Prince George's County Public Schools

FSDirect Facility Scheduling Handbook

Introduction

School Dude's FSDirect program is an online portal for requesting to use school space during and after hours for all PGCPS locations. This is currently in place for all schools for internal PGCPS/School activities. All external organizations (anything other than PGCPS) will be required to use this portal by July 1, 2017.

This handbook will be updated periodically and will be posted online on the PGCPS Plant Operations web page (http://www1.pgcps.org/plantoperations/) Please refer to the online version to ensure you have the most up to date information.

Feedback, comments and constructive criticism are always welcome. To provide yours please contact Andrew Kidwell at andrew.kidwell@pgcps.org.

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User Roles

Site Admin2- Site Administrator 2 are in the approval process and have the highest ability to make the final decision in the approval process (called schedule activation), this role is reserved for Principals and up to one other staff member designated by the principal who can act on their behalf for facility use approval or denial. Maximum of 2 Site Admin 2 per location

Site Admin 1- Site Administrator 1 are in the approval process and are able to approve but not activate a schedule. This role can be secretarial or other office staff that will view and process requested events before forwarding to a Site Admin 2 for final approval.

Service Provider- Service Providers are the Building Supervisors, they are staff who will be providing set up, break down or other custodial requirements specified in event requests.

Requester- This role is able to only submit requests

NOTE: A USER CAN ONLY SERVE AS ONE ROLE

Adding users- If you need a user added please email Andrew Kidwell Andrew.kidwell@pgcps.org, specify role needed, must have a PGCPS email address, school/location. If the role requested is a Site Admin 1 or 2 will need to verify with principal before granting access.

How to make a request

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

- Normal Schedule: Most commonly used (Up to 20 event dates can be selected). This schedule is used when all event dates will share the same time and room(s).
- Recurring Schedule: (Up to 100 events can be added). This schedule is used for events that follow a pattern (Every Monday and Wednesday for a semester or the 3rd Friday of the Month for the entire year). All event dates will share the same time and room(s).
- Irregular Schedule: Please ignore the irregular schedule, only use normal or recurring.

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

- Schedule ID - A permit number will generate once the schedule has been saved successfully.
- Status - The default status is Submitted. You may be asked by your system Administrator to change the status to Approved if you are in the approval process.
- Event Title - Describes the event including school name (HPHS Soccer Practice, ERHS Play Rehearsal, GPMS PTA Meeting).
- Area – Do not use.
- Location - Where the event will be held (School Name.)
- Rooms - Specific rooms, fields, or other spaces where the event will be held. Hold down the CTRL key on your keyboard while you left click the mouse to select multiple rooms OR you may need to click on the binocular lookup to find the rooms that you need. Up to 50 rooms can be added to any schedule.
- Event Date(s) - Click the dates from the calendar or type them in the box provided. Be sure to use the MM/DD/YYYY format.
- Start Time/End Time - Must be entered in 15 minute increments.
- Duration - This number automatically calculates according to the Start and End Time that you enter. *Note: The boxes beside Duration and Spans over typically will not need to be changed. Spans over should be left as 1 day unless you are requesting an overnight event.
- Click the Check Availability button. A pop up window will appear and display any approved events that are already booked in the same Room(s), Dates, and Times that you selected. It will also display holidays that may conflict with your request.

Organization Information

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

Setup Requirements

- Setup Requirements are maintenance services that may be needed for an event (Custodial, Event Setup, Audio Visual, etc).
- Check the box next to the item that is needed for an event.
- Type what is needed in the Service Description box. This will trigger an email notification to the designated Service Provider as to what task needs to be performed for the event.

Additional Fields

- Enter Number Attending. You can also break this number into number of adults and number of children.
- Enter any Other Needs.
- The Booked By section will be automatically filled in with your information.

File Attachments

- Attach a file to your schedule request by clicking the Add New File link.
- Browse your computer for the file and select it. You can also enter a File Description. Click Submit.
- The attached file will now be listed in the File Attachments section at the bottom of the schedule. *Note: There is no limit to the number of files that can be attached, however the total size of all uploaded files on the schedule must be less than 5MB.

Click Save to submit the schedule request. The Schedule ID number will generate once the schedule has been saved.

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

Flow Chart

Viewing the Calendar

- Click on the Calendar Tab.

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

When viewing the calendar you can:

- Hover your mouse over the event title to see the time of the event.
- Click on the event title to see more detailed information about the event.
- Click on the date to see a Daily View of the Calendar.

Click on Next Month > in the right hand corner to see upcoming events for the next month.

How to print Calendar Details

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

Approving/Processing Requests

Site Admin 1

The role of Site Administrator I can approve or decline schedule requests for their assigned locations. Administrators typically setup routing rules that will direct certain requests (usually based on location) to a Site Administrator I. That individual can then approve or decline the request when it is routed to them. If they approve the request it will follow the routing rules and notify the next user in the approval process. If the schedule is declined it will not route to anyone else. An email will be sent to the "Booked By" person and also to the schedule's organization contact when it is declined.

How to Process a Request

1. When a schedule routes to you for approval, you can locate the request on the Home page by clicking on the number displayed beneath Waiting Your Approval.
2. Select the schedule that you would like to approve from the drop down menu next to Waiting Your Approval.
3. Choose the appropriate option to process the request: Approved, Cancel, Decline, or Duplicate.
4. If you approve the request, click on Approval Note if you would like to add an internal note which will appear on the schedule request form. If you decline a request, you have the ability to add a Decline Reason. An email containing the Decline Reason will be sent to the Booked By and

Organization Contact when the respective boxes are checked. To prevent the Decline reason from being sent, uncheck the boxes. Click Submit to save the note.

5. Back on the processing screen, click the Save button.

Site Admin 2

The role of Site Administrator II can approve, activate, or decline schedule requests for their assigned location(s). Administrators typically setup routing rules that will direct certain requests (usually based on location) to a Site Administrator II for approval or activation. That individual can then process the request when it is routed to them.

- If a Site Administrator II approves a request, it will follow the routing rules and notify the next user in the approval process.
- If a Site Administrator II activates a schedule then it will not follow any other routing rules. Activating a request is giving final approval.
- If the schedule is declined it will not route to anyone else. An email will be sent to the Booked By person and also to the schedule's organization contact when it is declined.

How to Process a Request

1. When a schedule routes to you for approval, you can locate the request on the Home page by clicking on the number displayed beneath Waiting Your Approval.
2. Select the schedule that you would like to approve from the drop down menu next to Waiting Your Approval.
3. Choose the appropriate option to process the request: Process/Approve Now, Cancel, Decline, or Duplicate.

Approving a Request

- Click on Process/Approve Now
- Scroll down the page and review the schedule details. Check the box next to Approve. *Note: Only select the radial next to Activate Schedule? if you are the final approval person.
- If the request is from any external organization, the Site Admin 2 is only to approve and not activate. **External organization requests are to be activated by Plant Operations/Facilities Use office.**
- Click Save to update.

Declining a Request

If you decline or cancel a request, you can to add a Decline Reason to the schedule

- Click the Decline Reason button and enter your note.
- Click Submit to save your note.

- An email containing the Decline Reason will be sent to the Booked By and Organization Contact when the respective boxes are checked.
- To prevent the Decline Reason from being sent, uncheck the boxes next to Notify Booked By or Notify Contact Person.
- Click the Save button.

How to Create a Work Order From FSDirect

If you are a Service Provider and there is a requested service within an event:

- In the Upcoming Events section on the home page, select the Location from the drop down menu.
- Enter a date range in the Start Date and End Date fields.
- Click on the Refresh button. If needed, click on Next 10 to view more events.
- Click on the Create Work Order or Create Incident button. The system will open another window which will display the work order in MaintenanceDirect. The FS Schedule section on the work order will contain the schedule details from the event in FSDirect.
- If no additional information needs to be added to the work order or incident, either minimize or close out the window.
- You can now mark the task Complete in FSDirect. *Note: If the task is marked complete in FSDirect, it will also mark the work order or incident complete in MaintenanceDirect.

FAQ's

What are Internal/External Organizations

If the event is a school sponsored activity, it is considered as an Internal Organization Event. The Organization will be the name of the school.

If the event is from any entity other than within PGCPS, this will be considered an External Organization. External Organizations will be responsible for submitting their own requests and will be mandatory to use the online portal instead of the paper form as of July 1, 2017. When processing a request from an external organization, you must not activate the schedule, this will be done by Plant Operations/Facility Use Office. Site Administrators will only approve.

What if my events are labled inactive?

The final approval within FSDirect is called "activated," this can only be done by a Site Admin 2. At the bottom of the event schedule page, you will find a button that is labled "activate schedule," select that and then click save. The event is now active.

What if a request needs to be processed but the request isn't routed directly to me?

If someone in your office is on leave and you need to process a request, you can search for schedules using the calendar tab at the top of the FSDirect page. Select the appropriate event to process, change the status at the top of the application and then scroll to the bottom of the page to find, and click, the save button.
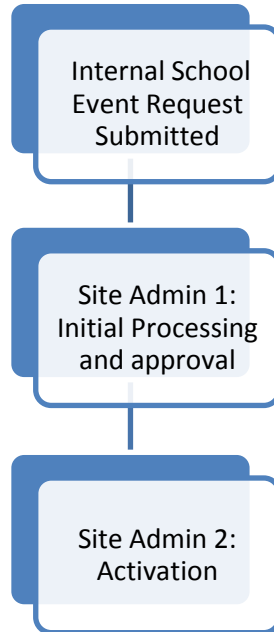
Who gets an email and when?

When a request is submitted, the person who booked the schedule, organization contact and site administrators for the location will receive an email. After every status change an email will be sent to the same users. If there is a wervice requested in the application, and the event has been both approved and activated, the Service Provider will receive an email 4 days prior to the event with notifications of required tasks.

What if my rooms aren't showing up in the rooms list?

1. Make sure that the "Area" field has not been selected and then check again.
2. If the room still does not show up, please send an email to Andrew.kidwell@pgcps.org to have the room added.

Internal Event Request Routing

Internal School
Event Request
Submitted

Site Admin 1:
Initial Processing
and approval

Site Admin 2:
Activation

External Event Request Routing

External Organization
Request Submitted

Site Admin 1: Initial
processing and
Approval

Site Admin 2:
Approval

Plant
Operations/Facilities
Use Office: Activation