

Overview

Through the setup of departments, and the creation of user accounts that are assigned permission to a department, the calendar provides your organization with the ability to organize your calendar users into logical workgroups. There is also the ability to create Administrative and Non-Administrative user roles within each department, providing the ability to have a review process for which events are automatically accepted into the calendar and which users must first have their events go through an approval process. This process is referred to as “workflow”.

Categories can be “locked” which can change the normal workflow for an event. Locked categories can then be assigned Category Owner(s). A Category Owner is a user who will need to approve any event that is classified within that particular Category and they will decide if the event can be displayed on the front-end view screens for that Category. An event that is added to locked and non-locked categories will need to be processed by both the Department Administrator (if the event is added by a User level account) as well as the Category Owner(s) for the locked category(s). A Category can have more than one Category Owner assigned.

While new accounts may be added as individual user accounts with distinct permissions and privileges. It is also possible to add user groups where you can assign a group of users the same permissions and privileges in bulk. When a user belongs to one or more user groups, it is still possible to add unique permissions and privileges at the individual user account level. Users will retain the combined collection of all privileges that they are assigned individual and within each group, as well as the highest department level permissions and roles ascribed individually or within the groups to which they belong.

Workflow Setup

Department(s): A Department is used for grouping similar Users. Departments should be created before adding user accounts and can be done so in [Workflow: Departments: Add](#). The contact information entered when creating a department is not required but if entered is used as the default contact information for any event that is added by a User Account within that department. This allows you to streamline the event entry process by standardizing event contact information by organizational department.

- A User Account can only select one department for adding their event and the department selected will determine the workflow followed for that particular event. If they are an Admin role of the department the event will “go live” once finalized with no additional review process unless a locked category is selected that they do not manage. If they are a User role in the department the event will not “go live” but show on the main menu of the department admin for approval.

Category(s): Categories and subcategories are used to classify your events for how they will display on the front-end calendar views available to your Calendar visitors. Events not added to a category will not show up on any calendar.

- A User Account can select as many Category(s) and Subcategory(s) as appropriate for classifying their event. Category(s) do not affect Workflow unless the Category that a User has selected for classifying their event is LOCKED and they do not own it.
- If a Category is LOCKED, then any event added to that Category must be approved at both the Department level and also at the Category Level.

User Permissions/Roles: User Account Permissions and Roles dictate how an event is processed based off the type of User Account (Super User, Administrator, and User) who is adding/modifying the event.

- **Super User:** A Super User can perform any action in the software and can submit an event to any Department or Category without any associated workflow. Events that are entered by the Super User area automatically posted live to the appropriate Calendar(s). This user is a globally

unrestricted user account regarding permissions and privileges.

- **Administrator:** An Administrator can Add/Modify/Delete events for the Departments to which they are an administrator and their events are automatically posted live to the appropriate Calendar(s). If an Administrator attempts to add an Event to a LOCKED Category, then their event will post live automatically for all Category(s) other than the LOCKED Category, which must be approved by the Category Owner of the LOCKED Category.

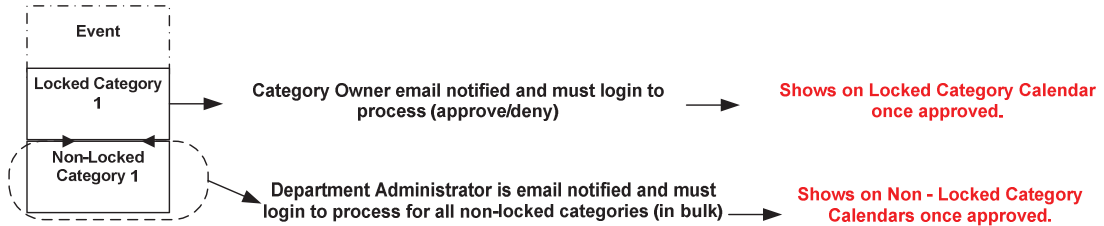
Example: Administrator of the Technology Department submits an event “Active Data Calendar Training” to two categories: 1. Locked Category (Training) and 2. Non-locked Category (Staff). The event is automatically approved and posted live for the Category (Staff) because the Department workflow is followed for non-locked Category(s). For the Category (Training) the event must be processed separately and must follow the Category Workflow and have approval by the “Training” Category Owner.

- **User:** Standard User Accounts can Add/Modify/Delete events that they have added for the Departments to which they are a User role. Any event added by a User Account must be processed by either the Department Administrator or Category Owner depending on the Categories selected for event classification.

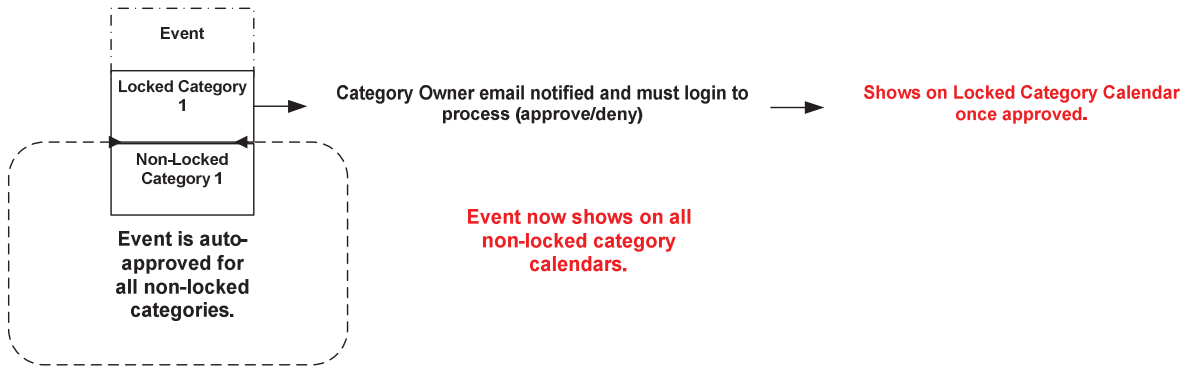
Example: User of Athletics Department submits an event “Active Data Calendar Training” to two categories: 1. Locked Category (Training) and 2. Non-locked Category (Staff). The event is processed for the Category (Staff) according to the Department workflow since it is a non-locked Category. For the Category (Training) the event must be processed separately and must follow the Category Workflow and have approval by the “Training” Category Owner.

Marketing Workflow Scenarios

Department – Standard User Role

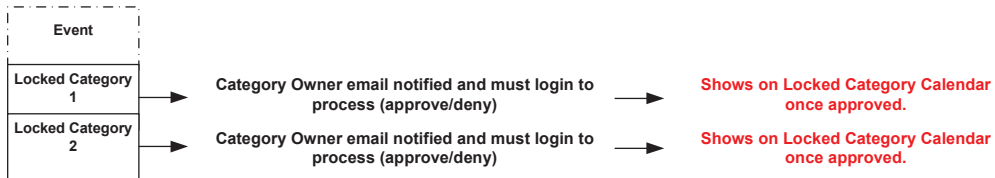


Department – Administrator Role

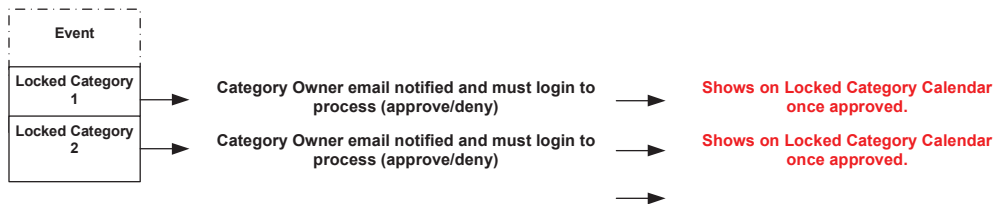


Marketing Workflow Using Locked Categories

Department – Standard User Role



Department – Administrator Role



**** NOTE:** Recommendation to limit the number of Administrators since Admins can see all other events in the department and modify/cancel/delete

Workflow Setup

Print and make copies of this page to setup your Active Data Calendar Department Workflow.

Department Name: _____

of Administrators (*admin role*) to Approve Events for this Department: _____

Administrator Name(s):

Can this admin add other users to dept? Yes No

Can this admin add other users to dept? Yes No

Can this admin add other users to dept? Yes No

of Users (*user role*) to Add Events for this Department: _____

User Name(s):

Standard Department Contact Information

If contact information (*Name, Email, and Phone Number*) is provided, it will be pre-populated for every event processed through this department. The User Account can always edit the information during the add/modify process of an event. Once the event is submitted the, information can be reviewed along with the general approval process by the Administrator.

NOTE: The address information filled out for departments is only used internally like an address book.

Contact Name: _____

Contact Email: _____

Contact Phone: _____

Support

Please contact Product Support at (610)-997-8100 or support@activedatax.com for further assistance.