Roommate Facilities Manager

Introduction

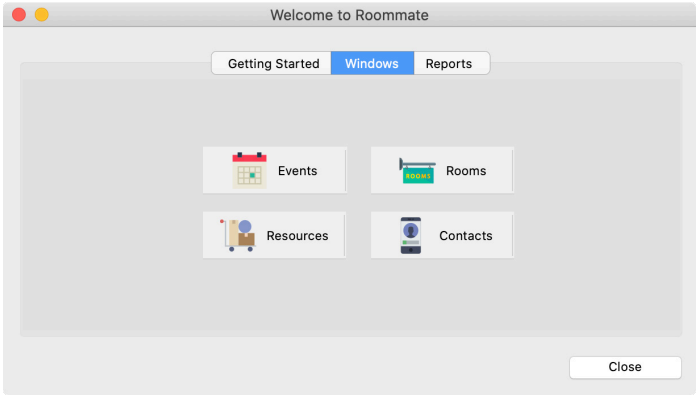
What is Roommate?

- Calendar
- Resource manager (inventory)
- Contact manager

Roommate is a powerful, effective scheduling tool for events and resources. Church-wide calendars or ministry specific calendars may be viewed or printed. Special event calendars, such as a wedding calendar, can be easily maintained. Reports include both calendar and list format, and can be produced by date range and departments.

Events from CDM+ Roommate can be viewed online using the Monthly Calendar and Event Listing tools. For more information on publishing tools, see the Getting Starting in Web Ministry Tools and Engage class.

The Welcome to Roommate window provides easy selection of the major Roommate functions; the Getting Started tab provides steps to initial setup; the Reports tab groups reports together by options for easy access. These items are also available from the Roommate menu under Programs in CDM+.



Setting Up: Master Coding System

▶File ▶Master Coding System ▶Codes tab

Room Configurations

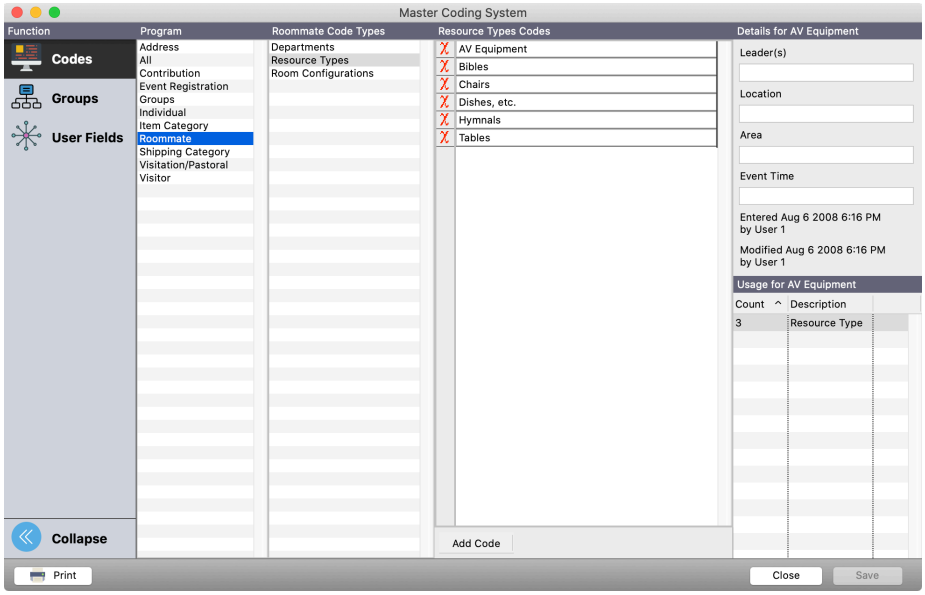
Room Configurations are codes you create to classify room setup, room type, or purposes. Room Configurations are associated with specific rooms.

Departments

Departments are Codes you create that are assigned to events for selection and grouping purposes on calendar views and reports. Departments are used to customize views on the Event Schedule and select content on Roommate reports.

Resource Types

Resource Types are used to group resources together and for selection purposes on Roommate reports. Resources are assigned to a Resource Type, e.g., AV Equipment would include televisions, DVD players, stereos, etc. Resource Types can be added on-the-fly or added, changed, or deleted on the Codes tab of the Master Coding System window.

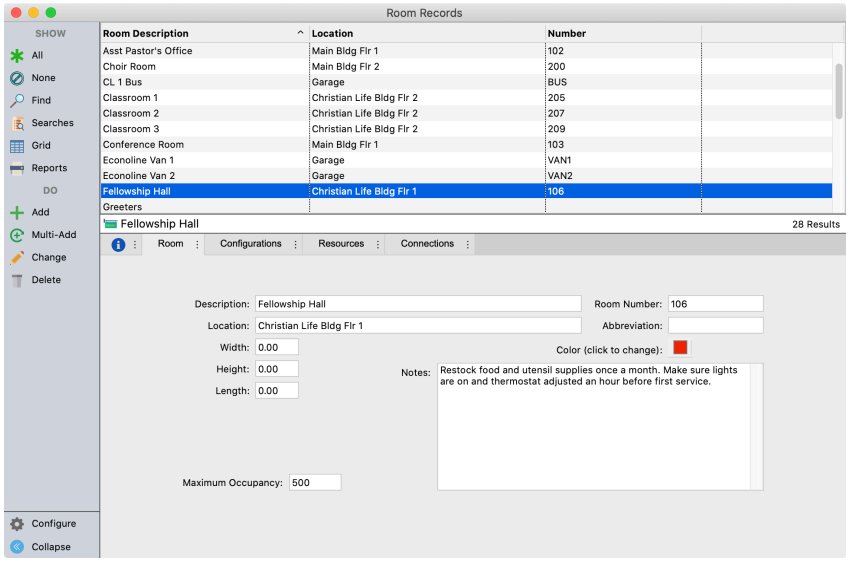


Use Resource Type descriptions to categorize resources. This will allow for the creation of Inventory lists by category (Resource Type).

Rooms

▶Program ▶Roommate ▶Room Records

Define all the areas of your facility that will be scheduled for use. Although the term "room" is used throughout the program, use CDM+ Roommate to schedule more than just rooms. For example, the list may include the church bus or van, the preschool playground, or the Prayer Garden. Don't be limited by walls!



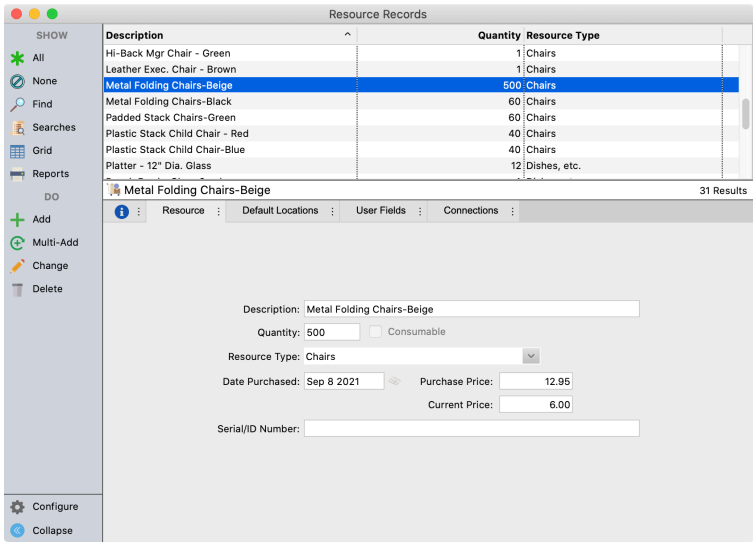
Detail view of Configurations tab

Resources

The Resource Records window displays the inventory or resources used when scheduling Events. In addition to a resource description, the quantity owned, purchase date, price, serial #, and Resource type are tracked. User-defined information can be maintained on the User Fields tab.

Resource Records

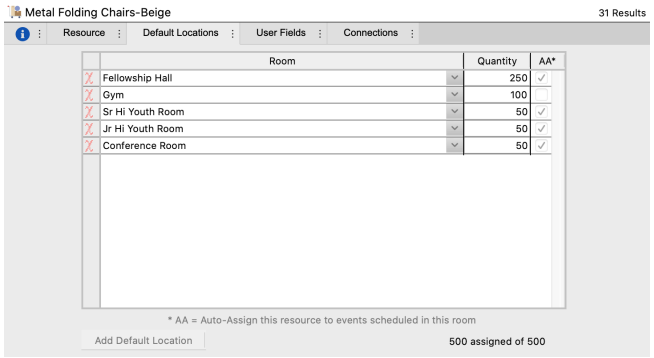
▶Program ▶Roommate ▶Resource Records



Create a Photo field under the User Fields tab and attach a scanned photo of the resource to the record.

Default Locations

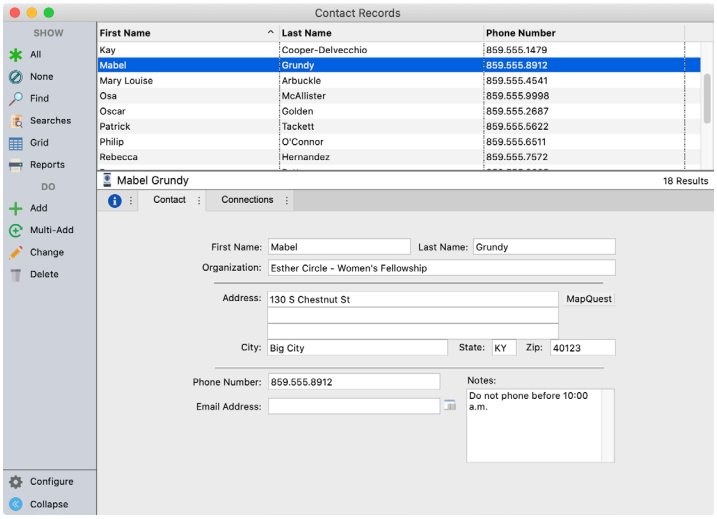
Specify the "normal" or "base" location for the selected resource. Multiple default locations can be tracked for a resource, so a group of 500 chairs could be split across multiple rooms. Check the "AA" box to Auto Assign the resource to scheduled Events in this room.



Contacts

▶Program ▶Roommate ▶Contact Records

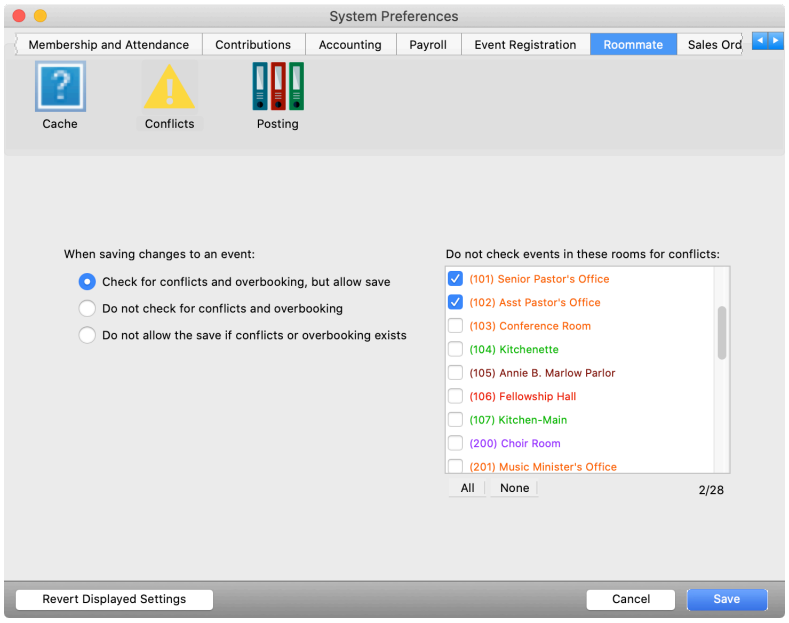
Information on contact persons for the organizations that use your facility—leaders of your church, community groups, and professionals (such as wedding coordinators and caterers).



System Preferences

CDM+(Mac)/File(Windows) ▶ Preferences ▶ CDM+ System ▶ Roommate tab

Conflicts

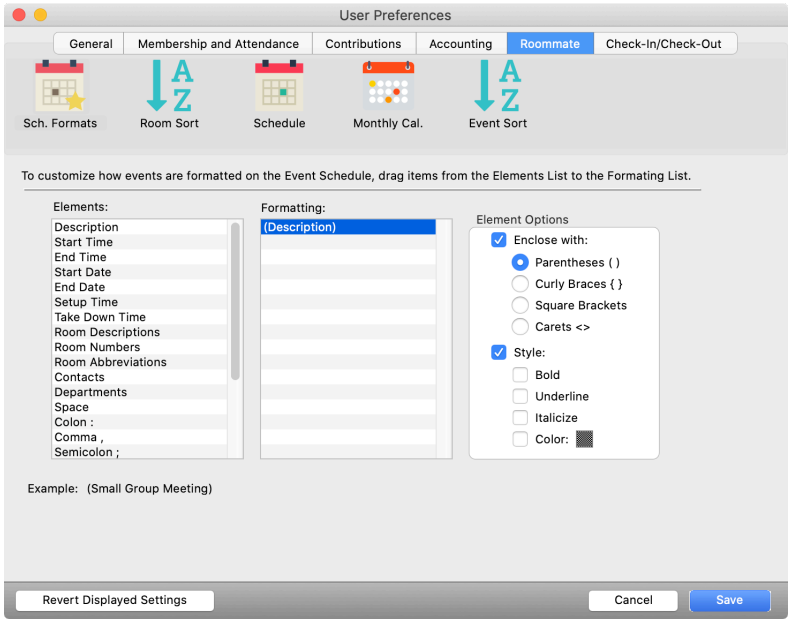


Select from three options to handle schedule conflicts.

User Preferences

CDM+(Mac)/File(Windows) ▶ Preferences ▶ CDM+ User ▶ Roommate tab

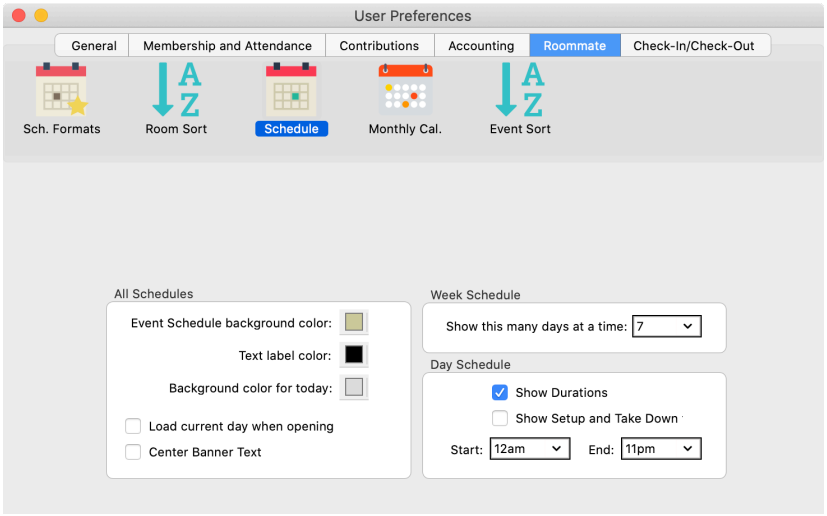
Monthly/Weekly Schedule Formats



Click on the Schedule Formats icon to specify what information is displayed for events on the Weekly or Monthly schedule. Drag desired elements from the Elements list on the left to the Formatting list on right.

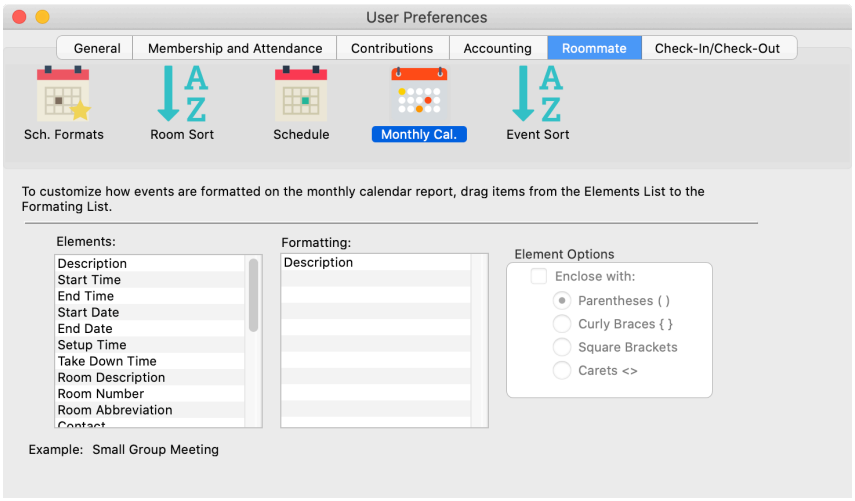
You can select an item in the Formatting list and further customize it under the Element Options. For example, add parethensis to separate a room number from its description, or bold the setup time.

Schedule



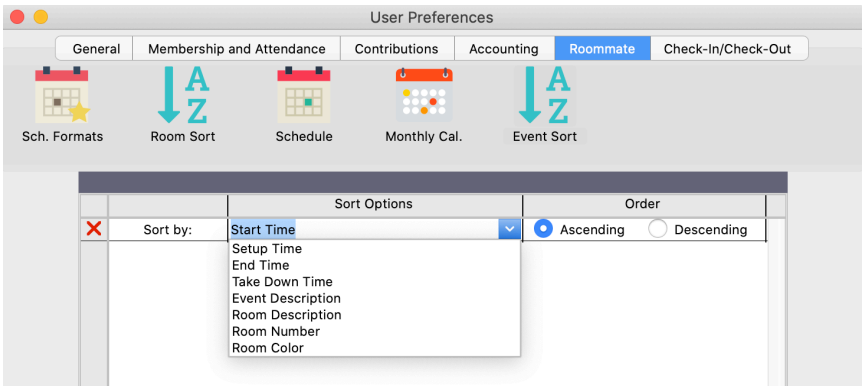
Click on the Schedule icon to select the color settings, the week schedule, and day schedule defaults

Monthly Calendar



Click on the Monthly Cal. icon to customize how events are formatted on the monthly calendar report by dragging items from the Elements List to the Formatting List. The Example below the lists changes dynamically to preview how the current Formatting would appear on a calendar report.

Event Sort



By default, events within a day on the schedule sort by start time. You can override this by adding sorts to this list. This example sorts events by start time, then by room number.

Scheduling Events

Event Schedule

▶Program ▶Roommate ▶Schedule

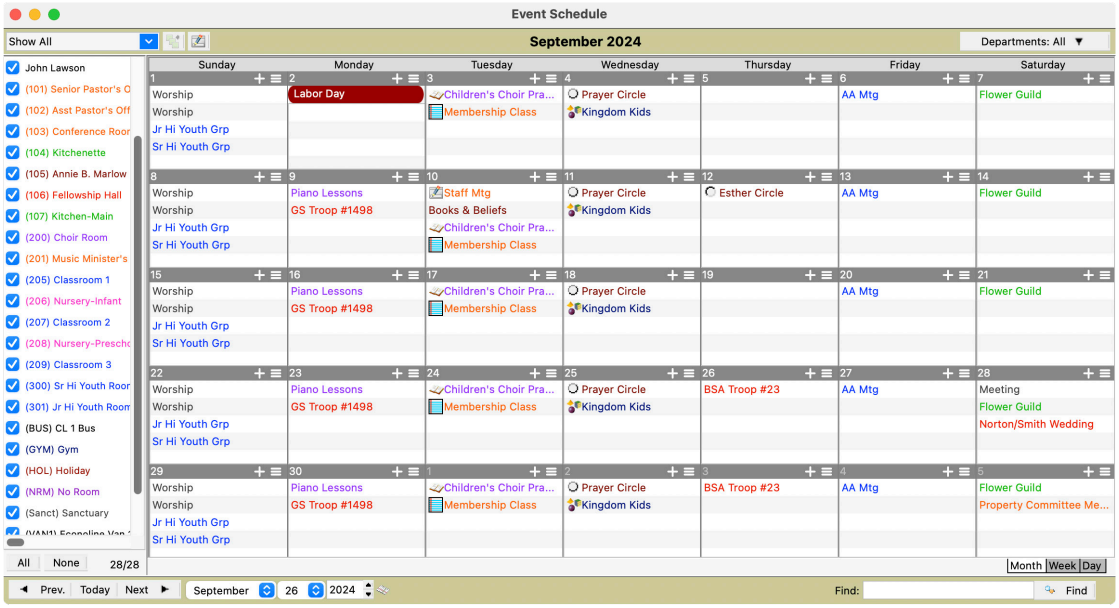
The Event Schedule allows for 3 views of the same information: Month, Week, and Day. Click tab in lower right to switch views.

Month Schedule

There are two ways to place an event on the Month Schedule:

- Double-click an open area while on the selected day.
- Click the Inspector on the selected day and then click Add.

The Event Information window will open; type the description and then complete all the tabs that apply.



To Change an event, double-click the event to open the Event Information window and make changes; click Save.

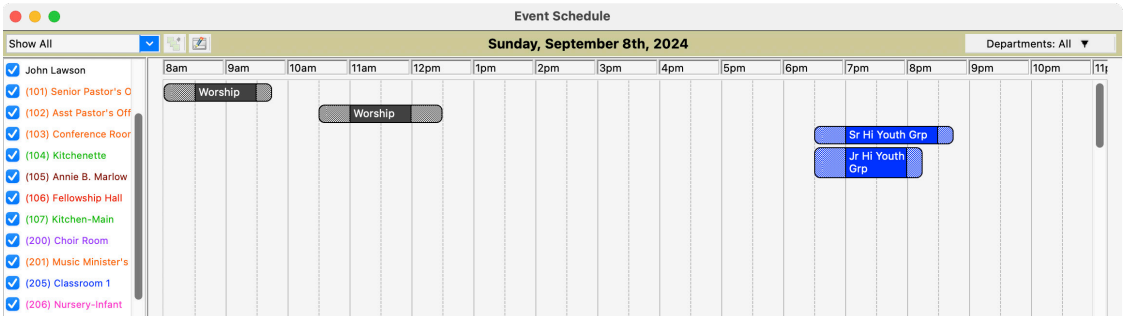
To Delete an event, double-click the event to open the Event Information window and click Delete. In addition, either the Inspector or the contextual menu can be used to delete. You can also delete an event by clicking it on the month or week view and pressing the delete key on your keyboard.

Week Schedule

The Week Schedule displays 1-7 days at a time; otherwise, it is identical to the Month Schedule.

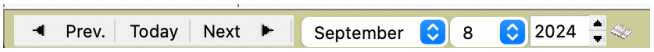
Day Schedule

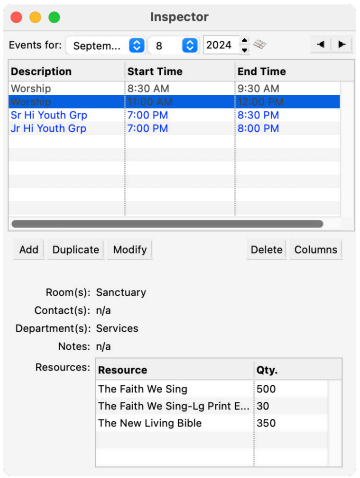
Each event will appear on the Day Schedule as a colored bar to indicate its assigned room; the length of the bar indicates the duration of the event measured on the time scale header.



Navigating and Finding Events on the Event Schedule

Navigation and search tools can be found at the bottom of the Event Schedule window. There are tools to quickly navigate month-to-month or jump to a specific day. There is also the option to look up an event by description using the search field.



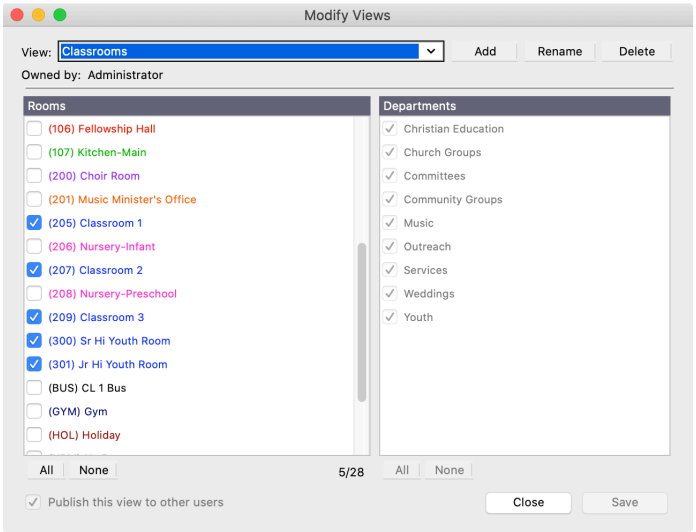


Inspector

Click on the small Inspector icon at the top of a day on the Month or Week Schedule to display a listing of all scheduled events for that day. Click the Add button to add a new event; click the Duplicate or Modify buttons to change or create a duplicate event; click the Delete button to remove an event.

Views

Views are custom-defined combinations of Rooms and/or Departments that filter the schedule to display just events for those rooms and/or departments. Views are also available for use on Event reports as search options. Views are user specific, but may be published for use by other users.



To create a View:

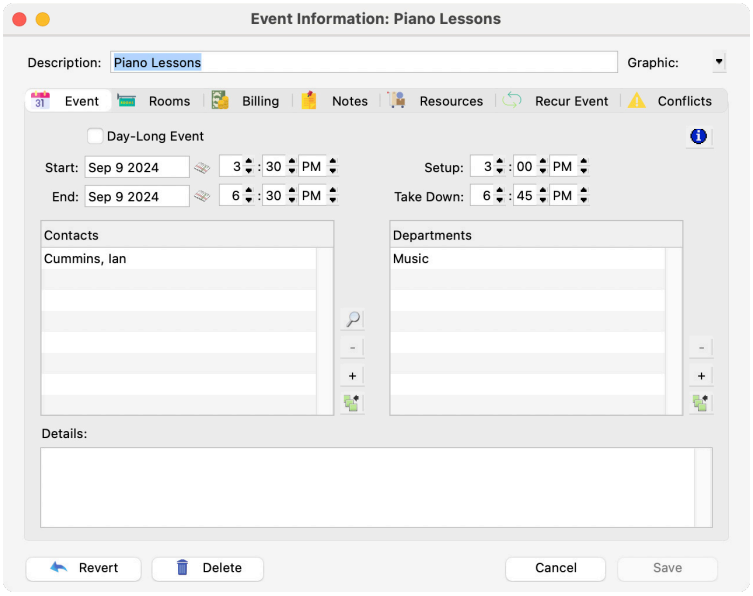
- Click the Modify button
- Then click the Add button and name the view
- Select the combination of Rooms and Departments desired
- Click Save

Creating Events

– Double-click in an open area of the Event Schedule window
– Or Add from the Inspector

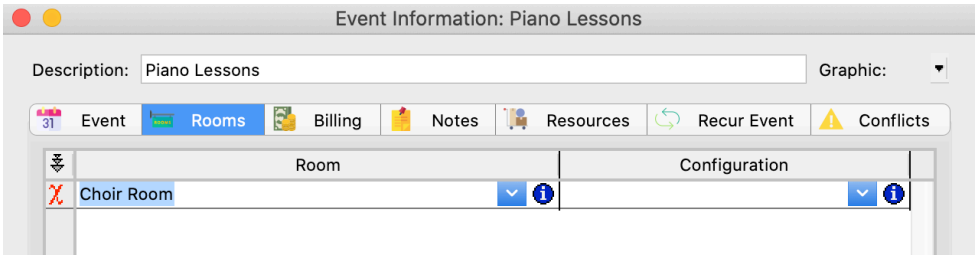
Events on all three schedules (month, week, and day) of the Event Schedule have **Contextual Menus** available. Control-click (Macintosh) or right-click (Windows) on an event to access contextual menu. From the contextual menu, you can open the Event Information window by selecting Modify, delete the event by selecting Delete, or duplicate the event by selecting Duplicate. The assigned Rooms, Contacts, and Departments for the event will be checked and can be changed by selecting different Rooms, Contacts, or Departments.

Event Information



The Event Information window contains the description of the Event and a series of tabs that contain all the details of the Event. Select the appropriate tab to add, view, or change Event details.

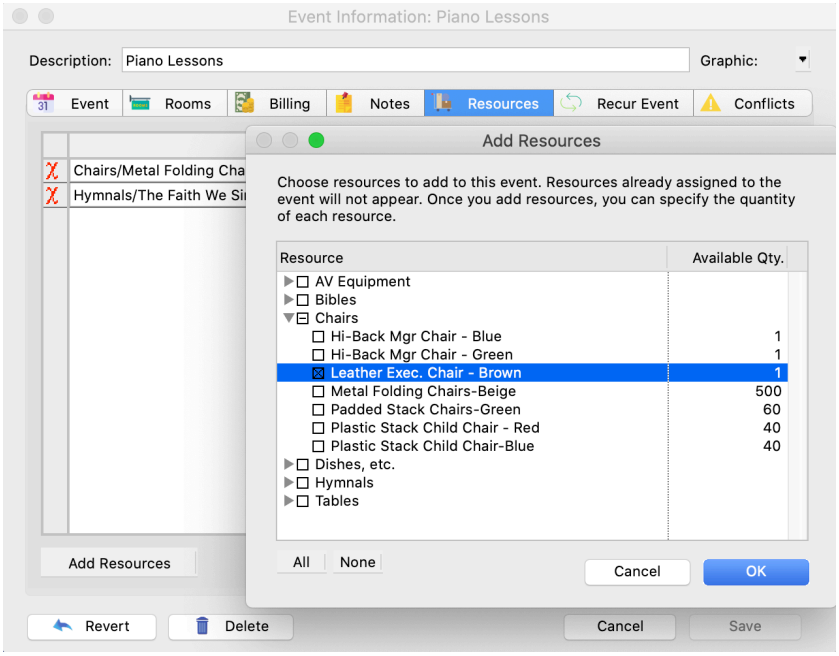
Room Selection



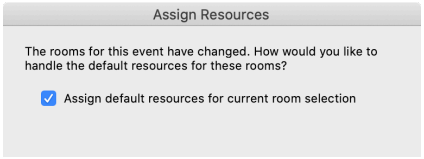
Billing

Roommate Events can be linked to Customers in Accounts Receivable and invoices generated to bill facilities usage. See the Accounts Receivable manual for more information.

Resources



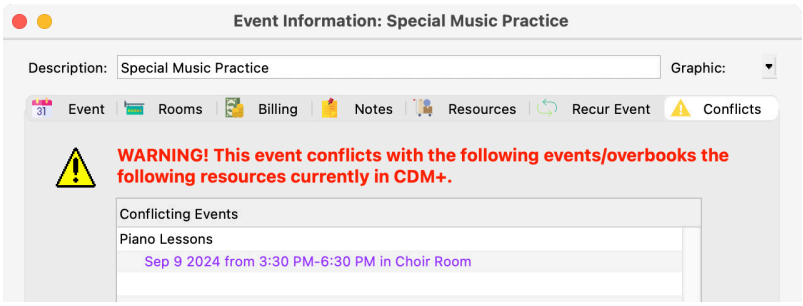
Click Add to select Resources for use in this Room. If the selected room has resources marked to Auto Assign (AA) on the Default Location tab of the Resources record, as soon as you click on the Resources tab of the Event Information window, a pop-up window will ask if you wish to assign them.



If you leave the box checked and click OK, the Resources tab for the Event will be auto-filled with Auto Assign (AA) resources. You can edit the list. If you uncheck the box and click OK, no resources will be assigned. Resources may be added by clicking Add Resources.

Dealing with Conflicts

The Conflicts tab displays any Room conflicts or Resources over-booking. Every time this tab is selected, Roommate re-checks for conflicts.

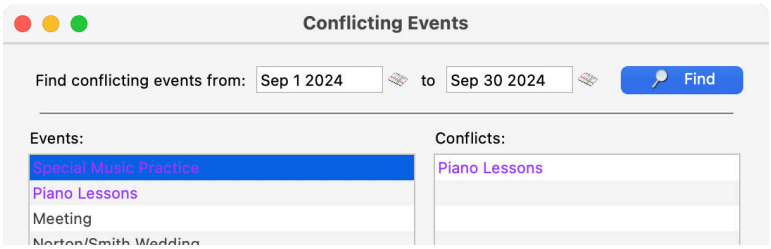


Settings selected in Systems Preferences determine how CDM+ Roommate handles conflicts. There are three choices for dealing with conflicts.

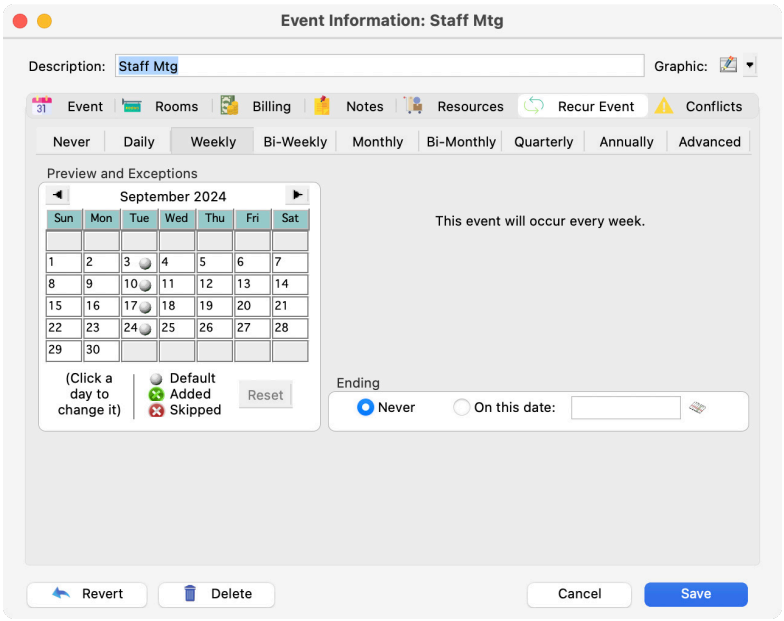
Search for Conflicting Events

▶Program ▶Roommate ▶Conflicting Events

The Conflicting Events window allows for date range searches for Event conflicts.

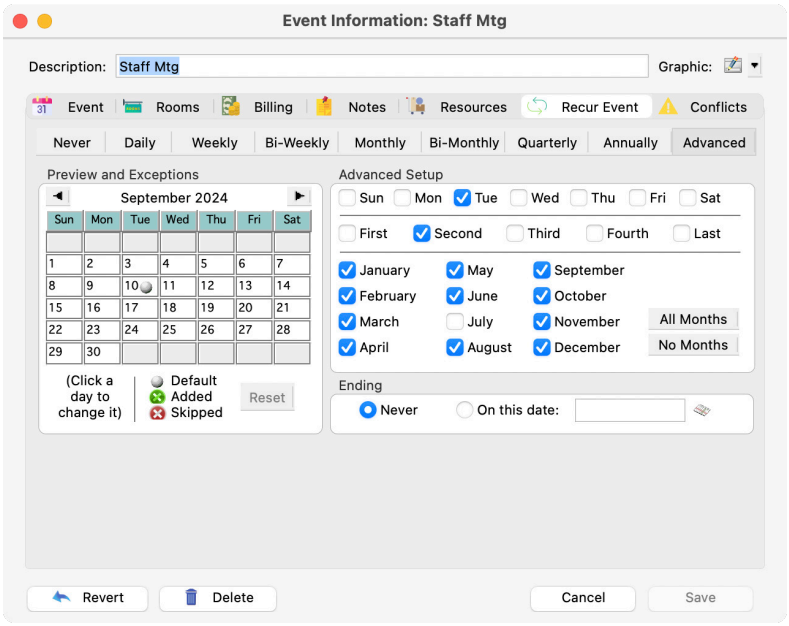


Recurring Events



Schedule an Event to recur on selected time intervals, either ending on a specific date or recurring indefinitely. Use the Advanced option to create complex recurring event schedules.

Use the Preview and Exceptions calendar to add or remove an occurrence of this event outside the standard occurrences. Colored dots indicate the exceptions and defaults.

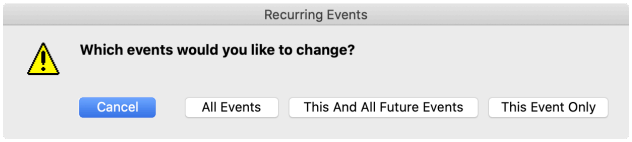


The settings under the Advanced tab should be used only when the date requirements are more unique than weekly, daily, monthly, etc. If you are setting up an event that is to meet once a month with no more specificity, set it up on the Monthly tab.

Changing a Recurring Event

Changing a recurring event in CDM+ has multiple options for the way it handles the changes upon saving.

If you select an occurrence of an existing recurring event from the schedule and change it, when you click Save the window at right will open. You must choose one of the 3 options shown:.



All Events, This and All Future Events, or This Event Only

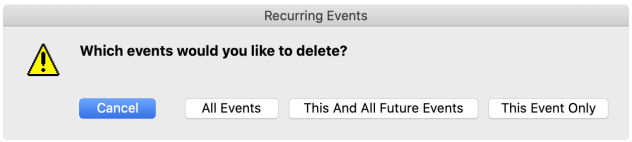
If you select **All Events**, CDM+ Roommate will save this change to the original event and update the preview calendar. It will delete all existing occurrences of the event and create new occurrences within the defined range.

If you select **This Event Only**, the program will create a new event for the specific day you selected and changed, and it will keep all other occurrences of the event with the original event settings.

If you select **This Event and All Future Events**, CDM+ will change the end date of the original event to the last occurrence prior to the date you selected and changed. Any occurrence of the event set for the date you changed and all occurrences after that date will be deleted. Roommate will then recalculate occurrences of the event for the date you changed and future dates based on the settings you saved.

Deleting a Recurring Event

Likewise, deleting a recurring event in CDM+ has the same multiple options.



When you double-click open an occurrence of an existing recurring event from the schedule and click Delete, the window at left will open. You must choose one of the 3 options shown:

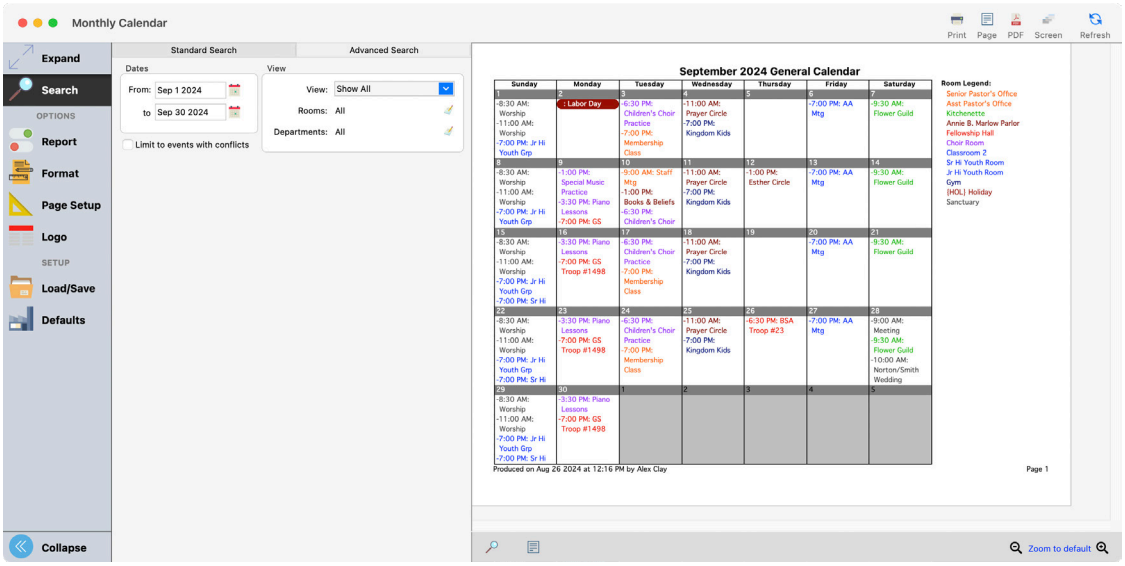
- **All Events** – deletes all existing occurrences of the event.
- **This and All Future Events** – deletes the occurrence you opened and all occurrences after that date will be deleted. Previous occurrences will remain on the schedule.
- **This Event Only** – deletes only that specific occurrence of the event you opened. All other occurrences of the event will remain on the schedule.

Roommate Reports

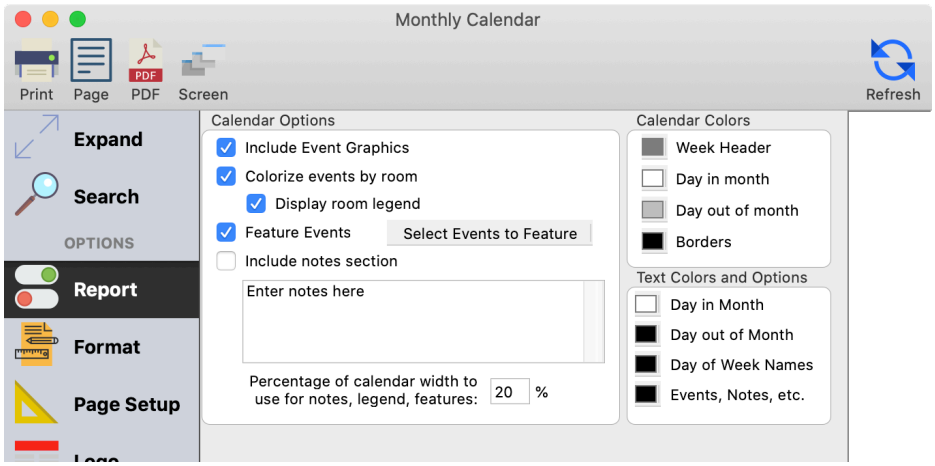
Directories of Rooms, Contacts, and Resources and Event Schedules in a number of different formats

Monthly Calendar Report

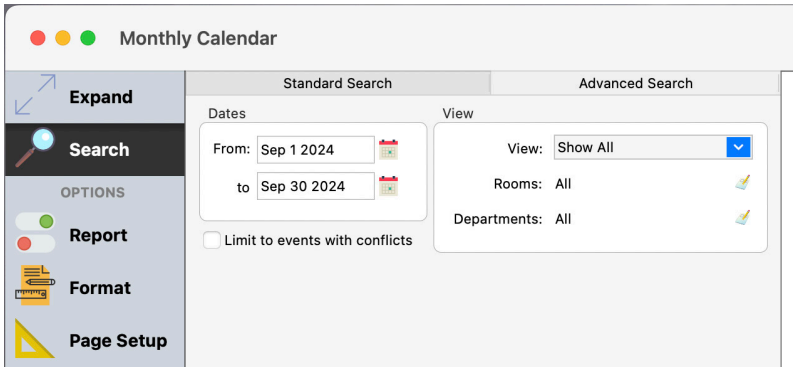
▶Reports ▶Roommate Reports ▶Monthly Calendar



Page formatting options are found on the Report tab:

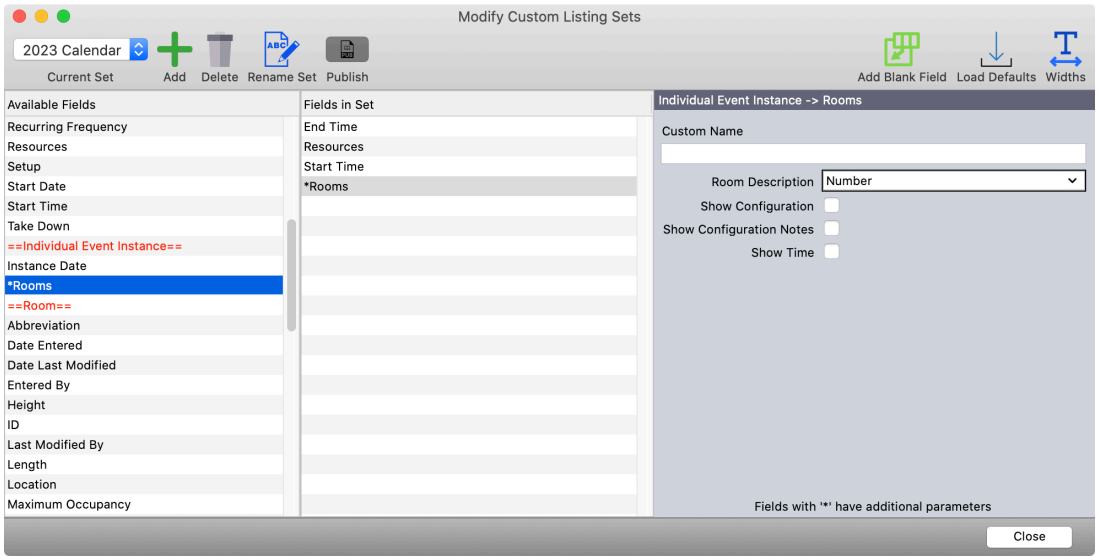


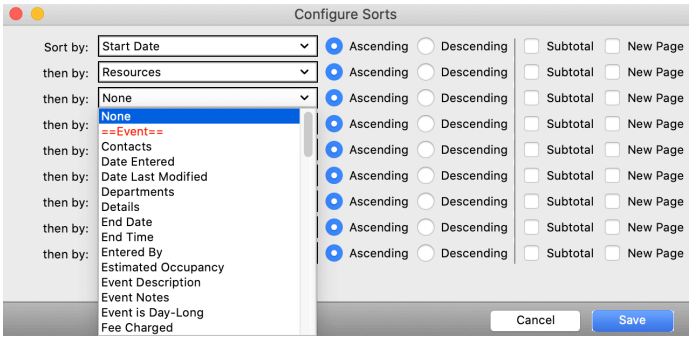
Click the **Search** tab to select the date range and which rooms and departments will be shown:

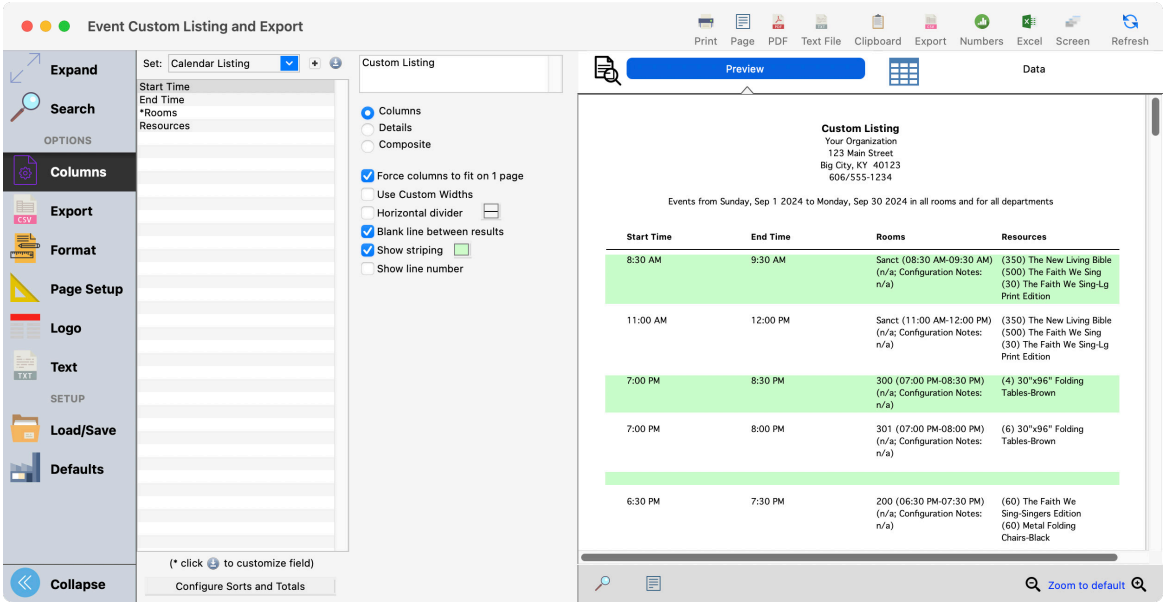


Event Custom Listing and Export Report

▶Reports ▶Roommate Reports ▶Listings and Exports ▶Event Custom Listing and Export

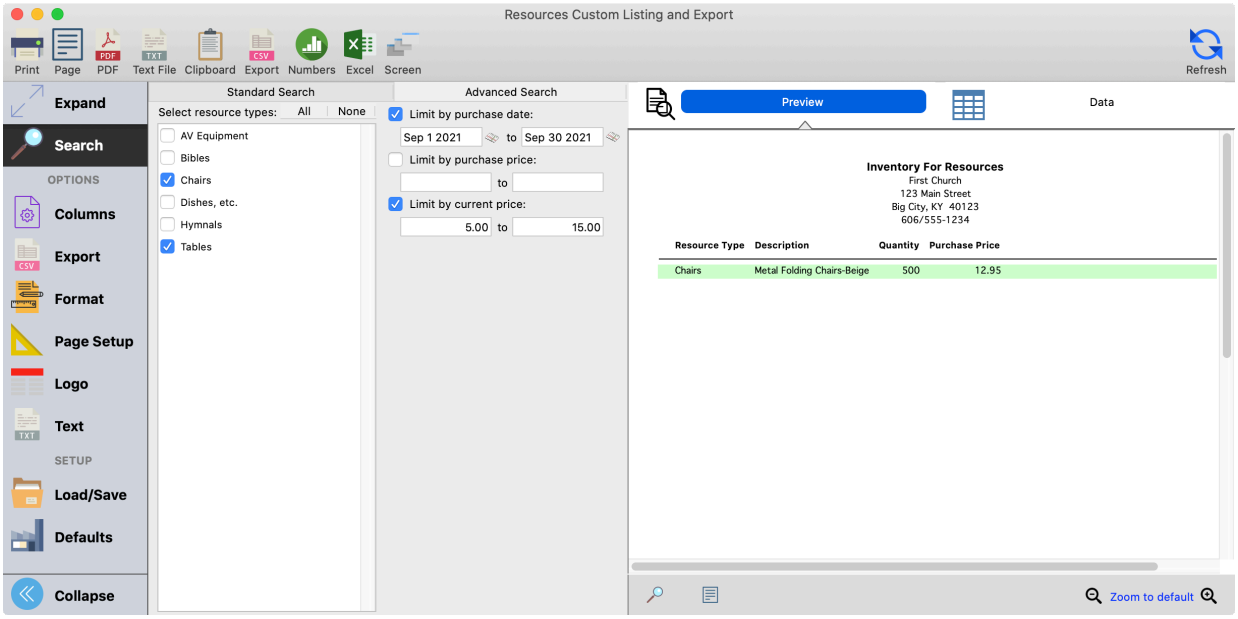



Configure Sorts
Sort by: Start Date
then by: Resources
then by: None
None
==Event==
Contacts
Date Entered
Date Last Modified
Departments
Details
End Date
End Time
Entered By
Estimated Occupancy
Event Description
Event Notes
Event is Day-Long
Fee Charged
Ascending
Descending
Subtotal
New Page
Cancel
Save


Event Custom Listing and Export
Print
Page
PDF
Text File
Clipboard
Export
Numbers
Excel
Screen
Refresh
Expand
Search
OPTIONS
Columns
Export
Format
Page Setup
Logo
Text
SETUP
Load/Save
Defaults
Collapse
Set: Calendar Listing
Start Time
End Time
*Rooms
Resources
(* click to customize field)
Configure Sorts and Totals
Custom Listing
Columns
Details
Composite
Force columns to fit on 1 page
Use Custom Widths
Horizontal divider
Blank line between results
Show striping
Show line number
Preview
Data
Custom Listing
Your Organization
123 Main Street
Big City, KY 40123
606/555-1234
Events from Sunday, Sep 1 2024 to Monday, Sep 30 2024 in all rooms and for all departments
Start Time
End Time
Rooms
Resources
8:30 AM
9:30 AM
Sanct (08:30 AM-09:30 AM) (n/a; Configuration Notes: n/a)
(350) The New Living Bible
(500) The Faith We Sing
(30) The Faith We Sing-Lg Print Edition
11:00 AM
12:00 PM
Sanct (11:00 AM-12:00 PM) (n/a; Configuration Notes: n/a)
(350) The New Living Bible
(500) The Faith We Sing
(30) The Faith We Sing-Lg Print Edition
7:00 PM
8:30 PM
300 (07:00 PM-08:30 PM) (n/a; Configuration Notes: n/a)
(4) 30"x96" Folding Tables-Brown
7:00 PM
8:00 PM
301 (07:00 PM-08:00 PM) (n/a; Configuration Notes: n/a)
(6) 30"x96" Folding Tables-Brown
6:30 PM
7:30 PM
200 (06:30 PM-07:30 PM) (n/a; Configuration Notes: n/a)
(60) The Faith We Sing-Singers Edition
(60) Metal Folding Chairs-Black
Zoom to default

Resources Reports

▶Reports ▶Roommate Reports ▶Listings and Exports ▶Resources Custom Listing and Export



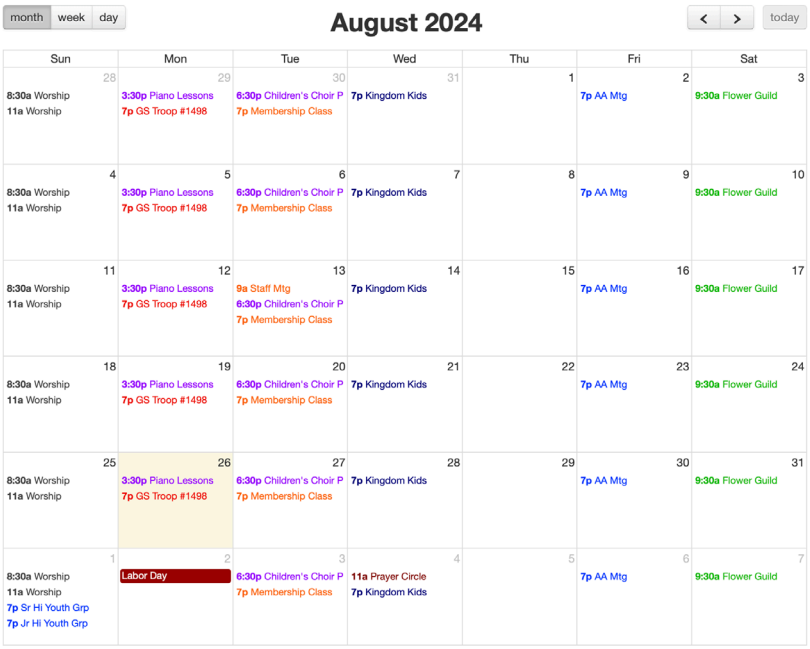
Web Ministry Tools – Basic Toolkit Tools Using Roommate

Calendars created in Roommate are easily published and automatically updated on your church's website using Web Ministry Tools Basic Toolkit.

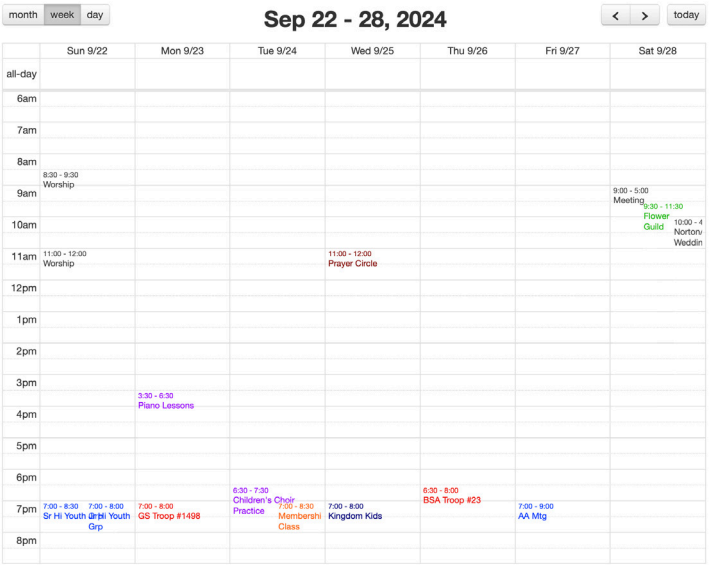
Calendar Tool in WMT

The Calendar Tool can show events in a monthly or weekly view. When you edit your event using Roommate, the changes you make automatically appear on your website in the published tool.

In the Calendar tool, changes to events made in CDM+ Roommate appear automatically on your website. However, if you add a department or room in Roommate, you must go into Tool Options and select the new department or room before the events in it will show up.



Weekly View



Click an event to view more details. Add notes for view online using the Details field on Event information.

Daily View