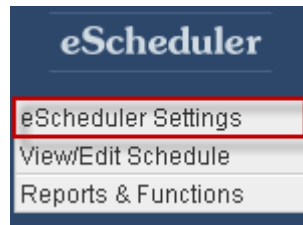
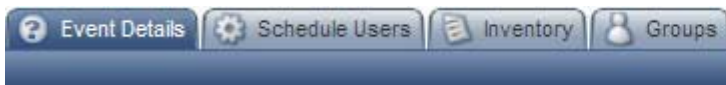


eScheduler Manual



eScheduler Settings: the eScheduler module allows you to schedule every aspect of your event, include users, set tasks, and manage reporting.



Event Details: on this page your Event Name, Start Date and End Date will be pre-loaded from eReg, this information can be edited. You can also adjust the times of your schedule as well as the start and end dates.

Names & Dates: in this section you can edit your schedule URL, change default dates and rows, as well as view other information about your event.

A screenshot of the 'Name & Dates' section in the eScheduler interface. The section is titled 'Name & Dates' with a dropdown arrow. It contains the following fields:

- Event Name ***: A text input field containing 'Event 1234'.
- Event URL ***: A text input field containing 'https://www.eiseverywhere.com/escheduler/'.
- Schedule Dates**: A section header for the date fields.
- Start Date ***: A date picker showing '6' for month, '8' for day, and '2010' for year.
- End Date ***: A date picker showing '6' for month, '10' for day, and '2010' for year.
- Default Date ***: A dropdown menu showing '06/08/2010'.
- Default Rows ***: A dropdown menu showing '2'.

Event Name: your event name will be automatically entered in this field, changing the name here will change the event name in every module.

Event URL: you are automatically assigned a scheduler URL with your event id on the back end, but you can create your own ending for your URL by entering it into this field.

Start Date: the start date is automatically pulled from eReg, changing this field will change it in every module.

End Date: the end date is automatically pulled from eReg, changing this field will change it in every module.

Default Date: use this dropdown box to select which default date you want to use. The date that is selected here will be the date that the scheduler opens on.

Default Rows: use this dropdown box to select the number of rows that rooms should have by default in the schedule. Adding more rows allows you to assign more meetings to the same room at the same time or provide a bit of space between meetings on the schedule.

<div> + Add Meeting Save Schedule Print Schedule Display Schedule </div>						
Room Name	Cap.	Setup	2:00 am	3:00 am	4:00 am	5:00 am
Flamingo A	50	Classroom	Meeting #1			
Ballroom	250	Exhibits			Added room	
					Meeting #2	

Schedule Times: in this section you can specify the start and end times for your schedule.

Schedule Times

Start Time
9:00 am

End Time
6:00 pm

☐ Specify different start and end times for different days

Start Time: use the dropdown box to specify the time that the schedule will begin. This value can be overridden on a day by day basis if required.

End Time: specify the end time of your schedule. This value can be overridden on a day by day basis if required.

Specify different start and end times for different days: if you want different days to have different start and end times, check this box. Doing so will populate a start and end dropdown box for each day of your event. Use these dropdown boxes to select the times.

☒ Specify different start and end times for different days

06/08/2010
Start
7:00 am
End
8:00 pm

06/09/2010
Start
6:00 am
End
11:00 pm

06/10/2010
Start
7:00 am
End
7:00 pm

Schedule Users: this page allows you to set up users which can access and edit the schedule. You will be able to adjust the permissions for each user you create. To add users, select the “Add User” button at the bottom of the list.

▼ Schedule Users

Email	Name
<div>Add User</div>	

General Details: in this section you will have to enter general details about the new user.

▼ General Details

Email *

First Name

Last Name

Notes

Email: enter the email address of the user here.

First Name: enter the first name of the user here.

Last Name: enter the last name of the user here.

Notes: input any notes associated with the user in this section, notes are for internal purposes only.

User Permissions: in this section you can adjust the permissions for your users by selecting the radio buttons.

▼ User Permissions				
Area	All Meetings	Own Meetings	Read Only	Invisible
Meeting Name	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Meeting Date/Time/Room	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Meeting Time Only	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Attendance	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Groups	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
A/V	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Agenda & Setup	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

All Meetings: selecting this option will allow the user to edit the specified area in all meetings.

Own Meetings: selecting this option will only allow the user to edit the specified area in their own meetings. An eScheduler user is not an etouches user, they can only own and create meetings using the eScheduler portal or link; they cannot log into the backend of etouches and create a meeting there.

Please see link example below:

Name Training Event 3-23 (#11065)

Last Modified 04/19/2010, 3:13 pm by wtropeano2

Schedule URL <https://www.etches.com/escheduler/11065>



Read Only: selecting this option will keep the specified area read only.

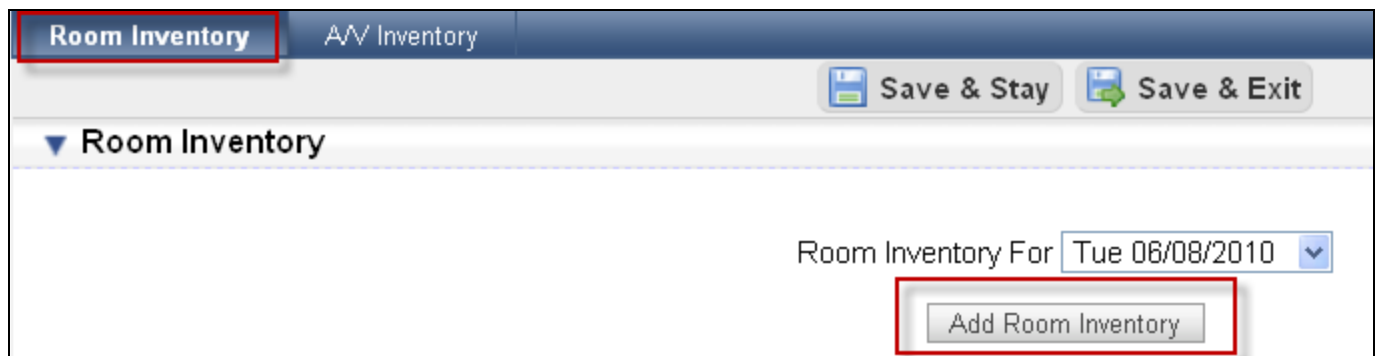
Invisible: selecting this option will make the specified area invisible to the users.



Inventory: this page has two sub-sections, Room Inventory and A/V Inventory. In both of these sections you will be able to add inventory for different dates and enter details.

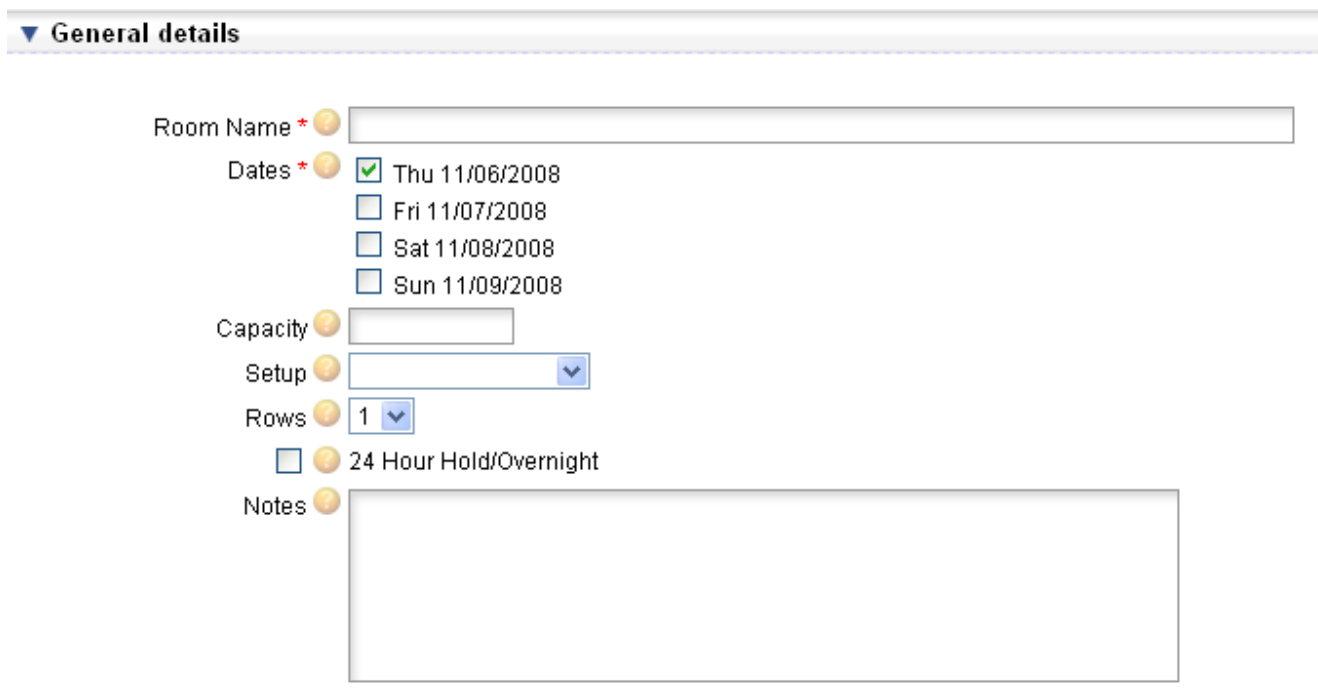
Room Inventory: on this page you will be able to set up the rooms that are available to hold meetings for your event. You can use the dropdown box to change the date and view the rooms available on that day of your

event. You can add a room by clicking the “Add Room Inventory” button.



The screenshot shows a web application interface for managing room inventory. At the top, there is a navigation bar with two tabs: "Room Inventory" (which is highlighted with a red box) and "A/V Inventory". To the right of the tabs are two buttons: "Save & Stay" and "Save & Exit". Below the navigation bar, there is a section titled "Room Inventory" with a downward-pointing triangle icon. On the right side of this section, there is a label "Room Inventory For" followed by a date selector showing "Tue 06/08/2010" with a dropdown arrow. Below the date selector, there is a button labeled "Add Room Inventory" which is also highlighted with a red box.

General Details: in this section you have to enter the name, dates and other details regarding the room you are adding.



The screenshot shows the "General details" section of the room inventory form. It contains several input fields and checkboxes. The "Room Name" field is a text input. The "Dates" section has four checkboxes for the dates: "Thu 11/06/2008" (checked), "Fri 11/07/2008", "Sat 11/08/2008", and "Sun 11/09/2008". The "Capacity" field is a text input. The "Setup" field is a dropdown menu. The "Rows" field is a dropdown menu showing "1". There is a checkbox for "24 Hour Hold/Overnight". The "Notes" field is a large text area.

Room Name: enter the name of your room in this field.

Dates: select which dates you want to make the room available for.

Capacity: enter the capacity of the room in this field.

Setup: using the dropdown box, select the preferred setup of the room.

Rows: use the dropdown box to select the number of rows that the room should have in the schedule

24 Hour Hold/Overnight: check this box if you want to hold the room overnight.

Notes: you can enter any notes about the room in this section here.

Room A/V Requirements: in this section you can add A/V requirements to your room. Your list of A/V will be on the left and you can use the add and remove buttons to select the ones you want.

▼ Room A/V requirements

Computers

Computers

Add

Remove

Lighting

Lights

Add

Remove

Sound

Lav Microphone
Sound Set Up 1
Sound Set Up 2
Sound Set Up 3

Add

Remove

Categories: each type of A/V will have its own section, such as lighting, sound and others as displayed above. The left section displays your available audio and visual and the right section displays the audio and visual included for the room. By clicking on the Add and Remove buttons you can add or remove A/V items to your Room.

****You can add to your list of A/V categories by going to your etouches account setup and under Module Settings—eScheduler, you are given the opportunity to add A/V Categories that will be available for all events. Any A/V categories that are added must be edited or deleted in your account setup.**

Name Demo Account (#14)

Last Modified 04/12/2010, 11:18 am by [user]

Account Details Security Settings Databases/Templates User Profiles **Module Settings**

ePlanning eBudget **eScheduler** eReg

Save & Stay Save & Exit

▼ Available A/V categories

Please note that these A/V categories are used by all your events that use eScheduler. Any changes made here will apply to all of your events.

A/V Category

Camera	
Computers	
Lighting	
Sound	
Staging	
Sign Stands	
Video	
Booths	
Other	

Add new A/V category

Event Details Schedule Users Inventory Groups
Room Inventory **A/V Inventory**

A/V Inventory: on this page you will be able to add audio and visual to your event and make them available for rooms. To add inventory, click the “Add A/V Inventory” button. The A/V inventory is broken up into different categories such as, computers, lighting, sound, etc.

Add A/V Inventory: when you click the add inventory button a small window will appear. In this window you can enter specific details about your inventory.

A/V Inventory Editor	
▼ General Details	
A/V Name *	<input type="text"/>
Serial	<input type="text"/>
Category	Lighting ▼

A/V Name: input the name of you're A/V inventory in this field

Serial: if you have a serial number for your item, enter it here


Category: use the dropdown box to select the category that you're A/V item falls under. These are the categories that your complete inventory will get sorted by.




Groups: in the groups tab you can set up the groups that you are going to use to group meetings, which allows you to export your meeting agenda by group. To add a group, click the "Add Group" button.

Add Group: when you click the add group button you will see a new window appear. In this window you will have to enter the group details.

▼ **General Details**

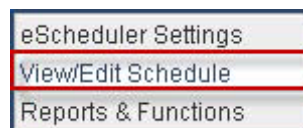
Group Name * 

Notes 

Group Name: enter the name of the group in this field

Notes: enter any notes that should be associated with your group here. Keep in mind that notes are for internal purposes only

View/Edit Schedule: by clicking the "View/Edit Schedule" link in the side bar menu you can make changes to your schedule. You can make changes such as adding meetings, adjusting times, etc. The layout of your schedule has your rooms listed in a column on the left side of the schedule, and along the top is a daily timeline. Each meeting will be placed according to the room they take place in and what time.



<div><div><div><div></div></div><div>Add Meeting</div></div><div><div><div></div></div><div>Save Schedule</div></div><div><div><div></div></div><div>Print Schedule</div></div><div><div><div></div></div><div>Display Schedule</div></div></div> <div>Thu 11/06/2008</div>									
Room Name	Cap.	Setup	9:00 am	10:00 am	11:00 am	12:00 pm	1:00 pm	2:00 pm	3:00 pm
Room1									
Meeting Room			Meeting 1						
<div><div><div></div></div><div>Add Room to Inventory</div></div>									



Add Meeting: if you want to add a meeting to your schedule click the “Add Meeting” button located above your schedule. Once you click this button a meeting editor will open in a new window.

Meeting editor

▼ **General details**

Name Meeting 1

Date Thu 11/06/2008

Room Name Surrey Room - eTouches Event Office

Start Time 08 00

End Time 08 00

Expected Attendance

Meeting Color

☐ This meeting is admin only

☐ This meeting has been recently updated

▼ **Meeting Groups**

Staff
 Viktoria Hallin, Event Director
 Board of Directors
 Marketing Working Group
 Application Working Group
 Evolutionary Technical Working Group
 Certification Working Group

Add
 Remove

▶ **A/V requirements**

▶ **Agenda & Setup**

Save & Stay Save & Exit

General Details: in the general details section you can edit the basic details of your meeting.

Name: input the name of your meeting in this field. A valid meeting name will result in a green checkmark to the right of the meeting name.

Date: use the dropdown box to select the date that your meeting takes place on.

Room Name: use the dropdown box to select the room that your meeting will take place in.

Start Time: use these two dropdown boxes to select the start time of your meeting.

End Time: use these two dropdown boxes to select the end time of your meeting. Note that the time is represented in the 24 hour format.

Expected Attendance: if you know how many people you are expecting in the meeting then enter that number in this field

Meeting Color: you can select a meeting color for your meeting; the colors are displayed when you view your schedule. You can use coloring as a way to categorize meetings or distinguish them among groups.

Checkbox 1: check this box if the meeting is admin only. Checking this will make sure that the meeting does not appear on public reports.

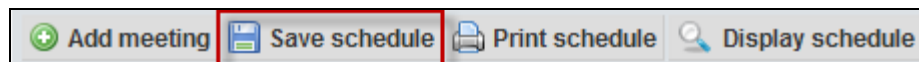
Checkbox 2: check this box if your meeting has been recently updated. This will change the color of your meeting on your schedule to orange, notifying you and your colleagues that recent changes have been made.

Meeting Groups: in the meeting group section you have a list of your available meeting groups as well as a list of the selected groups. To add groups to the selected list, highlight the group name and click the add button. You can also remove selected groups by highlighting them and clicking the remove button.

A/V requirements: in this section you can specify which audio and visual should be associated with the meeting. You can do this by going through the different categories and highlighting the audio or visual and click add. At the top of the section is a checkbox. Checking this box means that the meeting automatically uses the audio visual assigned to the room it is in.

Agenda & Setup: in the agenda and setup section you can add details to any of the sections. The sections include things such as agenda, food and beverage, room setup, session description, etc. Except from notes entered in the “agenda/notes” section, none of the notes entered will be visible on your schedule.

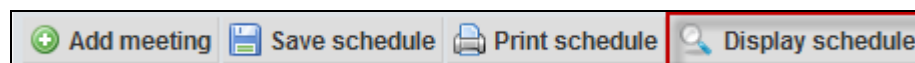
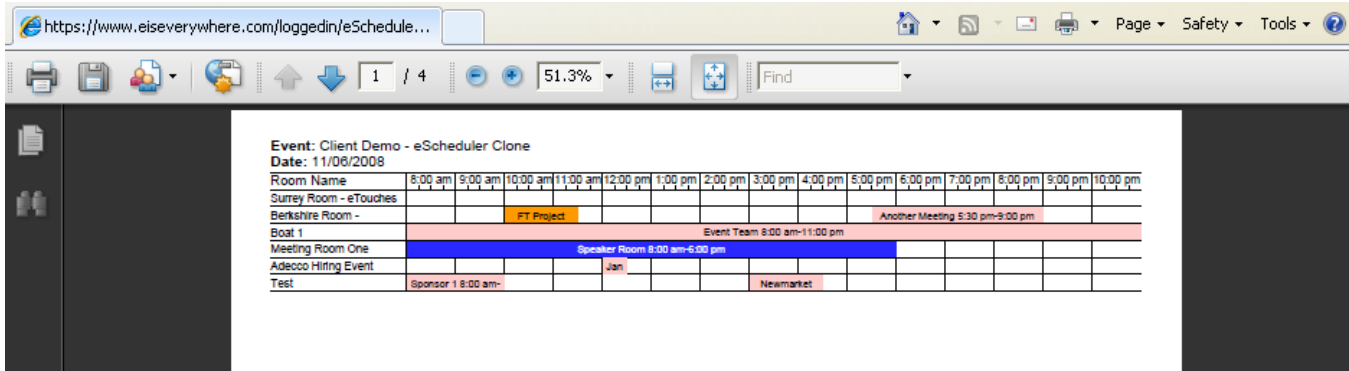
Agenda/Notes: you have the ability to report on any notes entered in this section. You can report on these notes by using the Agenda Report (with notes) under standard reports.



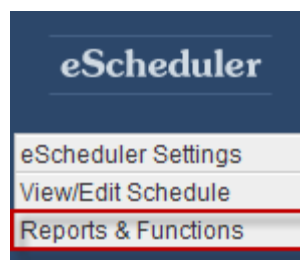
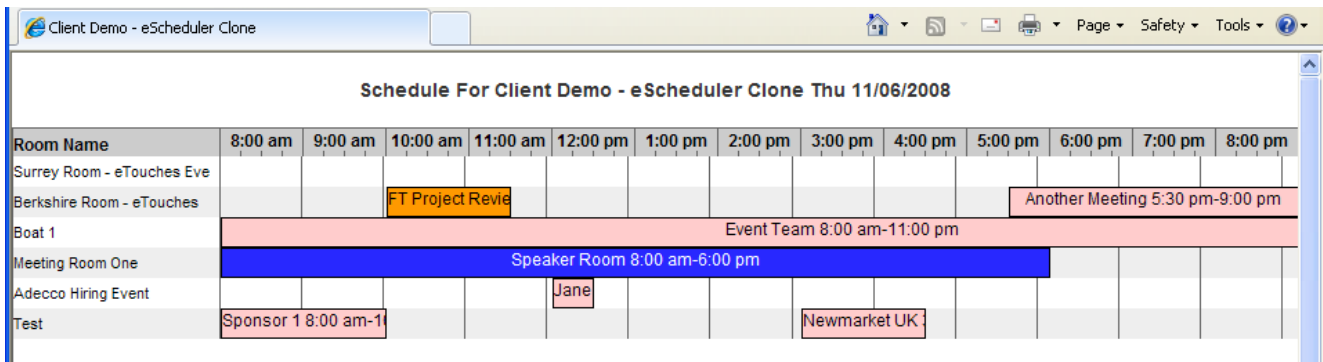
Save Schedule: the “Save Schedule” button allows you to save any changes you may have made to your schedule. Be sure to click save schedule before you exit the view/edit schedule feature.



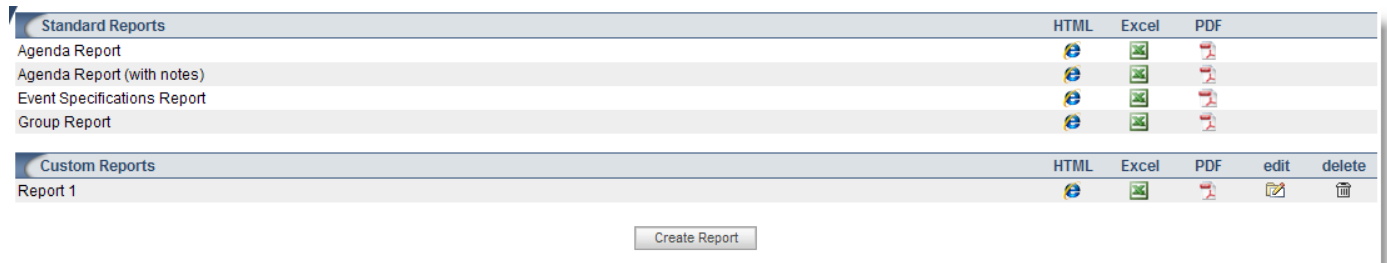
Print Schedule: you have the ability to print your schedule; you can do this by clicking the “Print Schedule” button in the top toolbar. When you click the print schedule button a new window will open with your schedule displayed in PDF format. From here you can save and/or print your schedule.



Display Schedule: clicking this button will display your schedule as a web page. Once you click this button a new window will open with your schedule. This can be useful because you can share the link so other can view a web based version of your event schedule.



Reports & Functions: the reports and functions section of your scheduler module is where you can report on your schedule by using the available standard reports, or create your own using the custom reporting feature.



Viewing a report: you have the ability to view a report three different ways, HTML, Excel, or PDF. Each can have different benefits, so you can select whichever you are most comfortable with.

Standard Reports: in the standard report section are four pre-populated reports; agenda report, agenda report (with notes), event specifications report, and group report.

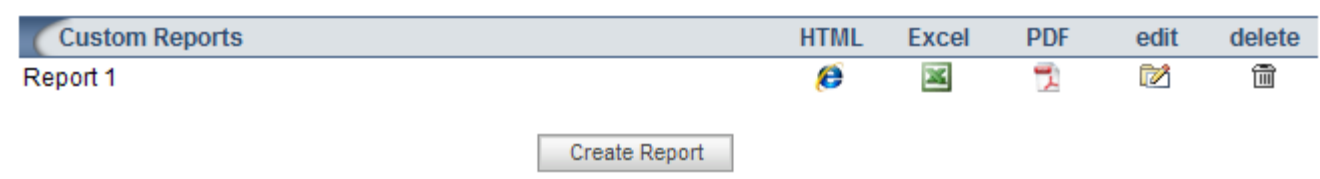
Agenda Report: the agenda report pulls your events full agenda and lists the meetings categorized by dates.

Agenda Report (with notes): this report pulls the same information as the agenda report but also displays any notes that were added in the “Agenda/Notes” section of the meeting.

Event Specifications Report: this report pulls all the information for each meeting categorized by dates. Any information entered in the meeting editor will be pulled in this report.

Group Report: the group report displays a group name, then reports every meeting associated with that group by date under it.

Custom Reports: custom reports are reports that you can make and it allows you to select exactly which fields will be pulled, as well as set filters for the information. You have the ability to view the custom reports in the same ways as you can the standard reports. You can choose between HTML, Excel, or a PDF document. There is also an edit and delete icon located to the right of the report name.



Create Report: you can create a custom report by clicking on the create report button located at the bottom of the custom report list. After you click the button, a report editor window will open.

Report Editor

▼ General Details

Name *

▼ Fields In Report

Add/Edit Fields

▼ Standard Filters

Available Groups

Staff
Viktoria Hallin, Event Director
Board of Directors
Marketing Working Group
Application Working Group
Evolutionary Technical Working Group
Certification Working Group

Add

Remove

Selected Groups

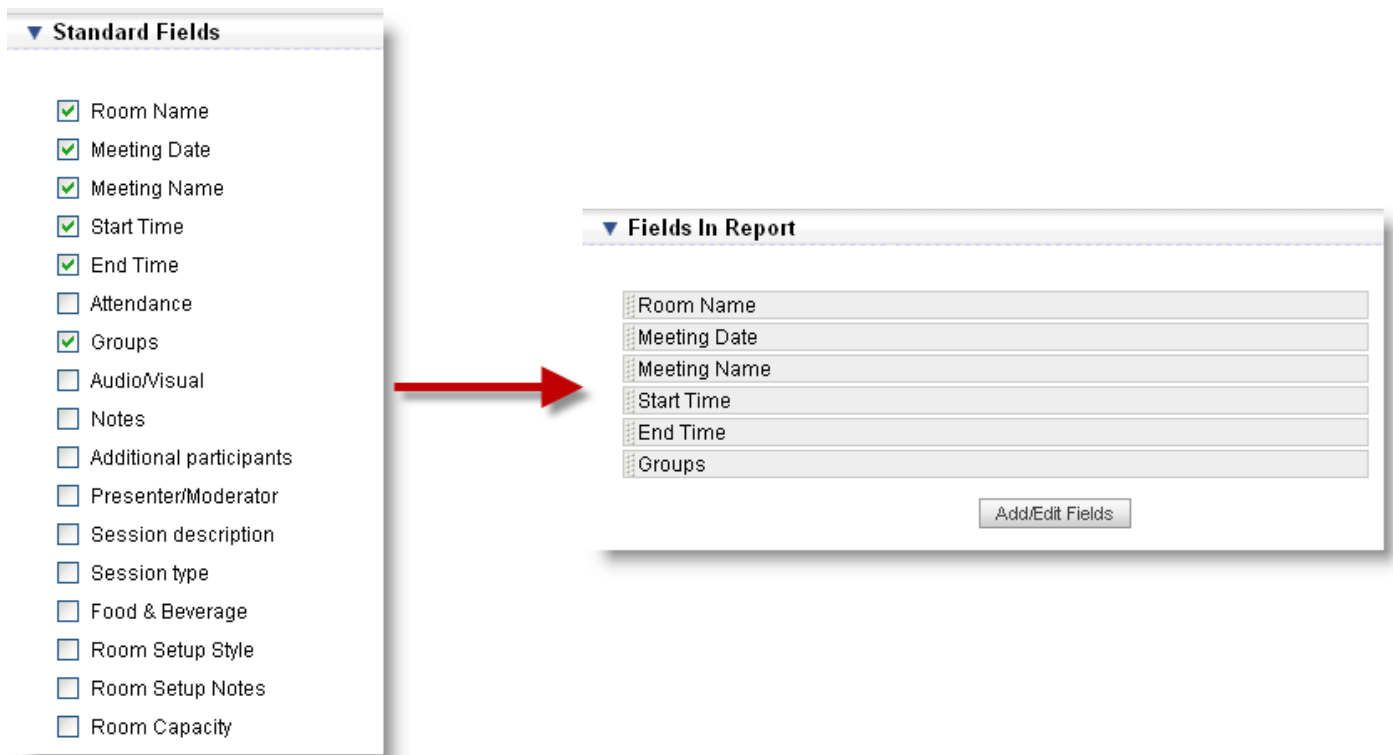
▼ Custom Filters

Add Custom Filter

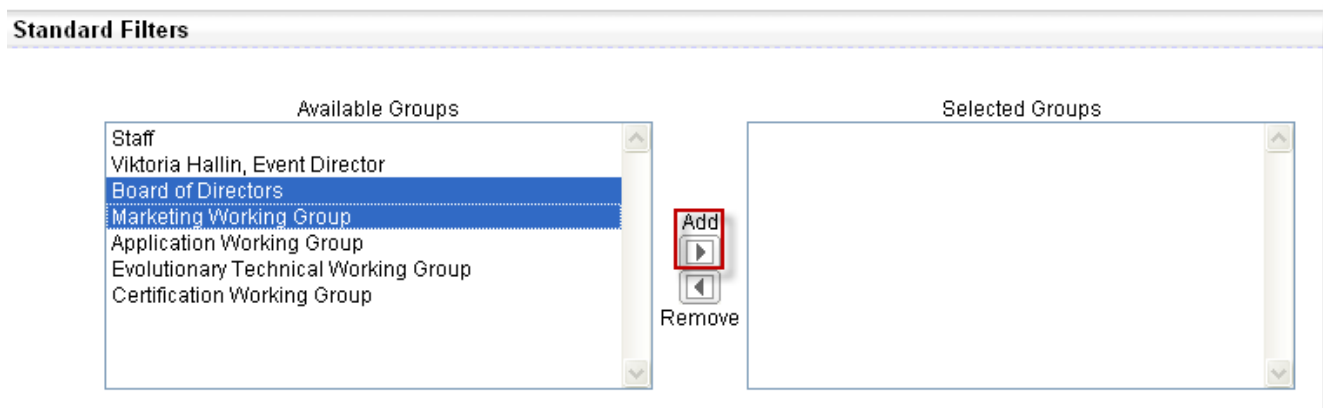
General Details: in the general details section you can input a name for your custom report. Be sure to name your report something obvious as this is the easiest way to select the correct report when there are many to choose from.

Fields in Report: in this section you can choose which fields you would like included in your custom report. To add an edit fields you, click the button labeled “Add/Edit Fields”. After clicking this button a report field editor window will open.

Add/Edit Fields: when you click the add/edit fields button you will see a list of standard fields with checkboxes next to them. You can use this list to start selecting which standard fields you want appearing in your custom report. Once you have selected all the fields you want click save and exit. After you click save and exit you will see a list of the selected fields. Here is where you can rearrange the order in which your fields will be displayed in your report.

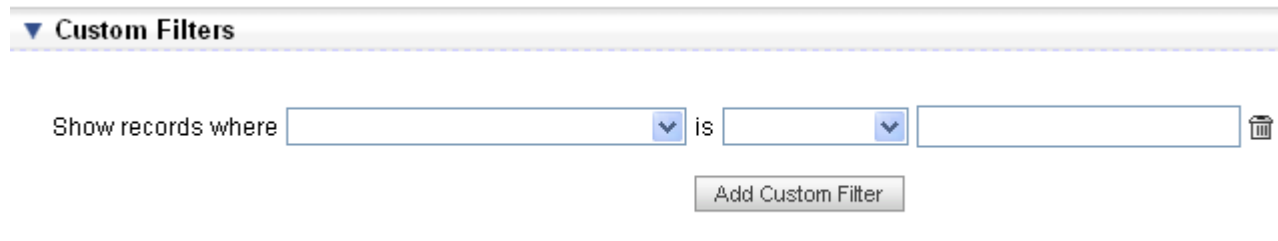


Standard Filters: in the standard filters section of the report editor you can filter meetings by selecting certain groups. You can add groups to the selected list by highlighting the group names(s) and click the add button. If you need to remove a group, highlight the name and select remove.




Custom Filters: if you want to use filters beyond what is given in the standard filters section you can add custom

filters. To add a custom filter click the button labeled “Add Custom Filter”. Once you do this a row of fields will appear. You can use these dropdown boxes to create your own filter. To delete a custom filter click on the delete icon located to the right of the custom filter.

The screenshot shows a software interface for creating custom filters. At the top, there is a header bar with a downward-pointing triangle icon and the text "Custom Filters". Below this header, the text "Show records where" is followed by a dropdown menu, the word "is", another dropdown menu, and a text input field. To the right of the text input field is a trash can icon. Below these elements is a button labeled "Add Custom Filter".

▼ Custom Filters

Show records where is 

Add Custom Filter

Field: the first field is a dropdown box that contains the fields that you have added in the “Fields in Report” section above.

Field: the second field is a dropdown box that contains values such as equals to, not equal to, contains, etc.

Field: the third field is **where** you input the answer to the field you want to use as a filter.
