

Active Data Calendar 3.5 - Facilities Module

Understanding the New Facilities & Resources Workflow - Tip Sheet

Overview of the New Facilities & Resources Workflow

There are two main rules that dictate the majority of the new workflow rules surrounding the addition of Facilities and Resource workflow approval in Active Data Calendar 3.5 – Facilities Module.

1. If a facility (or multiple facilities) is requested as part of an event, then all facility requests must be approved prior to the event moving forward into the marketing workflow.
2. If a resource (or multiple resources) is requested as part of an event, there is no impact to the event workflow processing as it relates to facilities or marketing. The event can proceed forward through the facility and then marketing workflow areas. Resources are handled separately and regardless of approval or denial of event resources, the event can still be “scheduled” and appear on the Public and/or Private Calendars.

Resources Workflow Rules Breakdown

- Resource workflow and approvals are independent of all other event workflow approvals.
- Resources Workflow will not affect the event moving forward in the facility or event marketing workflow process.
- Resources belong to a category/subcategory combination and resource managers are assigned at the resource category level. The approval on resources is conducted however at the resource item level.
- Each resource that is requested for an event will generate a separate email to all necessary resource managers.
- If more than one resource item is requested that belongs to the same resource category (owner), the owner will still get multiple emails with processing information (one per resource item type) and when the login to review the event they will see each item separately for processing on their main resource management menu. However, when they click on an item to view the event details they will be able to see on the “Resources” tab all other resource requests and if they have the ability to process/approve more than one resource for an event they will have options for processing in bulk or individually from the same screen.
- When an event is added and resources are requested, they are automatically requested for each date in the series. If “special” or “different” resources are needed or NOT needed for selected occurrences, then individual occurrences can be modified by going to modify event and selecting individual event occurrences.

Modifying an Event – Resource Workflow Rules

Event Fields Modified	Rules
Event Name, Event Description, Event Type, Highlight, Event Marketing Categorization, Images, Attachments, Contact Info, Customizable Fields, Registration Details, Internal Notes	No additional processing required by Resource Category Owner(s).
Date/Time/Pattern Modified	An email is generated to Resource Category Owner(s) and the request must be re-approved. Resources are set back to Pending.
Location is Modified	An email is generated to Resource Category Owner(s) but event does NOT require re-processing. However, if the Resource Category Owner wants to they can retract the event resource at any time.
Resource Items have quantities changed (additional requested or removed) during event modify process	An email is generated to Resource Category Owner(s) and the request must be re-approved. Resources are set back to Pending.
Event is Modified and Resources are Removed/Deleted from the Event.	An email is generated to Resource Category Owners(s) informing them.
Event is Cancelled (where resources are pending or approved)	An email is generated to Resource Category Owners(s) informing them.
Event is Deleted (where resources are pending or approved)	An email is generated to Resource Category Owners(s) informing them.

Facilities Workflow Rules Breakdown

- Facilities workflow is initiated as soon as a locked facility is selected for an event. Facilities workflow is not affected by Resource workflow. If an event includes facilities requests then all facilities must be approved before the event can move forward into Event Marketing Workflow.
- If a facility that is selected for an event is not locked and/or no facility is requested, then the event will move directly into the marketing workflow cycle.
- If an event is approved at the marketing level and is live on the Calendar and the event is then modified to request a facility, the event will remain live on the Calendar while the facility request is being processed.
- If the facility is denied, then the department admin will receive a notification, along with the user who added the event notifying them that the facility request was denied.
- It is up to the user/admin of the department to modify the facility request and resubmit, cancel the event or delete the event. Regardless, the event will remain on the marketing calendar until which time that the user/dept. admin removes it.

Modifying an Event – Facility Workflow Rules

Event Fields Modified	Rules	Notes/Comments
Event Name, Event Description, Event Type, Highlight, Event Marketing Categorization, Images, Attachments, Contact Info, Customizable Fields, Registration Details, Internal Notes	No additional processing is required by the Facility Owner(s).	
Date/Time/Pattern Modified and/or Facility selection is modified	An email is generated to the Facility Owner(s) and the request must be re-approved. The original Facility is "re-opened" and a new request sets the facility request status for the event back to Pending.	A message is presented to the user on the Preview/Finalize Screen that "This event has associated facility requests that will need to be re-approved if you finalize these event changes."
Event is Cancelled (where Facilities are pending or approved)	An email generated to Facility Owners informing them. Facility is re-opened/available for previously booked timeframe.	
Event is Deleted (where Facilities are pending or approved)	An email is generated to Facility Owners informing them. Facility is re-opened/available for previously booked timeframe.	
Event is Rescheduled (where Facilities are pending or approved)	An email is generated to Facility Owner(s) and the request must be re-approved. The original Facility is "re-opened" and a new request sets the facility request status for the event back to Pending.	A message is presented to the user on the Preview/Finalize Screen that "This event has associated facilities requests that will need to be re-approved if you finalize these event changes." Also, the "Event is Cancelled" email is sent for the original event/facility request that has been cancelled. So the same Facility Owner may receive two emails.