are filing in.

Overview

ACS Broadcast is a Web application used to display published events from your ACS Facility Scheduler database. Events and their details display in real time on TV monitors, projectors, or other computer video display. ACS Broadcast reads the events from ACS Facility Scheduler, so you don’t have to revise a PowerPoint presentation or other management system to update your displays. Just make the change in ACS Facility Scheduler and ACS Broadcast will automatically update at the time you select.

ACS Broadcast is divided into sections called Displays. This is the equivalent of channels on a TV. Each display can be set up independently of other displays to show information in a format and theme that is appropriate to the audience that it will be used for.

Events can be displayed in one of two layout types: slides and tabular. In both views events are displayed in chronological order.

When you display events using slides (shown below), events are displayed one event at a time with the event's name, date, start and end times, and description.

The Slides Layout Type

When you display events using the tabular view, all events for a given selection are displayed in a list view identifying the start time, name of the event, and primary location where it is occurring.

The List Layout Type

You can filter events by primary location and set up a monitor outside each room to display the events for only that room. You can also filter events by calendar. By doing this, you could have monitors in the youth areas that only display events on the youth calendar.

> **Fullscreen Mode**
> **Double-click** within the Broadcast window to switch to fullscreen mode. Press the **Esc** key while in full-screen mode to return to windowed mode.

Displays

You can have up to 50 display configurations. Customize each display by selecting the Data Refresh Internal (in 15 min intervals), the Information Display Time (in seconds), the Background files (image or color), Font (size and color), Layout Type (Slide or Tabular) and Data Filters.

About Displays

Displays can be configured to use a static background color, a static image background or motion graphics background. Static images or motion graphics can be uploaded for use on any Display (channel).

There are two background files: Background File and Default File. ACS Broadcast determines if the Background File or Default File should be used based upon the number of events and the files selected.

Events to Display

- The **Background File** displays.
- If no **Background File** is entered, the **Background Color** is used.

No Events Display

- The **Default File** displays.
- If no **Default File** is entered, the background will be black.

Adding Displays

To add a display

1. On the **Displays** page, click **Add New Display**.
2. Enter a **Display Name**.
3. Customize the other display settings as necessary.
4. To save the display, click **Save**. To save and view the display, click **Save & Launch**.

Deleting Displays

To delete a display

1. On the **Displays** page, click the **Delete** link beside the display you want to remove.
2. Confirm the deletion.

Viewing Displays

On the **Displays** page, click **Launch** for the display you want to view.

Switching Between Fullscreen and Windowed Mode

Double-click inside the Broadcast window to switch to fullscreen mode. Press the **Esc** key while in fullscreen mode to return to the default windowed mode.

Launching Displays in Internet Explorer Kiosk Mode

To launch a display in Internet Explorer Kiosk Mode

1. On the **Windows taskbar**, click, **Start**.
2. Click **Run**. If your OS is Windows Vista or higher, click **Search**.
3. Type this into the text box: `c:\Program Files\Internet Explorer\iexplore.exe -k "https://solutions.acstechnologies.com/broadcast/Display/run/<Display Name>"`
   Note: The <Display Name> is the name you labeled your instance of the display.
4. Click **OK**.

Files

You can create custom images and videos that can be used as background images on displays. You can upload the following file types to ACS Broadcast:

- .jpg
- .png
- .wmv

The maximum number of files is 50.

To upload files

1. On the **Files** page, click **Add New File**.
2. Click **Browse**.
3. Enter a friendly name in the **File Name** field.
4. Click **Save**.

To delete files

1. On the **Files** page, click **Delete** next to the file to remove.
2. Confirm the deletion.