

## Facilities Implementation Guide Set-up

Active Data recommends the following setup steps in order to maximize use of the Active Data Calendar Facilities Planning Module. The recommended steps below will help your organization to more quickly populate a representative sampling of data on your facilities and enable you to start adding events more rapidly.

### I. Determining User Privileges

Login to your Facilities Calendar as the Super User and add user accounts that you intend to take part your facilities workflow by selecting the privileges associated with facilities planning:

- Add/Modify/Delete Resources
- Add/Modify/Delete Facilities Setup

You may also decide to select which of your user accounts may be assigned as Facility Owners. This selection can be done on the same screen where you currently select Category Ownership. Since you will not yet have selected to lock your facilities, you will not want to choose the option entitled “Add User Account as Facility Owner and Select Locked Facilities(s) in Add Location/Building/Room Area”.

If there are new users that you will need to add in order to manage your facilities as facility owners, then you may add those new users at this time as well.

### II. Location Structure

Ensure that you have your location structure setup in the proper three (3) tiered structure. **Location – Building – Room**

- **Locations:** Main locations and/or areas where buildings are clustered.
- **Buildings:** Buildings, centers or areas at a defined location.
- **Rooms:** Rooms are located inside buildings, centers, or areas at a defined location.

#### Examples:

If you are a *smaller college*, you may only have one campus (location) but multiple buildings, and *larger colleges/universities*, may have multiple campuses (locations) with multiple buildings on each campus:

Locations: (Small College) Main Campus and Off Campus\*, (Larger College expanded to include), Downtown Campus, South Campus, North Campus, etc.

Buildings: Academic Buildings, Athletic Fields, Student Union, Science Center, Registrar’s Office, etc.

*\* Off Campus can be used to include events related to the local community such as YMCA, Sports Arenas, Art Museums, Hotels, etc.*

**\*NOTE:** If your location structure is not in the appropriate three tiered format, please use the Tip Sheet located off your Clients Only area entitled “Location Management”, along with the Move Locations utility wizard in the Calendar administration area, in order to restructure your locations.

### III. Setup Facilities Attributes



From within the Calendar administration area:

1. Click on new tab “Facilities”. There are two menus under the Facilities Tab: Manage and Setup. Click Setup.
2. Under the Setup Facilities Area – Choose to add Room Types.

### **What are Room Types?**

Room types are descriptors for how a room may be used from a very general perspective. A room may be able to be described using different room type descriptors. Examples include: Classroom, Gymnasium or Meeting Room

Room Types will be applied to Rooms in a later step. You may also use our sample Room Type list to easily populate your initial list of possible room types if you choose. Checkout the list that is linked off your Clients Only page under the Tips/Tricks documentation for Active Data Facilities.

3. Once you are done adding your Room Types, navigate to the Add Room Features screen.

### **What are Room Features?**

Room features are automatically included for use if that room is booked. When populating the room features you will need to think through the list of what all the possible features may be that a room possesses. Examples include: White Board, Internet Connection, Teleconference Telephone, Computer, etc.

Room features will be applied to rooms in a later step. You may also use our sample Room features list to easily populate your initial list of possible room features if you choose. Checkout the list that is linked off your Clients Only page under the Tips/Tricks documentation for Active Data Facilities.

4. Once you are done adding your Room Features, navigate to the Add Room Setup screen.


### **What is Room Setup?**

Room Setup allows you to pre-determine all of the possible formats/configurations that a room can be setup. Room setup options entered within this area of the product are generic and are intended to give a consistent naming convention to the various room setup options that might be needed for your various rooms/facilities.

Room Setup options will be applied to Rooms in a later step. You may also use our sample Room Setup list to easily populate your initial list of possible room setup if you choose. Checkout the list that is linked off your Clients Only page under the Tips/Tricks documentation for Active Data Facilities.

## **IV. Create Facility Rules and Assign Room Attributes to Facilities**

All Facilities (Locations, Buildings, Rooms) have various attributes including their address, “owners” or “managers” for approving bookings/reservations, availability schedules, features and more. It is important to setup these facility rules and attributes before users attempt to start scheduling/requesting facilities through the Calendar Facilities Module.



During the implementation period it is recommended that you choose a representative “group” of your facilities and focus on setting up the attributes and rules for that select group, opposed to all facilities across your organization or multiple campuses.

It is suggested that you select a grouping of similar buildings/rooms at the same location that might be used for similar type events. This way when you go to add events and test the scheduling optimization, you will be searching off a grouping of locations that might all be applicable for similar events.

## **Rules for Setup at the various Facility Levels**

### ***Locations***

The most important thing to remember when creating your location rules and attributes is that the location options chosen may cascade down to all buildings and rooms at that location.

**Screen 1:** Setup of Location Address & Facility Ownership (Choose to assign the same facility owner to all buildings and rooms at the location or not.)

The location address will appear on the front-end if the location is selected for the event.

**Screen 2:** Setup of Location Availability

Location Availability dictates the master schedule for when all buildings and rooms within that location are available for scheduling. By selecting nothing on this screen and leaving it with the default settings, the location and all associated buildings and rules will be available all day for every day of every year. Selecting to add availability rules, creates a more selective schedule of availability. You will have the option at the building and room levels to override and setup a unique schedule for the buildings and or rooms.

This information is only used for facility planning and scheduling and is not displayed on any front-end calendar.

### ***Buildings***

**Screen 1:** Setup of Building Address & Facility Ownership (Choose to assign the same facility owner to all rooms at the building or not.)


The building address will appear on the front-end if the building is selected for the event.

**Screen 2:** Upload Images & Attachments for the Building. These become available for any user looking to request a booking at that building. Example attachments include Building Accessibility Information, Security Information, etc.

This information is only used for facility planning and scheduling and is not displayed on any front-end calendar.

**Screen 3:** Setup of Building Availability

Building Availability dictates the master schedule for when all rooms within that building are available for scheduling. By selecting nothing on this screen and leaving



it with the default settings, the building and all associated rooms will be available all day for every day of every year (unless the location has been customized to have a location availability schedule and then the default availability for the building is set to the location availability schedule). Selecting to add availability rules, creates a more selective schedule of availability for the building and associated rooms. You will have the option at the room level to override and setup a unique schedule for any rooms that require that option. **NOTE:** A room cannot be set to have availability outside of the building's availability. A room can only be more restrictive than the rules for the building.

This information is only used for facility planning and scheduling and is not displayed on any front-end calendar.

### **Rooms**

**Screen 1:** Room Name(s) & Checkbox to enter Room Information

**Screen 2:** Select Room Types and Upload Images & Attachments for the Room  
**You may select more than one room type for any room.** So, if a room is known to be used as both a classroom and a training room, you may select both room types. Room types will be used by your users as they search for available facilities to host their event. Users may be looking for a training room and they may be looking for a classroom. If the room can be used for both “types” of events, then select multiple room types when adding your room attributes to ensure that the room shows up under both types of searches.

Attachments allow you to upload documents that may provide detail about the room such as accessibility information, setup diagrams, heating/cooling guidelines and more. Images for rooms can be helpful to show the room configured using the different setup options as well as to show placement of room features and past events for “marketing” the usage options for the room.

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**Screen 3:** Room Setup and Features

You may select multiple setup options for each room. When selecting a setup option for the room, you will be required to enter in the maximum capacity of the room if that setup option is selected as well as the required time to setup the room prior to the event and to tear down the room when the event is concluded. Please note that the setup time and tear down time are default guidelines and your users will have the option to request additional time for setup or tear down as well as request less than the default. Facility Owners will have the option to see events preceding and following each event request to determine if enough setup and tear down time has been included in the overall event plan.

If you are adding the room features list for a particular room and a particular feature has not been added, you may also click a link for “Add” in order to append the feature list directly from this screen.

General room notes and the room phone extension can be added from this screen as well.

This information is only used for facility planning and scheduling and is not displayed on any front-end calendar.

**Screen 4: Setup of Room Availability Schedule**

Room Availability dictates the master schedule for when the room is available for scheduling. By selecting nothing on this screen and leaving it with the default settings, the room will be available all day for every day of every year (The room will automatically take on the availability schedule of the building if no specific room availability is selected. Or, if the building is still using the default settings, then the room will use the location availability as its default.). Selecting to add availability rules, creates a more selective schedule of availability for the room. **NOTE:** A room cannot be set to have availability outside of the building's availability. A room can only be more restrictive than the rules for the building.

This information is only used for facility planning and scheduling and is not displayed on any front-end calendar.

**V. Adding Resources**

If your organization would like to take advantage of Resource Workflow, then the next step would be to setup your available resources.

Resources are requested by users by first selecting a resource category, then subcategory and then individual resource items. You will need to create this categorization structure for your resources before you can add your resource items.

**Step 1: Add Resource Categorization Structure**

- Go to the Categorization tab.
- Click on Add Category. Add your resource categories by entering in the resource name and selecting Category Type = Resources. When adding your Resource Categories you may choose to also select that a resource category (and all associated items within that category) are locked and require approval by a resource owner/manager. If you choose to lock a resource category you will be prompted to select a resource owner(s). Any user that was selected as a possible Category Owner (public, private or resources) will appear as available for selection. If you would like a user to have resource owner permissions, then you will need to modify those respective user accounts and select them to have category owner permissions.

**Step 2: Add Resource Subcategories**

- Stay within the Categorization tab and select to Add Subcategories.
- Select each Resource Category and add the relevant subcategories.

**Step 3: Add Resource Items**

- Click on the Resources tab.
- Click on Add Resources. Add your list of resource items and choose to enter Resource Notes or not. Resource notes may include details about the resource item such as "This projector may not work with Mac laptops or it may require special software to be installed."

**Examples of Resource Categorization includes:**

Resource Category(s)	Resource Subcategory(s)	Resource Item(s)
Technical Services	A/V Equipment	Infocus Projector 1

		Infocus Projector 2
	Computer Hardware	Dell Inspiron Laptop
		Mac Laptop
Catering	Breakfast Items	Pastries
		Tea
		Coffee

**NOTE:** Within the standard facilities module package, resource management allows users to request a quantity of a specific resource item but it does not track inventory.

## VI. Users are Ready to Add Events and Make Facility Requests

When adding events, users will note that now they will be requested/required to make their date/time selections on the same screen as selecting their desired facility. There are two main options for facility searching: Date/Time Searching to Find Available Facilities or Facility Searching to Find Available Dates/Times.

How do I know the type of facility search to use to optimize my results?

### Select Event Dates/ No Facility Required

Choose this option when you want to add an “event notice”. Examples include Spring Break, Christmas Break, Fall Semester Begins, etc. There is no associated facility.

### Date/Time Searching to Find Available Facilities

Choose this option if you need to host your event on a specific date/time and want to find any facility that is available for booking that meets your other selected criteria including (location, building, room, features, setup, capacity, etc.) Examples include meetings, classes, etc.


### Facility Searching to Find Available Dates/Times

Choose this option if you need a specific facility to host your event and need to check and see what dates/times the facility is open/available for booking. Examples include a theatre production where the main auditorium/theatre is needed for the event or a special dinner where the grand ballroom is required for the event.

Based off the type of event facility/date/time search performed, your user’s options will vary for how they make their final selections. Encourage your users to access the screen help file for more information on how to make their facility requests.

**NOTE:** All users should be encouraged to access and use the new Facilities Calendar (linked off the top menu within the Calendar Administration Area) in order to get an overview of what facilities are available for scheduling and what availability there may be for hosting their event on a selected date/time or within a select building.

## VI. Managing Facility Workflow



From the Calendar Main Menu there are now options for selecting to process Facilities, Marketing or Resources. Based off the menu that you are currently viewing on the main menu screen (default is the Marketing menu), there will be buttons in the upper right hand area to toggle/switch to either the facility menu or resources menu (if you have appropriate privileges/permissions). If you are only a manager for one area (Marketing, Facilities or Resources) then you may not see all of the processing options.

Please use the Tip Sheet located off your Clients Only page entitled “Understanding the New Facilities Workflow” in order to help you with the overview of how events are processed when the facilities workflow and resource options are being utilized.

**NOTE:** If an event includes a facilities request, then the facilities must be approved before the event can proceed in the workflow process. Once facilities are approved, then category or department workflow occurs based off the type of workflow enabled by the client under the Calendar Configuration area. Resource workflow is independent of facilities and marketing and does not impact the event from moving forward in workflow.