Tutorial

WELCOME to ministrEspace – The Easiest to Use Room Scheduling Software ANYWHERE!

We trust that this tutorial will be a great tool for you as you set up you **ministrEspace** account.

MY INFO/SECURITY QUESTION

We recommend that you follow these first few easy steps before you fully engage in the SETUP of your site:

- **Click "My Info" (top Right hand of screen)**
    - Check **Email Alerts** if you desire to receive e-mails when events are scheduled
    - Change **Password** if desired
    - Check **Update question** if desired (highly recommended!!!)
    - Select **Security Question** and supply **Answer**
- Click **SAVE**

SETUP

ADMINISTRATOR ONLY:

After sign up and entrance to the software, click on **"Setup"** tab

GENERAL: This tab allows you to set up the name to be used in the page headers and upload a logo or picture for your login page

- **Click "GENERAL"**
  - Add ministry **NAME**
  - Complete **URL** with snippet (not your churches web site)
  - **Upload** a logo or picture for your login page
  - The **PUBLC CALENDAR** is an option that is available. If you desire to utilize this feature, you can use the "icon" provided or your own icon.
  - If using the public calendar, copy and paste the **Calendar Link** into your website
  - **ADVNACED** allow you to either hide the logo (in case you wish to insert the calendar into an iframe) or hide the request button on public calendar.
  - **URL BUILDER** Allows for the setup of a second public calendar based on **CATEGORIES**
- Click **"Back to Setup"**

APPROVAL AREAS: Set up approval groupings of spaces, resources, and services you can use to establish partial administrative privileges. NOTE: *This is an optional feature only if you intend on having sub-administrators.*

- Click **"Approval Areas"**
  - **Add** a "ministry area" for sub- administrator privilege
  - Click **"ADD"**
  - Continue to add areas as needed
- Click **"Back to Setup"**

USERS: You can add unlimited users with a variety of permissions/privileges

- Click **"Users"**
  - Add **e-mail address**
  - Click **"ADD"**
  - Add **NAME**
  - Mark Appropriate boxes

- Enter **Password**…Password must be 1 uppercase letter, 1 number and a minimum of 6 characters.
- **Re-enter** password
- Select **ROLE**. NOTE: If you have established Sub-administrators, select the **APPROVAL AREA(S)**
- Click **"SAVE"**
- If you get a green "success" alert, click **"NEXT":** if not, correct form and click "SAVE"

- Click **"Back to Setup"**

CATEGORIES: Categories are usually ministry areas/departments such as youth, children, worship, etc. NOTE: *This is an optional feature, although it is recommended for enhancing the reporting, public calendar, and search features.*

- Click on **"Categories"**
  - Add **Category NAME**
  - Click **"ADD"**
  - Continue as needed
- Click **"Back to Setup"**

FORMS: Create and customize forms that must be completed as part of the scheduling/event creation process.

- Click **"Forms"**
  - Add **NAME** of the form
  - Click **"ADD"**
  - Enter a question
  - Check box if this is a required question
  - Set sequence/order of question(s) on the form
  - Click **"ADD"**
  - Continue as needed
  - Click **"SAVE"** to save form
  - Click **"BACK"**
- Click **"Back to Setup"**

SPACES: This is where the meat of the set up begins…identifying the physical spaces on your campus that can be used or reserved. These can include buildings, rooms within buildings, ball fields, picnic shelters, etc. This could even include items such as a church bus or van if you wish to see such a resource on the daily calendar view.

- Click **“Spaces”**
    - Click **“ADD”** at the bottom left of the page
    - Add **NAME** of the space. NOTE: if this is a building, you can start a space “tree” for this space by selecting the building and then clicking “ADD” (see Note below).
    - Click appropriate boxes
    - Add Description if desired
    - Click **“SAVE”** – look for a green confirmation notice at the top of the screen.
    - Add the maximum Space **Capacity**
    - Click **“BACK”**
    - Continue adding spaces as necessary
    - Once a space has been successfully added you can add **“Configurations” NOTE**: *Adding configurations is an optional features and only necessary if you plan to offer various configurations per room.*
        - Click on **“Configurations”**
        - Enter a **NAME** for the configuration
        - Click **“SAVE”**
        - Continue as necessary
        - Click **“BACK”** to continue setup or click on the Documents tab to upload configuration documents.
        - If you desire to upload a visual representation of the configuration (i.e a picture, drawings, hand sketch, etc.) You may upload items into **DOCUMENTS** and label accordingly- for greater ease of use it is recommended that the document name match the configuration name
    - **” NOTE**: *Adding documents is an optional features and only necessary if you plan to offer documents per room.*

        - Click on **“Documents”**
        - Enter **“Title”** of the document (configuration document names should match the configuration name selected above).
        - Upload file from your computer or other data storage device NOTE: File must not to exceed 5MB
        - Click **“SAVE”** – you will receive a green confirmation if successful and a link to the document will be displayed
        - Click **“BACK”** to continue the process
- Click **“Back to Setup”**

NOTE: To add rooms or spaces to a “building” or other primary space, select the the building/primary space “radio button” and then click “ADD” and repeat the above process.

RESOURCES: In this section, you can add resources or attributes that are available for use as part of an **EVENT** such as video projectors, sound equipment, coffee carts, flip charts, chairs, tables, etc. Resources cannot have the same names, so if you have multiple items you should number them or separate them into groups (i.e. 10 folding chairs Group 1, 10 folding chairs Group 2, etc.)

- Click **"Resources"**
    - Follow the same process as described in "Spaces"

SERVICES: Add services needed for the **EVENT** such as child care, sound technician, bus driver, etc. You may want to consider adding an Approval Area to match each service, so that the person(s) responsible for the service can be made sub-administrators and approve events requiring their service

- Click **"Services"**
    - Follow the same process as described in "Spaces"

GROUPS: This is feature allows you to setup collections of spaces, resources and services into one GROUP so as to ease the setup us events that utilize the same components on a regular basis (i.e. Weddings, funerals, Christian Education, VBS, etc)

- Click **"Groups"**
    - Insert **NAME** and click **ADD**
    - Select Space, Resources and Services associated with the Group
    - Click **SAVE**

IMPORT FEATURE

ministrEspace offers data importing as an optional service for those desiring to import data for another Room Scheduling product. This service can save you time and money and will allow you to expedite the setup process.

For information on the system requirements and a price estimate, contact us at info@coolsolutionsgroup.com or at 1-888-448-5664

CREATE AN EVENT

Creating an **EVENT** can be done from several different entrance points of the software:

- From the **DASHBOARD**
    - Click **"Create Event"**
    - Event Wizard will open
- From the **Calendar Views** (Weekly and Daily Calendars Only)
    - Double Click on any available time/space on the calendar
    - Event Wizard will open

Once in the **EVENT** "wizard":

- Start with the **General Information** tab
    - Enter **EVENT NAME** – NOTE: This is a required field
    - Select **"Category"**
    - Add **"Description"** NOTE: This will better describe the EVENT so other users can understand the purpose of the event
    - Select **"Public"** if this event is be displayed on the web calendar to the general public. The default setting is **"Private"**
    - Enter the **"Number of People"** expected for the event
- Click **"Next"** which takes you to the Date/Time tab
    - If the date has not already been selected, add **"Date".** NOTE: If you started this process from a Calendar View, the date will already be indicated.
    - Enter **"Begin Setup"** if appropriate
    - Enter **"Begin Event"** NOTE: Bold print items are required. Also, if you started this process from a Calendar View, the start time will already be indicated.
    - Enter **"End Event"**
    - Enter "End Tear down" if appropriate
    - If this is a **"Recurring"** event, make the appropriate selection NOTE: if creating a daily recurring event that begins or ends at different times each day, you may edit each occurrence from the Status tab. You may also add non-regular occurrences by clicking the "Add Occurrence" button on the Status tab (see below).
- Click **"Next"** which takes you to the Space/Resources tab

- NOTE: If you started this process from a Calendar View, the space from which you double-clicked will already be indicated.
- Select other spaces, resources and services from the right side bar. NOTE: items already requested for an approved event will be grayed out and unavailable for selection. Items requested for an event that has not yet been approved are still available, but will result in a conflict when added.
- Click "Add Selected" at the bottom of the side bar.
- All selected items will be displayed under the "Space/Resource" tab
- You may "edit" an entry by clicking "edit" and adding notes to the item
- You can delete an item by clicking "delete"
- If you have uploaded space "configurations" -
  - To add a **"configuration"** click on **"edit"** for the desired room
  - Select the appropriate configuration from the drop down menu
  - Add any special notes regarding the configuration
  - Click **"SAVE"** – This will return you to the "Space/Resource" tab. Edited items will be displayed
  - You can also add notes for the **"resources"** by following the same instructions as above.
- If the Space/Resource selected requires a form to be completed, a red warning box will display "Not Complete" in the "Questions" column. Click **"edit"** to complete the form, the click **SAVE.**

- Click **"NEXT"** which take you to the **"Status"** tab. This will display all of the recurring dates as well as all the space, resource and service and whether or not they have been "approved" or "pending" approval. Any conflicts will display in red. If another occurrence is desired, click the "Add Occurrence" button. Event information will be cloned, but date, time, etc. can be changed.
- Click **"NEXT"** Which take you to the **"Summary"** tab. This will display a summary sheet of the EVENT. If all is acceptable, click "FINISH". The event will <u>**not**</u> be saved until this is completed. If the event is not to your satisfaction, click **"Previous".** NOTE: The **"BACK"** button will return you to the **DASHBOARD**.
  - You can also print a report/confirmation of this event from this page After clicking "FINISH", click again on the event. The summary page will open by default and there is now a button that will allow you to print the summary page in PDF format.

DASHBOARD

ADMINISTRATOR DASHBOARD: This applies to Administrators and Sub-Administrators

The administrator(s) will have 4 sections on their DASHBOARD:

1. **MY EVENTS**: These are events that the user has personally scheduled.
2. **PENDING APPROVAL**: These are events that have been requested by the user and waiting approval by the appropriate administrator
3. **CONFLICTS**: if any events requiring approval conflict with other events, either pending or approved.
4. **ADMINISTRATIVE APPROVAL**: This will list the items that other users have requested that require you, as the administrator, to approve. From this section the administrator can APPROVE or DECLINE the requested event. If the event is declined, you will have the option of including a note to explain. This is delivered as a message to the creator's dashboard.

To view an event listed under each of the 3 above sections, click on the blue hyperlink, which is also the "name" of the event. This will take you to the summary page for the event.

USER DASHBOARD

Non-administrator users will only have the first3 sections on their dashboard (MY EVENTS, CONFLICTS, and PENDING APPROVAL)

VIEW CALENDAR

Click on the tab labeled **VIEW CALENDAR.** The default view will be the master calendar of the campus for the current day. The spaces that have been entered will be listed on the right side of the calendar while the time of day will be displayed on the top of the calendar. NOTE: "E" on the time of day is for events earlier than 6:00 AM. Concurrently, "L" depicts events that are scheduled later than 8:00 PM.

To see the entire week in this master calendar view, click **EXPAND TO WHOLE WEEK**. You also can select another single day by adding a date in **PICK A DATE** to view that day in the master schedule view and click **SELECT.**

You can also view a weekly calendar for an individual space. Click any "space" on the left side of the master calendar to view a **Room View Calendar**. You can change the date of the selected space by clicking the desired date on the month calendar in the top right corner. You can also change the "space" you are view by clicking the desired space in the **PICK AN ITEM** section.

REMINDERS:

1. You can begin the EVENT setup process by double clicking any open calendar date/time.
2. You can see additional detail of a scheduled event while on "calendar view" with a mouse over

ADD A SPACE

This section will allow you to search for available spaces for the date and time that you desire

- Add the **DATE** you want to search
- Select the **START TIME**
- Select the **END TIME**
- Select **RECURRENCE** if applicable and complete drop down items
- Add the **CAPACITY** of the space you desire
- Click **SEARCH** to initiate the search

REPORTS

Run reports based on Date Range as well as space

- **FORMAT**: Select desired format
- Select **Date Range**
- Select **Space** if so desired
- The Event Detail and Facility Setup reports include embedded links that let you print room configurations and other documents