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*Note: If prompted to log in, use your GISD credentials (GISD email address and password).*

To view the Calendar:

- Go to the Calendar tab.
  - Adjust Month/Year, if needed.
  - Select a Location.
  - Select specific Room(s), if needed, by clicking on the binocular image.
  - Click “Refresh Calendar”.

You can click event titles or specific dates for more details.

Note: If prompted to log in, use your GISD credentials (GISD email address and password).

### Select a Schedule Type

- Go to the **New Schedule** tab.
- Select a schedule type.

#### Normal Schedule
- most common, use when possible.
  - Single or multiple dates - max of 20 dates
  - Same room(s)
  - Same time of day

#### Recurring Schedule
- Daily/weekly/monthly - max of 100 dates
  - Same room(s)
  - Same time of day

**Irregular Schedule** - DO NOT USE
Submit a Request

Enter Schedule Details

☑️ = required fields

- **Status** - change to “Approved” if you are the approver for the spaces being requested, otherwise leave as “Submitted”.
- **Event Title** - enter a descriptive title for the event and specify if the event is a hosted event, practice, rehearsal, game, concert/performance, etc.
- **Location** - select a campus or facility.
- **Room(s)** - select the rooms/spaces needed for the event by clicking on the binocular image. Check the box next to each room needed, then click **Okay**. A max of 50 rooms can be selected per schedule.

For a **Normal Schedule Type**, enter dates/times as follows:

- **Event Date(s)** - click the dates on the calendar.
- **Start Time, End Time** - select the start and end times for the event. Additional time can be entered as Setup Begin Time and Breakdown End Time.
- **Duration** - DO NOT ADJUST! This field automatically calculates. “Spans over” should be 1 day unless you are requesting an overnight event.
- **Check Availability** - click to check availability of the room(s)/date(s) selected.

For a **Recurring Schedule Type**, enter dates/times as follows:

- **Start Time, End Time** - select the start and end times for the event. Additional can be entered as Setup Begin Time and Breakdown End Time.
- **Duration** - DO NOT ADJUST! This field automatically calculates. “Spans over” be 1 day unless you are requesting an overnight event.
- **Start Recurrence** - enter the date of the first event.
Submit a Request

- **Recurrence Pattern** - select a pattern: Daily, Weekly, Monthly
  - Select **Daily** if your event will occur EVERY DAY between the start and end dates.
  - If you choose **Weekly**:
    - Enter a value to indicate whether the event occurs every 1 week, every 2 weeks, etc.
    - Check the box(s) next to the day(s) of the week that the event will occur.
  - If you choose **Monthly**, either:
    - Enter the day of the month that the event will occur (such as the 15th) and enter a value to indicate whether the event occurs every 1 month, every 2 months, etc.
    - OR-
    - Select the weekday of the month (such as the second Monday) and enter a value to indicate whether the event occurs every 1 month, every 2 months, etc.

- **End Recurrence** - enter the date of the last event.

- **Check Availability** - click to check availability of the room(s)/date(s) selected.

### Additional Information
If this section appears, answer any questions, if applicable.

### Organization Information

- **Organization** - select the most appropriate “GISD Campus” or “GISD Department”.
- **Contact Name** - enter contact info for the person associated with the event.
Submit a Request

Insurance Information
Insurance info is not needed for internal/GISD events (skip).

Setup Requirements

- Check the box next to a requested service.
- Enter a description in the **Service description** box (required for any selected service).

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<tr>
<th>Maintenance Services</th>
<th>Service description</th>
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<tr>
<td>Custodial - select when custodial support is needed</td>
<td></td>
</tr>
<tr>
<td>Heating/Ventilation/Air Conditioning - select for activities outside of school hours</td>
<td></td>
</tr>
<tr>
<td>Lighting (Outdoor) - select when outdoor athletic field lighting is required</td>
<td></td>
</tr>
<tr>
<td>Personnel - select when technical director support is required for theaters or if you are the athletics approver scheduling a facilitator</td>
<td></td>
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<table>
<thead>
<tr>
<th>IT Services</th>
<th>Service description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic Door/Lock Access - select when electronic doors need to be programmed</td>
<td></td>
</tr>
<tr>
<td>Tech Services - select when support is needed by the Technology department</td>
<td></td>
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Additional Fields

- **Number Attending** - provide an approximate number of people attending.
- **Other Needs** - you may enter additional comments here.
- **Event Visibility** - for most events, keep the default setting of “Yes”.
Inactive-Pending-Activate Schedule

**IMPORTANT:** Leave schedule inactive or select activate.

- **Inactive Schedule** - leave this option selected if you are not the final approver for all of the spaces being requested.
  - The schedule will follow the normal approval process.

- **Activate Schedule** - you can select this option to activate the schedule if you are the final approver for all of the spaces being requested.
  - Site Admins can only activate internal/GISD schedules for the spaces that they approve.
  - Activation ends the approval routing process (will not route to the District Scheduler for review).
  - Be sure the spaces are available before activating.

To attach files to your request:

- Click the **Add New File** link to the right.
- Browse your computer for the file, select it, enter a File Description, and click Submit.

- Click **Save** to submit the schedule request.

If all required fields have been completed properly, you will see a note indicating that the **Schedule has been saved** and the system will generate a **Schedule ID** number. Your schedule request will follow the approval process (unless “Activate Schedule” was selected). A confirmation email will be sent to you and the contact.
Access a Request

You will receive an email notification when a request has been routed to you for approval.

To access the request:

- Click the email link, or click on the # under Waiting Your Approval on the Home tab.

- Select the request you would like to process.

Process a Request

The Approve Schedule Requests page provides a summary.

- Check for conflicts.
  - If you see **Conflicts Exist**, skip to the “Requests with Conflicts” section of this guide.
  - If not, continue.

- Click **Process/Approve Now**.
Process a Request

- Review all details of the request.
  - Check for conflicts.
    - Verify the **Organization**: internal/GISD or external.
  - Make any needed adjustments.
    - If you see “Classroom Request for CommunityUse” in the room selections, remove and assign specific classrooms.
    - Complete/adjust the **Setup Requirements**, as needed (custodial info, HVAC for after-hours only, etc.).
  - Change **Status** to: Approved, Canceled, Declined, or Duplicate.
    - If declining, click View/Change Declined Reason to add a reason.
    - Cancel and duplicate both cancel the schedule.
Process a Request

Inactive-Pending-Activate Schedule

**IMPORTANT:** If approving the request, select inactive/pending/activate schedule.

- **Inactive Schedule** - CAMPUS APPROVERS, leave this option selected if it is an external request OR you are not the final approver for all of the spaces being requested.
  - The schedule will follow the normal approval process.

- **Pending Schedule** - fine arts and athletic approvers can use this option:
  - When processing an internal request that may not be activated immediately and they want the system to check for conflicts while the schedule is in process.
    - Add Pending Reason = “pending final approval”
    - Pending Expiration Date - leave blank.
  - When processing an external request that needs insurance verification or needs to be invoiced immediately.
    - Add Pending Reason = “pending insurance verification”
    - Pending Expiration Date - leave blank.

- **Activate Schedule** - you can select this option to activate the schedule if it is an internal/GISD request AND you are the final approver for all of the spaces being requested.
  - Site Admins can only activate internal/GISD schedules for the spaces that they approve.
  - Activation ends the approval routing process (will not route to the District Scheduler for review).
  - Be sure you checked for conflicts before activating.

- Click the **Save** button. The request has now been processed.
Requests with Conflicts

If the request you are processing conflicts with another schedule, you will see **Conflicts Exist** on right side of the Approve Schedule Requests screen or at the top of the schedule.

- Click on **Conflicts Exist**.

- Review the conflict information.

- Decide how to process the request. If making any adjustments to the request prior to approving it, **DISCUSS WITH THE CONTACT FIRST**.
  - If the request conflicts with a school holiday, decline the request unless granting special approval.
  - If the request conflicts with a scheduled event that cannot be changed, you can:
    - Decline the request and provide a “decline reason” to the requester.
    - Adjust the rooms/dates/times of the request in order to avoid the conflict and then approve (changes will apply to all dates on the schedule).
  - If a request shows a conflict for a particular date, you can:
    - Cancel the request for that date and approve the remaining dates. Click the **Cancel Schedule Event** button on the conflicts page, then approve the request.
    - Create an “Alternate Event” for that date once the schedule has been activated. (This will allow you to adjust the location/rooms/date/times for a particular date without applying the changes to all dates on the schedule.) To do this, add an approval note for the District Scheduler to create the alt event when processing the schedule or approve/activate the schedule and then create the alt event (see next section of this guide for instructions).

If you need help, contact the District Scheduler.
Schedule Changes

If an activated schedule conflicts with another schedule, you can make cancellations or schedule adjustments to resolve the conflict. **If making any adjustments to an activated schedule, DISCUSS WITH THE CONTACT FIRST.**

**Cancellations**

You can cancel an entire schedule or just particular dates on a schedule.

To cancel an **entire schedule**:

- Go into the schedule.
- Change **Status** to: Canceled.
- Add notes to the **Other Needs** section documenting the reason and any relative conversations. Put the date and your name at the end of your comments.
- Click the **Save** button. The entire schedule is now cancelled.

To cancel a **particular date** on a schedule:

- Go into the schedule.
- Scroll down to the **Events** section and click on the date you want to cancel.
- Under the Cancellations section, select “**Yes**” for Cancel Event, then click **Submit**.
- The date is now cancelled.
Alternate Events

You can create an Alternate Event to adjust the location/rooms/date/times for a particular date without applying the changes to all dates on a schedule.

To create an Alternate Event:

- Go into the schedule.
- Scroll down to the Events section and click on the date you want to adjust.

- Click the Alternate Event Location/Date/Time button.

- Adjust the location, rooms, date, and/or times. Add notes to the Event Change Notes section documenting the reason for the change and any relative conversations. Put the date and your name at the end of your comments.
- Click Save. The Events section of the schedule will now show the Alternate Event.

Duplicate / Renew

If you need to make major changes to an activated schedule, you can use this option to cancel out the original schedule and create a copy that can be edited.

To use the Duplicate / Renew option:

- Go into the original, activated schedule.
- Change Status to: Duplicate.
- Add notes to the Other Needs section documenting the change. Put the date and your name at the end of your comments.
- Click the Save button to cancel out the original schedule.
- When the screen refreshes, hover of the Shortcuts menu and select Renew. This will create a new schedule with all of the information from the original schedule (minus the event dates).
Invoicing

Creating an Invoice

You can create an invoice for a schedule that is in pending or activated status.

To create an invoice:

- Go into the schedule.
- Scroll down to the Invoices section and click on Create Invoice.

- In the Invoice Header box:
  - Select the Invoice Date and Terms.
  - Verify the Bill To (organization name), and Address.
  - Adjust any other fields, as needed.

- Create charges for each event date.
  - Select the Event.
  - Select the Charge Type.
  - Adjust the Quantity, if needed. For example, if you will be charging for 2 custodians, adjust quantity from “1” to “2”.
  - Adjust the Description, if needed.
  - Hours will automatically calculate based on the Start/End times of the event. Use the calculated value or adjust, if needed.
  - Enter the Rate.
  - The Amount will automatically calculate (quantity x hours x rate). A flat rate can be applied by adjusting Quantity and Hours to a value of “1”.
  - Click Submit to save charges. You can save up to 5 charges at a time.
Invoicing

Review the **Line Items** section to see charges.

- Use the Event dropdown menu to select which date you would like to see charges for.
- Edit or Delete line items, as needed.

**Printing / Emailing the Invoice**

To print or save a PDF of the invoice, scroll to the top of the screen and click **Print This Invoice**.

To email the invoice:

- Scroll down to the bottom of the Add/Update Invoice page.
- Click the **Email Invoice** link. This will open a new email that is addressed to the organization’s contact and includes a link to a PDF of the invoice.
Help

- If you need help, click on the Help link at the top right of the screen within FSDirect.


- For additional assistance, contact our GISD District Scheduler, Kathy O’Connor.
  Email: oconnork1@georgetownisd.org
  Extension: 7623

*Email preferred, when possible.*