ACS Facility Scheduler

Setup and Use
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Introduction to ACS Facility Scheduler

ACS Facility Scheduler™ is a central calendar coordinator designed specifically to expand and meet the multiple needs of organizations and manage facilities. With this scheduling solution, you can create and distribute custom calendars to your members and staff so that rooms and resources are never double-booked.

This guide includes the following concepts:

- Setting up meeting rooms
- Creating and distributing custom calendars
- Coordinating multiple events and activities
- Booking multiple locations for one event
- Scheduling equipment, people, and facilities
- Creating system-wide calendars for every ministry area
- Scheduling rooms, events, and meetings
- Reviewing daily and weekly planning
Unit 1: Facility Scheduler Set Up

Facility Scheduler contains three main tabs that display across the top of the program: Calendar, Reports, and Administration. You must set up and configure these tabs before you can move on to the meat of Facility Scheduler. Click the **Administration** tab to set up your preferences.

![Facility Scheduler Administration tab](image)

**Figure 1: The Facility Scheduler Administration tab**

This Unit covers:

- Editing Options
- Creating Resource Categories
- Adding Resources
- Adding Calendars
- Creating Event Types
- Creating Media Categories
- Adding Media Files
Editing Options

Facility Scheduler lets you apply resource labels to each resource. Each resource type, such as Items, Locations, and People, can have up to four custom text fields. These fields can be used to track information about each resource. Here are some examples of labels you can use.

![Example of Resource Labels](image)

Figure 2: Example of Resource Labels

To add custom text fields to resources

1. On the Administration tab, in the Show group, click Options.
2. Click the Resource Labels tab.
3. Enter label information in the available fields for Items, Locations, and People.
4. Click OK.
Adding Resource Categories

Once you have created the Resource labels, you must set up the Administration tab in the following order:

- Resource Categories
- Resources
- Calendars
- Event Types
- Media Categories
- Media Files
- Roles
- Users
- Campuses
- Departments

Each menu item builds on the previous item, so each must be completed in order.

Figure 3: The Administration Tab and Resource Categories

Resource categories are used to organize similar resources and control who can book specific resources. Examples of Item resource category are “Audio Visual Equipment”, “Tables and Chairs” or “Wedding Equipment”. Examples of Location resource categories are “Youth Building”, “Education Center” or “Main Building”. Examples of People resource categories are “pastoral Staff”, “IT” or “childcare team”.

To add a resource category

1. On the Administration tab, click Resource Categories.
2. In the Actions group, click Add Resource Category.

Figure 4: Adding a Resource Category
3. In the drop-down list, select a **Resource Type**.

4. Enter a **Name**.

5. Enter a **Description**.

6. In the **Actions** group, click **Save & Close**.
Exercises

List a few of the Resource Categories you would use:
Adding Resources

Now that you have set up your resource categories, you can add resources under each category. Resources are organized into items, locations, or people that can be booked for events. Examples would be “projector”, “Room 102”, or “Pastor Jones”.

Use the **Actions** tab to add the type of resource you need.

![Figure 6: Adding Resources](image)

Adding Items

Make sure to add all of the items that you require individuals to reserve. Popular items are sound systems, tables, and portable electronics. Adding these items lets individuals reserve them in association with an event. Once an item is reserved, it cannot be booked by someone else.

**To add an item**

1. On the **Administration** tab, click **Resources**.
2. On the **Actions** tab, click **Add Item**.

![Figure 7: The General Tab](image)
3. Enter a **Name**.

4. Select the appropriate **Resource Category** from the drop-down list.

5. Enter a default time for the **Setup Time (mins)** and **Teardown Time (mins)**. This is the normal amount of time it takes to set up and teardown for the item.

6. Enter a **Quantity** for the item.

7. If necessary, enter information in the **Storage Location**, **Purchase Date**, and **Serial Number**.

8. To restrict access to the item, select **Restrict access to resource for certain users**.

9. On the **Actions** tab, click **Save & Close**.
**Adding Locations**

Make sure to add all of the locations that are required to be reserved. Adding these locations lets individuals reserve them in association with an event. Once a location is reserved, it cannot be booked by someone else.

To add a location

1. On the **Administration** tab, click **Resources**.

2. In the **Actions** group, click **Add Location**.

3. Enter a **Name**.

4. Select the appropriate **Resource Category** from the drop-down list.

5. Enter a default time for the **Setup Time (mins)** and **Teardown Time (mins)**. This is the normal amount of time it takes to set up and teardown for the location.

6. Enter the total **Occupancy** for the location.

7. If necessary, enter information for **Capacity – With Tables**, **Room Temperature**, and **Capacity – Chairs Only**.

8. To restrict access to reserving the location, select **Restrict access to resource for certain users**.

9. In the **Actions** group, click **Save & Close**.

![Figure 8: The General Tab](image-url)
Combining Locations
Locations can be combined with other locations so that rooms with dividers are not 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 or 100-B can be booked. If Room 100-A is booked, room 100-B can still be booked, but Room 100 cannot.

Useful Information
Add each of the locations that will be combined before beginning these steps.

To combine locations
1. In the Show group, click Combined Rooms.
2. Click Add.

Figure 9: Selecting a Location
3. Select the rooms to combine together. To select multiple rooms, press Ctrl and select the multiple rooms.
4. Click OK.
5. In the Actions group, click Save & Close.
Adding People

Make sure to add all of the people who individuals can reserve. Adding people lets you reserve them in association with an event. Once reserved, they cannot be booked by someone else. People can be listed by name, such as “Pastor Jim” in order to reserve that specific person, or people can be listed generically, such as “Childcare Worker A” to reserve a type of person but not an individual specifically.

To add people

1. On the Administration tab, click Resources.
2. In the Actions group, click Add Person.
3. Enter a Name.
4. Select the appropriate Resource Category from the drop-down list.
5. If necessary, enter information for Department, Duties, and Cell Contact Information.
6. To restrict access to reserving the person, select Restrict access to resource for certain users.
7. In the Actions group, click Save & Close.
List a few of your resources below to help you begin to see how they work in Facility Scheduler.

<table>
<thead>
<tr>
<th>Item</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
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</tbody>
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<table>
<thead>
<tr>
<th>Location</th>
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<tbody>
<tr>
<td></td>
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<tr>
<td></td>
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<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>People</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
Adding Calendars

Calendars are the central focus of ACS Facility Scheduler. You can create an unlimited number of calendars and determine who can access each calendar. Determining which calendars to create is an important step in setting up the software. Keep in mind that this is your master scheduling program, so it is appropriate to create calendars even for groups that do not need to reserve resources.

Examples of calendars you can create include:

- Youth
- Children
- Singles
- Seniors
- Women
- Men
- Small Groups
- Music/Worship Team
- Church-Wide Events
- Non-Church Related Events
- Pre-school

To add a calendar

1. On the Administration tab, in the Show group, click Calendars.
2. In the Actions group, click Add Calendar.
3. Enter the **Calendar Name**.

![Figure 13: The General Tab](image)

4. Select a **Color** for the calendar.

5. In the **Show** group, click **Resource Categories**.

6. Assign the resources to be booked on this calendar.

7. Click **Add**.

8. Click **OK**.

![Figure 14: Selecting Resource Categories](image)

9. In the **Actions** group, click **Save & Close**.
Useful Information

To select multiple resources at once, press Ctrl then select the resources.
Exercises

List the calendars you want to create. Ministries that need a calendar with only their events listed should have their own individual calendar.

<table>
<thead>
<tr>
<th>Calendar Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<tr>
<td></td>
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<td></td>
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<tr>
<td></td>
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<tr>
<td></td>
</tr>
</tbody>
</table>
Creating Event Types

Sometime events have similar needs and require similar information. For example, you may always want to capture the same information on events that are booked by non-members, such as “Agreement signed” or “Deposit paid.” Event Types are templates that can be used to speed up configuration for events. Event Types can also be used to capture specific information pertinent to that type of event.

To create an event type

1. On the Administration tab, click Event Types.
2. On the Actions group, click Add Event Type.
3. Enter a Name for the event type.
4. Select a **Calendar** to add the event type to. This is the default calendar for the event type.

5. Click **Edit Event Type Fields**.

6. Select a **Field Type**.
Figure 19: Selecting a Field Type

7. Click an open field location.

8. Enter a Description for the field.

9. Click Done.

10. Repeat steps 6-9 until you have the event types you need.

11. Click OK.

12. In the Actions group, click Save & Close.

Useful Information

To edit, delete, or move a custom field, click 回.
Creating 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.

![Figure 20: The Administration Tab]

2. In the Actions group, click Add Media Category.

3. Enter the Name of the media category.

![Figure 21: The General Tab]

4. Enter a Description of the media category.

5. In the Actions group, click Save & Close.
**Media Files**

You can upload an unlimited number of documents, images, and other files and attach them to events. These can be Microsoft Word® documents with specific set up instructions, images of the room layout, or spreadsheets that list attendees.

**To upload a media file**

1. On the **Administration** tab, click **Media Files**.

   ![Figure 22: The Administration Tab](image)

2. In the **Actions** group, click **Add Media Files**.

3. Enter the **Name** of the media file. This name does not need to match the file name and can be something easy for you to recognize.

   ![Figure 23: The General Tab](image)

4. Select the **Media Category** you want to include the media file in. If the category you want is not represented, click ![add](image) to add the category.

5. Enter a **Description** for the media file.

6. Click the **Upload File** link.

7. Locate the directory with the media file you want to upload.
8. Select the media file and click **Open**.

9. In the **Actions** group, click **Save & Close**.
Unit 2: Using Facility Scheduler

Now that you have completed setting up ACS Facility Scheduler, you are now ready to begin using all of its features.

This Unit covers:

• The Dashboard
• Viewing Calendars
• Adding Events to a Calendar
• Events Statuses
• The Bookings View
• Printing Calendars
The Dashboard

When opening Facility Scheduler for the first time, Facility Scheduler's Dashboard displays. The dashboard provides:

- Action Items — Lists any action items that require your attention
- 7 Day Outlook — Lists upcoming events

**Figure 24: The Facility Scheduler Dashboard**

To edit an action item or upcoming event on the Dashboard

1. Double-click the item or event you want to edit.
2. Make the necessary changes.
3. In the **Actions** group, click **Save & Close**.
Viewing Calendars

You can view multiple calendars at once using separate grids for each calendar or a combined grid with color-coded events. You can display calendars in daily, weekly, or monthly formats.

Figure 25: Viewing Calendars
To view calendars

1. On the Calendar tab, in the Show group, click Calendar.

2. Select the calendars you want to display.

![Calendars](image)

**Figure 26: Viewing Calendars**

3. To switch the display view, click Day, Week, or Month.

![Calendar View](image)

**Figure 27: Switching the Display View**

4. To view the calendars in a single calendar view, click By Date.

5. To view each calendar in a separate grid, click By Calendar.

### Useful Information

To display all or clear all, right-click and select the option you want.
Adding Events to a Calendar

You can begin to add events to the calendar you selected to view.

To add an event to a calendar

1. On the Calendar tab, in the Show group, click Calendar.

2. In the Actions group, click Add Event.

3. Select the Event Type.

4. Click OK.

5. Enter the Name for the event.
Figure 30: The Event Tab

6. Select the Calendar the event belongs to from the drop-down list.

7. Enter a Start Time and End Time. If the event lasts all day or does not have a set time period, select All Day.

8. If necessary, enter information in the other fields.

9. In the Actions group, click Save & Close.

Recurring Events
ACS Facility Scheduler can also set up Recurring Events. This lets you enter events that repeat on a regular basis.

To add a recurring event

1. On the Calendar tab, in the Show group, click Calendar.

Figure 31: The Calendar Tab

2. In the Actions group, click Add Event.

3. Select the Event Type.
4. Click **OK**.

5. Enter the **Name** for the event.

6. Select the **Calendar** the event belongs to from the drop-down list.

7. Enter a **Start Time** and **End Time**. If the event lasts all day or does not have a set time period, select **All Day**.

8. If necessary, enter information in the other fields.

9. In the **Options** group, click **Recurrence**.

10. Set the **Recurrence pattern**.
11. Set the **Range of recurrence**.

12. Click **OK**.

13. In the **Actions** group, click **Save & Close**.
Event Statuses

By default, new events are added with a status of **Pending**. A pending event is on the calendar, but any booked resources are not reserved, and the event has not been approved by the appropriate people. You may allow only certain users the ability to approve or confirm events thus creating a workflow process for approval.

**Useful Information**

Only users with the appropriate security rights can approve and confirm events.

To approve or confirm an event

1. On the **Dashboard**, in the **Action Items** list, double-click the event you want to approve or confirm.

   ![Figure 35: The Action Items List](image)

   **Figure 35: The Action Items List**

2. In the **Status** drop-down list, select **Approved** or **Confirmed**.

   ![Figure 36: The Event Tab](image)

   **Figure 36: The Event Tab**
3. In the **Actions** group, click **Save & Close**.

**Cancellations**

When an event is canceled, a record of the canceled event remains on the calendar. Any resources associated with the event are freed up. This differs from deleting an event, which frees up any booked resources and removes any record of the event from the calendar.

**To cancel an event**

1. On the **Dashboard**, in the **Action Items** list, double-click the event you want to approve or confirm.
2. In the **Status** drop-down list, select **Canceled**.
3. In the **Actions** group, click **Save & Close**.

**To delete an event**

1. Select the event you want to delete from the Calendar view.
2. In the **Actions** group, click **Delete Event**.

![Figure 37: The Calendar Tab](image-url)
<table>
<thead>
<tr>
<th>Terminology</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pending</strong></td>
<td>The event has been created and is pending approval. Resources have not yet been reserved.</td>
</tr>
<tr>
<td><strong>Approved</strong></td>
<td>The event has been approved, but resources have not yet been reserved.</td>
</tr>
<tr>
<td><strong>Confirmed</strong></td>
<td>All booked resources for the event have been reserved for the event.</td>
</tr>
<tr>
<td><strong>Canceled</strong></td>
<td>Events that are canceled will free up resources but does not remove the event form the public calendar.</td>
</tr>
</tbody>
</table>
The Bookings View

On occasion, you may want to know when a particular resource is available. To view all of your resources at once, on the Calendar tab, in the Show group, click Bookings.

![The Bookings View](image)

**Figure 38: The Bookings View**

From the Bookings view, you can:

- Add an event
- Edit an event
- Copy an event
- Delete an event

**Useful Information**

To access additional features, right-click in the Bookings view. To create new events, double-click a date or time.
Printing Calendars

ACS Facility Scheduler lets you print a variety of calendars. When printing calendars, you can select the style of the calendar, date range, layout, and many other options.

To print one or more calendars

1. On the Calendar tab, in the Actions group, click Print.

![Figure 39: The Calendar Tab](image)

2. Select the Format, Paper, and Resources options you want.

![Figure 40: Selecting the Format, Paper, and Resource Options](image)

3. Click OK.

Useful Information

In the Page Setup dialog box, the Resources tab refers to Calendars, not to booking resources.
Unit 3: Facility Scheduler Reports and Queries

ACS Facility Scheduler provides a set of standard reports you can print or export to a file on your computer. You can filter reports based on dates, calendars, event types, and booked resources.

Depending on your user account permissions, the data available to print may be limited. You can only print events and other data on calendars you have access to.

![Report Menu](image)

**Figure 41: Report Types**

You can print reports to your default printer or you can preview reports on the screen. You can also print the report using a different printer or print settings. You can customize the number of copies, the number of pages to print, or whether to print single-sided or double-sided.

- You can print reports for a selected period of time and selected calendars.
- You can include Pending, Confirmed, Approved or Canceled Events on reports.
- You can print reports based on an Advanced Query.

With Advanced Queries, you create search criteria to search for specific data. For example, you can search for all events with the flag “All Day”.

When you process the query, ACS Facility Scheduler looks at every event in your database and returns those events that match the criteria you specified. Then, you can print reports based on the results of your query.
This Unit covers:

- Available Reports
- Printing and Exporting Reports
- Page Set Up
- Creating Advanced Queries

Useful Information

To customize your view of the Reports tab, drag the Report Menu to the middle of the window, and select one of the eight areas to place the menu. To auto hide the Report Menu, click the “push pin” icon on the Report Menu.
Available Reports

The following list describes the available reports:

3x5 Card – Prints the following on a 3x5 index card:

- Each Event Date
- Event Name
- Start Time
- End Time
- Calendar Resources
- Event Information based on Event Type

![Figure 42: The 3x5 Card Report](image)

The 3x5 Card report lets you:

- Select the date range of the report
- Print results from a query
- Print all or specific events

List of Events – Prints a list of events with the following information:

- Event Name
- Start Time
- End Time
• Calendar Resources

• Event Information based on Event Type

![List of Events Report](image)

**Figure 43: The List of Events Report**

The List of Events report lets you select:

- the report’s date range

- which options do and do not print

The List of Events Report is useful for areas such as maintenance planning, cleaning or repairs, when to service vehicles, etc.

**List of Events by Resource** – Prints a list of events grouped by:

- Resource Type

- Resource Category

- Resource
The List of Events by Resource Report lets you select:

- the report’s date range
- which options do and do not print


**List of Resources** – (Not Shown) Prints a list of resources, resource names, and custom fields grouped by resource type and resource category.

**Monthly Calendar** – (Not Shown) Prints a monthly calendar of events.

**Request for Use** – Prints a blank form based on the selected event type. The content of this report comes from the custom event type.

**Planning Calendar** – (Not Shown) Prints a blank calendar.

**Weekly Calendar Report** – Prints a weekly calendar of events with the following information:

- Event Name
- Start Time
- End Time
- Calendar Resources
- Event Information based on Event Type
Printing and Exporting Reports

Facility Scheduler lets you print and export reports you need for operations.

To print a report using the default printer and settings

1. Click the Reports tab.

![Figure 45: The Reports Tab](image1)

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.

![Figure 46: The Quick Print Option](image2)

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 Print.
5. Select the printer you want to print to from the Select Printer list.

6. To change the printer properties, such as paper size and output tray, click Preferences.

7. Click Print.

Useful Information
Refer to your printer’s reference guide for the available printing settings.

To preview a report

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 Report Preview.

Figure 47: The Print Option

Figure 48: The Report Preview Option
Useful Information

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.

You can choose to export the report as a file on your computer rather than print the report. Once you export the file you can save it to your computer or e-mail it in several different formats.

![Export Format Options](image)

**Figure 49: Export Format Options**

To export the report

1. Click Export To.

2. Select an Export File Type. Your options are:

![Selecting an Export File Type](image)

**Figure 50: Selecting an Export File Type**
3. Save the file to your desktop.

To e-mail a report

1. Click Email as.

2. Select an Email File Type. Your options are:

![Figure 51: Selecting a File Type](image)

Figure 51: Selecting a File Type
Setting Up the Page

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

Figure 52: Changing the Page Setup

To change the scaling

1. Select the report you want to print.
2. In the Page Setup group, click Scale.
3. Select the scaling you want for the report.

Figure 53: Changing your Report’s Scaling

4. Click OK.

To change the report margins

1. Select the report you want to print.
2. In the Page Setup group, click Margins.
3. Select one of the standard margin settings available. To change the paper size, source, orientation, and margins at the same time, click **Custom Margins**.

![Custom Margins](image1)

**Figure 54: Customizing your Report’s Margins**

4. Click **OK**.

To change the report orientation

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

![Portrait and Landscape](image2)

**Figure 55: Changing your Report’s Page Orientation**

4. Click **OK**.

To change the paper size

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

![Page Size Options]

Figure 56: Selecting your Page Size

4. Click OK.
Creating Advanced Queries

You can filter events based on a combination of the calendars, dates, and report settings you choose. You can also filter your events based on more advanced criteria. In these situations, use Advanced Queries.

Advanced Queries let you create search conditions to locate specific data. For example, you can create search conditions for all events flagged as “All Day”.

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. You can then print reports based on the Results, Conditions, Keywords, and Groups.

Conditions contain a **Query Field**, an **Operator**, and a **Value**. 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. An Example would be “bookings” (this is the query,) “Equals” (this is the operator) and “Adult Class Room” (this is the value). This query would be used to determine what bookings there are for the Adult Classroom.

The available operators depend on which field being used in the condition. To create conditions, use the following operators:

- Equals
- Does not equal
- Contains
- Begins with
- Ends with
- Is greater than
- Is greater than or equal to
- Is less than
- Is less than or equal to

**Figure 57: An example of a Generic Condition**

**Useful Information**

You can save queries and use them to filter the events that print on reports.
Queries can contain multiple conditions.

Use “And” if you want to find events that match all the conditions in the query.
Use “Or” to find events that match any of the conditions in the query.

**To create a condition**

1. On the **Query** tab, click 🆙. A generic condition displays.
2. To select a **Query Field**, click **All Day**.

![Figure 58: The Query Tab](image)

3. To select an operator, click **Equals**.
4. To enter a value, click `<enter a value>`.

**Useful Information**

When creating a condition, the operators and values available depend on the query field selected.
To delete a condition

1. Select the condition you want to delete.

![Figure 59: The Query Tab](image)

2. On the **Query** tab, click **×**.

To add a group or condition

1. On the **Query** tab, click the keyword you want to add a group to.

![Figure 60: Adding a Group or Condition](image)

2. Depending on what you want to do, click **Add Group** or **Add Condition**.

Advanced Queries contain one or more conditions. Queries with more than one condition use keywords to determine if any or all of the conditions must be met. Complex queries can be built by grouping conditions.

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.

![Image of the Reports tab]

Figure 61: The Reports Tab

2. In the Actions group, click New Query.

3. To add a condition, click 📸. A generic condition displays.

![Image of the Query Tab]

Figure 62: The Query Tab

4. To select a Query Field, click All Day.

![Image of selecting a Query Field]

Figure 63: Selecting a Query Field

5. To select an Operator, click Equals.

6. To select from a list of Values, click <enter a value>.

7. Click Run.

![Image of running the query]

Figure 64: Running the Query
Useful Information

The operators and values available depend on the selected condition.

To sort the results, click the column header you want to sort by. If necessary, you can also change the order of the columns.

**To remove columns**

1. Right-click the column header you want to remove.
2. Click **Column Chooser**.
3. Drag the heading in to the **Column Chooser**. Repeat until you have all the headers you want to remove.
4. Close the dialog box.

![Figure 65: Column Customization](image)

You can also drag the column you want to remove away from the grid until an “X” displays over it.

**To add columns back to the grid**

1. Drag the column header you want to add from the **Column Chooser**.
2. Drop the column header back in the grid.

Advanced Queries can be saved and used later to filter the events that print in reports. A saved query can be processed at any time.
**Terminology**

**Query Field** – The type of data you want to use to filter events.

**Operator** – A mathematical expression that determines how you want to compare the data with the value.

**Value** – The specific value by which you want to filter events.
Unit 4: Roles and Users

ACS Facility Scheduler uses roles to determine which parts of the software and which data users can access. Different roles have different permissions. When users are added, they are assigned roles and inherit the permissions granted to those roles. All rights and permissions are granted using roles.

Permissions are granted for the following:

- **People** — Add, edit, and delete individuals.
- **Reports** — View and print reports based on access to various calendars.
- **Scheduler** — Create and manage calendars, resources, and event types.

The following permissions are granted for each calendar:

- Add, edit, view, and delete events
- Approve, confirm, and cancel events
- Publish events
- Book restricted resources

You can create an unlimited number of roles to manage rights and permissions.

For example, you can create a Calendar Coordinator Role with all rights to all calendars, and a Staff Role with permission to add events, but not approve or confirm events.

### Useful Information

Access ACS users with a Member, Lay Leader, or Staff profile type are assigned the same permissions as the Member role type. Guests in Access ACS are assigned all the permissions as the Guest role type. The **Member** and **Guest** role types are built in and have special properties.

When a role type is assigned to a user, the user inherits all of the roles in the role type, and by extension, all of the permissions granted to those roles. If any of the permissions in any of the roles change, the user inherits those changes. If a role type has two roles with conflicting permissions, the more permissive role takes precedent. When additional roles are added to or removed from the role type, the user profile is automatically updated to reflect the changes to the role type.

There are two built-in role types that have special properties: **Member** and **Guest**.

When an Access ACS user with a Member, Lay Leader, or Staff profile type accesses a calendar in Access ACS, he is assigned all the roles in the ACS Facility Scheduler Member role type. By default, the Member role is the only role in the Member role type.
When a Guest views a calendar in Access ACS, he is assigned all roles in the ACS Facility Scheduler Guest role type. By default, the Guest role is the only role in the Guest role type.

### Useful Information

We highly recommend you do not add additional roles to the Guest role type.

ACS Facility Scheduler comes with three built-in roles:

- **Administrator** — Provides system-wide access. This role cannot be deleted or modified.
- **Member** — This role is assigned to Access ACS users who are not ACS Facility Scheduler users. The Access ACS users can log in and work in ACS Facility Scheduler. By default, users assigned this role can view published events and add new events. The permissions granted to this role can be modified.
- **Guest** — Provides access to calendars in Access ACS for anonymous users. Users assigned this role can only view published events. This role cannot be deleted or modified.

This unit covers:

- Adding Roles
- Creating User Accounts
- Modifying Password Requirements
Adding Roles

To manage rights and permissions, you can create an unlimited number of roles. For example, you can create a Calendar Coordinator role with rights to all calendars, and a Staff role with permission to add events, but not approve or confirm events.

To add a role

1. On the Administration tab, in the Show group, click Roles.

2. Click Add Role.

3. Enter a Name for the role.

4. Enter a Description for the role.

5. Select a Role Type from the drop-down list.

6. Under Permission Summary, click Edit.
7. Select the **Granted** checkbox for the permissions you want to grant.

![Image of the Edit Permissions Window](image1)

**Figure 68: The Edit Permissions Window**

8. Click **OK**.

9. In the **Actions** group, click **Save & Close**.

When permissions change, all users assigned the role are updated automatically.

**To change a role’s permissions**

1. On the **Administration** tab, in the **Show** group, click **Roles**.

![Image of the Administration Tab](image2)

**Figure 69: The Administration Tab**

2. Select the role you want to modify.

3. In the **Actions** group, click **Edit Role**.
4. Under **Permissions Summary**, click **Edit**.

5. Select the **Granted** checkbox for the permissions you want to grant. Clear the **Granted** checkbox for permissions you do not want to grant.

![Figure 70: The Edit Permissions Window](image)

6. To grant all permissions, click **Add All**. To deny all permissions, click **Remove All**.

7. Click **OK**.

8. In the **Actions** group, click **Save & Close**.
Exercises

List some of your users and which calendars they will need rights to manage:

<table>
<thead>
<tr>
<th>User</th>
<th>Calendar(s)</th>
</tr>
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<tbody>
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</tbody>
</table>
Creating User Accounts

ACS Facility Scheduler uses a combination of user accounts, user roles, and calendar/resource availability to manage security. Each user is assigned a user account with a unique user name, password, and one or more roles.

User accounts include security settings that affect:
- Functional permissions granted to the user
- Access to specific calendars.
- Access to restricted resources
- Ability to create user accounts and assign roles to users

There are two ways to create a new user account in ACS Facility Scheduler:
- Add a new user account for a new or existing individual
- Associate an existing login with a new or existing individual

Passwords
ACS Facility Scheduler passwords should:
- Be between six and fifteen characters long. We recommend a minimum of at least eight characters.
- Cannot contain any part of the user name.
- Cannot have consecutive letters, numbers, or other characters.
- Include at least two letters and two numbers.

To create a user account (not using Access ACS)

1. On the Administration tab, in the Show group, click Users.

![Figure 71: The Administration Tab](image)

2. Click Add User.

3. Enter the user’s name in the Search field.

4. Click Search.

5. If the new user is not listed in the search results, click Add New Individual.
   If the new user is listed, go to Step 8.
6. Enter Individual Information.

7. Click Save & Close.

8. Select the individual you just added.

9. Click OK.

10. Complete the Login Information.

11. Click Roles, then Add.

12. Select the role or roles you want to assign to the user.

13. In the Actions group, click Save & Close.

After five consecutive unsuccessful login attempts, user accounts are locked. When a user account is locked, the user cannot log in with that user name. User accounts automatically reset after a short period. Only Login Administrators can manually unlock a user account immediately.

To unlock a user account

1. On the Administration tab, in the Show group, click Users.

2. Select the user account you want to unlock.

3. Click Unlock.

At some point, you will need to remove an account. An individual may have left your organization, and you may want to delete that account. Or, if an individual has not attended in a while, you can deactivate the account.

To delete a user account

1. On the Administration tab, in the Show group, click Users.
2. Select the user account you want to delete.

3. Click **Delete**.

4. Click **Delete Login**.

![Figure 73: The Delete User Window](image)

To deactivate a user account

1. On the **Administration** tab, in the **Show** group, click **Users**.

2. Select the user account you want to deactivate.

3. In the **Actions** group, click **Edit User**.

4. Under **Login Information**, clear the **Active** option.
5. Click **Save & Close**.

**To disassociate a user**

1. On the **Administration** tab, in the **Show** group, click **Users**.

2. Select the user account you want to disassociate.

3. In the **Actions** group, click **Disassociate User**.

4. Click **Yes**.
### Terminology

**User** – Individuals who have access to ACS Facility Scheduler.

**Login** – Individuals who have User accounts in other ACS solutions, such as Access ACS, but do not have access to ACS Facility Scheduler. To create a Facility Scheduler user account from a login, select a login then click **Associate Login**.

**Individual** – People who are in your ACS Facility Scheduler database but do not have an ACS Facility Scheduler user account. Individuals can include members and Contacts.

**Deleting a User Account** – Removes the account from ACS Facility Scheduler. You have the option to remove the individual from the database when you delete a user account.

**Deactivating a User Account** – Prevents the individual from logging into the program, but leaves their account information in the ACS Facility Scheduler database.

**Disassociating a User Account** – Prevents the individual from accessing ACS Facility Scheduler, but leaves the account active for use with other ACS Solutions (Access ACS).
Modifying Password Requirements

Because you can access and edit your data via the Internet, you should consider what precautions to take in regards to passwords. ACS Facility Scheduler offers several options to help you ensure the security of your data.

To modify password requirements

1. On the Administration tab, in the Show group, click Options.

Figure 76: The Administration Tab

2. Click on the Site Settings tab.

3. To set the minimum required password strength, Under Password Strength, adjust the slider bar until the desired strength displays.

Figure 77: Setting Password Strength
4. To set password expiration dates, clear the **Passwords Never Expire** option. Adjust the slider bar until the desired number of days display.

5. To select the number of previous passwords that are not permitted for reuse, adjust the slider bar until the desired number of passwords display.

6. Click **OK**.
Unit 5: Integration with Other ACS Tools

ACS Facility Scheduler will allow your organization to save time and energy by integrating with several different tools.

This unit covers:

- Integrating ACS Facility Scheduler with Access ACS
- Web Site Integration with Access ACS and ACS Facility Scheduler
- Integrating with Microsoft Outlook
- ACS Broadcast
Integrating Access ACS with ACS Facility Scheduler

ACS Facility Scheduler can be integrated with your Access ACS account so Access ACS users can view your calendar. Users with the appropriate permissions can enter new events to the calendar, which displays in Facility Scheduler.

To add Facility Scheduler in Access ACS

1. Point to Admin, then click Options.
2. Under Calendar Preferences, select Use Facility Scheduler.
3. Click Save.
Web Site Integration with Access ACS and Facility Scheduler

Access ACS provides Web links to each calendar type you create and a public Web link for events for all calendar types. You can place the Web links on your organization’s Web site to let visitors view your scheduled events without signing in to Access ACS.

The calendar Web links only display approved events. Access ACS creates multiple Web links for your organization’s published calendars. For example, your organization might publish a Public, Master, and Pastor calendar; your organization’s Calendar Links page would display a link for Public Calendar, Master Calendar, and Pastor Calendar.

Each published calendar is assigned a Web link for Calendar View and Table View. Access ACS also creates individual Web links for events you create with the Event Registration feature and general Web links to other Access ACS features.

To view Calendar Type URLs

1. Point to Admin, then click Options.
2. Click the Web Links tab.
3. Click the Calendar tab.
4. Copy the calendar URLs you want to post on your organization’s Web site.
Integrating with Microsoft Outlook

With ACS Church Life's Outlook integration feature, you can import published events from calendars in ACS Facility Scheduler and people data from Access ACS to Microsoft Outlook. This lets you access your contact information in Outlook, as well as add Facility Scheduler events to your Outlook calendars.

Useful Information

The People data comes from Access ACS, and the calendar data comes from Facility Scheduler. The data available to you depends on which program you have and the data published in it.

The Outlook Integration feature is a free add-on for all clients with Facility Scheduler and Access ACS. You can download it from the Client Portal.

Useful Information

Make sure you have .NET Framework 3.5 installed and close Microsoft Outlook and ACS Facility Scheduler before attempting to integrate.

To install the Outlook Integration application

1. On a workstation with ACS Facility Scheduler installed, create a new directory named Outlook AddIn.

2. Copy the contents of OutlookAddIn.zip into the Outlook AddIn directory you created.

3. To install the Outlook plug-in, double-click the Setup.exe file inside the directory.

4. Click Next.

5. Open Microsoft Outlook.

6. When the ACS Church Life About window displays, minimize it and drag it to your Outlook toolbar.

7. In the Microsoft Outlook toolbar, click Tools, then click Options.

8. On the ACS Church Life tab, enter your Site Number, User Name, and Password.

9. To log into your site, click Apply.
Once you complete this procedure, you have the option to include all calendars or sync individual calendars with Outlook. To include all the calendars, click OK.

**To include only specific calendars**

1. Select **Synchronize with the Selected Calendars Only**.
2. Click **Calendars**, then click **OK**.
3. Sign in to Access ACS.
4. Select the calendars you want to include.
5. Click **Close**
6. Click **Apply**.
7. Click **OK** to close Outlook options.

**To update the calendar**

1. Open **Outlook**.
2. Access your calendars in Outlook.
3. On the **Church Life** toolbar, click **Sync Events**. Syncing events may take a few moments.
4. Once syncing occurs, the ACS Church Life Calendar displays in your calendar list.

Sometimes, the ACS Church Life calendar does not display under **My Calendars** in Outlook.

**To manually update the calendar**

1. In **Outlook**, go to your **Folder List**.
2. Click the + beside **Calendar**.
3. Select **ACS Church Life Calendar**.
4. The calendar should now display.
Outlook. Any changes made to individual records should be made in Access ACS.

To manually update contacts

1. In Outlook, go to your Contacts.
2. On the ACS Church Life toolbar, click Sync People. Syncing people may take a few moments.
3. Once syncing occurs, the ACS Church Life Contact group displays in your contact list.

Sometimes, the ACS Church Life contact does not display under Contacts in Outlook.

To manually update contacts

1. In Outlook, go to your Contacts.
2. Click the + beside Contacts.
3. Select the ACS Church Life contact group.
4. The contacts should display.

Useful Information

To refresh your events data, click Sync Events. This is a one-way sync from ACS Facility Scheduler to Outlook. Any changes made to events should be made in Facility Scheduler.

Useful Information

To refresh your contacts data, click Sync People. This is a one-way sync from Access ACS to Outlook. Any changes made to individual records should be made in Access ACS.
ACS Broadcast

ACS Broadcast works with Facility Scheduler to display events in rotation on monitors. If you have ACS Facility Scheduler, ACS Broadcast is available at no additional cost.

In ACS Broadcast, you can customize how you want the screen to display by:

- Adding a background or looping video
- Selecting a layout style
- Selecting a text color
- Displaying only certain events for certain locations
- Setting margins and font colors
- Setting refresh and display intervals

To get ACS Broadcast, go to the ACS Broadcast download page.
Upcoming Events
Teachers' Kids Class
Sunday, December 13, 2009
9:30 AM - 12:30 PM
Adult Class Room (room 123)

Figure 80: An event displayed in Broadcast
Mobile Application

The ACS Church Life mobile application lets you view your Access ACS individual records and ACS Facility Scheduler event records on your cellular phone or mobile device. Provided you're in a location that has mobile Internet access, your records are right at your fingertips without needing your computer.

There are no fees for this application. It is free to all ACS clients with Access ACS or Facility Scheduler. However, People data comes from Access ACS, and the calendar data comes from Facility Scheduler. The data available depends on which of those programs you have and the data published in them.

Using ACS Church Life, you can

- Use People to search for individuals in the database and view their details. This is based on the permissions set in Access ACS for the specific user and login.
- Search for and view information about anyone in the database.
- Use Events to look up Today’s Events, the Week’s Events (7-Day Outlook), and the Month’s Events.

Where can I get ACS Church Life?

**iPhones** – You can download ACS Church Life from [iTunes](http://itunes) or you can search iTunes for **ACS Church Life**.

**Windows Mobile Devices** – To install and run ACS Church Life on your Windows Mobile Device, you must have .NET Compact Framework 3.5 installed. To download .NET Compact Framework 3.5, click [here](http://www.microsoft.com).

Once you have downloaded and installed .NET Compact Framework 3.5, you can install **ACS Church Life**.

**All other mobile HTML, Internet-ready devices such as BlackBerry, PDA, or Smartphones** – To download and install ACS Church life, visit the **ACS Church Life Web site**.