

# Athletic Scheduler Pro 2024 <br> Version v17.3.10 

## User's Guide

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## Table of Contents

Introduction ..... 3
First The Backroom ..... 3
School. ..... 3
Organizations ..... 6
Teams ..... 7
Opponents ..... 10
Locations. ..... 10
Contests ..... 11
Players ..... 11
Coaches ..... 12
Transportation ..... 12
Officials ..... 12
Help. ..... 12
Contests. ..... 12
Scrolling ..... 13
Columns (Edit \& Speed Layout) ..... 13
Group Sort. ..... 16
Check List ..... 17
Settings ..... 17
What's Next ..... 18
Navigation Menu. ..... 18
Go To ..... 18
Finding Contests ..... 21
Schedule Grid View ..... 21
Utilities. ..... 23
Information Boxes in the Footer ..... 23
Logistics Calculations ..... 23
Officials Assignments ..... 24
Scores. ..... 24
Functions Menu. ..... 24
Scheduling After Your First Season ..... 27
Archive ..... 28
Rollover. ..... 28
Confirm ..... 28
Send Contracts ..... 29
iPhone/iPad connection with Filemaker Go ..... 30
Imports ..... 31
Teams. ..... 31
Players ..... 31
Players should have been archived, graduating seniors and promoting underclasses, before importing for the upcoming year, unless this is the very first time you are importing player information ..... 31
Players have two types of imports, ..... 31
Coaches ..... 33
$\qquad$
$\square$
Contests.
Customization............................................................................................................................................... 35

## Introduction

The main purpose of the Athletic Scheduler is to facilitate the scheduling of athletic contests and to share that information to all concerned individuals without ever typing or writing them again. With the Athletic Scheduler, you will be able to create contests records, calculate the logistics for each, post contests to your Google calendar, and roll them over from year to year. You will be able to create detailed Master Schedules for all school departments, Contracts for opponents, Change Notices, and Weekly Reminders for coaches and opponents - emailing them directly out of the Athletic Scheduler. In addition, the Athletic Scheduler can schedule practices as well. The Athletic Scheduler allows for you to pick your school colors on the Schedule, Contests and Backroom layouts and the ability to check the weather at the host site with the click of a button. In addition, the whole grid view and printout system has be revamped to accommodate greater functionality. The newest addition allows for the creation and managing facility use by non-competitive groups, including outside rentals. I have created the Athletic Scheduler using Filemaker Pro so that it can easily be customized to your needs.

Organizationally, the Schedule is built upon the Contests which are built upon the Backroom information.

## First The Backroom



To begin you must enter required information in the Backroom. It will be the source of all the necessary information for the Logistics Calculator and for creating and emailing information to your school's offices and opponents. It is set up like a file drawer with eleven folders and within each folder are sub-folders. Each tab contains detailed information about its named subject: School, Organizations, Teams, Opponents, Locations, Contests, Players, Coaches, Transportation, Officials and Help.

Athletic Scheduler comes with the NEPSAC Schools information loaded in the Opponent table. It also has a list of the most common athletic teams loaded in the Teams table, which you should modify or add new records based on your Schools offerings. You will have to enter information in several other tables before you can create contests and calculate their logistics. You can start by inserting your school's logo or shield on the School tab.
(Note: Tool Tips pop up when you place your cursor over a field or button to explain its purpose see right)

## School

Enter the information about your school.

- Details - details such as School Name and address, etc. Insert your school's logo by clicking on the logo and pasting or inserting it.

- Logistics Values - information for calculating logistics.
- Meal Hours - your school's meal hours
- End of Day - your school's end of class day times
- Team Defaults - enter default values for your teams as a starting point, then click on the Set Defaults button to set all teams' logistical values to the default - adjust as needed. These will also be used if you create a new team.
- Logistics Data Confirmation Sheet - allows you to print or email a sheet of currently set logistic times for each team to the head coach for verification.
- Meal Settings
- Custom names of meals
- Sandwich Options
- Meal Money Options
- Colors
- These colors are used to color code the text of event records. After including the set of colors you want you will be able to select the color for each contest
 conditions such as Contests, Practices, Past, Home, Away, Confirmed, Rescheduled, and Cancelled.
- Change colors by editing their Name, Hex Code,and RGB values.
- Check Yes in the Include and/or Background field to have the color show in the color menus, but there is only room in the menu for about 14-18 colors depending on the length of each color name, so watch it carefully.
- Not all of the colors listed in these portals have samples. While they are not required, they give you a better idea of what the color looks like than the colored name. To fill in the color sample, first click on the color name (it will automatically be copied) and then click on the "Color Hex Code" button which will take you to a color web site. Click into the color search field on the web site and past the name, then click on the search button. Copy the color sample image found and return to this tab. Now click into the color's sample field and the sample will automatically be pasted.
- Add colors by clicking into the bottom empty row and entering the color's information.
- Personnel
- Enter personnel by clicking on the New Person button.

- Be sure to enter the department of the individual so that athletic department personnel are differentiated from other school personnel.
- Personnel Settings
- select whom should be sending, receiving, and signing emails and documents.
- Test Email Address - Contracts, Reminders, and other notifications have a Test Email selection so that you can see what the email looks like before you send it for real. Enter the email
 address you want the test to go to.
- Email Options
- Enter all of your email messages and review the senders and recipients for emails.
- Contracts
- Notifications
- Reminders
- Test
- Email Aouth.2.0
- The Athletic Scheduler is set up to use either Google Gmail's or Microsofts Outlook email server. Be sure to select your email provider.
- You must have an account for each person who will be sending emails. If you don't have one you'll have to set one up. After you have an email
 account your IT department will have to create credentials with either Google or Microsoft API services. Follow the instructions on the OAuth2.0 Credentials tab and for a more detailed walk through, read Instructions pdf provided to you.
- Authenticate new users after you get your credentials
- You are allowed to have as many senders as you would like. Just select their name in the New User field and a new authentication record will appear.
- To set up each email account, click on "Authenticate". A window will then pop up for you to enter your gmail address, click Next and enter your gmail password.
- When completed and successful, the "Authenticate" button will change to your email address.
- Repeat this process for each email account you want to use.
- Calendar Setup
- If you want to post contests and/or rentals to a Google or Outlook calendar you will need to set up your calendar before trying to do so.
- First select the provider for your calendar: Google Calendar or Outlook CalendarOAuth2.0

- Get your Client ID and Secret. Follow the instructions on the OAuth2.0 Credentials tab and for a more detailed walk through, read Instructions pdf provided to you.
- Daylight Savings Time - Set the start day and end day for daylight savings time for the current year. This must be update annually.
- OAuth2.0 Credentials

- If you want to post events to your Calendar and/or send emails using the API method, click on the OAuth2.0 Credentials tab.
- Paste your Client ID and Secret from the credentials you obtained into their fields.
- For Google, Click on the Get Code button. Enter email address of our Google calendar and sign in.
- You will get some similar pop ups to the email authentication.
- For Outlook, Click on the Connect button.
- You will be taken through a fairly quick process
- For both of these providers you will get your access token.
- OAuth2.0 Information
- This box contains essential codes \& tokens for posting events to your calendar and send email by API. If for some reason, any of these fields are blank, for Google click on Get Code to get an Access Code and Get Token to get an Access Token and Refresh Token. For Outlook, click on the Connect button. The Access Token has a time limit, so you may need to click on the Refresh Token button each time you return to the Athletic Scheduler to post new events.
- Accounts etc
- Creating Accounts - While the Athletic Scheduler comes with the Athletics account with Full Access privileges, individual accounts should be created for each user. There are three privilege sets available depending on the editing needs of the user. There is no default password for new accounts, but the user will be prompted to enter one upon signing in for the first time.
- Manage Databases - Available only to users with Full \& Manager Access, this allows the user to create, edit and delete tables, fields and relationships. This should only be done by experienced Filemaker users.
- Preferences - Set User Name default to match your account name for each computer.


## Organizations

are the organizations who use your schools facilities. The only required organization at this point is your school's athletic department for all contests. You can add other school departments for physical education classes, student activities or faculty groups. This is where you will also include outside groups that rent your facilities, such as the local youth hockey program, if you want to track your facilities, but you can do that later.

- List - is a list of all organizations with key fields for you to keep track of information.
- Create a new organization by clicking on the "New Organization" button. Use the chooser to select which type of organization you want to see.

- Click on the school icon in the organization list to go to the selected details
- Detail - gives you access to all the fields of each organization as well as a list of teams or groups the selected organization has. Click into the empty row at the bottom to create a new team or group.
- Groups - gives you access to details of the teams or groups as well as a list of facility uses each group has.

- To create an event or use for a given
team, go to the appropriate layout: contests, Practices, or Rentals add them there. You can create a batch of repeating uses, such as every Monday, Wednesday, and Friday from 1:00 PM to 2:00 PM, by clicking on the "Create Batch Use Schedules" button on the Groups tab.


## Teams

are the competitive and non-competitive teams you have. The Athletic Scheduler comes with common teams that schools have. You can also import a list of your own by clicking on the "Edit" tab and using the "Import" button there. See import instructions at the end of this document.

- Settings
- Team Name Order
- It is important to set your preferred Team Name order as it determines how it reads. There are five orders
 available:
- Level Gender Sublevel Sport
- Gender Level Sublevel Sport
- Gender Sport Level Sublevel
- Sport Level Gender Sublevel
- Sport Gender Level Sublevel
- Sport Gender Sublevel Level
- You will see a sample of each order when you click on a different order button. For example, 2 shows Boys JV Soccer. If you have already entered scheduled contests, a pop up will ask you to okay a lookup. Click "OK" and the Athletic Scheduler will re-lookup the values of fields based on Team Id\# in any contests you have already created.

- Team Abbreviation Order
- Level Gender Sublevel Sport
- Gender Level Sublevel Sport
- Gender Sport Level Sublevel
- Sport Level Gender Sublevel
- Sport Gender Level Sublevel
- Sport Gender Sublevel Level
- Team Dividers - If you would like a divider between the sport and gender or level in either the team name or abbreviation, chose

those by clicking into the divider fields. Your choices include a colon, bar, or hyphen(: | -).
- Edit Team Names and Abbreviations
- Click on this button to take you to a layout to edit your team names and abbreviations.
- This button is also available on the Lists tab and is explain fully in the Lists section below.
- Set Schedule Columns
- Click on this button to go to the layout for setting the column headings for your Schedule Grid layouts.
- List - is a list of all your teams and basic information. This tab is one place to delete unwanted teams and add new teams and their basic information. Use the red $x$ at the far right of each row to delete teams. The other
 place to edit is found by clicking on the "Edit" tab.
- There are 3 tabs for listing All Teams and Activities, just Teams and just Activities,
- New Team - Click to create a new competitive team.
- Team List - go to a team list layout for viewing or printing
- Multi - go to a multi-team list layout by season for viewing or printing
- Name |Abbreviations - click on the Abbreviations button to customize your team abbreviations to your school. It will take you to the Abbreviations layout which has the following tabs.
- Fill - copies the abbreviation calculation to the Abbreviation field.
- Update - updates your contests with the new team abbreviations.
- Calc>10 - finds all abbreviation calculations that are > 10 characters long. ( 10 being the limit on length to be seen in the abbreviation fields)
- Abbrev>10 - finds all abbreviations that are > 10 characters long.
- Contest, Schedules, \& Backroom - will take you to those layouts
- Replace - is a great tool for replacing phrases in your abbreviation with a new phrase, for example - enter Search Text "Lacr" and Replace Text "Lax" will replace "Lacr" with "Lax" in your abbreviations.
- Team Abbreviation Details - here you enter the team levels that your school uses and select the Team Abbreviation Order you want for your team abbreviations.

- Edit - is a great layout for entering and editing team information.
Back to the main sub-tabs for the Teams tabs:
- Logistic Data List - a list of your teams' times for warm up, length of contest, etc. Using the School>Logistics Values tab, you can set defaults for all teams and then adjust the ones that are actually different. (Do not leave blank, probably easiest to enter on this tab)
- Team Detail - details such as division, sport, level, gender, warm up time, locations etc., and Sport, Gender, Level order of the team name.
- Facilities - If you want to track your facilities you will need to enter the locations for your practices and contests and whether they are on or off campus (site). In order to get a drop-down menu on the location fields you must first set the Contest and Practice sites to On Site or Off Site
- The Athletic Scheduler allows you to divide your teams by school division, such as High School, Middle School, etc. Already set up are HS \& MS. If you don't have divisions or don't want to use them, set them all the same, either blank, HS or MS but importantly use the All setting on the Division Chooser on the various layouts.
- Team Levels - are used in calculating team abbreviation.
- Here you should enter your team levels in order to seniority and their corresponding abbreviations. A sample is shown.

The following tabs under Teams can be used later after your contests have been entered - you can now skip to Opponents in the next section (Opponents) if you want.

- Contests - a list of contests for the selected team \& team schedule printout
- Print Schedules
- On the Schedule layout, set your footer settings to show the your desired personnel.

You can select one team or all that play in a season. Use the Legal | Letter selection to set the page length. Use the Preview setting and you can scroll through the schedules by clicking on the < > buttons in the upper left-hand corner of the layout to see the selected schedules. When you are satisfied you can either print the schedules, save them as pdfs, or email them to coaches.

- To send them as emails to coaches check the email details shown on the panel on the right. There is a Salutation field and a calculation that ties the correct coaches to that salutation. The end result is that the message need only be the message and the salutation and signature block will be concatenated to the beginning and end of the message for the email. There a Coaches tab under Notifications as where you can edit your Salutation and Message. They can be as long as you like.
- There is also a Tags field for adding tags (up to 4) to the bottom of your signature block. Tag fields are found on the Personnel Information layout.
- There is also a Coaches Schedule Message Signature field so that the message signer can be different than the email sender.
- When emailing this it will use the Reminder Sender's email and Coaches Schedule Message Signature block.
- Return to the schedule layout and click on either "Email This Team" or "Email All Teams" to email the schedules to your coaches. Check the Test box to try it out.
- Scores - a list of contests with fields for home and visitor(s) scores
- Practices - a list of scheduled practices for the selected team
- Roster - a list of players for the selected team

Note: The Backroom has two navigation buttons on its lists to help you get things done. 1) The logo on the far left of each row will take you to the detail of that record. 2) The red $X$ symbol on the far right is a button that deletes the record in a list. A chooser field allows you to select a subset of whatever tab you are on such as the season, team, opponent, etc.


## Opponents

Enter the information about opponent schools

- List - is a list of all of the NEPSAC schools - add new opponents
- New Opponent - creates a new opponent for your opponent table. After entering the basic information, click on the school icon to enter the remaining details for this opponent.
- Calculate All - calculates the travel times to each of your opponent schools.
- Address Labels - takes you to an address label layout for printing them.
- Abbreviations - click on Abbreviations to fine tune opponent abbreviations to your preference.
- Fill - fills the opponent abbreviation with the calculation.
- Name > 12 - finds all opponent names that are greater than 12 characters long.
- Abbrev>12 - finds all opponent abbreviations that are greater than 12 characters long.
- Opponent Chooser - selects the opponent of your choice.
- Edit - is a great place to edit and remove any opponents you don't want to keep in your database.
- Personnel - tab displays a portal of opponent personnel in its table.
- You can find all personnel, a single person, or all personnel of a selected opponent.

- Import Personnel button opens a layout for importing updated personnel records provided by NEPSAC as collected on their website.
- Opponent Details - details such as the name of the school, address, travel time, etc. There is a Calculate All Travel Times button on the tab to find the travel time from your school to all opponents. Map button uses Google Maps to give directions. Calc Travel Time calculates the travel time from your school to this opponent.
- Email Settings - shows a layout for selecting the email recipient for each opponent.
- Contests - a list of contests you play with the selected opponent
- Map - an embedded google map of the location of selected opponent



## Locations

Enter On \& Off contests and practices Sites as well as E bus pick up sites. After entering these sites here, they will appear in a drop down menu for sites when creating your contests records. If any facilities are shared during the same time period (such as a lake) be sure to check "Shared" so that the event doesn't
 appear to have a facility conflict.

- List - is a list of On Site and Off Site locations for events. Select On Site or Off Site in the chooser to see the list you want.
- The "Calculate All Off Site Travel Times" button will do just that - calculate travel times from your school to each off site location.
- Select the color of each location if you plan on using the Facilities Calendar.
- Locations Details - Shows the detail information of each location and a list of all events held at the location.
- The "Calculate This Off Site Travel Times" button will do just that - calculate travel times from your school to this off site location
- Map - Shows a map of the selected location as well as some travel information.
- Pickup - is a list of locations on campus where the transporting vehicle will pick up the players.

To be done later

## The following Backroom information is optional or can be entered later when the time is right.

## Contests

Enter the information about your Contests - Import (see last page for details)

- Season - a list of the selected season's contest logistics and scores
- Teams - a list of contests for the selected team with basic details
- Seasons List - a list of all seasons in use
- Pegging Dates - a list of pegging date years
- Special Dates - a list of special dates such as SATs, Parents Weekends, etc.
- Vacations - a list of vacation periods to avoid when scheduling practices
- Sort Order - provides setting for sorting contests, practices, rentals and facilities.
- Menu Text - makes available the text labels in the navigation and function menus.
- Prime Pump - You are asked whether or not you would like to prime the pump when you first leave the introduction layout and head to the Contests layout. You are offered the following options. This is a full explanation.


## Players

Enter the information about your student players - add players

- List - a list of players with basic information
- New Player - to add a new player to the Player table
- Player Information List - is a list of player information
- Import Players \& Sign Ups - provides a menu for importing and exporting player assignment sheets
- Player Team List - I s printable list of Teams and their players
- Player Alpha List - is a printable list of players and their teams for each season
- Player Export - is a layout for exporting player team/activity assignment to Blackbaud SIS
- Import - player information \& sport signups (see last page for details)
- Player Details - details such as name, grade, gender, sport, parents names \& email addresses, and their team assignments
- Archiving
- Graduate seniors and promoting underclasses
- Player Archive Summary and List


## Coaches

Enter the information about your coaches - add coaches

- List - a list of coaches with teams they coach and their role
- New Coach - Create a new coach record
- Import coach information (see last page for details)
- Print coach assignment
- Coach Details - details such as name, phone, email, and assignments
- Coaches Archive - create and access an archive of coaching assignments.


## Transportation

Enter the information about transportation companies and their vehicles

- List - a list of transportation companies including your school (do not enter vehicles on this tab - this is for providers, vehicles will be added on the detail tab for each provider.)
- Transportation Details - details such as name, phone, contact, vehicles, etc.
- Assignments - a list of assigned vehicles for contests - printouts
- Tabs - Displays vehicle assignments: Schedule,Today, This Week, Next Week, Future, Season, All, \& Details


## Officials

Enter officials information which can be entered individually or by importing.

- List - a list of Officials
- Officials Details - details such as name and contact information
- Officials Organizations - a list of officials' organizations
- Officials Organizations Details - details such as the assigning authority, contract information
- Assignments - Lists of official assignments
- Print Outs - links to several Officials Lists for printing


## Help

holds helpful information about using the Athletic Scheduler

- Procedure - a sequential list of what to do and in what order
- Check Lists - check lists for tasks
- Logistics Calculations - formulas used to calculate results
- History - a list of past versions and their modifications
- About - contact information about Mark B Perkins High Street Solutions


## Contests

Once you have filled in School, Team, Opponent and Location information in the Backroom, you can begin creating your schedule by going to the Contests layout. When serving the athletic scheduler from the cloud the Contest layouts run slower due to the way Filemaker handles data. In ordered to give you some contest layout options, there are three modes available: Info, Edit and Speed (the quickest). You can try each and determine which is best for your situtation.

## Scrolling

There are scrolling controls for moving up and down the list in the header on the left right under you school seal.

- Top and Bottom of the list - will scroll to the top or the bottom of the contest records list.

- Page up and Page down - will scroll one page at a time either up or down.
- Go to date field - will scroll to the date you enter in the field.
- Loop - facilitates looping through the contest found set for either of two purposes:
- 1) to automatically run down through your contest so that you can review them, 2) to prime the pump so to speak, that is, load all the records in the found set from the server to your computer in one action so that afterward scrolling the contest records will happen quicker (2 or 3 times). I would use "Page No Pause" first, it is the fastest method of loading the contest records. The other choices are more for when you want to review your contests.
- You might run the Loop after you first load a season on the layout. Click on the Loop button and a menu will give you an explanation and several options.


## Columns (Edit \& Speed Layout)

On the Contests layouts you will find the following Columns from left to right.

- Icon Button - Edit Contest
- Day - Day of Contest
- Date - Date of Contest
- Classes - Class day on this date
- Start Time - Start time of this contest
- Place - Home or Away
- Team - Team Abbreviation
- Opponent - Opponent 1 Abbreviation
- Vehicle - Vehicle assigned to this contest
- Pickup Location - Location of departure
- Level - Level of opponent's team is different
- Type - Type of contest, DH, Scrimmage, etc.
- Opponent 2 - 2nd opponent
- Opponent 3 - 3rd opponent
- Opponent $4+-4^{\text {th }}, 5^{\text {th }}, 6^{\text {th }}, 7^{\text {th }}, 8^{\text {th }}, \& 9^{\text {th }}$ opponents
- Campus Location - Location if on campus
- Locations Off Site - Location if off campus
- Meal \$ - green = need money, checked = requested
- S - Confirmed by schedule
- A - Confirmed by assigning authority
- O - Confirmed by opponent
- Reminders - Date of remainders to Dept, Coaches, Opponents, \& Officials
- Season - Season of contest
- Rescheduled - Indicated contest is rescheduled
- Contest Canceled - Canceled contest indicator
- More - additional functions
- Change - Pop up for making change in contest
- Undo - Undo rescheduled setting
- Contest Note - Pop up for contest note
- Email Confirmations - Confirmation dates of Notifications \& Reminders

You also have an Information Contest layout available: Use the "I", "E", \& "S" buttons in the Navigation menu to toggle between them. Click on the Speed button to the right of the Mode field to set your Speed default
 choice.

- Info Layout - drill down to detail data by clicking on the particular field you are interested in, such as, Opponent, and a pop-up card will appear with detailed information on that opponent.
- Edit records by clicking on the school logo in the far left of the current record.
- Note: in order to speed up scrolling there are no contest text format indicators in Info.
- Edit Layout - edit each field by clicking in the field and changing the value or click on the school logo in the far left of the current record.


## $\square$

- In either layout you can add new records creating new contests for each team by clicking on the "New Contest" button.
- Speed Layout - similar to the Edit mode, you can edit each field by clicking into the field itself. The only difference between the two is that the contest record colors \& styles have been remove in order to increase navigation speed.
- Speed is available in BW Barebones, BW, or Color versions.
- BW Barebones Plain runs the qucikest as it has no drop-down menus.
- BW Barebones runs the second quickest for scrolling but does not show conflict warnings.
- BW runs a little slower but shows conflict warnings.
- Color will allow you to color the background of the records to indicate home or away contest, but runs the slowest.
- If you already have a schedule in some other form, such as an Excel file, you can import it, but you must be careful to match the field names of the Excel file with the Filemaker Pro file and the Team Names \& Opponent Abbreviations must match those in the Athletic Scheduler. The Import button is on the Function Menu in the bottom right corner of the Contests layout.
- See importing details at the end of this document.
- Once your contests are in, you can set the colors and text styles you want for the home/away, confirmed/unconfirmed and past contests. Click on the "Text Format" button on the right of the Navigation men. You an also set the color of the Contest Layouts header and menus if you would like.
- Warning Lights - You may also notice amber, green, or red colors in certain fields. These colors are warnings:
- Amber - special date you entered (notice the ACT also in amber below the Today's Date in the header). Of course, if you didn't fill out all of your Special Dates on the Contests tab of the Backroom, this will not happen.
- Green - meal money required (notice the green in the Meals box at the bottom of the window). Light green indicates that this contest needs meal money and dark green indicates that you have made the request for meal money to the business office.
- Red - indicates either a facility or team conflict, that is, a non-shared facility is scheduled more than once on overlapping date and time for use by two different teams/groups, or the same team is scheduled more than once on overlapping date and time.
- Yellow - indicates the abbreviation in the field doesn't match the abbreviation of the team, opponent, or location in the Backroom.

While most columns are pretty straight forward, there are a few that need a more detailed explanation.

Vehicles

- Select the vehicle from the drop-down to be used for this contest. Once selected, a vehicle assignment record is automatically created in the vehicle assignment table. If you later decide to delete or change this vehicle, the assignment record is changed accordingly.
- If more that one team is traveling in the same vehicle, assign the vehicle to the both contests and in the Travel With field in the Logistics box select the team it is traveling with for each of the contests.
- Colors: Yellow indicates that the vehicle abbreviation does not match the vehicle abbreviation in the Backroom on the Transportation>Vehicle list; Green indicates that the team is traveling with another team.
Locations
- You can leave the Campus Location and/or Location Off Site blank if you choose. If so, the location for home contests will be your school's name and the location for away contests will be the opponent's name.
- But, if you want to be more specific with your Campus Location and enter the field or court name, then that will show as your contest location.
- You should enter a Location off Site if the contest is being played at an off camps locations. If you enter the abbreviation of an off site location that doesn't exist in the Backroom it will automatically be created. If you enter the abbreviation of an opponent, it will automatically be added to the Off Site Locations table.
- Enter the various location fields in the Backroom to populate the drop down menus on the contest layouts. Be sure to enter their address and calculate travel times so logistics will be correct.


## Meal \$

- The fields in this column turn light green if your logistics for the contest indicate a restaurant meal as a reminder that you need to notify the business office for meal money.
- The field is automatically checked "Yes" and turns dark green once a meal money request is made.
- This column can be changed to serve another purpose such as a flag of some sort. Simply click into the column heading and change the text to what you want (don't forget to do it on the Info layout as well).
Changes on the More Pop Up
- Before the schedule has been published, a contest's information can be modified by editing its record. Edit your contest records by clicking on the school logo in the far left column of the row or in the Edit layout you can also click into any field. Add a new contest by clicking on New button in the navigation menu. If you want to cancel a contest you
 can just delete it or if you want to keep a record of it check "Yes" in the Contest Canceled field at the end of the row.
- However, once the schedule is published, you will most likely want to notify others of a change - "change" meaning a change in the published schedule. The "Change" button is located on the far-right end of each row of the Edit layout or on the Contest Edit pop-up card. Don't change your data on the Contest layout, make your change on the Change Card once it appears (this does not apply to a new contest - add it on the Contest layout and then click the "Change" button to notify others).
- First click on the Change button to open the pop up menu. Then click on your choice, either Reschedule or Cancel depending on which you are doing.
- Cancellation will open a Cancel layout for you to send an email to either school departments or opponents or both (you choose) stating the cancellation.

- You will be able to review all email settings including who you want to send the cancellation notice to and who it is from. Click on Send Cancellation Email when you all set.
- A red test check box is for you to have this send only to your test email address. Uncheck it to send to the real people.
- If you are posting events to a Google calendar, click on the "Delete Google Event" to remove it from your Google calendar.
- Click on "Go To Official Assignments" to send a message to your assigned officials for this contest.
- Here you will be able to review all email settings including who it is from. Click on Send Cancellation Email when you all set.
- The Contest Canceled field will be set to "Yes"
- The contest will appear with strike out font.
- Reschedule will open a reschedule layout for you to enter the new contest details showing the existing contest. ENTER CHANGE HERE!
- After entering your changes, click
 on Post New Contest button and they will be highlighted in yellow on the Revised Contest sheet.
- To Undo a rescheduled contest, click on the Undo button
- On both the Contest and Schedule layouts, rescheduled contests will have the color background that is specified in the Text Format pop up..
- Re-calculate this contest's logistics by clicking on the "Calculate" button and send the email by clicking on the button(s) of your choice.
- Select who you want to receive the email and check other details of the emails similarly to the cancel notice.
- Click on "Send Change Notice Email" to send emails. Test selection is provided so you can see the what happens - a test email will be sent to the Test Email Address.
- A time stamp will be posted in the Confirmation field or "Error" if the email was not sent.
- To Undo rescheduled contests, click on the Undo button on the Schedule layout and on the popover menu click either Undo All or Undo Selected.
- The message embedded in the change email is shown and allows you to edit it.


## Group Sort

- The Group Sort settings control the sort of the contests on all of the contest layouts (Info, Edit, \& Speed). It is called Group sorting because when using it the sort groups the contests by the Level 1 field as shown in the screenshot on the right.

- There is a Group Sort field that determines whether or not to use the grouping. The sort will still apply, just not the grouping.
- To set your Group Sort, click on the Group Sort button in the Navigation
 Menu and the setting pop-up will appear. There are six primary sort fields: Date, Team, Sport, Opponent, Place, \& Facility. Within each primary sort you can select your $2^{\text {nd }}$, $3^{\text {rd }}, \& 4^{\text {th }}$ level fields. These are the most common sorts.
- There are also three secondary sort fields: Place, Vehicle, and Location. These all have a primary sort field of Date, but then give you
 control over the $2^{\text {nd }}, 3^{\text {rd }}$, and $4^{\text {th }}$ level sort fields.
- As a convenience for you any column heading that is underlined is also a sort button for that field. The default sort for the Contest layout is by Date. But if you wanted to sort the contests by teams, for instance, just click on the Team heading at the top of the Team column.


## Check List

- In order to help you keep track of your progress There is a Check List that automatically checks off each step of scheduling your contests. Here are the items that it tracks:
- Logistics -> Logistics Calculator Run

- Vehicle - Vehicle Needed \& Assigned
- Contract -> Contract Sent
- Confirmation -> Confirmed With Opponent
- Money -> Meal Money Needed \& Requested
- Meals -> Pre or Post Game Meals Not Regular \& Requested
- Officials -> Assigned
- Results -> Score Entered
- Click on the Check List button in the Navigation Menu to see your progress with the selected contests
- To find all contests that are incomplete. Select the step that you want to track and click on the Find button and the script will find all contests of the current season missing that step.


## Settings

- Mode - select your default (Info, Edit or Speed) Contest layout for when you go to Contests.
- BW or Color - select your preference for the Speed mode.
- Divisions - if you have high school and middle school divisions in your school, you can view them separately by selecting the division you desire to see.
- Include Practices - check this "Yes" if you wish to see practices with your contests.
- Group Sort - whether of not to use the Group Sort.
- Schedules Settings
- Contest or Practices - include one the other or Both for Schedule layout
- BW, Single, Double, or Multi - Schedule layout choice
- BW is a speed version for faster performance but without colors and styles
- Athletic Contact - select the person who will serve as the athletic department contact on the selected contest date. The drop down list is fed by the personnel in the Backroom.


## What's Next

At this point, you should have your contests entered and are ready to perform the functions of the Athletic Scheduler. What you do next is up to you: Navigate your Contests, Calculate Logistics, Create Contracts, Produce the Master Schedule, etc. I've tried to make the Athletic Scheduler somewhat intuitive, that is for example, if you want to create Contracts, there is a Contracts button to click on. So, look for the button that does what you want to do.

## Navigation Menu

On the Contest Layouts,
 look at the Navigation Menu in the header. The Navigation Menu navigates the database taking you to different views and finding desired contests.

## Go To

Let's look at the different views of the contests we can go to. There are buttons for navigating to List, Backroom, Facilities, Rentals, Practices, Weather, Calendar, Emails, Archive, as well as the Schedule grids: Fall, Winter, Spring).

- List - is a pop up menu for several List to be printed.
- Athletic Contact List of assignments
- Contest print out form for any (or all) team found set you desire
- Coaches Alpha List
- Officials Lists
- Player Alpha or Team Lists

- Transportation Lists
- Vehicles Lists
- Team Schedules for print or emailing PDF.
- Show or Hide Sort|Print options pop-up.
- Master Schedule
- The Master Schedule is a print out for distribution to departments in your school. It contains all contests of one date on a page with all the logistical information. You can print this or save it as a PDF and distribute it as you wish. Four versions are available.
- Included with the Master Schedules is the Transportation Master.
- Backroom - takes you to the Backroom for managing the details of Athletic Scheduler
- Practices - takes you to the Practice layout where you can view and create your practices. Most of the Navigation \& Function buttons work similarly to those on the Contest layout, but Create is new.
- Create - determine your repeating practice times and create practice schedules for selected teams

- Select the season you want to work with and set the first and last practice dates.
- In the Team Chooser field, select the team you want to set up. Check the Practice Schedule check box.
- After entering practice start and end times and location, you can copy them to be added to another week for that same team or another team. Click on " $C$ " to copy, "A" to add, or $X$ to delete. The copied settings will be displayed in the fields below.
- You can have up to four week-rotations, that is, a team can have as many as four different week schedules repeating in a rotation. You will begin with week 1 - enter your Start Time, End Time and Location for each day of the week. If this team practices at these times throughout the season, you are all set and can select the next team. However, if you rotate practice times with other teams, click into the second week and enter the team's week 2 schedule. You can continue this up to four rotations. When you are finished, choose your next team and repeat the process.
- Be sure to do the following before clicking on the Create Practices button to generate the creation of practice records:
- Enter your contest schedule
- Enter your vacation dates (Backroom => Schedule => Vacation Dates)
- Enter your Practice Start and End Dates for each season
- Select the Season in the Season Chooser field
- You are now ready to create your practice schedule for the selected season.
- The process creates a new record for each team practice, so this will take a fairly long time, depending on how many teams you have.
- After the practices for this season have been created you can create practices for the next season.
- You have a choice of creating practices one team at a time or the whole season at one time.
- If you choose to create them one team at a time, be sure to uncheck the "Create Practices" yes field before creating the next team's practice.
- If you don't, even though you will not duplicate practices, you will add substantial time to the process.
- If you need to change the start time and end time of a team's practices, first find the practices you wish to change and then click on the "Change" button in the Navigation Menu.
- Here you click into the Start Time or End Time field and make the change. A script will run replacing all the practices in the found set to the new time.
- Unfortunately, if you are changing the times of several days, but not all days in the date range, you will have to do this one day at a time.
- Practices can be included on the Contest layout by checking "Yes" for Include Practices. Or you can view just practices by clicking on Practice button. They can be included in the Contest layout by clicking on the Practices or Both radio button.
- Use the Clear Practices button to undo your practice records - be sure that you have selected the desired season. You can also edit/delete practices using the Contest layout click on Practices and edit practice records on the Practice layout.
- Rentals - rental records are actually the same as contest and practice records. They are all event records in the Athletic Scheduler. The Rentals layout essentially the same but uses rental event records instead of practice or contest records. See the instructions for the Batch Practice Creator on the previous page for creating batch rental events.
- Facilities - the Facilities layout is also very much like the Contests, Practice, and Rental layouts. It uses the same navigation button, but shows slightly different fields and

uses different sorts to maximize viewing records. Since you are interested in all types of events taking place in your facilities, the records will be a mix of contests, practices and rentals.
- Select the type of facility you want to view by clicking the Facility Type in the menu.
- Grid will display a grid view of facilities by date showing all events taking place on a field/court on each day,
- On the Grid View you can select a season and within that season you can select a facility type.
- The Wide button will toggle back and forth between the 13 column and 30 column layout.


The Long button will toggle back and forth between the 4 time slot and 8 time slot layout.

- The Headings for the Facility Grid can be accessed in the Backroom on the Locations tab.
- Conflicts are highlighted in red.
- Weather - takes you to Weather for the host location of the current contest.
- Calendar - takes you to Calendar layout for creating, updating, and deleting posts to your Google or Outlook Calendar.
- Here you can find the events you want to post, update or delete in your calendar using the buttons in the header.

- You must enter your calendar id's for each calendar you want to have. In addition to the main calendar, you can have division and/or individual team calendars. If you are tracking your facilities, you can also have facility calendars.
- For example, you might have a rink calendar. You will enter their id's by clicking on the Export Settings button in the left panel. For the main calendar, the id = "primary", but for the sub-calendars, you must obtain their id's from the Google calendar. Open the settings for each sub calendar and copy it's calendar id and paste it in it's corresponding id field in the Export Settings popover. Calendar id example:
 landmarkschool.org_2640fufm0a89jn24tde6vinhc4@group.calendar.google.com
- You can now post your contests to your calendar. First, select the Export Mode: Main, Divisions, Teams or Facilities. You can select one, two, three or all four and when you post an event the event will be posted on the corresponding calendar(s).
- Now, find the contests you want to post and then click on the "Create/Update Found Events" button. Because you are posting to the internet this process takes a fair amount of time depending on the number of contests, maybe as much as 30 or more minutes. To help you monitor this there is a counter in the upper left-hand corner telling "Progress = \# of Total \#".
- Three other buttons are available to you on this menu: Post 1 Event, Update 1 Event and Delete 1 Event. These buttons appear, or not, based on the condition that the current event has been posted. For instance, it wouldn't make sense to Update 1 Event or Delete 1 Event if the current event has not be posted.
- Finally, there is a check box for which version of the opponent name you want, the full name or the abbreviation. Check it as you wish.
- Emails - takes you to the Email viewer where you can manage sent emails
- Archive - takes you to previous year's Contests that you have archive


## Finding Contests

This sub-menu provides buttons with preset found sets of contests (New, Fall, Winter, Spring, This One, Today's, This Week's, Next Week's, Upcoming and Flex.

- New - will open a New Contest card for you to enter information for a new contest. Click on "Save" and it will save the newly created contest and ask you if you want to notify others of this new contest. Click "OK" and you will get a layout for notifying departments, coaches, opponents, and officials by email.
- Conflicts - will find any facility or team conflicts during the current selected season.
- Flex - is a flexible find menu that allows you to easily find any combination of season, date range, team, sport, and opponent. Select the criteria you want and click on the Find button.
- You can also find contest by clicking on Find in the Tool Bar above the layout and entering keywords in required fields. For instance, you could find all of Varsity Football contest by
 clicking on Find and selecting Football Boys Varsity in the Team field, then click on Perform Find.
- In order to fine tune your find set, you can omit contests from your find set by selecting the contest and clicking on the "Omit" button in the Filemaker tool bar at the top. This will not delete the contest, but merely remove it from the current find set.


## Schedule Grid View

- The first thing to do before going to a Schedule view is to set up your column orders for each division you plan to use. In the Backroom on the Team>List tab, click on the "Set Grid Columns" button and you will be presented nine records one each for All, HS, and MS in each of the three seasons. Simply click into each
 field and select the team you want in the order you want.
- If you only have one division, such as high school, then you can use the HS column headings and leave the other ones blank. Then on your contest and schedule layouts you will select HS in the Division Chooser field.
- If you don't set up your column orders, the headers of each column will be blank. Simply click on each header and chose the team when you go to the Schedule layouts, the headings will be blank and no contests will show.
- You can change the column heading on the Schedule layout by clicking into the heading and selecting the desired team on the
 drop-down menu.
- The first time you go to the Schedule grids they will need to be built first - the script will notify you of this which will take a few minutes depending on how many contest and practice records you have. After you have built the schedule grids once, the Jump, Fall, Winter, \& Spring buttons will take you there. Jump returns you to the previously used schedule grid more quickly than the others. You have the option of a single line, double
 line or multiple line opponent on the grid. Check the box appropriately.
- You will need to build each season's schedule grids after rolling over seasons, you can do this by clicking on the Build button under the season you wish to re-build. You can also re-build your schedule grids anytime you have added a contest on a new date which doesn't appear on the grid.
- The Schedule Menu contains many navigation and function buttons.

- Header Text Size Chooser - lets you set the size of the header text and whether or not to make it bod so that the team name fits into the header field properly.
- L, D, P, S, T - will toggle On Site Location, Special Dates, condition Indicators, Scores, and AM|PM to show or not show.
- UnCheck - removes the confirmation check for all contests of the season.
- Print - pops up a print selection window which allows you to select the criteria for the grid printout you desire. You can print grids with contest or worksheets without contests.
- New Date - creates a new date in the grid found set which doesn't already exist.

- Save Headers - Saves any changes you have made on the grid layout so the new column order will be saved for the next time you visit this grid.
- Contests - goes to the Contests layout.
- Backroom - goes to the Backroom layout.
- Fall, Winter \& Spring - finds the chosen schedules.
- Today, This Week \& Next Week - Find the corresponding contests on the schedule layout.
- Find Flex - finds selected dates for the schedule layout.
- Zoom In \& Zoom Out - magnifies or reduces the view.
- FX - pops up a function menu with many of the same functions that are found on the Contests layout. See on the next page for detailed info on functions.
- Division Chooser - finds contests for the selected division.
- Event Order - set the top to bottom order of the contest to either time then opponent or opponent then time.
- BW, Single, Double, or Multi - Schedule layout choice
- BW is a speed version for faster performance but without colors and styles
- Show Chooser - shows just contests, just practices or both.
- On the Schedule layout, you can view and edit contests, and perform most of the functions of the Athletic Scheduler.

- To add a new date, click on the " N " on any date field.
- Also, in the date field are " O " for omit and " D " for delete buttons to omit or delete a date from the grid. Omitting just removes the date from the found set of grid dates while delete deletes the date from the table of grid dates.
- To edit a contest, just click into the field and use the pop-up to make your edits. You can also delete, cancel and confirm contests in the popup.
- To add a new contest, click on the blank contest field that you want to add.

- Clicking on the date in the Schedule Grid layout will show a pop up with all the contests scheduled for that date.
- Here you can edit the contests just as you would on the Edit Contests layout. In addition, you can choose to include practices in the list by checking the Include Practices field.
- You can also sort the contests by any field whose column heading is
 underlined - just click on the underlined heading. In the example on the right the contests are sorted by Place.
- Note that just like on the Contests layout, special dates appear in amber and the name of the special date appears in the box in the header.


## Utilities

- Vehicles- The Vehicle Batch Assignment feature allows you assign a selected vehicle to all of the found contests.
- First, find the desired contests using the Flex find feature or any other method you would like to use.
- Then click on the "Vehicle" button found under the Utilities heading in the Navigation Menu above all the contests
- A pop up will appear where you can select the vehicle you want to assign and then click on the Assign Vehicle button.
- The vehicles shown come from the Backroom under the Transportation tab. It is here that you enter the company source and that company's vehicles.
- You will also notice a Remove Vehicle button. This script is for removing the assigned vehicle for a set of found contests. You don't need to select a vehicle for this function.
- Tool Bar - toggles between showing and hiding Filemaker's Tool Bar in the header.
- Themes - Select the colors and styles for contests, headers and menus. These can be customized for your scheduler.
- Locations - offers two functions:
- sets the on and off site locations in the contest found set to each team's contest location in the backroom.
- Cleans up the errant on site location id\#.
- Zoom - controls for zooming in or out and using windows to maximize your desktop use.


## Information Boxes in the Footer

There are Three Information boxes across the footer showing information about the selected contest: Logistics, Scores, Team Logistic Times \& Information, and Opponent information and the Function Menu.


## Logistics Calculations

- Here you will find the calculated values and other logistics values for each contest. They are based on the Logistic times you have entered in the Backroom.
- Among the logistics that are calculated are Meal Money Denominations and Sandwich Requests.
- You can view these after running the logistics calculator by clicking on the Money and Sandwiches buttons in the Logistics box.
- These fields will be included on the Meal Money and Meal Requests printed or emailed by you.
- You can also enter a logistic field and change the calculation found there, but realize that a new calculation will replace it unless you lock the logistic by checking the Locked box in the logistics box. Locked contests will keep their logistics fields unchanged by the logistics calculator. Click it again and it will unlock or you can unlock all contests in the found set by clicking on the Unlock Found Calc Mode button on the Menu.
- The logistics calculator handles two teams traveling together. Use the Travel With field to select the team another team is traveling with in both contest records.
- The calculator will use team's data who is playing earliest for pre-contest info and the team's data who is playing latest for the post-contest info.
- If you find that they are not accurate, look at the Logistics Values for the related Team and Opponent (on the footer), and make sure they reflect that team's current practice and that opponent's travel time and meal and dressing facility settings.
- To help you check the calculated logistics, click on the Logistic Details button in the logistics box in the left side of the footer. It will open a window (see right) showing you all the logistic details for the selected contest.

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- Make any changes necessary and re-calculate by clicking on the appropriate calculation button. You can calculate as many times as you want.


## Officials Assignments

Officials assignments is just to the right of the Logistics box. If you have entered your officials in the Backroom you can enter your assignment here.

Officials can be assigned to each contest by clicking in the Officials box in the Logistics box (see right) at the bottom left corner of the Schedule layout. Simply click in the box and select the officials name from the drop-down menu.


## Scores

Enter the scores of each contest in these fields. They will be part of the contest record and archived for a historical view.

## Functions Menu

The Menu in the bottom right corner in the footer of the Contest layout controls many functions of the Contest. Here you can Calculate Logistics, Import, Export, Rollover, Rollback, make Meal \& Meal Money Requests, send Reminders, and go to Contracts.

- Logistics Calculator
- You can calculate the logistics for the whole found set or for a
 single selected contest
- Selected - Runs the Logistics Calculator on just the currently selected contest.
- Found Set - Runs the Logistics Calculator on All contests in the current found set of records.
- Clear All - Clears all logistics values for All contests in the current found set of records.
- Note: There is a Miss Class setting for each contest. Its default setting is No, assuming that most schools want to avoid missing class as much as possible and would take bag lunches rather than eating

at school and having to leave class early. But there may be times when it makes more sense to miss class than take bag lunches. In this case, change the setting to Yes and recalculate.
- After calculating the logistics, it is a good idea to carefully examine the results for each contest found on the footer below and make sure they are what you want.
- Import - have one import for each season or you can import the whole year's schedule at one time. In the Function Menu in the lower right hand corner of the Contest layout, click on the Import Contest button. It will display a pop-up with 3 buttons: Guide, Go To Import, and Import. The guide shows you this guide, the Go To Import button takes you to the Contest Import layout, and the Import button runs an import script with several pop-up instructions that will walk you through the process. On the Contest Import layout you can Import a contest spreadsheet, export a sample contest spreadsheet, delete contest that you have imported but don't want, and view the Contest Import Guide. (see details at the end of this document)
- Export - allows you to export the Contest for archiving purposes before rolling over the Contest to the next year or for importing into a calendar program such as Google calendar, Outlook, or even your School's website.
- Rollover - sets the found season of contests to next year's dates.
- Be sure that the nearest leap year is correctly entered and that you have checked whether or not this is a Pegging Year for the selected found set.
- To help you with this the popup shows you what the currently selected contest date will become with the current pegging year and leap year settings.

- Be sure that you have set the Flip Place field on each contest record correctly: Yes to flip the location and blank to not flip it during the rollover.
- Your found set should be a season, such as Spring 2022.
- Rollback - simply undoes a Rollover, just in case you make a mistake and want to undo your rollover.
- Set Flip - sets the contest Flip Place field to each team's Flip Home Away value. You will have the option to do this for all contests or just the found set.
- Delete - deletes the contests in the current found set in case you are going to import a set of new contests instead of rolling the previous season over. Don't for get to archive them first
- Contracts
- Sending contracts is pretty straightforward. On the contest layout, in the Function menu in the lower right-hand corner, click on the Contracts button.
- It will take you to the Contract layout.
- Here you will find all the opponents that you play in the selected season and receive contracts during the chosen season.

- You can control which contests to include for each opponent's contract

by selecting the Confirm and/or Sent fields.
- Checking them will include contests that have been confirmed and/or already sent. Leaving them empty will omit confirmed and/or sent contests.
- You will see who is sending and receiving each email and the message being sent.
- By clicking on the "Email Information" button, you can change these settings.
- Select the contract version you wish to use.
- Click on the Contracts Version button to see a preview of the available versions.
- You can print, save as PDF, or send the contract to all found schools using the Print or Email button on the menu.
- To select an opponent do one of the following either scroll up or down the list and click on an opponent or you can also click into the opponent name field in the menu.
- To view the contract and print or email just one opponent:
- Click on it's name in the list on the left or select an opponent by click into the opponent name field in the menu.
- The pop-up Contract window will show all the contests with
 the selected opponent. You can preview the contract by clicking on the "Preview" button.
- Again, you can control which contests to include for each opponent's contract, as on the first layout, by selecting the Confirm and/or Sent fields.
- Checking them will include contests that have been confirmed and/or already sent. Leaving them empty will omit confirmed and/or sent contests.
- You can chose the preferred contract layout length (Letter or Legal), although the script will automatically set is based on the Legal Length number of lines setting you chose. The Legal | Letter setting will override the auto feature.
- On this layout you can print, save as PDF, or email the one contract being shown.
- You can also check the Email Information and the record of contract that have been sent.
- If you want to return to the Opponent Contract List layout, be sure to close this window.
- After you have sent your contract(s) you can review the details by clicking on the Contract Sent button or looking sent date information in the lower right part of the layout.
- You can also have all the contests of a contract checked opponent confirmed by clicking on the Confirm Contests button.
- Check the Test box to send a test email to preview what the school will receive, but make sure you are selected as a receiver of a Test first.
- Reminders
- Before sending reminders, on the Contests layout find the found set of contests you wish to remind others about such as This Weeks or Next Weeks, etc.
- Similar to Contracts, on the contest layout, in the Function menu in the lower right-hand corner, click on the Reminders button.
- You will be presented with a pop-up menu offering you who you would like to send reminders to: Teams, Departments, Meal \$ (Money), Opponents, Officials, or Clear.
- Click on your choice and the selected reminder layout will appear. Here you can verify the reminder emails and send them.
- The Opponent reminder layout is a little more complicated that the others so I detail it next.
- The Opponent reminder button will take you to the Reminder layout, which is very similar to the Contract layout.
- Here you will find all the opponents that you play in the selected contest found set.
- You will see who is sending and receiving each email and the message being sent.
- By clicking on the "Email Information" button, you can change these settings.
- You can send the reminder to all found schools using the Email button on the menu.

- To select an opponent do one of the following either scroll up or down the list or you can also click into the opponent name field in the menu.
- To view the reminder and email just one opponent:
- Click on it's name in the list on the left or select an opponent by click into the opponent name field in the menu.
- The pop-up Reminder window will show all the contests with the selected opponent. You can preview the reminder by clicking on the "Preview" button.
- On this layout you can email the one contract being shown.
- You can also check the Email Information and the record of contract
 that have been sent.
- If you want to return to the Opponent Reminder List layout, be sure to close this window.
- After you have sent your remnders(s) you can review the details by clicking on the Reminder Sent button or looking sent date information in the lower right part of the layout.
- Meal \$ Requests - takes you to a layout where you can send an email to the business office requesting meal money for contests in the found set. Once a Meal Money Request has been made, the green field will be replaced with " $\checkmark \mathrm{Yes}$ ".
- Officials Payment - takes you to Officials Payment form for the current found set.


## Scheduling After Your First Season

Archive, Rollover, Confirm, Send Contracts
This section walks you through the process of rolling over your Contests, modifying the new schedule,
 confirming it with each opponent school, and sending out contracts.
Let's assume you are at a point where you want to start working on next year's Fall schedule. To begin, click on Fall to find all fall contests.

## Archive

- The next thing you would do is archive your Fall Contests. You do this by clicking on the Export button in the function menu in the lower right hand corner of your Contest layout. This will save a copy of the past season for future reference.



## Rollover

- The next step is to rollover your Fall Contests to the next year. You do this by clicking on the Rollover button on the function menu.
- You are presented with some instruction, and a reminder to Archive your Contests before rolling it over. At the bottom there are several options when rolling over:
- Canceled Contests
- Practice Records

- Rental Records
- This gives you control over whether or not you clear these or leave them for the upcoming year - it's up to you.
- Check what date the currently selected contest date will become and Found Self
Doyou heve the correac Found set?

| cancel | 0 ok |
| :---: | :---: | make sure that is what you want. If not, change either the leap year or the pegging year setting.

- Once you decide and click on No or Yes for each one, click on the "Rollover" button. You'll get a little box asking you if you have the correct season set. If you do, click "Yes".
- After rolling over your season, you will need to Build its schedule grid by clicking on the Build button located below its season in the Navigation menu in the top right corner.


## Confirm

- You now have your new Fall season Contests with all of previous season's contests on their new corresponding dates. You will need to look this over, talk to the other AD's and make agreed upon changes for the new Fall season. To make this process easy for you, the Athletic Scheduler
 offers several options.
- If your Athletic Scheduler is being served on a server at your school and you have a VPN and wifi to connect you to your server or if you run a stand-alone copy on your laptop, you can bring your laptop with you to the scheduling meeting and use both \#1 and \#2 methods below.
- 1 - If you like working with the Contest view, simply find the opponent you are working on (let's say Groton) by clicking on the Flex Find button, selecting Groton
 in the opponent field and let's say, Fall 2022 in the season field, and clicking on Find. Once you confirm a contest with the opponent, click "Yes" in the "Contest Confirmed"
column. Continue doing this until all your contest have been confirmed.
- 2 - If you prefer the Grid view, go to the desired grid layout by clicking on season in the Grid box in the navigation menu. Select either Single, Double or Multi to determine the size of each contest information area (see "Single" on the right). On the Grid layout, you can edit each contest by clicking in the field and changing the information. You can also delete a contest, by clicking on the "Delete" button. In the date column on the left, you can add a new contest click on the " $N$ " button for the date of your contest. If the date doesn't exist, click on the "Add New Date" button in the menu in the header. Enter the new date in the Date field and then click on the " N " button to create your new contest. After you have confirmed a contest, click the Confirmed Yes field in the edit popup. The color of the opponent name will turn to the color you selected on the Contest layout for confirmed contests.
- 3 - If you don't want to or can't use your computer to confirm contests, you can do it the old fashion way with paper and pencil. To help you with this, the Athletic Scheduler has several forms to print out. On the Grid view, in the Navigation Menu, Click on the
 "Print" link and a pop up menu will appear.
- Here check Worksheet to printout your schedule in grid format and a blank grid with dates and teams in different size fonts depending on how many teams you have. The smaller the font the more teams will fit on the page.


- Once you have finished confirming all of your contests on paper, you will have to go to your computer and make your changes. Obviously, confirming on your computer using your laptop and the Athletic Scheduler is a big time saver.


## Send Contracts

- Now that you have confirmed all of your contests you can send out contracts or letters of agreement, whatever you would like to call them. In the backroom, on the School tab, enter the name you prefer to use for contracts. "Athletic Contract" is the default name.
- Now, go to the Contest layout and select the season for which you want to send contracts out. In the bottom right hand Function Menu, click on the "Contracts" button. This will take you to the Contract layout where you can select the opponent(s) for sending or printing contracts.
- First, select the desired season and all opponents with contests in that season will be in the found set. You can either print all of these contracts or send them out attached to emails by clicking on either "Print Found Contracts" or "Email Found Contracts".
- If you want to see what the emails will look like, you can check the Test check box and the Athletic Scheduler will send a contract email to the email address you have on the School>Email Settings tab in the Backroom.
- As each email is sent, a record of the email will show on the table on the right side of the layout. Clicking on the button on the left edge of each record will show details of the email.
- Also, the date is posted in the "Sent" field and a time stamp is entered in the Email Confirmation field on the Contract layout and on the Contest layout on the far right under Email Confirmations. If there is an error in sending the email, the word "Error" will appear in the field instead of the time stamp. The error could be a problem with the opponent email address. You can check these in the Backroom on the Opponents tab
- If you want to handle one opponent at a time, after selecting the season, click on the "Find" mode button and the screen will change offering you a space to click into so that you can
 choose your desired opponent. Now, click on either "Print Found Contracts" or "Email Found Contracts".
- The same confirmation information will appear in the Email Confirmation field. Also, the date sent will appear. Once you receive the approved contract back from your opponent, you can enter the Returned date on the contract layout and check the
 Contest Confirmed box for each contest with that opponent.
- You can click on each "Yes" box or by clicking on the "Contests Confirmed" button, check boxes for all contests where the Opponent is Opponent 1 will be checked.



## iPhone/iPad connection with Filemaker

 Go- Filemaker Go allows you to run the Athletic Scheduler on your iPhone or iPad. When opening the Athletic Scheduler with an iPhone/iPad, it will automatically go to a layout designed for touch devices. There you will be able to find a particular contest and view the contest details.
- In order to use your ipad or iphone with the Athletic Scheduler, you need to add the Filemaker Go app (Free) to your iphone/ipad by googling Filemaker Go on your iphone/ipad and downloading it. You can read "Connecting to a file via FileMaker Go" for details on connecting it to your computer. The Athletic Scheduler must be open either on your Filemaker Server or your computer, if you are not using a server.


## Imports

If you have existing databases of your teams, players, coaches, officials and/or contests, you can import this information into the Athletic Scheduler. Importing data requires mapping the fields of the import file with the fields of the Athletic Scheduler. The best and easiest way to do this mapping is to have the field names of the import file match the names of the Athletic Scheduler table exactly. In the field specifications below, an Asterisk denotes required fields with information. If you don't have an existing database, then you must enter this data by hand, instead of importing.

## Teams

have one import, name your import file "Team Import" and place it on your desktop.

- Team Fields: Sport*, Gender, Level,SubLevel Name, Sub2Level Name, Abbreviations, School Division(US, MS, etc), Miss Class, Location Off Site Contest, Location Off Site Practice, Location On Site Contest, Location On Site Practice, Season Played* (Fall, Winter, Spring)
- In the Backroom on the Team>List tab click on the "Edit" tab.
- If you are importing your own team list, you will most likely want to delete the existing teams and start fresh. You can do this by clicking on the "Select All" button atop the far left column and then click on the "Delete" button.
- Now click on the "Import" button and your team records will be imported.


## Players

Players should have been archived, graduating seniors and promoting underclasses, before importing for the upcoming year, unless this is the very first time you are importing player information.

## Players have two types of imports,

1) General information such as name, grade, gender, address, phone, parent names \& email addresses, etc, and is imported before the start of each year. It is an update so based on matching First Name and Last Name, data will be updated for returning students and new player records will be created for new students.

- Player General Info fields: (* indicates required Fields, but order doesn’t matter - don't include the * in the headings)
- First Name*, Last Name*, Nickname*, Gender, Cell Phone, Email Address, Street, City, State, Zip, Lives With Family, Family 1 Phone, Family 1 Parent Full Name, Family 1 Parent Email Address, Family 1 Parent Phone, Family 1 Spouse Full Name, Family 1 Spouse Email Address, Family 1 Spouse Phone, Family 2 Phone, Famliy 2 Parent Full Name, Family 2 Parent Email Address, Family 2 Parent Phone, Family 2 Spouse Full Name, Family 2 Spouse Email Address, Family 2 Spouse Phone
- Sample Import Record

| First Name* | Last Name* | Nickname* | Gender | Cell Phone, | Email Address | Street City | State | Zip | Lives With Family |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |
| Mark | Perkins | Gus | Male | $555-555-5555$ | markbperkins@gmail.com | 20 High Street Woodstock | VT | 05091 | Family 1 |

- After clicking on the Import button, you will get a message that the file can't be found. Find your import file and click open. The import window will pop up with default settings.
- They should be:
- The first record set as use as Field Names,
- Update and Remaining Data as New Records checked.
- First Name, Last Name are your Match Fields
- Be sure to check Perform Auto Enter.
- Click on "Import"

2) Sports sign-ups for each season and is imported each season. You must include one record for each student for
 each season, you can't combine all three sign-ups in one record. You could make 3 sheets in the main spreadsheet file, one for each season, and have only one season's team, season on each copy. Then you could run the import 3 times. Import button is found in Backroom or on the Player Assignment Import layout.

- Player Sports Signups fields: (* indicates required Fields, but order doesn't matter - don't include the * in the headings)
- First Name*, Last Name*, Grade*, Team Name *(Full team name matching those in the Athletic Scheduler), Team Name Waitlist, Season*(with year matching the season in the Athletic Scheduler), Role (Player, Captain, Manager, etc), Position (Forward, Guard, Center, etc), White Jersey Number, Color Jersey Number
(Note: use White Jersey Number if you want to use just one Jersey Number field)
Sample Import Record:

| First Name | Last Name | Grade | Team Name | Season | Role | Position | White Jersey Number |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |
| Mark | Perkins | 10 | Varsity Football | Fall 2023 | Player | RB/HB | 24 |
| Color Jersey Number | Team Name Waitlist |  |  |  |  |  |  |
| 24 | Dance |  |  |  |  |  |  |

- After clicking on the Import button, you will get a message that the file can't be found. Find your import file and click open. The import window will pop up with default settings.
- They should be:
- The first record should be Use as Field Names,
- Import Action setting should be Add
- Fields should be by Matching Names.
- Be sure to check Perform Auto Enter.
- Click on "Import"
- The records will be imported and you will be on the
 Player Assignment Import layout shown on the right.
- A red highlighted team indicates that the team name doesn't exist in the Team table in the Backroom. Click on it to select the correct team name. If the team you want doesn't exist, then go to the backroom and add it.
- You can return to this layout by clicking on the Edit Import button on the Players>School tab.


## Coaches

also have two types of imports

- General information such as name, gender, phone, etc, and is imported just once for each coach
- coaching assignments including the role (Head Coach, Assistant Coach, Timer, Score Keeper) for each season and is imported each year.
- Import button found in Backroom.
- Coach General Info fields: Firstname*, Lastname*, Nickname*, Gender, Campus Phone Home, Campus Phone Office, Cell Phone, Email Address.
- Coach Sports Assignments fields: Firstname*, Lastname*, Fall Sport, Fall Sport Role, Winter Sport, Winter Sport Role, Spring Sport, Spring Sport Role.
- After importing or entering new data, be sure to click on the Compile Email and Name Fields button. This will combine the emails and names into one field for each sport.
- 


## Officials

have one import for each sport or officials organization. Before importing the officials, you must create an officials organization record for these officials.

- Click on the Officials tab in the Backroom, then the Organizations List tab. Click in the Organization Name field and enter the information you have.
- Now click on the School icon at the far left of the record you just created and it should take you to the Organization Detail tab for this organization.
- There you will find an "Import Officials" button. When you are ready to import your officials, you will click on this button. Make sure the field names of your file to import match the ones below. Officials Info fields: Last Name*, Middle Name, First Name*, Personal Title, Business Name, Business Street, Business City, Business State, Business Zip Code, Business Title, Home Street, Home City, Home State, Home Zip Code, Phone Number, Phone Type, Email Address*


## Contests

have one import for each season or you can import the whole year's schedule at one time. In the Function Menu in the lower right hand corner of the Contest layout, click on the Import Contest button. It will display a pop-up with 3 buttons: Guide, Go To Import, and Import. The guide shows you this guide, the Go To Import button takes you to the Contest Import layout, and the Import button runs an import script with several pop-up instructions that will walk you through the process. On the Contest Import layout you can Import a contest spreadsheet, export a sample contest spreadsheet, delete contest that you have imported but don't want, and view the Contest Import Guide.
When you are ready to import your contest spreadsheet, click on the Import button. A pop-up will appear for you to select the import file.

1. Click OK, then the import mapping box will appear. Check to see that the import fields map to the Schedule field correctly. If they don't it is most likely due to the field names not being the same. If this is so, Cancel and correct your import field names.
2. Records are Imported.
3. Click OK, then Set Team Name order to match your import if it doesn't already. Click on any yellow Team Names or Abbreviations
 to reset them and once they are no longer yellow, then click Continue.
4. Click on the Continue button or press the Enter key.
5. "Did you import Team Names or Team Abbreviations?" Select Abbreviations or Names
6. "Do you want to set all the locations or use the ones in this import?" If you don't use imported locations select "Team Locations" and the script will enter the team on site locations as set in the Backroom.
7. "This Found Set are the contests with Opponents whose imported abbreviations don't match your Opponent Abbreviations. Click OK, then click in each yellow Opponent field and select this Opponent"
8. Your Import is now completed.

- Importing Contests is a little tricky. It works best if the column headings in your import spreadsheet match the Contest field names exactly. Use the accompanying sample spreadsheet for more complete reference, but here is a look at it what you import should look like.
- Contests fields: Season*(must match Season in the Athletic Scheduler), Date*, Start Time Text*(must have AM or PM, either Team Name* or Team Abbreviation*(must match Team Name or Abbreviation in Athletic Scheduler), Opponent 1*, Opponent 2, Opponent 3, Opponent 4, Opponent 5, Opponent 6, Opponent 7, Opponent 8, Opponent 9 (must match Opponent Abbreviation in Athletic Scheduler, Place *(Home or Away), Opponent Level, Location On Site, Location Off Site, Vehicle Abbreviation Input (multiple vehicles must be separated by CR - see sample import spreadsheet below), Travel With



## Import Fields

- Season* (must match Season in the Athletic Scheduler (Spring 2023, Fall 2023, or Winter 2023-2024)
- Start Date* mm/dd/yyyy
- Start Time Text* (must have AM or PM) as shown above.
- Place * (Home or Away)
- Team Name* or Team Abbreviation( - Use can use the Team Name or the Team Abbreviation as long as it matches the Team Name or Team Abbreviation in the Athletic Scheduler. The column heading should match what you are using.
- Contest Type If is it a contest it can be left blank. You can use abbreviations such as DH for double header, or Tri for tri-meet.
- Opponent 1* primary opponent if there are more than one
- Opponent Level if it is different than your team's level
- Opponent 2, Opponent 3, Opponent 4, Opponent 5, Opponent 6, Opponent 7, Opponent 8, Opponent 9 - all opponent abbreviations
- Location On Site - On site field or court name (must match the locations in the Backroom) or can be left blank if you just want the school name
- Location Off Site - Off site location (must match the locations in the Backroom) such as a golf course or a neutral site or can be left blank if you just want the opponent name
- Vehicle Abbreviation Input - Multiple vehicles must be separated by a carriage return as shown in the example above. In the spreadsheet, double click into the field and Press Alt $+\hookleftarrow$ Enter (PC) or Control +$\urcorner$ Option $+\triangleleft$ Return on a Mac after each vehicle.
- Travel With - The Travel With field holds the team abbreviation of the team that
shares a vehicle for an away contest. It doesn't matter which sharing team abbreviation you use just as long as it is the same team for all contests using the same vehicle(s).
- Contest Canceled - If you want to keep cancelled contest in the database as canceled enter Yes
- You can add other fields from here on if you want the information included in contests records but it needs to match a field in the athletic scheduler


## Customization

In addition to all of the capabilities described above, Filemaker Pro is a very flexible database that can do almost anything you can dream of. So, put your thinking cap on and rest assured that I can add or change any of the information or functionality of the Athletic Scheduler to meet your needs.

You can customize the Athletic Scheduler yourself with the Admin privilege set. Any layout can be modified by going to layout mode. Tables, fields, and relationships can be added or modified by clicking on the Manage Databases button in the Backroom on the School/Accounts, etc tab.

In addition, your payment for the Athletic Scheduler includes my customization of your scheduler. I am available anytime to customize your unique version of the Athletic Scheduler to meet your needs. (Included customizations are modifications within the scope of the software, not new extensive functionality.)

For information contact: Mark B Perkins | 802-457-7383 | markbperkins@gmail.com

