Getting Started: Basic eSPACE Training for Event Scheduling
Step-by-Step User Guide

Welcome to eSPACE!

*Getting started on the right foot with any software application is paramount to your team’s success!*

You are an important part of a valuable team! Understanding the Event Creation process within eSPACE will help you become more effective, efficient and intentional with the resources you’ve been entrusted to steward.

In light of that, this document will provide an easy-to-follow user experience to properly equip you to better create and manage events. Happy planning!

**CREATING AN EVENT**

**STEP 1: Create an Event** - Once inside your Dashboard, click on **ADD EVENT** button at the top of the screen.
STEP 2: Add Event Details - The Event Details screen includes important information about your event:

1. Choose the Event Name and its description (the description text is viewable by internal staff only)
2. Is this event offsite? (NOTE: If Offsite box is checked, an off-site Location will be required) and the location of the event (NOTE: If you only have 1 location, you will be not be required to select a location).
3. Is your event Public? Check the “Public?” box if you are showing this event on your public website. Note that the PUBLIC NOTES box will also show - these notes will be viewable on your public website.
4. Choose the Event Category(ies), if required. Categories are great for filtering on the Internal Calendar and better reporting.
5. Enter the number of people (if applicable) you expect to attend. If you are the event creator, you are also the event owner; however, if you need to change ownership, select a new user from the Event Owner drop-down menu (NOTE: Changing event ownership is an administrative setting. If you don’t have that option but would like to see it, please speak with your organization’s admin). Event Editors may be selected if you desire other users be allowed to make modifications to your event, if necessary.

6. Select the Event Date and whether or not it’s an All-Day event (NOTE: All-Day events are considered a singular instance from 12:15 AM to 11:45 PM).

7. Next, enter the day of the event, and the start/end times, as well as setup and teardown times (if applicable).
8. Recurrence rules are next: Does your event happen weekly? Monthly? Yearly? Randomly (Custom Dates)? You can choose a number of occurrences or set your event to end after a specific date.

9. Continuous Event: This should be selected only if your event requires the space(s), resource(s) and service(s) need to be secured for the entire event duration (examples include weekend retreats, student lock-ins, or camp).
10. Event Attachments - like liability waivers, programs, or meeting agendas - can be added here from your desktop or from the Document Library (NOTE: Adding new documents is an administrative function - see your organization's admin to add documents you might use often).

11. If you've set a recurrence rule, you will have the option here to send an email reminder to yourself a month before the LAST occurrence so you can extend the rules.
12. Add event reminders for your staff, if desired, and image (shown on the public website for public events), then select SAVE and PROCEED. If you stop the event creation process at this point, your event details will be saved in the "My Drafts" grid, located on your dashboard.

13. Add Contacts to your event - volunteers, guest speakers, etc., that may need information about the event. Email notifications are sent to the contact(s) after the event is in approved status.
14. **Add SPACES**: In which room or area is your event being held? Select one or more spaces from your available list. **NOTE**: Click on the the black triangle (toggle) button to expand the spaces that are available within a building. **NOTE**: The space’s availability is indicated by the **GREEN CHECK MARK**.

15. **Conflicts**? If your selected space is not available at the date or time you selected, you will see a **SEE CONFLICTS** note in **RED**. This note will require you to a) click on “See Conflicts” to see what event/items are in conflict and try to resolve prior to submitting for approval or b) allow your administrative approver to resolve the conflict before your event can be approved (**NOTE**: b) is based on settings in Advanced>General. If settings are not checked, a user can still submit a conflicted item for approval. The Admin would then have to decline it, resolve it or approve with conflicts). Click **NEXT**.
16. **Add Resources**: Select the exact number of resources you need for your event and SAVE, or select an individual resource like a bus or a projector.

17. **Add Services**: Select the services you need for your event.
18. **SETUP page**: You can do many things from this setup page, including providing additional details about how the room should be set up for your event.
   - Click on the GREEN EDIT BUTTON on the right-hand side of the screen.
   - Make notes for setup or housekeeping staff (turn on lights, start coffee, empty trash)
   - Choose available room configurations (drop-down menu available), associate any resource or services to a specific space, and add notes.
   - Click on and complete forms that may be attached to an ITEM (see Food Service Form example)

CLICK NEXT when finished

19. **AVAILABILITY page**: Make changes to any of your occurrences on this screen!
   - Delete individual occurrences from the recurring event (RED “Delete Occurrence” button)
   - EDIT DATE/TIME/SPACE/RESOURCE/SERVICE if changes to only one or two occurrences need to be made
   - Click the RED TRASHCAN icon on the right-hand side of the screen to delete the ITEM from an occurrence
20. Click **SUBMIT EVENT** when finished

21. Return to your Dashboard and see your event in the yellow **PENDING APPROVAL** grid. This event is now awaiting administrative approval (NOTE: Currently, if your organization is using “Pre-Approvers,” the event will not show in your Pending Approval grid until it is Pre-Approved).

22. Click on the black toggle triangle to view additional detail, including the Approval Area and who still needs to approve items for your event.
23. Once your event is approved, it will show up in the green **MY APPROVED EVENTS** grid.

24. See the Internal Calendar view by clicking on **CALENDARS** in the sidebar. Events highlighted in green are **APPROVED**, events highlighted in yellow are **PENDING**, events highlighted in red are **IN CONFLICT** or has a **RESOURCE SHORTAGE**. Events highlighted in green with red text are **APPROVED with CONFLICTS**.
25. The blue Filter Calendar button will allow you to filter by space, resource, service, event status, etc.

26. **Need reports?** Users have full access to Reports: Event Setup, Event Setup (Legacy), Event List and Space Usage. Click on REPORTS in the Sidebar.

[Image of Event Calendar]

[Image of Reports sidebar with Event Setup, Event Setup (Legacy), Event List, and Space Usage options]
TYPES OF REPORTS:

a. **Event Setup**: This report is great for setup teams who may only need to see events that have configurations or setup notes. You may also choose to show forms and other attachments. Thumbnail pictures and diagrams are also visible on this report.

b. **Event Setup (Legacy)**: This report gives data in more of a “list” format. Thumbnail pictures and diagrams are NOT included on this report.
c. **Event List:** This report shows the list of Events and additional selected criteria.

![Event List Table]

<table>
<thead>
<tr>
<th>Event</th>
<th>Start/End Times</th>
<th>Space</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setup</td>
<td>Time</td>
<td>Event</td>
<td>Notes</td>
</tr>
<tr>
<td>8:00 AM</td>
<td>9:00 AM</td>
<td>Team Meetings</td>
<td></td>
</tr>
<tr>
<td>12:00 PM</td>
<td>1:00 PM</td>
<td>Conference</td>
<td></td>
</tr>
<tr>
<td>5:00 PM</td>
<td>6:00 PM</td>
<td>Dinner</td>
<td></td>
</tr>
</tbody>
</table>

d. **Space Usage:** Lists your spaces first - start/end times of event, event name and event date are also displayed.

![Space Usage Table]

<table>
<thead>
<tr>
<th>Space</th>
<th>Date</th>
<th>Times</th>
<th>Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gym</td>
<td>11/24/2017</td>
<td>8:30 AM - 2:00 PM</td>
<td>Basketball</td>
</tr>
<tr>
<td>Auditorium</td>
<td>12/1/2017</td>
<td>9:00 AM - 4:00 PM</td>
<td>Back To School Festival</td>
</tr>
</tbody>
</table>
Additional Helpful Information:

➢ We provide you with some great tools to assist you with your transitioning! Simply click on KNOWLEDGE BASE, located on the top of your dashboard where you will find many helpful articles and videos to better assist you with setting up your organization.

➢ Need support? We are grateful for our clients and strive to provide the best customer service out there! Start a conversation by clicking on LIVE SUPPORT, located on the top of your dashboard.

➢ We welcome any questions or concerns that you may have. You can also reach us by phone at (888) 448-5664. You can also reach out to our Engagement Team at support@coolsolutionsgroup.com. We are happy to assist you!

➢ If you have any suggestions or ideas, we want to know! Simply click on POST IDEA, located at the top of your dashboard to add your idea. These ideas are seen by other eSPACE users who can vote on your idea - and our Development Team continues to enhance our product using YOUR ideas!