



Washington Local Schools FMX Administrator Schedule Request Guide

Login to FMX

Step 1: Open an internet browser and navigate to <https://wls4kids.gofmx.com>

Step 2: Click on “Log in with Google”

Create a Request (Shortcut)

Step 1: Click **New request** in the right top corner of the calendar page.

The screenshot displays the FMX Administrator calendar interface. The calendar is set to January 2020. The interface includes a sidebar with navigation options: Admin (FMX Administrator), Log out, Calendar, Maintenance Requests, Planned Maintenance, Schedule Requests, Technology Requests, and Transportation Requests. The main calendar area shows a grid of days. A dropdown menu is open in the top right corner, listing request types: Schedule request, Planned maintenance task, Transportation request, Maintenance request, and Technology request. The 'New request' button is visible in the top right corner of the calendar area.

Step 2: Choose the request type you would like to submit from the drop down list (see picture below).



Create a Schedule Request

Step 1: Click **Schedule Requests** in the left sidebar, then click **New request**.

Step 2: Enter the required fields (marked with an asterisk) and click **Submit** to submit the schedule request (see picture below).



The screenshot shows the 'New Schedule Request' form in the FMX Admin interface. The left sidebar contains a navigation menu with the following items: Admin (with a 'Log out' button), Calendar, Maintenance Requests, Planned Maintenance, Schedule Requests (highlighted in red), Technology Requests, Transportation Requests, Buildings, Equipment, Inventory, Resources & Locations, Users & Contacts, Bulk Imports, Reporting, Admin Settings, Refer a Friend, Help & Updates, and My Logs. The main content area is titled 'New Schedule Request' and contains the following fields:

- * Request type:** Staff Event (dropdown)
- * Event name:** Monthly Staff Meeting (text input)
- * Buildings:** High School (dropdown)
- * Resources:** Auditorium (dropdown)
- * Starts:** 1/31/2020 (calendar icon), with an 'All day' checkbox.
- * From:** 6:00am (time input)
- * To:** 7:00am (time input)
- * Repeats:** Never (dropdown)
- Setup time:** (dropdown)
- Teardown time:** (dropdown)
- On behalf of:** (dropdown)
- Technology Details:** (empty text area)

At the bottom left of the page, there is a footer with the text: © 2020 FMX | Terms | Privacy.

Step 3: Check your email for your request confirmation and a link to check the status of your request. New requests will have a “Pending” status until they have been approved.



Edit a Schedule Request

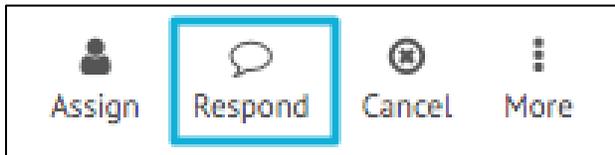
Step 1: Find the schedule request you wish to edit (on the calendar or in the schedule requests grid), then click the **Edit** icon (from the grid) or click **on the request** and then the **Edit** button:



Step 2: After making the necessary editing changes click **Save**.

Respond to a Schedule Request

Step 1: Find the schedule request you wish to respond to (on the calendar or in the schedule requests grid), then click **Respond**.



Step 2: Enter a response (see picture below).



Step 3: Click **Respond** to send your response. This will generate an email notification to all users involved with the request.



Approve a Schedule Request

Step 1: Find the schedule request you wish to approve (on the calendar or in the schedule requests grid), then click **Approve** (see picture below).



Step 2: Click **Approve** again to finalize the approval.

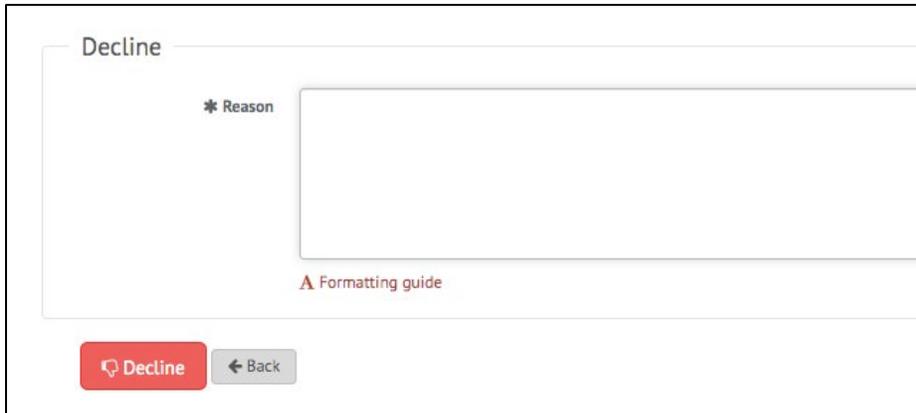


Decline a Schedule Request

Step 1: Find the schedule request you wish to approve (on the calendar or in the schedule requests grid), then click **Decline** (see picture below).



Step 2: Enter a reason for declining and click **Decline** again to finalize the declination.



The screenshot shows a "Decline" form. At the top, the word "Decline" is displayed. Below it, there is a section labeled "Reason" with a red asterisk icon, followed by a large text input area. Below the input area, there is a "Formatting guide" link with a red triangle icon. At the bottom of the form, there are two buttons: a red "Decline" button with a speech bubble icon and a grey "Back" button with a left arrow icon.

Estimate a Schedule Request (Skip this portion if you are not responsible for estimating)

Step 1: Find the schedule request you wish to estimate (on the calendar or in the schedule requests grid), then click **Estimate**.

The screenshot shows a user interface for a schedule request. At the top, it says 'Requests > Awards Ceremony'. The main header displays '2201828 - Awards Ceremony on Sat, Apr 25, 2020' with a 'Pending estimate' badge. Action buttons include 'Assign', 'Estimate' (highlighted with a red box), 'Respond', 'Cancel', and 'More'. Below this is a notification from 'Marcy McDowell' dated April 13, 2020. The request details are as follows:

- Request type: Community Event
- Event name: 2201828 - Awards Ceremony
- Buildings: High School
- Resources: Gymnasium
- Event time: Sat, Apr 25, 2020, 6:00pm - 9:00pm
- Technology Details: -
- Upcoming reminder: -

Step 2: Enter the amount of the estimate along with a description of what the estimate includes. New lines can be added by clicking the green “+” arrow.

The 'Estimate' form contains a table with the following data:

Description	Qty	Rate	Line total
1 Gym hourly rate	3	\$ 75	\$ 225.00
Totals	3		\$ 225.00

Below the table, there is an 'Other amount' field set to \$ 0.00 and a 'Total amount' field set to \$ 225.00. A 'Description' text area is provided for additional details. At the bottom, an 'Acceptance' checkbox is checked with the text 'The requester must accept this estimate before the request can be invoiced.' Action buttons at the bottom include '\$ Estimate', '\$ Estimate & Email', 'Waive', and 'Back'.

Step 3: Click **Estimate** to save your estimate. Click **Estimate & Email** to save your estimate and email a PDF format to the requester. Click **Waive** to skip this process. If the “Acceptance” checkbox is selected, this will generate an email notification to the requesting user asking them to confirm the estimate.



Invoice a Schedule Request (Skip this portion if you are not responsible for invoicing)

Step 1: Find the schedule request you wish to invoice (on the calendar or in the schedule requests grid), then click **Invoice**. (Please note that the invoice action only appears once a request has been estimated and the estimate has been accepted by the requesting user.)

Step 2: Enter the invoice amount along with a description of what the final invoice includes. Click **Invoice** to send your invoice.

2201828 - Awards Ceremony on Sat, Apr 25, 2020 Pending invoice Assign **\$ Invoice** Respond Cancel More

Invoice

Description	Qty	Rate	Line total	
1 Sym hourly rate	3	\$ 75.00	\$ 225.00	<input type="button" value="+"/>
Totals	3		\$ 225.00	

Other amount

* Total amount

Paid

Remaining balance

Description

A Formatting guide



Apply a Payment to a Schedule Request (Skip this portion if you are not responsible for payments)

Step 1: Find the schedule request you wish to apply payment to (on the calendar or in the schedule requests grid), then click **Apply Payment**. (Please note that the apply payment action only appears once a request has been invoiced.)

Step 2: Enter the payment amount, or click the checkbox for “Remaining balance amount”, and click apply payment.

Payment

Remaining balance \$225.00

* Amount

Remaining balance amount

Payment Method

Reference No.

Step 3: To apply additional payments follow steps 1 and 2. Once a request is paid in full it will be flagged as finalized and payments can no longer be added.



Filter in Calendar View

Step 1: Click the Filter button above the calendar view and select the filter you would like:

Configure Filter

Accessibility

Private Public

Assigned to

Not filtered

Building

Building 1 Elementary School
 Event Center High School
 Middle School

Custom fields Any All

Not filtered

Equipment

AHU 1 (Building 1) Bus 1 (High School)
 Heating & Cooling System (Building 1) Printer B (High School)

Event/reservation options

Show reservation time

Meter

Mileage

Module

Maintenance request Planned maintenance
 Schedule request Technology request
 Transportation request

Ownership

Following Internal
 Mine Outsourced

Planned maintenance mode

Meter-based Time-based

Request type

Not filtered

Resource/location

Not filtered

Status

Not filtered

Save filter

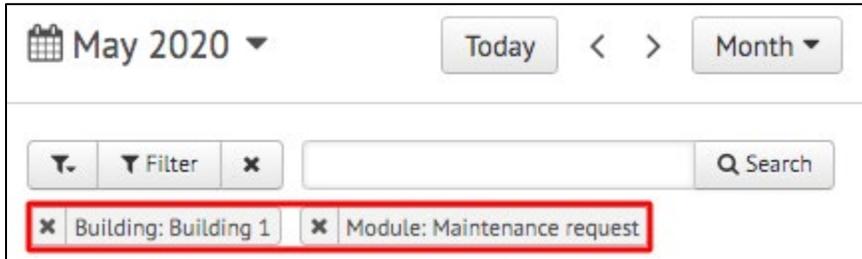
NOTE: You may choose more than one filter at a time



Remove Filters

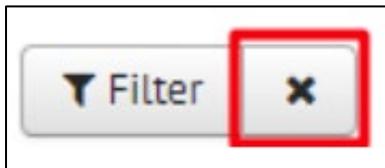
If you're having trouble locating certain requests, events, or other information on your FMX calendar or in your FMX grids it could be because you have a filter selected that is hiding the information you're looking for.

You can see the filters that have been applied by looking underneath the Filter and Search bar:



Remove All Filters

To quickly remove all of the filters that are currently selected, click on the "x" attached to the filter button:

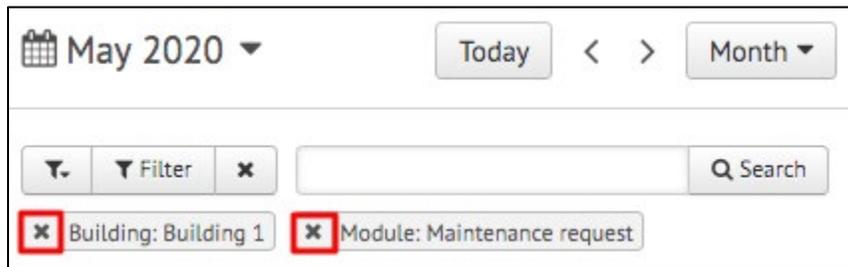


Another way to remove filters is to click on the "Filter" button and choose "Clear Filter" at the bottom of the page:



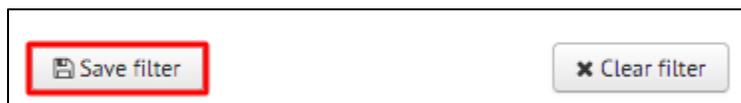
Remove a Single Filter

To remove filters one at a time, click on the "x" button next to the filter(s) you would like to remove:



Save Filters

To save your current filters for future use, click the button at the bottom that says "Save Filter":



Then type in the name of this saved filter. Once done, click the checkmark to save:

