Marketing Calendar with Facilities Module

User Guide

Version 3.14.1

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Welcome to Active Data Calendar v3.14.1 and the Facilities Module

Active Data Calendar is your solution to sharing event information with customers, students, partners and other key constituent groups throughout your organization.

Active Data Calendar can be used to display events on your organization's website, Intranet, extranet, and more. You can even share event information across multiple websites.

Active Data Calendar's browser-based interface makes it easy to use. Users can enter and view calendar information from any Internet connection.

Active Data Calendar Includes "Online Administration" that supports multiple levels of security, allowing entry of events from many levels of your organization, while still having the ability to approve events before they are published to your website.

TIP: Before starting, we recommend reviewing the terminology in the *Glossary* at the back of this User Guide.

What's New in Version 3.14.1?

Active Data Calendar 3.14.1 includes new features and functionality for Public/Private Marketing Calendars, Advanced Registration, Facilties Management and Custom Text Module clients.

This version includes many enhancements to improve the user experience for both your event creators and your audience. We've re-designed the Registration Form, enhanced the Calendar's support for "rich snippets" (search engines will see your event details more clearly), and made possible bulk-processing of refunds—very usefulfor canceled events.

OUR REDESIGNED REGISTRATION FORM

The registration form has been redesigned to be more end-user friendly, with greater ability to stylize it for your specific needs. The work flow has been improved, and the form is now "responsive." This means that it reflows the labels and fields to accommodate screen size, which your mobile devices users will really appreciate.

SEARCH-ENGINES WILL SEE YOUR EVENTS MORE CLEARLY

With release 3.14.1, Active Data Calendar enhances its support for major search engines like Google, Yahoo and Bing. schema.org's *Rich Snippets* for events are a key current technology to identify your information as an event, with details such as its name, start and end dates, location and more, making it more visible-and more likely to be viewed.

NEW REFUND PROCESSING CAPABILITY

Until now, processing refunds for canceled events required manual steps for each registrant. In 3.14.1, this process is much less labor-intensive if you use PayPal's Payflow Pro payment gateway. Now, with one operation, the administrator can refund the full ticket price to all registrants of canceled events.

Payment Gateway Enhancement

* Bulk Processing of Refunds *
Refunds can now be issued for the full ticket price, for canceled events that were charged through Payflow Pro. The refunds are bulk authorized by an administrator for all registrants, regardless of their status.

Core Calendar

Product Area	Type	Description
Event Publishing	Enhancement	Users can now view a list of categories associated with other events based on currently viewed event.
Mobile	Enhancement	The text of a category name will now show in the header of the mobile view if used in search criteria.
Mobile	Enhancement	Clicking on "Register for this Event" in a mobile view now presents a responsive version of the registration form.
Front-end Display	Enhancement	Active Data Calendar now conforms to WCAG 2.0 Level A accessibility guidelines.
Front-end Display	Enhancement	Calendar can now send event reminders in one-day increments, from 1 to 7 days, in addition to the current hours and minutes options.
Front-end Display	Enhancement	The Subscribe window has been updated to be more user-friendly.
Front-end Display	Improvement	Audio has been added to the Captcha text on the Email a Friend option to further comply with accessibility standards.
Front-End Display	Improvement	Pages providing Captcha audio now have a statement that users only need to enter the first letter of each word pronounced.

Syndication	Improvement	Custom HTML code defined for a syndication template now is inserted even if a particular element (such as an image or attachment) is absent from an event.
Syndication	Improvement	RSS & Syndication output caching frequency has been increased, thereby improving performance of these features.
Configuration	Improvement	Improved “Rich Snippets” for events, using the *schema.org* standard.
Configuration	Improvement	The General System Settings dialog window has been updated to remove a few unused options.
Registration	Improvement	The length of the Registration Spaces Remaining message has been increased to 500 characters.
Front-end Display	Correction	The *Email a Friend* feature no longer sees a hard return in *Comments* box as pressing the Enter key in Firefox.
Front-end Display	Correction	Location keyword search now returns values in cases where previously it had caused the selection box to clear (go blank).
Front-end Display	Correction	Private categories now display in the private calendar’s *Category(s)* list box option. Previously, only public categories showed.
Front-End Display	Correction	Event Name is no longer duplicated in Category View if an event is added to more than one location.
Locations	Correction	Conflicts are now correctly reported in conflict notification lists, in cases where certain event occurrences overlapped.
Front-end Display	Correction	Some WCAG 2.0 Level A conformance issues that were identified have been resolved.
Front-end Display	Correction	The *Remind Me* function now provides an example of how to enter a wireless number. (Note: This has also been added to the Custom Text Module settings to configure if you license this module.)
Registration	Correction	Quick tip registration icon now correctly respects the registration deadline date by disappearing when appropriate.

Registration	Correction	Fax number, State and Zip Code now correctly display on the Registration Form Preview screen.
Registration	Correction	A bug has been corrected that would sometimes add nonfunctioning radio buttons to the *Modify Event Registrant* screen.
Event Publishing	Correction	Registration Deadline now correctly displays on the Preview summary screen.
Import/Export	Correction	Every iteration of a persistent export now contains the same GUID, to assure event matching in update operations.
Import/Export	Correction	The help file for the event export function no longer lists an *All* option (which never existed) for exporting all departments.
Import/Export	Correction	Lengths of custom fields 1 through 4 are no longer limited to 500 characters during import.
Import/Export	Correction	Rescheduling events now works correctly during import; the canceled event no longer displays.
Notifications	Correction	Notification e-mails now correctly display the single-quote character in the message body.
Notifications	Correction	Emails are now correctly being sent to the associated facility owner, when an event is deleted.
Documentation	Correction	Updated the help file for the "View Reports - Facility Utilization Report" page to correct the “Percentage Utilization” calculation.
Documentation	Correction	Updated the help file for the *Add Event - Contact & Other Information* page to show the correct limit of 255 characters for the Contact Name field.

Marketing Open Entry Module*

PRODUCT AREA	TYPE	DESCRIPTION
Open Entry Form	Improvement	The word *Locked* has been removed from all Open Entry Form’s *Category* drop-down lists in both Marketing & Facilities forms.

Open Entry Form	Improvement	At the request of many Calendar clients, *Select all Categories* has been removed from the Facilities Open Entry form.
Workflow	Improvement	Open Entry Form now places in the *Change Log* the full details (name, e-mail address, organization and telephone number) of the user submitting the event.

Facilities Management Module*

PRODUCT AREA	TYPE	DESCRIPTION
Facilities	Improvement	The Facilities Gantt view chart now shows the building name on both ends of the chart in addition to the room which was added in 3.14.
Reports	Enhancement	Facilities Exceptions Report (approved and non-approved conflicts) can now be downloaded in a CSV file format.
Other	Correction	The help file for the *Delete Room Type* page no longer states that there is a *MODIFY* button.

Facilities Open Entry Module*

PRODUCT AREA	TYPE	DESCRIPTION
Open Entry Form	Improvement	The word *Locked* has been removed from all Open Entry Form's *Category* drop-down lists in both Marketing & Facilities forms.
Workflow	Improvement	Open Entry Form now places in the *Change Log* the full details (name, e-mail address, organization and telephone number) of the user submitting the event.
Open Entry Form	Improvement	Improved styling applied to internal fields with long titles on the Facilities Open Entry form.
Open Entry Form	Correction	Room search function now respects the "exclude" option, the same way the "I'm Flexible" option does.

Advanced Registration*

PRODUCT AREA	TYPE	DESCRIPTION
Front-end Display	Enhancement	The registration form has been reworked to make it more user-friendly. It is now DIV- and CSS–based, with responsive design. (Note: responsiveness can be hindered by a client's header and footer design.)
Front-end Display	Enhancement	A new option for the Registration Form in *Configuration: Display Settings* tells the form whether to open in a new window (*new window* is the default).
Front-end Display	Enhancement	New option to "not display start or end dates/times" on registration forms; this is primarily used for forms with payment to allow for essentially a form to collect payment (donations, etc.) and ask custom questions but not tie the event to a date.
Import/Export	Enhancement	The Internal Custom fields for the event registered for now appear at the end of the Persistent Registrant Export file format to give further context to the event registered for and allow for better data integration with other systems.
Custom Forms	Enhancement	All six administrator-configured e-mails can now be authored in HTML, providing greater formatting flexibility.
Registration	Enhancement	Administrator can now issue bulk refunds for canceled events, if they were charged through the PayFlow Pro payment gateway.
Import/Export	Enhancement	Registrant exports now include the date and time that the user registered for an event ("created on").
Registration	Improvement	Confirmation e-mails now show the event total cost.
Registration	Improvement	The Registration dialog window has been redesigned to always show the total cost before the registrant enters payment information.
Registration	Improvement	Font sizes in custom fields are now consistent with non-custom fields throughout the Advanced Registration pages.
Registration	Correction	The additional registrant area now correctly disallows non-numeric data in the Other Registrants field.

Registration	Correction	A bug has been corrected that would have allowed registering for events without payment if multiple advance registration forms were open in a single browser session.
Registration	Correction	Advanced Registration forms can now be previewed correctly; previously there were formatting issues.
Registration	Correction	A bug preventing removal of custom images from registration forms has been corrected.

** This Active Data Calendar module is separately licensed. Contact your account executive for information.*

Version 3.14.1 Requirements

A Calendar 3.14.1 installation has these requirements:

- SQL server must be 2005.
- .Net 3.5 is required on the web server. Higher versions of .NET may co-reside on the machine.
- Facilities Module enhancements affect an installed Facilities Module.
- Open Entry Form Module enhancements affect an installed Open Entry Module.
- Custom Text Settings affect an installed Custom Text Settings Module.
- For further Server requirements please see your Client Portal page and select the *Server Requirements Tip Sheet.*

User Guide Features

While reviewing this User Guide you will be presented with information for using Active Data Calendar as well as important Tips, Tricks and Security suggestions to help you configure your calendar. As you continue through the guide look for the below icons:

The notepad icon is used to denote a tip or trick that we want to point out to you.

The lock icon denotes a security suggestion or security tip that we feel you should know about. Whenever viewing a security message, remember that your organizations security procedures and policies will always over ride suggestions in this guide. You should always consult your security area if there are any questions regarding security.

The finger with a bow points you to a Reminder tip. Reminder tips are placed in the User Guides to call your attention to something that was previously mentioned in the guide. We will provide you with helpful reminders to help you as you go through Active Data Calendar.

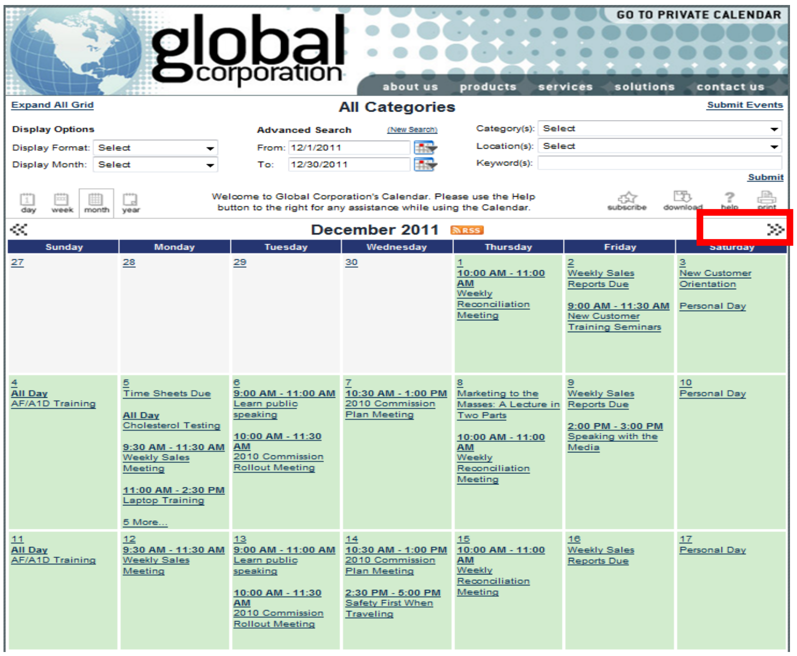
This user guide is intended for use with the Facilities Module. It covers logging into the Calendar but is geared toward Facilities for the rest of the document. Calendar how to and basic in's and out's are available in the Calendar User Guide located on your Clients Only page at http://www.activedatax.com or by speaking to your Calendar Administrator.

Logging into the Calendar Administration Area and System Workflow

Before you can manage events or administer your calendar you'll need to login to the calendar administration menu. A Login ID and Password will have been supplied to you by Active Data Exchange, or your calendar administrator. You'll use this information for logging into the calendar.

Calendar Login

1. From the main view of the calendar you can proceed to the login area by clicking on the **Submit Events** link. (Below is an example of the screen.)



2. You'll be presented with the main login screen of Active Data Calendar (note if you've previously logged into the calendar you may bypass the login screen since user data is stored in the browser session). Your Login ID and password is required to continue.

3. Enter your Login ID and Password and then click Submit or press enter to continue. If your Login ID and Password cannot be found in the Calendar and you are unable to login, you can either contact your calendar administrator in order to get the correct login information or you can use the **Forgot Your Password** feature. If you forgot your password please click on the link "Forgot Your Password? Click Here." And you will be prompted to enter in your Login ID or Email Address. Entering either of this information will prompt an email to be sent to that account's email address with the current Login ID and a new Password.

NOTE: Calendar installations that are using LDAP Connections in order to authenticate users will not display the "Forgot Your Password" option. You will need to contact your network administrator for your login credentials.

Account Types (Users)

Super User

The Super User by default has all privileges.

- The Super User has permissions at the Category Owner level to all locked categories including Public and Private
- They also have permission to all Departments at the Administrator level.
- There is only one super user per install and you will setup that account at the time of install.

Facility Owner

A Facility Owner is granted NO special privileges by default. However they are granted the following default permissions:

- Ability to approve or deny any facility request made to the facility(s) that they own/manage.

Resource Category Owner

The privileges of a Resource Category Owner account by default include:

- Ability to approve or deny any resource request made to the resource category(s) that they own/manage.

Public/Private Calendar Category Owner

The privileges of a Public/Private Category Owner account by default include:

- Ability to approve or deny any event marketing request made to the category(s) that they own/manage.

Department Administrator

The privileges of an Administrator account by default include:

- Add/Modify/Cancel/Reschedule/Delete Public Events to those Departments that the user as added as an Administrator (and User)
- Ability to Highlight Events for the Departments that they administer.
- Upload Images & Attachments
- Enable WYSIWYG Editor for Event Management
- Ability to Process Pending Events for the Departments that they administer.
- Ability to Manage Registration for events within their department. (This is automatically enabled for an administrator if at least one user within their department has the privilege enabled.)

User Level

The privileges of a traditional User account by default include:

- Add/Modify/Cancel/Delete Public Marketing Requests
- Enable Highlighted Events
- Enable WYSIWYG Editor for Event Management
- Upload Event Images & Attachments

Additional Privileges that can be assigned to any user includes:

SYSTEM ADMINISTRATION PRIVILEGES

- Configure Calendar
- Import Event Data
- Download/Export Event Data
- Download/Export Registrant Data (only appears for installations with the Advanced Registration Module)
- Purge Event Data
- Add/Modify/Delete Categorizations
- Add/Modify/Delete/View Registration Payment Accounts (only appears for installations with the Advanced Registration Module)
- View All Private Events
- View Reports

DEPARTMENT/WORKFLOW PRIVILEGES

- Add/Modify/Delete/View User Groups
- Add/Modify/Delete Users for any Department
- Add/Modify/Delete Users for Departments with Administrative Roles
- Add/Modify/Delete Departments
- View User Accounts

FACILITIES/LOCATIONS PRIVILEGES

- Add/Modify/Delete Locations/Buildings/Rooms
- Add/Modify/Delete Facilities Setup (only when Facilities Module is part of the install)
- Add/Modify/Delete Resources (only when Facilities Module is part of the install)

EVENT MARKETING PRIVILEGES

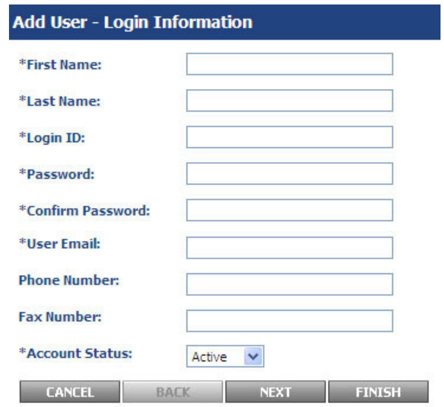
- Add/Modify/Cancel/Delete Private Events (only appears if the Private Module is Enabled)
- Enable Event Registration
- Send Email Notifications
- Generate Syndication, RSS and Quick Links
- Add/Modify/Delete Syndication Templates
- Add/Modify/Delete/View Registration Forms (only appears if the Advanced Registration Module is Enabled)

ADDITIONAL OPTIONS FOR PUBLIC/PRIVATE EVENT MARKETING

- Enable Highlighted Events
- Enable Event Registration
- Enable WYSIWYG Editor for Event Management
- Upload Event Images & Attachments
- Send Email Notifications
- Generate Syndication, RSS and Quick Links
- Add/Modify/Delete Syndication Templates
- Add/Modify/Delete/View Registration Forms - Only if the Advanced Registration Module is Enabled

Add Users

To navigate to the Add Users functionality, click on the WORKFLOW tab and then select ACCOUNT(S): ADD. This function is used to add the general details about the User Account that you are entering into the Active Data Calendar.



Step 1: Add User - Login Information

Use the following instructions to complete Step 1. All fields are required

- **First Name**: (50 character limit - alpha-numeric)
- **Last Name**: (50 character limit - alpha-numeric)
- **Login ID**: (50 character limit - alpha-numeric)
- **Password**: (minimum 6 characters - 12 character limit.) You are required to include at least 6 characters with 2 of them being numeric. If you attempt to enter in a password that is not to this specification, then you will receive an error message. Keys entered will display as an asterisk (*) within this field for security purposes.
- **Confirm Password**: The same alpha-numeric selections as entered in Password field must be re-entered in this field.
- **User Email**: (100 character limit.)
- **Phone Number**: (50 character limit - alpha- numeric)
- **Fax Number**: (50 character limit - alpha-numeric)
- **Active**: This field determines if the account is active (Yes) or inactive (No).

NAVIGATION OPTIONS WITHIN THIS AREA

Continue to the next step of the Add User process by clicking the NEXT button. Click the FINISH button to save the User Account additions at any time. If all required fields can be validated you will receive a message that the User has been added successfully.

If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click either the NEXT or FINISH button depending on your intended action. The BACK button is disabled on this screen.

If you elect to FINISH from this step and do not add any department permission(s) or role(s), then the user will not be able to login until you assign at least one department related permission and role.

***NOTE**: If LDAP is enabled this feature will not be functional. Please review the area later in this User Guide that describes the LDAP functionality.

Step 2: Add User - Department Permission(s) and Role(s)

This function includes options for setting up individual department permission(s) and role(s) or universal permission(s) and role(s).

Use the following instructions to complete Step 2:

First you must select the option for "Setup Department Permissions" to let the application know that you would like to add Department permissions for this User account. NOTE: You may bypass this screen completely if you only want to add the User Account as a Facility Owner or Category Owner.

Select the type of Department Permission(s) that you would like to setup for this User Account. Options include:

ADD AS A USER ACCOUNT TO ALL DEPARTMENTS: This is the default selection and if maintained, the User Account is added to every department at the user level. A "User" level role does not allow the new User Account to post events live to the Calendar. All events submitted by this User Account will need to be processed by a Department Administrator or a Category Owner.

ADD AS AN ADMINISTRATOR ACCOUNT TO ALL DEPARTMENTS: If this selection is chosen, then the User Account will be added to all departments at the administrator level. An "Administrator" level role allows the new User Account to post events live to the Calendar. All events submitted by this User Account will automatically post live and will not require processing/approval.

ADD INDIVIDUAL DEPARTMENT ROLES: If this selection is chosen, then a new function window will open on the right hand side of the screen and the function will include the capability for you to select individual department roles.

NAVIGATION OPTIONS WITHIN THIS AREA

Continue to the next step of the Add User process by clicking the NEXT button. Click the FINISH button to save this User Account at any time. If all required fields can be validated then you will receive a message that the user has been added successfully.

If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click either the NEXT or FINISH button to complete the process, depending on your intended action.

STEP 3: ADD USER DEPARTMENT PRIVILEGE(S)

This function includes options for setting up department privilege(s). Only the Super User account will have the ability to see and assign Administrative level privileges such as the ability to add other User Accounts. Any Administrative User who is given the privilege to add other User Accounts will only see Non-Administrative privileges for assignment to the new user account(s) that they add.

Use the following instructions to complete Step 3:

Privileges are broken down into two main "levels".

1. **ADMINISTRATIVE LEVEL PRIVILEGES** - these privileges are those assigned to a Super User as a default. However, when adding a User Account, the Super User can elect to pass along these privileges to another User Account.
2. **NON-ADMINISTRATIVE PRIVILEGES** - anyone adding User Accounts, other than the Super User, can only assign these non- administrative level privileges to the User Accounts that they are adding.

***NOTE**: The privileges of a traditional User Account, by default, includes only the ability to Add/Modify/Cancel/Delete Events to those Departments that the User is added. If a user is not given a specific privilege than that functional tab/link should not display on their user menu for selection.

The privileges of an Administrator User Account, by default include the ability to Add/Modify/Cancel/Delete Events to those Departments that they have been added as an Administrator and the ability to Highlight Events that they add as well as those that they are processing for standard User Accounts within their department.

SYSTEM ADMINISTRATION PRIVILEGES

- Configure Calendar
- Download/Export Event Data
- Purge Event Data
- Add/Modify/Delete/View Registration Payment Accounts (installations with Advanced Registration Module only)
- View Reports
- Import Event Data
- Download/Export Registrant Data (Installations with Advanced Registration Module only)
- Add/Modify/Delete Categorizations
- View All Private Events

DEPARTMENT/WORKFLOW PRIVILEGES

- Add/Modify/Delete/View User Groups
- Add/Modify/Delete Users for Departments with Administrative Roles
- View User Accounts
- Add/Modify/Delete users for any Department
- Add/Modify Delete Departments

FACILITIES PRIVILEGES

- Add/Modify/Delete Facilities Setup
- Add/Modify Delete Resources
- Add/Modify Delete Locations/Buildings/Rooms

EVENT MARKETING PRIVILEGES

- Add/Modify/Cancel/Delete Public Events
- Add/Modify/Cancel/Delete Private Events (installations with Private Module only)

DEFAULT USER PRIVILEGES

By default any user to Active Data Calendar is assigned the ability to Add/Modify/Cancel/Delete Facility Requests.

ADD EVENT OPTIONS FOR USERS GRANTED ONLY DEFAULT PRIVILEGES

Users who maintain the default privileges and are NOT assigned public marketing or private marketing privileges will see only the following fields on their Add Event Wizard:

- Step 1
  - Department (required)
  - Event Name (required)
  - Event Description (required)
- Step 2
  - Images and Attachments (displays if user has privilege assigned but none are required)
- Step 3
  - Schedule and Request Facility (all options and user must select at least date)

- Step 4
    - Resources (all options but none required)
- Step 5
    - Contact Information (all fields but none required)
    - Other Details (any fields enabled in configuration area and required if selected to be required in configuration)
    - Internal Notes (not required)

**Note: No registration options.

Users Granted Public or Private Event Marketing Privileges

- Step 1
    - Department (required)
    - Event Name (required)
    - Place Event on Selected Marketing Calendar(s): Drop down defaulted to "Select" (since this is not a required selection even if the user has public or private marketing privileges). Other options include Public and/or Private depending on the user's assigned privileges
    - Category(s)/Subcategory(s): This displays if a selection is made from the "Place Event on Selected Marketing Calendar(s)" drop down menu. Public and Private Categorization shows depending on selection made. This is a required field only if Public or Private marketing was selected for the event.
    - Highlight this Event: (only displays if public/private marketing is selected and if the user has the privilege assigned but is not required.
    - Event Description (required) – WYSIWYG options show if user has privilege assigned
- Step 2
    - Images & Attachments (displays if user has privilege assigned but none required)
- Step 3
    - Schedule & Request Facility (all options and user must select at least date)
- Step 4
    - Resources (all options but none required)
- Step 5
    - Contact Information (all fields but none required)
    - Other Details (any fields enabled in configuration area and required if selected to be required in configuration)
    - Internal Notes (not required)

**NOTE: No registration options.

Users Granted Public or Private Event Marketing Privileges

- Step 1
    - Department (required)
    - Event Name (required)
    - Place Event on Selected Marketing Calendar(s): Drop down defaulted to "Select" (since this is not a required selection even if the user has public or private marketing privileges). Other options include Public and/or Private depending on the user's assigned privileges
    - Category(s)/Subcategory(s): This displays if a selection is made from the "Place Event on Selected Marketing Calendar(s)" drop down menu. Public and Private Categorization shows depending on

selection made. This is a required field only if Public or Private marketing was selected for the event.

- Highlight this Event: (only displays if public/private marketing is selected and if the user has the privilege assigned but is not required.
- Event Description (required) – WYSIWYG options show if user has privilege assigned

- Step 2
  - Images & Attachments (displays if user has privilege assigned but none required)
- Step 3
  - Schedule & Request Facility (all options and user must select at least date)
- Step 4
  - Resources (all options but none required)
- Step 5
  - Contact Information (all fields but none required)
  - Other Details (any fields enabled in configuration area and required if selected to be required in configuration)
  - Registration (displays if user has privilege assigned but is no required)
  - Internal Notes (not required)

**NOTE: No registration options.

NAVIGATION OPTIONS WITHIN THIS AREA

Continue to the next step of the Add User process by clicking the NEXT button. Click the FINISH button to save this User Account at any time. If all required fields are validated, then you will receive a message that the User has been added successfully. If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click either the NEXT or FINISH button to complete the process, depending on your intended action.

Step 3: Add User - Category Permissions

Only Super Users will be presented with this Step in the Add User Wizard.

This function includes options for setting up the privilege for the user account to be a Category Owner. Use the following instructions to complete Step 4:

ADD USER - CATEGORY PRIVILEGE(S)

When a Category is being added, the Administrative User Account adding the Category can choose to lock the category. When a Category is “locked”, then at least one Category Owner must be selected for management of events that are submitted to that particular Category. However, multiple Category Owners can be selected for a locked Category. This step in the “Add User” wizard will allow the user to select a checkbox that the user should be assigned Category Ownership permissions. After the checkbox is selected, the user is prompted to select from three radio buttons:

- User has Category Owner Permissions for All Current Locked Category(s)
- User has Category Owner Permissions for Selected Categories

- User has Category Owner Permissions but Category Ownership will be selected later

If a User is Added as a Category Owner to Individual Locked Category(s) and the Administrator would like to select the Category(s) from within the Add User Account Wizard

- Click the appropriate radio button "User has Category Owner Permissions for Selected Categories".
- Function window is opened on the right hand side of the screen
- Select from the list of available Locked Category(s) those which the User Account should manage as the Category Owner
- Click the **SUBMIT** button to save your selections and return back to the main wizard screen for adding the User Account - Step 4
- If you need to change your selections, click the **CHANGE** button beside the list box showing your current Locked Category selections and the function window will launch with the previously selected Category(s) checked and you will have the ability to make modifications

Other buttons on this function window include:

- **RESET:** Can be clicked to reset the function window values to their default settings.
- **SUBMIT:** Finalizes selections, closes the function window and brings you back to the main wizard step that they were on before opening the function window.
- **CANCEL:** Cancels out of the current function window and brings you back to the main “Add User – Step 4" screen with no categories selected. The checkbox for "Lock Category" should no longer be selected.

***NOTE:** Every time an event is added to a locked category, the Category Owner for that locked category is notified that the event requires approval. (This bypasses the normal Department review and approval process for that particular Category. However, if the event was also added to non-locked Category(s), then the event is processed according to the standard Department review process). If there are multiple Category Owners for a locked category, then all Category Owners are notified and the event is processed according to the first Category Owner who takes action on the event. When a Category Owner posts an event to the category to which they are the owner, then their event is approved automatically.

STEP 4: ADD USER - FACILITY PERMISSIONS

When a Facility (Location - Building - Room) is being added, the User Account adding the Facility can choose to lock the facility. When a facility is “locked”, then at least one Facility Owner must be selected for management of facility booking requests that are submitted to that particular Facility. However, multiple Facility Owners can be selected for a locked Facility.

This step in the “Add User” wizard allows the user to select first if the User has Facility Owner Permissions or not. If the checkbox is selected, then there are three radio button selection options:

- Add User Account as Facility Owner to All Current Locked Facility(s)
- Add User Account as Facility Owner to Individual Locked Facility(s) and Select Facility(s) Now
- Add User Account as Facility Owner and Select Locked Facility(s) in Add Location – Building - Room Area

If a User is Added as a Facility Owner to Individual Locked Facility(s) and the Administrator would like to select the Facility(s) from within the Add User Account Wizard:

- Click the appropriate radio button "Add User Account as Facility Owner to Individual Locked Facility(s) and Select Facility(s) Now".

- A function window is opened on the right hand side of the screen
- Select from the list of available Locked Facility(s) those which the User Account should manage as the Facility Owner. Facilities are displayed in hierarchical order (Location - Building(s) - Room(s)).
- Click the SUBMIT button to save your selections and return back to the main wizard screen for adding the User Account - Step 4
- If you need to change your selections, click the CHANGE button beside the list box showing your current Locked Facility selections and the function window will launch with the previously selected Facility(s) checked and you will have the ability to make modifications.

Other buttons in this function window include:

- **RESET**: Can be clicked to reset the function window values to their default settings.
- **SUBMIT**: Finalizes selections, closes the function window and brings you back to the main wizard step that they were on before opening the function window.
- **CANCEL**: Cancels out of the current function window and brings you back to the main “Add User – Step 4" screen with no facilities selected. The checkbox for "Lock Facility" should no longer be selected.

***NOTE**: Every time an event is added to a locked facility, the Facility Owner for that locked facility is notified that the facility request requires approval. All facilities for an event must be approved before the event proceeds forward into the marketing workflow process to be reviewed by department administrator(s) or category owner(s).

NAVIGATION OPTIONS WITHIN THIS AREA

Continue to the next step of the Add User process by clicking the **NEXT** button. Click the **FINISH** button to save this User Account at any time. You will receive a message that the User has been added successfully.

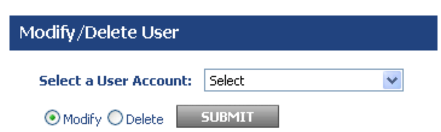
If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click either the **NEXT** or **FINISH** button to complete the process, depending on your intended action. You can also click the **CANCEL** button to cancel your actions and be returned to the Main Menu of Active Data Calendar.

Modify/Delete User - Select User Account

To navigate to the Modify/Delete User functionality, click on the WORKFLOW tab and then select ACCOUNT(S): MODIFY/DELETE.

This function is used to Modify/Delete a current User Account for your installation of Active Data Calendar. You can either modify a User's permissions/privileges and general accounts details or completely delete the User Account from the system. You can also Copy a User Account in order to more quickly setup another new User Account with exact or similar privileges and/or permissions.

Use the following instructions to begin the modification/deletion process:



SELECT A USER ACCOUNT NAME: Use the drop-down to select the name of the account that you would like to modify or delete. The user account names are listed (last name, first name) in alphabetical, ascending order.

Then select the action you would like to take from the two radio button options:

- **Modify:** Allows you to change user account information including privileges, permissions and/or general account details. You can also select MODIFY if you would like to COPY the user account to create a new account. From the Modify Wizard you will see the COPY button option.
- **Delete:** Navigates you to the Delete User Account Confirmation area where once you confirm your action will removes the User Account completely from the Calendar database and it will no longer be available for any purposes in the Calendar application.

Click the **SUBMIT** button to finalize your action and proceed to either the first step in the modification process or to the Delete User Account confirmation screen.

Modify User

This function is used to Modify/Delete a current User Account for your installation of Active Data Calendar. You can either modify a User's permission(s)/privilege(s) and general account details or completely delete the User Account from the system. You can also Copy a User Account in order to more quickly setup another new User Account with exact or similar privileges and/or permissions.

IMPORTANT TO NOTE FOR CLIENTS WITH LDAP/AD CONNECTIONS ENABLED

The only user details that can be modified on this screen include:

- **First Name:** If the account that was imported from LDAP does not have a First Name specified from within LDAP/AD then this field will be enabled for data entry. Otherwise this field will not be displayed. You will be required to enter in a First Name for the new account before proceeding forward in the Modify User Wizard.
- **Last Name:** If the account that was imported from LDAP does not have a Last Name specified from within LDAP/AD then this field will be enabled for data entry. Otherwise this field will not be displayed. You will be required to enter in a Last Name for the new account before proceeding forward in the Modify User Wizard.
- **Active:** This field determines if the account is active (Yes) or inactive (No) and is automatically defaulted to (No) for user accounts imported from LDAP. You must select (Yes) to enable the account so that they can begin to login to the Calendar product.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your modification. You can also use the CANCEL button at the bottom of the screen to cancel out of this modify action but you will be navigated back to the Main Menu. The BACK and NEXT buttons are disabled on this screen.

Delete User

This function includes options for confirming or canceling out of our **DELETE** action. Use the following instructions to complete the delete User process.

User Name - The user name is listed here (last name, first name). The User Account details are also displayed on the bottom portion of this screen. Review the User Account and associated details to ensure that this is the User you would like to delete.

Yes/No Radio Selection: Click the radio button associated with the action that you would like to take. Select "Yes" if you do want to finalize the delete process. Select "No" if you want to end this action.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your selection. You can also use the CANCEL button at the bottom of the screen to cancel out of this delete action but you will be navigated back to the Main Menu. The BACK and NEXT buttons are disabled on this screen.

NOTE: New functionality in Calendar version 3.8 includes the ability to reassign event ownership of events for a user account that is being deleted (or made inactive). If you attempt to delete a user with active events associated with the user ID, then you will receive the following warning message:

Reassign Event Ownership

The user you have selected to delete has active and/or past events assigned to their account. Please select the user account to reassign event ownership for all events per department. If not user account is selected for any or all departments listed, then Active Data Calendar will automatically assign event ownership to the Super User account. Event actions taken by this user account will be retained in the Change Log but any new actions will be assigned to the user(s) selected.

Arts & Theatre:
Select

Bookstore:
Select

You will see the departments to which the user has permission and active events associated and be able to select another user account within that department to reassign event ownership.

View User Accounts - Search

To navigate to the View User Accounts functionality, click on the WORKFLOW tab and then select ACCOUNT(S): VIEW and use the link on the screen entitled "Search Users". Selections available for User Account searching include:

- Select Department: A single Department can be selected from this drop-down to narrow your search/list to a specific department of User Accounts.
- Select Role: Options include Category Owner, Department Administrator, User or All (All is the default)
- Keyword (User Name): The keyword field searches the fields for First Name and Last Name.
- Account Status: Options include Active, Inactive or All (All is the default)

When the “Search” button is selected, you will be navigated back to the View User Account List with the search results displayed on the View User Accounts List screen.

There is also a link in the upper right hand corner of the search screen that says “Back to Full List” to enable you to quickly go back to the full list without finalizing their search selection.

View User Accounts - List

To navigate to the View User Accounts functionality, click on the WORKFLOW tab and then select ACCOUNT(S): VIEW.

The ability to view user accounts within your installation of Active Data Calendar is a privilege that must be assigned to a particular User Account. The default list that is presented is a display of ALL User Accounts in the database. However, there is also a drop-down at the top of the screen that allows you to sort the list by Department as well.

The columns of information displayed for each User Account in the list includes:

- **Last Name:** This displays as a link and if selected, takes the user to the User Account Details screen. This is also the column that the list is sorted by with the list displaying in alphabetical, ascending order, starting with "A" at the top of the list.
- First Name
- Email
- **Max. Dept Role:** This displays the highest department role that the User has within the Calendar application. If the user is an Administrator for at least one department, then Admin would display in this column.
- **Category Role:** If the User is a Category Owner of at least one Category, then Owner will display in this column, otherwise, nothing is displayed in this column for the user account.
- **Facility Role:** If the user is a Facility Owner of at least one Facility, then Owner will display in this column, otherwise, nothing is displayed in this column for the user account.
- **Account Status:** Options for display in this column are Active or Inactive.

From this screen you can either click on a User Account name to go to the User Account Details screen or click on the link in the upper right hand corner entitled "Search Users" and navigate to a separate screen where you can further refine your User Account View List.

View User Accounts - Details

This screen allows you to view all the account details for the User selected from the list view.

DETAILS INCLUDED PER ACCOUNT INCLUDE:

- General Account Information - All details are displayed except for User password information.
- Administrative and Non-Administrative Privileges
- Department Permission(s) and Role(s)
- Category Owner Permission(s)
- Facility Owner Permission(s)

There is also a link included in the upper right hand corner for you to quickly navigate "Back to Full List".

My Profile

To navigate to the My Profile functionality, click on the WORKFLOW tab and then select ACCOUNT(S): MY PROFILE.

This screen allows you to set default values and selections for various fields throughout the Calendar administration area for your particular user account. When selecting these profile settings, they will only be saved for your account and will not affect any global Calendar settings.

- **Default Department when adding events:** The Department selected here will become the default department selected each time your user account goes to add a new event.
- **Default Categories when adding events:** Categories and Subcategories selected here will be selected as default category/subcategory selections each time your user account goes to add a new event.
- **Default Main Menu:** Options include Marketing, Facilities and Resources

Facilities

This function allows you to add locations to be used for adding events from within the administration area of the Active Data Calendar program.

This area of Active Data Calendar administration includes two main navigational panels: *Setup* and *Manage*.

- **Setup:** Includes options for creating your facilities attributes that will then be applied to your managed rooms in the “Manage” area. Facilities attributes include: Room Types, Room Setup Options and Room Features.
- **Manage:** Includes options for creating your three-tiered facilities structure consisting of Location, Building and Room. Under each tier you are prompted to enter details about the location, building and room, including availability schedules, facility ownership rules and more.

TIP: For additional tips on how to maximize your location management, see the Clients Only page for Tips and Tricks on "Location Management".

Before you can take full advantage of Location Management in Calendar, it is important to understand how Calendar defines each element of location setup.

- **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.

The location setup area within Calendar allows you to set up the three-tiered structure for administering your events and then you can also configure your Calendar (under Configuration Tab / Setup Calendar) to display any of the location information that you choose.

***NOTE**: When setting up your Calendar location structure, remember that locations can be used for all of the following functions inside the Calendar software:

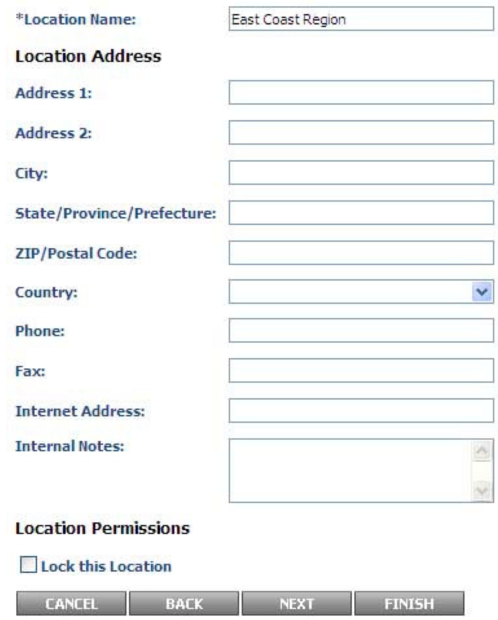
- **Site Visitors**: If enabled in Configuration / Setup Calendar - Visitors to your Calendar can search and sort events by location - down to the room level. Location information can also include links to other sites, MapQuest maps/directions and campus map attachments.
- **Calendar Administrators**: Administrators can see possible conflict notification warnings if events are being scheduled for the same date and time and at the same location/building.
- **Event Planners/Managers**: The Calendar Location View can be used to see if other events are taking place in the same locations or buildings and plan events on dates where they can achieve optimal attendance.
- **Facility Planners**: Who can be notified of internal requests related to events and responds accordingly. Calendar can help bridge the gap between event planning, marketing and facilities scheduling.

Add Location

To navigate to the Add Location functionality, click on the FACILITIES tab and then select the LOCATION: ADD link.

Use the following information to complete adding your Location. The only required field is Location Name. Other information you may choose to include is:

- **Location Address** (Address 1 & 2, City, State, ZIP and County if Domestic enabled): This information displays along with the Location Name on the Event Details screen for any event that is taking place at this location. If you have chosen to enable International Options, then the County Field will display as Country instead. Also, some other field names may be slightly different to accommodate International options. (i.e. State/Province/Prefecture)
- **Phone**: Phone information will display on the front-end Event Details view screen for events that are taking place at this location.
- **Internet Address**: Internet Address will display on the front-end Event Details view screen for events that are taking place at this location.
- **Internal Notes**: This open text field allows you to enter notes about the location which will be viewable for users adding and managing events but will not appear on the front-end view screens available to visitors.



- **Lock this Location and all associated Buildings and Rooms**: Checkbox that if selected will lock the all rooms at all buildings under the specified location. A function window will open on the right hand side of the screen where you may select facility owner(s) to be applied to all locked rooms under this location.

***NOTE**: When an event is added or modified you will also have the ability to enter in a Room # and Room Link to further refine your event location information.

ADD LOCATION – AVAILABILITY SCHEDULE

This function allows you to determine the dates and times when all buildings and rooms at the location are available for scheduling.

Use the following information to complete adding your availability schedule.

SELECTING LOCATION AVAILABILITY

Standard Schedule

- Start Date: Select the date where your schedule should start to take effect.
- End Date: Select an end date for your new schedule.
- Select Day(s): Use this drop-down function to further refine your schedule (this field is optional for selection). If this option is selected, then the values available for selection include:
- Week Days – includes Monday, Tuesday, Wednesday, Thursday and Friday
- Weekends – includes Saturday and Sunday
- All Days - includes Sunday, Monday, Tuesday, Wednesday, Thursday, Friday and Saturday
- Select Days – if selected, this opens a pop-up window with all days of the week available for individual selection or group selection.

Each Day of the week is also listed separately in the drop-down menu for individual selection.

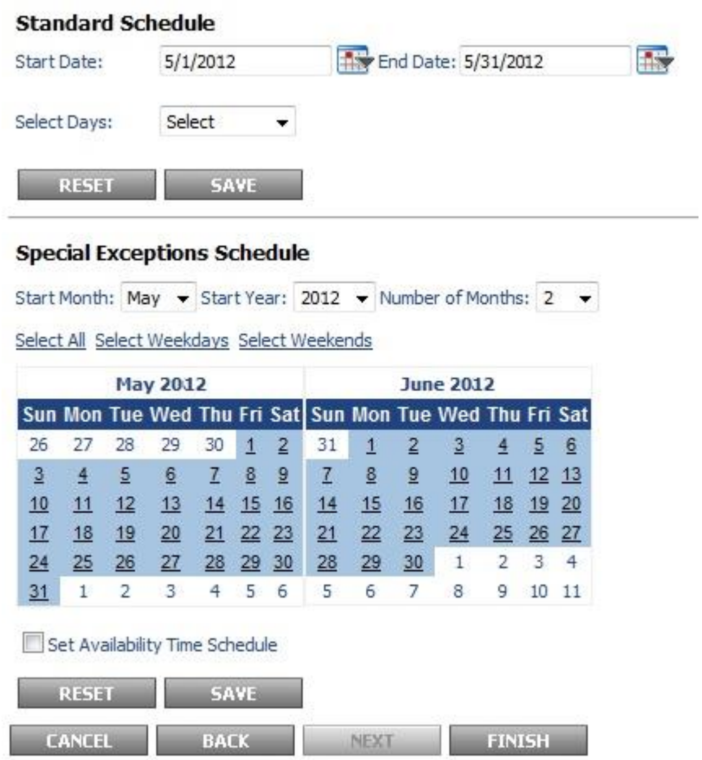
SELECT AVAILABILITY TIME SCHEDULE

Once the date range and days of the week are selected for your schedule, then the availability time schedule function window is automatically opened on the right hand side of the screen. Within this function window area you may select up to four different starting and ending times for availability scheduling within each selected day within your date range.

There are also options for selecting to make all buildings and rooms at the location "Open All Day" or "Closed/Not Available".

By default the time selection is set for "Open All Day".

Other options for selection include:



- **Closed/Not Available**: If selected, the location is closed from any scheduling during that date range period on the days selected.
- **Select Times for Scheduling Av**ailability: By using the various starting and ending time drop-downs you can create various open and closed times during each day selected for your schedule. Times cannot be selected in overlapping patterns.

Buttons Available within the Time Schedule Function Window

- **SUBMIT Button**: Click SUBMIT within the function window to submit your time selections for the current date range/days of the week you have entered for your schedule. If SUBMIT is selected, then the current entries are saved in your session and the schedule and times you have entered are displayed in a list on the main Add Location - Step 2 screen.
- **CANCEL Button**: Click CANCEL to exit out of the time selection function window and return to the main Add Location - Step 2 screen without submitting/saving your time selections entered in the function window.

Links/Buttons Available within the Standard Schedule Area

- Edit Link: Click Edit under the "Action" column of the Standard Schedule area in order to edit the availability times for a certain schedule.
- Restrict Link: Click Restrict under the "Action" column of the Standard Schedule area in order to open a function window on the right of the screen where you can select Users and User Groups that are the only Users/Groups who may see the Location and associated Buildings/Rooms for scheduling during that specific timeframe.
- Remove Link: Click Remove under the "Action" column of the Standard Schedule area in order to remove a previously entered availability time schedule.

- SAVE Button: Click SAVE at any time in order to save the current schedule of availability. If SAVE is selected, then the current entries are saved to the database and a new drop-down field is enabled on the screen entitled "Current Schedule".
- RESET Button: Click RESET to reset all current screen values back to their defaults. Any data that was previously saved is still maintained in the database.

SPECIAL EXCEPTIONS SCHEDULE

This portion of the screen should only be completed if you want to denote that there are certain dates where the standard schedule should not apply and there will be an alternate schedule of availability instead.

First, select the number of grids (months) and actual months from which you would like to select. The options available for enabling the appropriate grids for selection include Year, Month and # of Months drop-down selection boxes.

Select specific dates from the grids by clicking on those dates or select from three date "grouping" options to set availability by standard groupings of "Select All", "Select Weekdays" or "Select Weekends".

- **Select All**: If this option is chosen, then all dates in the displayed grids will show as "selected" and the schedule that is set within the function window will be applied to every date selected.
- **Select Weekdays**: If this option is chosen, then all weekdays on the displayed grids will show as "selected" and the schedule that is set on the right hand side will be applied to every weekday. Weekdays include Monday, Tuesday, Wednesday, Thursday and Friday.
- **Select Weekends**: If this option is chosen, then all weekend days (Saturday and Sunday) on the displayed grids will show as "selected" and the schedule that is set in the function window will be applied to every weekend date.

SELECT AVAILABILITY TIME SCHEDULE

Within this function window area you may select up to four different starting and ending times for availability scheduling for the dates you have selected as having special exceptions. There are also options for selecting to make all buildings and rooms at the location "Open All Day" or "Closed/Not Available".

By default the time selection is set for "Open All Day".

Other options for selection include:

- Closed/Not Available: If selected, the location is closed on the dates selected under the Special Exceptions area.
- Select Times for Scheduling Availability: By using the various starting and ending time drop-downs you can create various open and closed times during each day selected for your special exceptions schedule. Times cannot be selected in overlapping patterns.
- Buttons Available within the Time Schedule Function Window
- SUBMIT Button: Click SUBMIT within the function window to submit your time selections for the current dates selected. If SUBMIT is selected, then the current entries are saved in your session and you are returned to the main Add Location - Step 2 screen.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your addition.

You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu and none of your information will be saved. The BACK and NEXT buttons are disabled on this screen.

Modify/Delete Location - Select Location

To navigate to the Modify/Delete Location functionality, click on the FACILITIES tab and select LOCATION(S): MODIFY/DELETE.

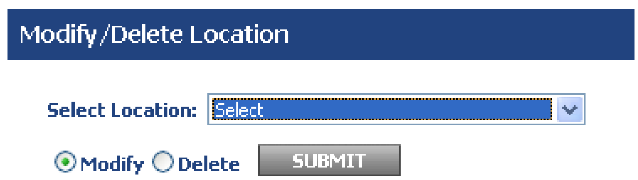
This function is used to Modify/Delete a current Location for your installation of Active Data Calendar. You can either modify a Location's details or completely delete the Location from the system.

Use the following instructions to begin the modification/deletion process:

Select a Location Name: Use the drop-down to select the name of the location that you would like to modify or delete. The location names are listed in alphabetical, ascending order.

Then select the action you would like to take from the two radio button options:

- **Modify**: Allows you to change location information including location name.
- **Delete**: Navigates you to the Delete Location confirmation area where once you confirm your action will remove the Location completely from the Calendar database and it will no longer be available for any purposes in the Calendar application.



Click the SUBMIT button to finalize your action and proceed to either the first step in the modification process or to the Delete Location confirmation screen.

Modify Location

This function allows you to modify locations to be used for adding events from within the administration area of the Active Data Calendar program.

Use the following information to complete modification of your Location.

The only required field is Location Name. Other information you may choose to include is:

- **Location Address** (Address 1 & 2, City, State, ZIP and County if Domestic enabled): This information displays along with the Location Name on the Event Details screen for any event that is taking place at this location. If you have chosen to enable International Options, then the County Field will display as Country instead. Also, some other field names may be slightly different to accommodate International options. (i.e. State/Province/Prefecture)
- **Phone**: Phone information will display on the front-end Event Details view screen for events that are taking place at this location.
- **Internet Address**: Internet Address will display on the front-end Event Details view screen for events that are taking place at this location.

- **Internal Notes**: This open text field allows you to enter notes about the location which will be viewable for users adding and managing events but will not appear on the front-end view screens available to visitors.
- **Lock this Location and all associated Buildings and Rooms**: Checkbox that if selected will lock the all rooms at all buildings under the specified location. A function window will open on the right hand side of the screen where you may select facility owner(s) to be applied to all locked rooms under this location.

***NOTE:** When an event is added/modified you will also have the ability to enter in a Room # and Room Link to further refine your event location information.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your modification. You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu and none of your information will be saved. The BACK and NEXT buttons are disabled on this screen.

Modify Location - Availability Schedule

If you have previously setup a location availability schedule, then you will see any existing schedules in a drop-down entitled "Current Schedule". Select one of these current schedules in order to refresh the screen and display the date/time selections for that schedule. You can then add new schedule criteria, modify existing schedule criteria or delete specific schedule rules completely.

TIP: Please note that the rules for "cascading" the location availability rules are different during an "Add Location" and "Modify Location" process. During the Add Location process any availability rules applied at the location level automatically cascade to all buildings and rooms beneath. The user can select to "override" the location availability schedule and create a unique/custom building or room schedule but by default the location schedule is applied.

However, during the Modify Location process, if any changes are made to the availability schedule, they are NOT cascaded down automatically to buildings and rooms beneath that location. The new schedule is only applied to new buildings. Existing buildings and rooms are not affected by the location schedule change.

Selecting to Create New Location Availability Schedules/Rules

Standard Schedule

- Start Date: Select the date where your schedule should start to take effect.
- End Date: Select an end date for your new schedule.
- Select Day(s): Use this drop-down function to further refine your schedule (this field is optional for selection). If this option is selected, then the values available for selection include:
- Week Days – includes Monday, Tuesday, Wednesday, Thursday and Friday
- Weekends – includes Saturday and Sunday
- All Days - includes Sunday, Monday, Tuesday, Wednesday, Thursday, Friday and Saturday
- Select Days – if selected, this opens a pop-up window with all days of the week available for individual selection or group selection.

Each Day of the week is also listed separately in the drop-down menu for individual selection.

Select Availability Time Schedule

Once the date range and days of the week are selected for your schedule, then the availability time schedule function window is automatically opened on the right hand side of the screen. Within this function window area you may select up to four different starting and ending times for availability scheduling within each selected day within your date range.

There are also options for selecting to make all buildings and rooms at the location "Open All Day" or "Closed/Not Available". By default the time selection is set for “Open All Day”.

Other options for selection include:

- **Closed/Not Available**: If selected, the location is closed from any scheduling during that date range period on the days selected.
- **Select Times for Scheduling Availability**: By using the various starting and ending time drop-downs you can create various open and closed times during each day selected for your schedule. Times cannot be selected in overlapping patterns.

Buttons Available within the Time Schedule Function Window

- SUBMIT Button: Click SUBMIT within the function window to submit your time selections for the current date range/days of the week you have entered for your schedule. If SUBMIT is selected, then the current entries are saved in your session and the schedule and times you have entered are displayed in a list on the main Add Location - Step 2 screen.
- CANCEL Button: Click CANCEL to exit out of the time selection function window and return to the main Add Location - Step 2 screen without submitting/saving your time selections entered in the function window.

Links/Buttons Available within the Standard Schedule Area

- Edit Link: Click Edit under the "Action" column of the Standard Schedule area in order to edit the availability times for a certain schedule.
- Restrict Link: Click Restrict under the "Action" column of the Standard Schedule area in order to open a function window on the right of the screen where you can select Users and User Groups that are the only Users/Groups who may see the Location and associated Buildings/Rooms for scheduling during that specific timeframe.
- Remove Link: Click Remove under the "Action" column of the Standard Schedule area in order to remove a previously entered availability time schedule.
- SAVE Button: Click SAVE at any time in order to save the current schedule of availability. If SAVE is selected, then the current entries are saved to the database and a new drop-down field is enabled on the screen entitled "Current Schedule".
- RESET Button: Click RESET to reset all current screen values back to their defaults. Any data that was previously saved is still maintained in the database.

Special Exceptions Schedule

This portion of the screen should only be completed if you want to denote that there are certain dates where the standard schedule should not apply and there will be an alternate schedule of availability instead.

First, select the number of grids (months) and actual months from which you would like to select. The options available for enabling the appropriate grids for selection include Year, Month and # of Months drop-down selection boxes.

Select specific dates from the grids by clicking on those dates or select from three date “grouping” options to set availability by standard groupings of "Select All", "Select Weekdays" or "Select Weekends".

- **Select All**: If this option is chosen, then all dates in the displayed grids will show as “selected” and the schedule that is set within the function window will be applied to every date selected.
- **Select Weekdays**: If this option is chosen, then all weekdays on the displayed grids will show as “selected” and the schedule that is set on the right hand side will be applied to every weekday. Weekdays include Monday, Tuesday, Wednesday, Thursday and Friday.
- **Select Weekends**: If this option is chosen, then all weekend days (Saturday and Sunday) on the displayed grids will show as “selected” and the schedule that is set in the function window will be applied to every weekend date.

Select Availability Time Schedule

Within this function window area you may select up to four different starting and ending times for availability scheduling for the dates you have selected as having special exceptions. There are also options for selecting to make all buildings and rooms at the location "Open All Day" or "Closed/Not Available". By default the time selection is set for “Open All Day”.

Other options for selection include:

- **Closed/Not Available**: If selected, the location is closed on the dates selected under the Special Exceptions area.
- **Select Times for Scheduling Availability**: By using the various starting and ending time drop-downs you can create various open and closed times during each day selected for your special exceptions schedule. Times cannot be selected in overlapping patterns.

Buttons Available within the Time Schedule Function Window

- SUBMIT Button: Click SUBMIT within the function window to submit your time selections for the current dates selected. If SUBMIT is selected, then the current entries are saved in your session and you are returned to the main Add Location - Step 2 screen.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your modification.

You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu and none of your information will be saved. Click the NEXT button to navigate to the Modify Location - Availability Schedule screen.

DELETE LOCATION

This function includes options for confirming or canceling out of your DELETE action.

Use the following instructions to complete the delete Location process.

- **Location Name** - The location name is listed here. The location details are also displayed on the bottom portion of this screen. Review the location and associated details to ensure that this is the location you would like to delete.
- **Yes/No Radio Selection**: Click the radio button associated with the action that you would like to take. Select "Yes" if you do want to finalize the delete process. Select "No" if you want to end this action.

***NOTE**: If you select to DELETE a location which is actively being used by a live event, then you will receive an error message that the location cannot be deleted. You first have to select new location information (or No Location) for those events currently utilizing the location you wish to delete.

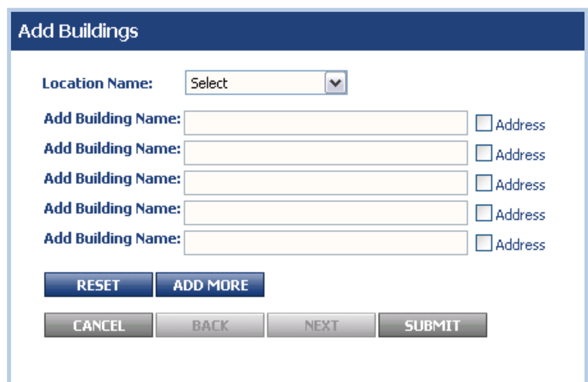
You still need to click the FINISH button at the bottom of the screen to completely finish/finalize your selection. You can also use the CANCEL button at the bottom of the screen to cancel out of this delete action but you will be navigated back to the Main Menu.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your delete action. You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu. The BACK and NEXT buttons are disabled on this screen.
Add Building

To navigate to the Add Building functionality, click on the FACILITIES tab and select BUILDING(S): MODIFY/DELETE.

This function allows you to add Building(s) to available Location(s). Buildings are used for classifying how events are displayed to visitors on the front end views of your Calendar.



Use the following information to complete adding your Building(s).

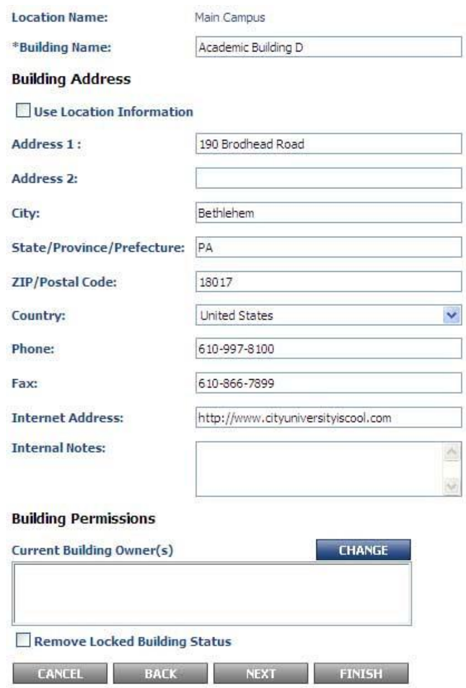
Before adding Building(s), you must first select the Location to which you will be adding the new Building(s).

LOCATION NAME: Drop-down selection that allows you to pick a single Location Name. Location Name(s) are listed in alphabetical, ascending order in the drop-down. Select the Location Name and then the screen will be refreshed to display a small function box on the right which lists any current Building Name(s) already added within that Location. This will aid you in not adding duplicate entries which produce an error message.

BUILDING NAME(S): By default, five (5) Building Name text fields are provided where you can enter Building Name(s) for classification within the Location selected. Each Building Name cannot exceed 50 alpha-numeric characters. If you would like to add more than five (5) Building(s) at any one time, please click the **ADD MORE** button, available at the bottom of the list of Building Name fields to automatically refresh the screen to include an additional five (5) fields. You can click the **ADD MORE** button as many times as you like in order to add the complete list of Buildings(s) within the Location that you have selected. **Note**: You can always come back to Add Buildings(s) at any time to add new Building Name(s) to any available Location in the Active Data Calendar system.

- **Building Address**: By default the address of your building will be the address of the location that it was added within. If you would like to change the building address, then click the Address checkbox to launch a function window where you can add specific building information. You will see the location address information pre-populated in this screen. You can change the information in the fields to have custom building information. If you click the "Use Location Address" checkbox, then the fields for entering custom building address information will be disabled. Click **SUBMIT** on this screen to finalize your building address information and return to the main screen of Add Building or click **CANCEL** to cancel out of this screen and not save the building address changes made.

***NOTE**: You will want to take into consideration the complete width of your Location selection drop-down on the front-end Calendar views that are presented to your Calendar visitors, when adding/modifying Building Name(s). While 50 characters are allowed as the maximum for the field, you may want to limit the names to a maximum of 30 in order to maximize the space that the drop-down allows on the front-end. However, if you choose to have more lengthy Location and/or Building names, then your visitors may need to click on "Select Multiple" to open the pop-up window on the front- end where they can view all the Location/Building names/options in full.



NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your addition.

You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu and your information will not be saved. The BACK and NEXT buttons are disabled on this screen.

Add Building - Step 1 (Address & Permissions)

This function allows you to add the building address and select to lock the building and assign ownership. Use the following information to complete adding your building address and ownership.

Building Address

- Address 1
- Address 2
- City
- State (or State/Province/Prefecture if International Fields are enabled)
- ZIP/Postal Code
- Country (if International Fields are enabled) or County if Domestic
- Phone
- Internet Address
- Internal Notes: This open text field allows you to enter notes about the location which will be viewable for users adding and managing events but will not appear on the front-end view screens available to visitors.

From this screen you can elect to choose a checkbox to "Use Location Address". Choosing this checkbox will automatically populate all of the address fields with the location address information and if any fields are modified at the location level, the updates will be automatically applied to any building that has selected to use the default location address as the building address information.

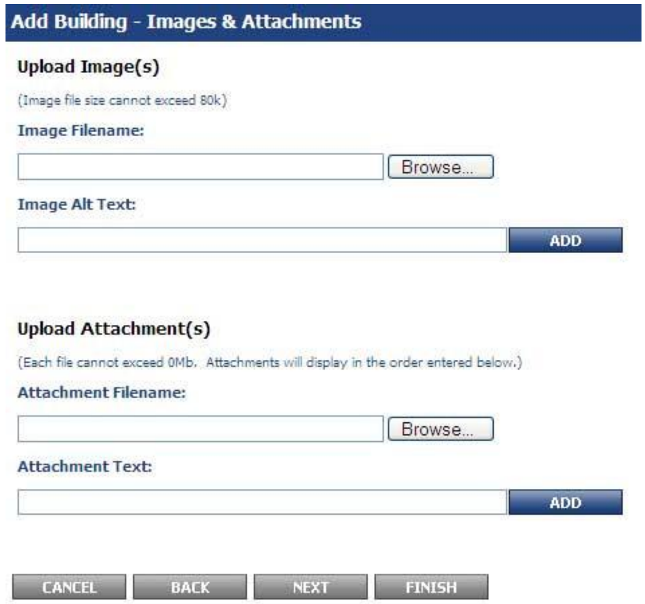
Other buttons on this function window

BUILDING PERMISSIONS

- Lock this Building and Associated Rooms: Checkbox that if selected will lock the building and enable facilities workflow for the building. The building will automatically show as locked if the location to which it has been added is already locked. If the building is already locked (based off the location to which it is being added being locked), then a list box will display showing the currently assigned owners(s).
- If no owners display, then the Super User is automatically assigned as the owner of the building until a specific building owner(s) is assigned. There is also a checkbox displayed that allows you to unlock the building. The building can always be modified to include specific ownership rules and assigned separate owners.

Add Building - Step 2 (Images & Attachments)

This function allows you to add images and attachments for the building that will always appear within the Calendar administration area if a user selects to view the details about the building. Use the following information to complete adding your images and attachments.



Upload Image(s): Ability to browse and upload an image that will display along with the other building details within the Calendar facilities management. The image must be either a .GIF or a .JPG and the maximum file size should not exceed 80K. The maximum pixel size of an uploaded image when displayed to users on any screen is 280 pixels wide. The aspect ratio of any image that you upload will remain constant.

Image Alt Text: This text field allows you to enter Image Alt Text if an Image has been uploaded. The image alt text is required if any image has been uploaded. (The maximum character limit is 75 characters)

You must click the ADD button in order to finalize adding your image to the building and then the image and alt text will display with the following capabilities:

- Click on the Image Name to open a preview of the image.
- Click the DELETE button beside the image in order to delete it from the event and add a new image.
- Change the Image Alt Text within the editable text field.
- The upload field is disabled once you have already uploaded an image file. It is not re-enabled unless you select the DELETE button.

Upload Attachments: Ability to browse and upload different attachment files that will display as links within the building details screen on the Facilities Calendar interface. The attachments can be any of the following document types: .doc, .xls, .wav, .wmf, .wma, .jpg, .gif, .pdf, .avi, .mp3, .ram, .qt, .swf.

Attachment Link Text: This is a text field where you can enter in text that will serve as the link that a user sees on the Building Details screen and that they can select in order to download/open the attachment file. The Attachment link text is required. (The character limit is 75 characters).

You must click the ADD button in order to finalize the addition of your attachment to the building and then the attachment filename and link text will display below the upload box and you will have the capability to:

- Click the DELETE button beside the attachment in order to delete it from the building and add a new attachment.
- Change the Attachment Link Text.
- Click on the Attachment Name to open a copy of the attachment.

Add Building - Step 3 (Availability Schedule)

This function allows you to determine the dates and times when a building is available for scheduling. By default, the building will follow the same availability rules as the main location under which it is classified. Any changes made to the building availability schedule automatically cascade down to the associated rooms.

The top of the screen includes information and links to view the current location availability schedule. Use the following information to complete adding your availability schedule.

ALWAYS APPLY LOCATION SCHEDULE TO BUILDING

By default, the building will follow the same availability rules as the main location under which it is classified. This selection will result in the remaining options to be un-editable.

USE LOCATION SCHEDULE AS START POINT ONLY

This selection will enable a drop-down selector with a list of schedules tied to the location. This will allow you to make adjustment where necessary. Any changes made to the building availability schedule will permanently replace the location schedule. Note: This is only a starting point to build the schedule.

CREATE NEW BUILDING SCHEDULE

This selection will allow a new schedule to be created for the selected building. If no options are chosen for the schedule, then the building is assumed to be opened all the time. **Note**: This option allows the building's schedule to be independent from the location's schedule.

STANDARD SCHEDULE

- Start Date: Select the date where your schedule should start to take effect.
- End Date: Select an end date for your new schedule.
- Select Day(s): Use this drop-down function to further refine your schedule (this field is optional for selection). If this option is selected, then the values available for selection include:
- Week Days – includes Monday, Tuesday, Wednesday, Thursday and Friday
- Weekends – includes Saturday and Sunday
- All Days - includes Sunday, Monday, Tuesday, Wednesday, Thursday, Friday and Saturday
- Select Days – if selected, this opens a pop-up window with all days of the week available for individual selection or group selection.

Each Day of the week is also listed separately in the drop-down menu for individual selection.

SELECT AVAILABILITY TIME SCHEDULE

Once the date range and days of the week are selected for your schedule, then the availability time schedule function window is automatically opened on the right hand side of the screen. Within this function window area you may select up to four different starting and ending times for availability scheduling within each selected day within your date range.

There are also options for selecting to make all buildings and rooms at the location "Open All Day" or "Closed/Not Available".

By default the time selection is set for "Open All Day".

OTHER OPTIONS FOR SELECTION INCLUDE:

- Closed/Not Available: If selected, the location is closed from any scheduling during that date range period on the days selected.
- Select Times for Scheduling Availability: By using the various starting and ending time drop-downs you can create various open and closed times during each day selected for your schedule. Times cannot be selected in overlapping patterns.

BUTTONS AVAILABLE WITHIN THE TIME SCHEDULE FUNCTION WINDOW

- SUBMIT Button: Click SUBMIT within the function window to submit your time selections for the current date range/days of the week you have entered for your schedule. If SUBMIT is selected, then the current entries are saved in your session and the schedule and times you have entered are displayed in a list on the main Add Location - Step 2 screen.
- CANCEL Button: Click CANCEL to exit out of the time selection function window and return to the main Add Location - Step 2 screen without submitting/saving your time selections entered in the function window.

LINKS/BUTTONS AVAILABLE WITHIN THE STANDARD SCHEDULE AREA

- Edit Link: Click Edit under the "Action" column of the Standard Schedule area in order to edit the availability times for a certain schedule.
- Restrict Link: Click Restrict under the "Action" column of the Standard Schedule area in order to open a function window on the right of the screen where you can select Users and User Groups that are the only Users/Groups who may see the Building and associated Rooms for scheduling during that specific timeframe.
- Remove Link: Click Remove under the "Action" column of the Standard Schedule area in order to remove a previously entered availability time schedule.
- SAVE Button: Click SAVE at any time in order to save the current schedule of availability. If SAVE is selected, then the current entries are saved to the database and a new drop-down field is enabled on the screen entitled "Current Schedule".
- RESET Button: Click RESET to reset all current screen values back to their defaults. Any data that was previously saved is still maintained in the database.

SPECIAL EXCEPTIONS SCHEDULE

This portion of the screen should only be completed if you want to denote that there are certain dates where the standard schedule should not apply and there will be an alternate schedule of availability instead.

First, select the number of grids (months) and actual months from which you would like to select. The options available for enabling the appropriate grids for selection include Year, Month and # of Months drop-down selection boxes.

Select specific dates from the grids by clicking on those dates or select from three date "grouping" options to set availability by standard groupings of "Select All", "Select Weekdays" or "Select Weekends".

- Select All: If this option is chosen, then all dates in the displayed grids will show as “selected” and the schedule that is set within the function window will be applied to every date selected.
- Select Weekdays: If this option is chosen, then all weekdays on the displayed grids will show as “selected” and the schedule that is set on the right hand side will be applied to every weekday. Weekdays include Monday, Tuesday, Wednesday, Thursday and Friday.
- Select Weekends: If this option is chosen, then all weekend days (Saturday and Sunday) on the displayed grids will show as “selected” and the schedule that is set in the function window will be applied to every weekend date.

SELECT AVAILABILITY TIME SCHEDULE

Within this function window area you may select up to four different starting and ending times for availability scheduling for the dates you have selected as having special exceptions. There are also options for selecting to make all buildings and rooms at the location "Open All Day" or "Closed/Not Available".

By default the time selection is set for “Open All Day”.

OTHER OPTIONS FOR SELECTION INCLUDE:

- Closed/Not Available: If selected, the location is closed on the dates selected under the Special Exceptions area.
- Select Times for Scheduling Availability: By using the various starting and ending time drop-downs you can create various open and closed times during each day selected for your special exceptions schedule. Times cannot be selected in overlapping patterns.
- Buttons Available within the Time Schedule Function Window
- SUBMIT Button: Click SUBMIT within the function window to submit your time selections for the current dates selected. If SUBMIT is selected, then the current entries are saved in your session and you are returned to the main Add Location - Step 2 screen.

NAVIGATION OPTIONS WITHIN THIS AREA

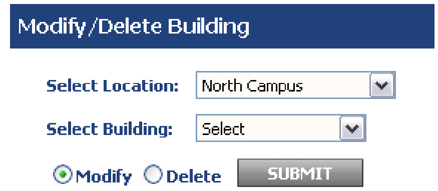
You will still need to click the FINISH button at the bottom of the screen to save your building settings. You will be navigated back to the main Add Building(s) screen with a CHANGE button located now beside the field for the building that you chose to customize. Click the CHANGE button to go back into the Add Building wizard and make edits before finalizing your new building or continue down the list of new buildings until you have customized the information for any buildings that you choose to customize. You will still need to click the FINISH button on the main Add Building(s) screen in order to fully save/finalize your building information additions.

You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu and none of your information will be saved.

Modify/Delete Buildings - Select Building(s)

To navigate to the Modify/Delete Building functionality, click on the FACILITIES tab and select BUILDING(S): MODIFY/DELETE.

This function is used to select a Building that you would like to modify or delete from within the Active Data Calendar program.



Use the following instructions to begin the modification/deletion process:

Select a Location Name: Drop-down displays a list of Location Names in alphabetical, ascending order starting with "A" at the top of the list. Select a Location first to then see a drop-down list of the associated Building Names that can be selected for modification deletion.

Select a Building Name: Drop-down displays a list of Building Names, in alphabetical, ascending order starting with "A" at the top of the list. The Building Names displayed are only those related to the Location that was selected. Select the name of the Building that you would like to modify/cancel/delete from the drop-down and then select the action you would like to take from the two radio button options:

- **Modify**: Allows you to change Building information, including Building Name and address.
- **Delete**: Removes the Building completely from the Calendar database and it will no longer be available for any purposes in the Calendar application.

Click the SUBMIT button to finalize your action and proceed to either the first step in the modification process or to the Delete Building confirmation screen.

Modify Building

This function allows you to modify a Building name.

If a Building Name is changed, it will change the Building Name within the administration area and also throughout all views displayed on the front-end Calendar(s).

- **Building Name**: This field allows for up to 50 characters to be entered for your Building Name.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your modification. You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu. The BACK and NEXT buttons are disabled on this screen.

Use the following information to complete modifying your building address and ownership.

Building Address & Permissions

- Address 1
- Address 2
- City
- State (or State/Province/Prefecture if International Fields are enabled)
- ZIP/Postal Code
- Country (if International Fields are enabled) or County if Domestic
- Phone
- Internet Address
- Internal Notes: This open text field allows you to enter notes about the location which will be viewable for users adding and managing events but will not appear on the front-end view screens available to visitors.

From this screen you can elect to choose a checkbox to "Use Location Address". Choosing this checkbox will automatically populate all of the address fields with the location address information and if any fields are modified at the location level, the updates will be automatically applied to any building that has selected to use the default location address as the building address information.

Lock this Building and Associated Rooms: Checkbox that if selected will lock the building and enable facilities workflow for the building. The building will automatically show as locked if the location to which it has been added is already locked and the user has selected to automatically assign the same ownership rules to the buildings at the location.

NAVIGATION OPTIONS WITHIN THIS AREA

You need to click the FINISH button at the bottom of the screen to save your building settings. You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu and none of your information will be saved. The BACK button is disabled on this screen and the NEXT button will navigate you to the next step in the Modify Building wizard. All screen field values will be validated prior to proceeding to the next screen.

MODIFY BUILDING - IMAGES AND ATTACHMENTS

This function allows you to add or remove images and attachments for the building that will always appear within the Calendar administration area if a user selects to view the details about the building. Use the following information to complete modifying your images and attachments.

Upload Image(s): Ability to browse and upload an image that will display along with the other building details within the Calendar facilities management. The image must be either a .GIF or a .JPG and the maximum file size should not exceed 80K. The maximum pixel size of an uploaded image when displayed to users on any screen is 280 pixels wide. The aspect ratio of any image that you upload will remain constant.

Image Alt Text: This text field allows you to enter Image Alt Text if an Image has been uploaded. The image alt text is required if any image has been uploaded. (The maximum character limit is 75 characters)

You must click the ADD button in order to finalize adding your image to the building and then the image and alt text will display with the following capabilities:

- Click on the Image Name to open a preview of the image.
- Click the DELETE button beside the image in order to delete it from the event and add a new image.
- Change the Image Alt Text within the editable text field.
- The upload field is disabled once you have already uploaded an image file. It is not re-enabled unless you select the DELETE button.

Upload Attachments: Ability to browse and upload different attachment files that will display as links within the building details screen on the Facilities Calendar interface. The attachments can be any of the following document types: .doc, .xls, .wav, .wmf, .wma, .jpg, .gif, .pdf, .avi, .mp3, .ram, .qt, .swf.

Attachment Link Text: This is a text field where you can enter in text that will serve as the link that a user sees on the Building Details screen and that they can select in order to download/open the attachment file. The Attachment link text is required. (The character limit is 75 characters).

You must click the ADD button in order to finalize the addition of your attachment to the building and then the attachment filename and link text will display below the upload box and you will have the capability to:

- Click the DELETE button beside the attachment in order to delete it from the building and add a new attachment.

- Change the Attachment Link Text.
- Click on the Attachment Name to open a copy of the attachment.

MODIFY BUILDING - AVAILABILITY SCHEDULE

Rules for Modifying Building Availability

A Building's Availability can always be modified to be greater than its previous availability. It cannot be modified to be less than any of the room schedule availability or the following actions will occur:

- List of affected events (Pending or Active) is displayed along with the option to download the list.
- You may cancel out of your modification process or continue with your modification.
- You may enter notes to include in an email that will be sent to all affected event owners on final modification of the room.
- An email is sent to all affected event owners on final modification and the event is set back to "Review".
- Affected Event Owners may go in and modify their event facility request if they choose to or the event can be reprocessed with the new facility information.

Use the following information to complete modifying your availability schedule.

TIP: Please note that the rules for "cascading" the building availability rules are different during an "Add Building" and "Modify Building" process. During the Add Building process any availability rules applied at the location level automatically cascade to all rooms beneath. The user can select to "override" the building availability schedule and create a unique/custom room schedule but by default the building schedule is applied.

However, during the Modify Building process, if any changes are made to the availability schedule, they are NOT cascaded down automatically to rooms beneath that building. The new schedule is only applied to new rooms. Existing rooms are not affected by the building schedule change.

Please see the matrix later in this document for a full break-down of the rules for modifying your facilities structure.

SELECTING TO CREATE AVAILABILITY SCHEDULES/RULES

Standard Schedule

- Start Date: Select the date where your schedule should start to take effect.
- End Date: Select an end date for your new schedule.
- Select Day(s): Use this drop-down function to further refine your schedule (this field is optional for selection). If this option is selected, then the values available for selection include:
- Week Days – includes Monday, Tuesday, Wednesday, Thursday and Friday
- Weekends – includes Saturday and Sunday
- All Days - includes Sunday, Monday, Tuesday, Wednesday, Thursday, Friday and Saturday
- Select Days – if selected, this opens a pop-up window with all days of the week available for individual selection or group selection.

Each Day of the week is also listed separately in the drop-down menu for individual selection.

Select Availability Time Schedule

Once the date range and days of the week are selected for your schedule, then the availability time schedule function window is automatically opened on the right hand side of the screen. Within this function window area you may select up to four different starting and ending times for availability scheduling within each selected day within your date range.

There are also options for selecting to make all buildings and rooms at the location "Open All Day" or "Closed/Not Available".

By default the time selection is set for “Open All Day”.

Other options for selection include:

- Closed/Not Available: If selected, the location is closed from any scheduling during that date range period on the days selected.
- Select Times for Scheduling Availability: By using the various starting and ending time drop-downs you can create various open and closed times during each day selected for your schedule. Times cannot be selected in overlapping patterns.

Buttons Available within the Time Schedule Function Window

- SUBMIT Button: Click SUBMIT within the function window to submit your time selections for the current date range/days of the week you have entered for your schedule. If SUBMIT is selected, then the current entries are saved in your session and the schedule and times you have entered are displayed in a list on the main Add Location - Step 2 screen.
- CANCEL Button: Click CANCEL to exit out of the time selection function window and return to the main Add Location - Step 2 screen without submitting/saving your time selections entered in the function window.

Links/Buttons Available within the Standard Schedule Area

- Edit Link: Click Edit under the "Action" column of the Standard Schedule area in order to edit the availability times for a certain schedule.
- Restrict Link: Click Restrict under the "Action" column of the Standard Schedule area in order to open a function window on the right of the screen where you can select Users and User Groups that are the only Users/Groups who may see the Building and associated Rooms for scheduling during that specific timeframe.
- Remove Link: Click Remove under the "Action" column of the Standard Schedule area in order to remove a previously entered availability time schedule.
- SAVE Button: Click SAVE at any time in order to save the current schedule of availability. If SAVE is selected, then the current entries are saved to the database and a new drop-down field is enabled on the screen entitled "Current Schedule".
- RESET Button: Click RESET to reset all current screen values back to their defaults. Any data that was previously saved is still maintained in the database.

Special Exceptions Schedule

This portion of the screen should only be completed if you want to denote that there are certain dates where the standard schedule should not apply and there will be an alternate schedule of availability instead.

First, select the number of grids (months) and actual months from which you would like to select. The options available for enabling the appropriate grids for selection include Year, Month and # of Months drop-down selection boxes.

Select specific dates from the grids by clicking on those dates or select from three date “grouping” options to set availability by standard groupings of "Select All", "Select Weekdays" or "Select Weekends".

- Select All: If this option is chosen, then all dates in the displayed grids will show as “selected” and the schedule that is set within the function window will be applied to every date selected.
- Select Weekdays: If this option is chosen, then all weekdays on the displayed grids will show as “selected” and the schedule that is set on the right hand side will be applied to every weekday. Weekdays include Monday, Tuesday, Wednesday, Thursday and Friday.
- Select Weekends: If this option is chosen, then all weekend days (Saturday and Sunday) on the displayed grids will show as “selected” and the schedule that is set in the function window will be applied to every weekend date.

SELECT AVAILABILITY TIME SCHEDULE

Within this function window area you may select up to four different starting and ending times for availability scheduling for the dates you have selected as having special exceptions. There are also options for selecting to make all buildings and rooms at the location "Open All Day" or "Closed/Not Available".

By default the time selection is set for “Open All Day”.

Other options for selection include:

- Closed/Not Available: If selected, the building is closed on the dates selected under the Special Exceptions area.
- Select Times for Scheduling Availability: By using the various starting and ending time drop-downs you can create various open and closed times during each day selected for your special exceptions schedule. Times cannot be selected in overlapping patterns.
- Buttons Available within the Time Schedule Function Window
- SUBMIT Button: Click SUBMIT within the function window to submit your time selections for the current dates selected. If SUBMIT is selected, then the current entries are saved in your session and you are returned to the main Add Location - Step 2 screen.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your modification. You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu and none of your information will be saved.

Delete Building

This function includes options for confirming or canceling out of your DELETE action. Use the following instructions to complete the delete Building process.

- **Building Name** - The Building name is listed here.
- **Yes/No Radio Selection**: Click the radio button associated with the action that you would like to take. Select "Yes" if you do want to finalize the delete process. Select "No" if you want to end this action.

***NOTE**: You cannot delete a Building that has active events or events that currently require processing.

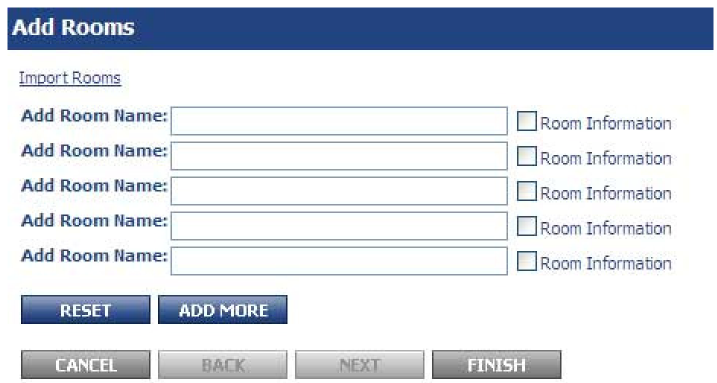
You will still need to click the **FINISH** button at the bottom of the screen to completely finish/finalize your selection. You can also use the **CANCEL** button at the bottom of the screen to cancel out of this delete action but you will be navigated back to the Main Menu.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your delete action. You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu. The BACK and NEXT buttons are disabled on this screen.

Add Room(s)

To navigate to the Add Rooms functionality, click on the FACILITIES tab and select ROOM(S): ADD.

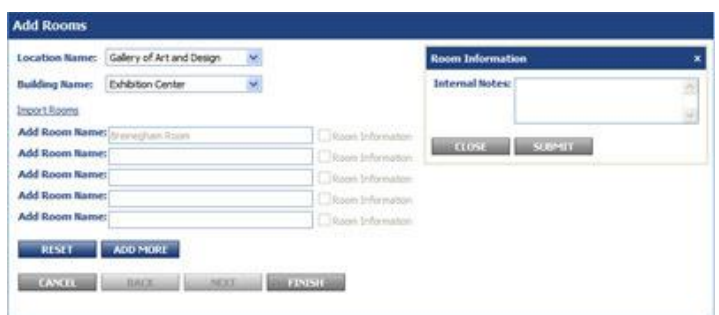


This function allows you to add Room(s) to available Building(s). Rooms are used for classifying how events are displayed to visitors on the front end views of your Calendar. Rooms are also used for helping to identify possible event conflicts in scheduling between events within the Calendar system.

Use the following information to complete adding Room(s).

Before adding Room(s), you must first select the Location/Building to which you will be adding the new Room(s). Once a Location is selected, then a second drop-down will be displayed with all Building(s) available for selection within that Location. A Building must be selected and then you will see various options for adding your Room(s).

- **Select Location:** Select the Location where the Building exists for which you plan to add your Room list.
- **Select Building:** Select the Building where you plan to add your Room list.



When the screen is refreshed you will see:

- **Import Rooms**: Click this link to refresh the screen and there will be a field where you can **BROWSE**, find your file and upload it into the field. Once uploaded, click **SUBMIT** and the list will be automatically imported and you will be returned to the main "Add Rooms" screen with the Rooms included in your file listed in the available Room Name fields.
- **Add Room Names**: There will be five (5) Room Name fields displayed by default. You can click on the ADD MORE button in order to automatically add an additional five (5) Room Name fields available for entry of your Rooms. Continue to click the ADD MORE button to append the available fields for entering your Rooms.

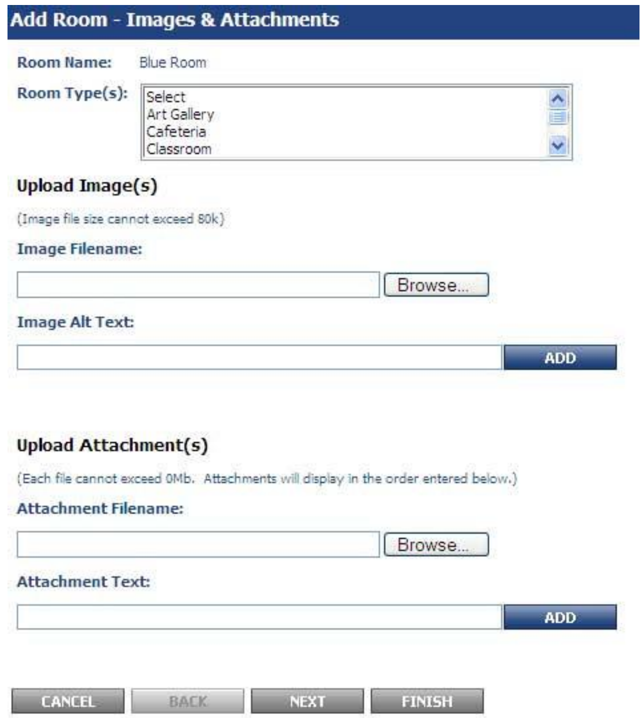
The only required field is Room Name

***NOTE**: Your list of rooms that are being added can be a combination of rooms brought into the system from an import file and also manually entered. You can also import multiple room files into Calendar to complete your final room list for a building.

The only required field is Room Name

ADDITIONAL ROOM DETAILS

- Room Information: To add more information about each room, including uploading images and attachments and setting the room availability schedule, click the checkbox to launch the Add Room Wizard.



NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your room additions. You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu and none of your information will be saved. The BACK and NEXT buttons are disabled on this screen.

ADD ROOM - STEP 1: IMAGES & ATTACHMENTS

This function allows you to select one or multiple room types for classifying your room, as well as add images and attachments for the room that will always appear within the Calendar administration area if a user selects to view the details about the room.

Use the following information to complete this screen.

Select Room Type(s): Select one or multiple Room Type classifiers from the list box by using your CTRL key.

- **Room Types** help users searching for available rooms to see which rooms are specified as being a certain type that may related to their type of event.
- **Upload Image(s)**: Ability to browse and upload an image that will display along with the other room details within the Calendar facilities management. The image must be either a .GIF or a .JPG and the maximum file size should not exceed 80K. The maximum pixel size of an uploaded image when displayed to users on any screen is 280 pixels wide. The aspect ratio of any image that you upload will remain constant.
- **Image Alt Text**: This text field allows you to enter Image Alt Text if an Image has been uploaded. The image alt text is required if any image has been uploaded. (The maximum character limit is 75 characters)

You must click the ADD button in order to finalize adding your image to the room and then the image and alt text will display with the following capabilities:

- Click on the Image Name to open a preview of the image.
- Click the DELETE button beside the image in order to delete it from the event and add a new image.
- Change the Image Alt Text within the editable text field.

The upload field is disabled once you have already uploaded an image file. It is not re-enabled unless you select the DELETE button.

Upload Attachments: Ability to browse and upload different attachment files to display as links on the room details page, on the Facilities Calendar interface. The attachments can be any of the following document types: .doc, .xls, .wav, .wmf, .wma, .jpg, .gif, .pdf, .avi, .mp3, .ram, .qt, .swf.

Attachment Link Text: This is a text field where you can enter in text that will serve as the link that a user sees on the Room Details screen and that they can select in order to download/open the attachment file. The Attachment link text is required. (The character limit is 75 characters).

You must click the ADD button in order to finalize the addition of your attachment to the room and then the attachment filename and link text will display below the upload box and you will have the capability to:

- Click the DELETE button beside the attachment in order to delete it from the room and add a new attachment.
- Change the Attachment Link Text.
- Click on the Attachment Name to open a copy of the attachment.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to save your room settings. You will be navigated back to the main Add Room(s) screen with a CHANGE button located now beside the field for the room that you chose to customize. Click the CHANGE button to go back into the Add Room wizard and make edits before finalizing your new room or continue down the list of new rooms until you have customized the information for any rooms that you choose to customize. You will still need to click the FINISH button on the main Add Room(s) screen in order to fully save/finalize your room information additions.

You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu and none of your information will be saved.

ADD ROOM - STEP 2: ROOM SETUP & FEATURES

This area allows you to add options for how a room can be setup (tables, chairs, layout) and how room setup affects capacity of the room, along with the time required for the room setup and tear down based off the setup selected. You may also select what features are automatically included in the room and are available for use by event owners if the room is booked.

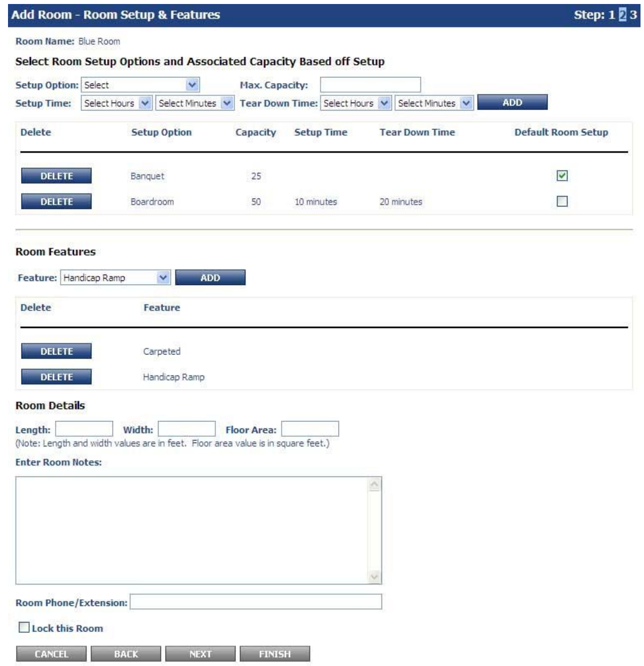
There is no limit to the room setup options that can be applied to any one room, except based off the number of room setup options that exist within the application in general. The same room setup option cannot be added twice to the same room.

ROOM SETUP OPTION(S)

Use the following steps to complete selecting your room setup options and features.

- **Setup Option**: Drop-down with available room setup options. If a setup option is selected, then a maximum capacity number must be entered.
- **Maximum Capacity**: This is a numeric value (max characters 10) that is directly applied to the room if the setup option is selected. Registration and other functions in the software are directly tied to this value. You may not have more than the maximum capacity number of registrants for any event that is occurring in the room if this setup option is selected.

- **Setup Time Required**: There are two drop-down fields; hours and minutes. The hour drop-down allows you to select hourly increments from 1 – 24. The minutes drop-down field allows you to select 5 minute increments starting at 5 and going up to 60. If you select nothing from the setup area, then the system will assign a "0" minute setup time requirement.
- **Tear Down Time Required**: There are two drop-down fields; hours and minutes. The hour drop-down field allows you to select hourly increments from 1 – 24. The minutes drop-down field allows you to select 5 minute increments starting at 5 and going up to 60. If you select nothing from the tear down area, then the system will assign a "0" minute tear down time requirement.



Rules for Deleting Room Setup Options

If Room Capacity, Setup or Tear down is modified then a list of affected Events will be displayed along with an option to download the list. You can choose to cancel out of your modification process or continue with modification. You will also have the option to enter notes to include in an email that will be sent to the event owners. When the room modification is completed, an email will be sent to all affected event owners notifying them that their respective events at the modified room have been set back to a status of "Review". Users can go in and modify their event facility request if they choose, or the event may be cancelled or deleted.

NOTE: The only time that the workflow above is NOT initiated, is if the capacity is modified to be greater than the original – then there is no email or workflow initiated.

If the ADD button is selected, then the new setup option is added to a list on the screen displaying all available setup options and associated values.

The table includes the following columns, actions and options:

- Delete: Removes the setup option from the room as an available option for selection by event owners.
- Setup Option
- Capacity
- Setup Time
- Tear Down Time
- Default Room Setup: If this checkbox is selected for any setup option (can only be selected for one in the list), then the setup option becomes the default displayed for the room whenever the room details/options are presented to event owners.

Room Features

There are no limits to the number of features that can be assigned to a room. To add a feature to a room, select from the pre-determined drop-down values and click the ADD button. If the room includes a feature that is not available from the drop-down list and you have the privilege to add facilities setup options, then you will also have a link entitled “ADD NEW”. If selected, this link will open a pop-up window that allows you to enter a new feature.

Once the ADD button is selected, the feature is added to a table/list on the screen of all room features. The list includes a DELETE button that the user can select to remove a feature from the list before continuing forward.

RULES FOR DELETING ROOM FEATURES

Room features can be added or removed from any room. Adding Room Features does not affect events currently scheduled at the room. If Room Features are removed from the room then a list of affected Events will be displayed along with an option to download the list. You can choose to cancel out of your modification process or continue with modification. You will also have the option to enter notes to include in an email that will be sent to the event owners. When the room modification is completed, an email will be sent to all affected event owners but there is no event status change.

It is up to the event owners if they want to go in and modify their event facility request.

ROOM DETAILS

- **Room Size**: Includes fields for entering length, width and floor area. (Note: Length and width values are in feet. Floor area value is in square feet.)
- **Enter Room Notes**: This open text field allows for up to 1,000 characters to be entered.
- **Room Phone/Extension**: Alpha-numeric text field that allows for up to 50 characters.

ROOM PERMISSIONS

To the right of each Room Name field there is a checkbox entitled "Lock Room".

Lock this Room: Checkbox that if selected will lock the room and enable facilities workflow for the room. A function window will open on the right hand side of the screen where the room owners can be selected. The room will automatically show as locked if the building to which it has been added is already locked. The room can always be modified to include specific ownership rules and separate assigned owners.

ADD ROOM - STEP 3: AVAILABILITY SCHEDULE

This function allows you to determine the dates and times when a room is available for scheduling. By default, the building will follow the same availability rules as the main building under which it is classified.

The top of the screen includes information and links to view the current location and building availability schedules. Use the following information to complete adding your availability schedule.

ALWAYS APPLY BUILDING SCHEDULE TO ROOM

By default, the room will follow the same availability rules as the building under which it is classified. This selection will result in the remaining options to be un-editable.

USE BUILDING SCHEDULE AS START POINT ONLY

This selection will enable a drop-down selector with a list of schedules tied to the building. This will allow you to make adjustment where necessary. Any changes made to the room availability schedule will permanently replace the building schedule. Note: This is only a starting point to room the schedule.

Create New Room Schedule

This selection will allow a new schedule to be created for the selected room. If no options are chosen for the schedule, then the room is assumed to be opened all the time. Note: This option allows the room's schedule to be independent from the location/building's schedule.

Standard Schedule

- Start Date: Select the date where your schedule should start to take effect.
- End Date: Select an end date for your new schedule.
- Select Day(s): Use this drop-down function to further refine your schedule (this field is optional for selection). If this option is selected, then the values available for selection include:
- Week Days – includes Monday, Tuesday, Wednesday, Thursday and Friday
- Weekends – includes Saturday and Sunday
- All Days - includes Sunday, Monday, Tuesday, Wednesday, Thursday, Friday and Saturday
- Select Days – if selected, this opens a pop-up window with all days of the week available for individual selection or group selection.

Each Day of the week is also listed separately in the drop-down menu for individual selection.

Select Availability Time Schedule

Once the date range and days of the week are selected for your schedule, then the availability time schedule function window is automatically opened on the right hand side of the screen. Within this function window area you may select up to four different starting and ending times for availability scheduling within each selected day within your date range.

There are also options for selecting to make all buildings and rooms at the location "Open All Day" or "Closed/Not Available".

By default the time selection is set for "Open All Day".

Other options for selection include:

- Closed/Not Available: If selected, the location is closed from any scheduling during that date range period on the days selected.
- Select Times for Scheduling Availability: By using the various starting and ending time drop-downs you can create various open and closed times during each day selected for your schedule. Times cannot be selected in overlapping patterns.

Buttons Available within the Time Schedule Function Window

- SUBMIT Button: Click SUBMIT within the function window to submit your time selections for the current date range/days of the week you have entered for your schedule. If SUBMIT is selected, then the current entries are saved in your session and the schedule and times you have entered are displayed in a list on the main Add Location - Step 2 screen.
- CANCEL Button: Click CANCEL to exit out of the time selection function window and return to the main Add Location - Step 2 screen without submitting/saving your time selections entered in the function window.

Links/Buttons Available within the Standard Schedule Area

- Edit Link: Click Edit under the "Action" column of the Standard Schedule area in order to edit the availability times for a certain schedule.

- Restrict Link: Click Restrict under the "Action" column of the Standard Schedule area in order to open a function window on the right of the screen where you can select Users and User Groups that are the only Users/Groups who may see the Room for scheduling during that specific timeframe.
- Remove Link: Click Remove under the "Action" column of the Standard Schedule area in order to remove a previously entered availability time schedule.
- SAVE Button: Click SAVE at any time in order to save the current schedule of availability. If SAVE is selected, then the current entries are saved to the database and a new drop-down field is enabled on the screen entitled "Current Schedule".
- RESET Button: Click RESET to reset all current screen values back to their defaults. Any data that was previously saved is still maintained in the database.

SPECIAL EXCEPTIONS SCHEDULE

This portion of the screen should only be completed if you want to denote that there are certain dates where the standard schedule should not apply and there will be an alternate schedule of availability instead.

First, select the number of grids (months) and actual months from which you would like to select. The options available for enabling the appropriate grids for selection include Year, Month and # of Months drop-down selection boxes.

Select specific dates from the grids by clicking on those dates or select from three date “grouping” options to set availability by standard groupings of "Select All", "Select Weekdays" or "Select Weekends".

- Select All: If this option is chosen, then all dates in the displayed grids will show as “selected” and the schedule that is set within the function window will be applied to every date selected.
- Select Weekdays: If this option is chosen, then all weekdays on the displayed grids will show as “selected” and the schedule that is set on the right hand side will be applied to every weekday. Weekdays include Monday, Tuesday, Wednesday, Thursday and Friday.
- Select Weekends: If this option is chosen, then all weekend days (Saturday and Sunday) on the displayed grids will show as “selected” and the schedule that is set in the function window will be applied to every weekend date.

SELECT AVAILABILITY TIME SCHEDULE

Within this function window area you may select up to four different starting and ending times for availability scheduling for the dates you have selected as having special exceptions. There are also options for selecting to make all buildings and rooms at the location "Open All Day" or "Closed/Not Available".

By default the time selection is set for “Open All Day”.

Other options for selection include:

- Closed/Not Available: If selected, the location is closed on the dates selected under the Special Exceptions area.
- Select Times for Scheduling Availability: By using the various starting and ending time drop-downs you can create various open and closed times during each day selected for your special exceptions schedule. Times cannot be selected in overlapping patterns.
- Buttons Available within the Time Schedule Function Window

- SUBMIT Button: Click SUBMIT within the function window to submit your time selections for the current dates selected. If SUBMIT is selected, then the current entries are saved in your session and you are returned to the main Add Location - Step 2 screen.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to save your room settings. You will be navigated back to the main Add Room(s) screen with a CHANGE button located now beside the field for the room that you chose to customize. Click the CHANGE button to go back into the Add Room wizard and make edits before finalizing your new room or continue down the list of new rooms until you have customized the information for any rooms that you choose to customize. You will still need to click the FINISH button on the main Add Room(s) screen in order to fully save/finalize your room information additions.

You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu and none of your information will be saved.

Modify/Delete Room - Select Room

To navigate to the Modify/Delete Rooms functionality, click on the FACILITIES tab and select ROOM(S): MODIFY/DELETE.

This function is used to Modify/Delete a current Room for your installation of Active Data Calendar. You can either modify a Room Name or completely delete the Room from the system.

Use the following instructions to begin the modification/deletion process:

Select a Room Name: Use the drop-down to select the name of the room that you would like to modify or delete. The room names are listed in alphabetical, ascending order.

Then select the action you would like to take from the two radio button options:

Modify: Allows you to change the room name.

Delete: Navigates you to the Delete Room confirmation area where once you confirm your action will remove the Room completely from the Calendar database and it will no longer be available for any purposes in the Calendar application.

Click the **SUBMIT** button to finalize your action and proceed to either the first step in the modification process or to the Delete Room confirmation screen. The first screen in the Modify Room process will allow you to change the room name. The maximum characters for room name are 75 alpha-numeric characters.

Modify Room – Step 1: Images & Attachments

This function allows you to select one or multiple room types for classifying your room, as well as add images and attachments for the room that will always appear within the Calendar administration area if a user selects to view the details about the room.

If a Room Name is changed, it will change the Room Name within the administration area and also throughout all views displayed on the front-end Calendar(s).

- **Room Name**: This field allows for up to 50 characters to be entered for your Room Name.

Use the following information to complete this screen.

Select Room Type(s): Select one or multiple Room Type classifiers from the list box by using your CTRL key. Room Types help users searching for available rooms to see which rooms are specified as being a certain type that may related to their type of event.

Upload Image(s): Ability to browse and upload an image that will display along with the other room details within the Calendar facilities management. The image must be either a .GIF or a .JPG and the maximum file size should not exceed 80K. The maximum pixel size of an uploaded image when displayed to users on any screen is 280 pixels wide. The aspect ratio of any image that you upload will remain constant.

Image Alt Text: This text field allows you to enter Image Alt Text if an Image has been uploaded. The image alt text is required if any image has been uploaded. (The maximum character limit is 75 characters)

You must click the **ADD** button in order to finalize adding your image to the room and then the image and alt text will display with the following capabilities:

- Click on the Image Name to open a preview of the image.
- Click the DELETE button beside the image in order to delete it from the event and add a new image.
- Change the Image Alt Text within the editable text field.
- The upload field is disabled once you have already uploaded an image file. It is not re-enabled unless you select the DELETE button.

Upload Attachments: Ability to browse and upload different attachment files that will display as links within the room details screen on the Facilities Calendar interface. The attachments can be any of the following document types: .doc, .xls, .wav, .wmf, .wma, .jpg, .gif, .pdf, .avi, .mp3, .ram, .qt, .swf.

Attachment Link Text: This is a text field where you can enter in text that will serve as the link that a user sees on the Room Details screen and that they can select in order to download/open the attachment file. The Attachment link text is required. (The character limit is 75 characters).

You must click the ADD button in order to finalize the addition of your attachment to the room and then the attachment filename and link text will display below the upload box and you will have the capability to:

- Click the DELETE button beside the attachment in order to delete it from the room and add a new attachment.
- Change the Attachment Link Text.
- Click on the Attachment Name to open a copy of the attachment.

Modify Room - Step 2: Room Setup & Features

This area allows you to modify options for how a room can be setup (tables, chairs, layout) and how room setup affects capacity of the room, along with the time required for the room setup and tear down based off the setup selected. You may also select what features are automatically included in the room and are available for use by event owners if the room is booked.

There is no limit to the room setup options that can be applied to any one room, except based off the number of room setup options that exist within the application in general. The same room setup option cannot be added twice to the same room.

Room Setup Option(s)

Use the following steps to complete selecting/modifying your room setup options and features.

- Setup Option: Drop-down with available room setup options. If a setup option is selected, then a maximum capacity number must be entered.
- Maximum Capacity: This is a numeric value (max characters 10) that is directly applied to the room if the setup option is selected. Registration and other functions in the software are directly tied to this value. You may not have more than the maximum capacity number of registrants for any event that is occurring in the room if this setup option is selected.
- Setup Time Required: There are two drop-down fields; hours and minutes. The hour drop-down allows you to select hourly increments from 1 – 24. The minutes drop-down field allows you to select 5 minute increments starting at 5 and going up to 60. If you select nothing from the setup area, then the system will assign a "0" minute setup time requirement.
- Tear Down Time Required: There are two drop-down fields; hours and minutes. The hour drop-down field allows you to select hourly increments from 1 – 24. The minutes drop-down field allows you to select 5 minute increments starting at 5 and going up to 60. If you select nothing from the tear down area, then the system will assign a "0" minute tear down time requirement.

Rules for Deleting Room Setup Options

If Room Capacity, Setup or Tear down is modified then a list of affected Events will be displayed along with an option to download the list. You can choose to cancel out of your modification process or continue with modification. You will also have the option to enter notes to include in an email that will be sent to the event owners. When the room modification is completed, an email will be sent to all affected event owners notifying them that their respective events at the modified room have been set back to a status of "Review". Users can go in and modify their event facility request if they choose, or the event may be cancelled or deleted.

NOTE: The only time that the workflow above is NOT initiated, is if the capacity is modified to be greater than the original – then there is no email or workflow initiated.

If the ADD button is selected, then the new setup option is added to a list on the screen displaying all available setup options and associated values.

The table includes the following columns, actions and options:

- Delete: Removes the setup option from the room as an available option for selection by event owners.
- Setup Option
- Capacity
- Setup Time
- Tear Down Time
- Default Room Setup: If this checkbox is selected for any setup option (can only be selected for one in the list), then the setup option becomes the default displayed for the room whenever the room details/options are presented to event owners.

Room Features

There are no limits to the number of features that can be assigned to a room. To add a feature to a room, select from the pre-determined drop-down values and click the ADD button. If the room includes a feature that is not available from the drop-down list and you have the privilege to add facilities setup options, then you will also have a link entitled “ADD NEW”. If selected, this link will open a pop-up window that allows you to enter a new feature.

Once the ADD button is selected, the feature is added to a table/list on the screen of all room features. The list includes a DELETE button that the user can select to remove a feature from the list before continuing forward.

RULES FOR DELETING ROOM FEATURES

Room features can be added or removed from any room. Adding Room Features does not affect events currently scheduled at the room. If Room Features are removed from the room then a list of affected Events will be displayed along with an option to download the list. You can choose to cancel out of your modification process or continue with modification. You will also have the option to enter notes to include in an email that will be sent to the event owners. When the room modification is completed, an email will be sent to all affected event owners but there is no event status change.

It is up to the event owners if they want to go in and modify their event facility request.

ROOM DETAILS

- Room Size: Includes fields for entering length, width and floor area. (Note: Length and width values are in feet. Floor area value is in square feet.)
- Enter Room Notes: This open text field allows for up to 1,000 characters to be entered.
- Room Phone/Extension: Alpha-numeric text field that allows for up to 50 characters.

ROOM PERMISSIONS

To the right of each Room Name field there is a checkbox entitled "Lock Room".

LOCK THIS ROOM: Checkbox that if selected will lock the room and enable facilities workflow for the room. A function window will open on the right hand side of the screen where the room owners can be selected. The room will automatically show as locked if the building to which it has been added is already locked. The room can always be modified to include specific ownership rules and separate assigned owners.

RULES FOR MODIFYING ROOM OWNERSHIP

The Room was locked and had owners and there are pending events for the room. If you select to unlock the room, then all pending events for the room automatically follow through to the next step in your configured workflow process.

The Room was not locked and at least one event was submitted with the selected unlocked location. If the event has passed the step in the workflow chain where the facility must be approved (for those that are locked), then the event is not processed for the facility since it has already been flagged as approved. It is only for new events added or events that are modified for that room that the approval/processing is required.

The Room was locked and has owners assigned and the location request is pending for at least one event. The location owner is removed and a new owner is assigned. An email will be sent to the new facility owner that there are pending events for approval. The events also show on the new location owners main locations pending menu for approval. The previous owner (who was removed from the locked location) does not see the event facility requests any longer for processing.

Modify Room - Step 3: Availability Schedule

This function allows you to determine the dates and times when a room is available for scheduling. By default, the room follows the same availability rules as the building under which it is classified. Any changes made to the building availability schedule automatically cascade down to the associated rooms.

The top of the screen includes information and links to view the current Location and Building availability schedules.

Rules for Modifying Room Availability

The room schedule must always fall within the availability of the building where it is located. If the room availability is modified (to be more restrictive) and there are affected events then the following actions will occur:

- List of affected events (Pending or Active) is displayed along with the option to download the list.
- You may cancel out of your modification process or continue with your modification.
- You may enter notes to include in an email that will be sent to all affected event owners on final modification of the room.
- An email is sent to all affected event owners on final modification and the event is set back to "Review".
- Affected Event Owners may go in and select a different facility and/or change their event date/time to reflect the new room availability schedule.

Use the following information to complete modifying your availability schedule.

Standard Schedule

- **Start Date**: Select the date where your schedule should start to take effect.
- **End Date**: Select an end date for your new schedule.
- **Select Day(s)**: Use this drop-down function to further refine your schedule (this field is optional for selection). If this option is selected, then the values available for selection include:
- **Week Days** – includes Monday, Tuesday, Wednesday, Thursday and Friday
- **Weekends** – includes Saturday and Sunday
- **All Days** - includes Sunday, Monday, Tuesday, Wednesday, Thursday, Friday and Saturday
- **Select Days** – if selected, this opens a pop-up window with all days of the week available for individual selection or group selection.

Each Day of the week is also listed separately in the drop-down menu for individual selection.

Select Availability Time Schedule

Once the date range and days of the week are selected for your schedule, then the availability time schedule function window is automatically opened on the right hand side of the screen. Within this function window area you may select up to four different starting and ending times for availability scheduling within each selected day within your date range.

There are also options for selecting to make all buildings and rooms at the location "Open All Day" or "Closed/Not Available".

By default the time selection is set for “Open All Day”.

Other options for selection include:

- Closed/Not Available: If selected, the location is closed from any scheduling during that date range period on the days selected.
- Select Times for Scheduling Availability: By using the various starting and ending time drop-downs you can create various open and closed times during each day selected for your schedule. Times cannot be selected in overlapping patterns.

Buttons Available within the Time Schedule Function Window

- SUBMIT Button: Click SUBMIT within the function window to submit your time selections for the current date range/days of the week you have entered for your schedule. If SUBMIT is selected, then the current entries are saved in your session and the schedule and times you have entered are displayed in a list on the main Add Location - Step 2 screen.
- CANCEL Button: Click CANCEL to exit out of the time selection function window and return to the main Add Location - Step 2 screen without submitting/saving your time selections entered in the function window.

Links/Buttons Available within the Standard Schedule Area

- Edit Link: Click Edit under the "Action" column of the Standard Schedule area in order to edit the availability times for a certain schedule.
- Restrict Link: Click Restrict under the "Action" column of the Standard Schedule area in order to open a function window on the right of the screen where you can select Users and User Groups that are the only Users/Groups who may see the Room for scheduling during that specific timeframe.
- Remove Link: Click Remove under the "Action" column of the Standard Schedule area in order to remove a previously entered availability time schedule.
- SAVE Button: Click SAVE at any time in order to save the current schedule of availability. If SAVE is selected, then the current entries are saved to the database and a new drop-down field is enabled on the screen entitled "Current Schedule".
- RESET Button: Click RESET to reset all current screen values back to their defaults. Any data that was previously saved is still maintained in the database.

SPECIAL EXCEPTIONS SCHEDULE

This portion of the screen should only be completed if you want to denote that there are certain dates where the standard schedule should not apply and there will be an alternate schedule of availability instead.

First, select the number of grids (months) and actual months from which you would like to select. The options available for enabling the appropriate grids for selection include Year, Month and # of Months drop-down selection boxes.

Select specific dates from the grids by clicking on those dates or select from three date “grouping” options to set availability by standard groupings of "Select All", "Select Weekdays" or "Select Weekends".

- Select All: If this option is chosen, then all dates in the displayed grids will show as “selected” and the schedule that is set within the function window will be applied to every date selected.
- Select Weekdays: If this option is chosen, then all weekdays on the displayed grids will show as “selected” and the schedule that is set on the right hand side will be applied to every weekday. Weekdays include Monday, Tuesday, Wednesday, Thursday and Friday.
- Select Weekends: If this option is chosen, then all weekend days (Saturday and Sunday) on the displayed grids will show as “selected” and the schedule that is set in the function window will be applied to every weekend date.

Within this function window area you may select up to four different starting and ending times for availability scheduling for the dates you have selected as having special exceptions. There are also options for selecting to make all rooms at the location "Open All Day" or "Closed/Not Available".

By default the time selection is set for “Open All Day”.

OTHER OPTIONS FOR SELECTION INCLUDE:

- Closed/Not Available: If selected, the room is closed on the dates selected under the Special Exceptions area.
- Select Times for Scheduling Availability: By using the various starting and ending time drop-downs you can create various open and closed times during each day selected for your special exceptions schedule. Times cannot be selected in overlapping patterns.
- Buttons Available within the Time Schedule Function Window
- SUBMIT Button: Click SUBMIT within the function window to submit your time selections for the current dates selected. If SUBMIT is selected, then the current entries are saved in your session.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your modification. You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu. The BACK and NEXT buttons are disabled on this screen.

DELETE ROOM

This function includes options for confirming or canceling out of your **DELETE** action. Use the following instructions to complete the delete Room process.

- Room Name - The Room name is listed here.
- Yes/No Radio Selection: Click the radio button associated with the action that you would like to take. Select "Yes" if you do want to finalize the delete process. Select "No" if you want to end this action.

***NOTE**: You cannot delete a Room that has active events or events that currently require processing.

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your selection. You can also use the CANCEL button at the bottom of the screen to cancel out of this delete action but you will be navigated back to the Main Menu.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your delete action. You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu. The BACK and NEXT buttons are disabled on this screen.

Add Room Subdivisions

This function includes options for entering in an unlimited number of subdivided spaces for the room selected.

ADD ROOM DIVISION NAMES: There will be five (5) Room Division Name fields displayed by default. You can click on the ADD MORE button in order to automatically add an additional five (5) Room Division Name fields available for entry of your Room Subdivided spaces. Continue to click the ADD MORE button to append the available fields for entering your Room Subdivisions.

To the right of each Subdivision Name there is a checkbox entitled "Subdivision Information". If selected, this navigates the user to Modify/Delete Subdivision Information screen.

SUBDIVISION SETUP & FEATURES

Subdivisions automatically assume the following attributes of the room from which they were subdivided and the attributes listed cannot be modified at the subdivision level:

- Facility Ownership rules and assigned Owners.
- Images & Attachments
- Room Type
- Room Availability Schedule and Booking Rules

Subdivisions also automatically assume the following attributes of the room and these attributes are pre-populated in the fields displayed for modifying the room subdivision information. However, the following fields may be modified at the room subdivision level:

ROOM SUBDIVISION DETAILS

- Phone/Extension: Alpha-numeric text field that allows for up to 50 characters.
- Size: Includes fields for entering length, width and floor area. (Note: Length and width values are in feet. Floor area value is in square feet.) Notes: This open text field allows for up to 1,000 characters to be entered.

ROOM SUBDIVISION SETUP OPTION(S)

Use these options and features to complete your room setup:

- **Setup Option:** Drop-down with available room setup options. If a setup option is selected, then a maximum capacity number must be entered.
- **Maximum Capacity:** This is a numeric value (max characters 10) that is directly applied to the room if the setup option is selected. Registration and other functions in the software are directly tied to this value. You may not have more than the maximum capacity number of registrants for any event that is occurring in the room subdivision if this setup option is selected.
- **Setup Time Required:** There are two drop-down fields; hours and minutes. The hour drop-down allows you to select hourly increments from 1 – 24. The minutes drop-down field allows you to select 5 minute increments starting at 5 and going up to 60. If you select nothing from the setup area, then the system will assign a "0" minute setup time requirement.
- **Tear Down Time Required:** There are two drop-down fields; hours and minutes. The hour drop-down field allows you to select hourly increments from 1 – 24. The minutes drop-down field allows you to select 5 minute increments starting at 5 and going up to 60. If you select nothing from the tear down area, then the system will assign a "0" minute tear down time requirement. If the ADD button is selected, then the new setup option is added to a list on the screen displaying all available setup options and associated values. The table includes the following columns, actions and options:
- **Delete:** Removes the setup option from the room subdivision as an available option for selection by event owners.
- **Setup Option**
- **Capacity**
- **Setup Time**
- **Tear Down Time**
- **Default Room Setup:** If this checkbox is selected for any setup option (can only be selected for one in the list), then the setup option becomes the default displayed for the room whenever the room details/options are presented to event owners.

Room Subdivision Features

There are no limits to the number of features that can be assigned to a room subdivision. To add a feature to a room subdivision, select from the pre-determined drop-down values and click the ADD button.

View Room Types

The list that is presented is a display of ALL Room Type(s) in the Calendar database. The total number of Room Type(s) currently added to your installation of Active Data Calendar will display at the top of the screen.

The columns of information displayed for Room Types includes:

- **Room Type**
- **Internal Notes**
- **# of Rooms:** The number of rooms that are currently using this room type.
- **View Rooms:** If there are rooms currently using this room type, then a View Rooms link displays in this column and if selected, allows the user to view a list of the rooms currently attributed with this room type.

The top of the list also displays the total number of room types currently active with your installation of Active Data Calendar.

Add Room Setup Option

Example Room Setup Options include: Hollow Square, U-Shape, Round Tables, Training Setup, etc.

Room Setup: By default, five (5) Room Setup text fields are provided where you can enter Room Setup Option Name(s). The fields allow for up to 100 characters to be entered to create each Room Setup Name.

If you would like to add more than five (5) Room Setup Options at any one time, please click the ADD MORE button, available at the bottom of the list of Room Setup fields to automatically refresh the screen to include an additional five (5) fields. You can click the ADD MORE button as many times as you like in order to add the complete list of Room Setup Options.

Navigation Options Within This Area

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your actions. You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu. The BACK and NEXT buttons are disabled on this screen.

Modify/Delete Room Setup Option – Select Setup Option

This function is used to Modify/Delete a current Room Setup option within your installation of Active Data Calendar. You can either modify a Room Setup name and notes or completely delete the Room Setup option from the system.

Use the following instructions to begin the modification/deletion process: Select a Room Setup: Use the drop-down to select the name of the Room Setup option that you would like to modify or delete. The Room Setup names are listed in alphabetical, ascending order.

Then select the action you would like to take from the two radio button options:

- **Modify**: Allows you to change Room Setup information including name and notes. Any room setup option can be modified. If modified the new room setup will be automatically applied to any room that was previously tagged with the original room setup.
- **Delete**: Navigates you to the Delete Room Setup confirmation area where once you confirm your action will remove the Room Setup completely from the Calendar database and it will no longer be available for any purposes in the Calendar application.

*__NOTE:__ Room Setup options cannot be deleted unless no rooms are currently using that room setup.

Click the SUBMIT button to finalize your action and proceed to either the first step in the modification process or to the Delete Room Setup confirmation screen.

Modify Setup Option

This function allows you to modify:

- Room Setup Option Name
- Internal Notes

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your modification. You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu. The BACK and NEXT buttons are disabled on this screen.

DELETE SETUP OPTION

This function includes options for confirming or canceling out of your DELETE action. Use the following instructions to complete the delete Room Type process.

- Room Type Name: The room type name is listed here.
- Room Type Internal Notes: The room type internal notes are listed here.
- Yes/No Radio Selection: Click the radio button associated with the action that you would like to take. Select "Yes" if you do want to finalize the delete process. Select "No" if you want to end this action. You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your selection.

You can also use the CANCEL button at the bottom of the screen to cancel out of this delete action but you will be navigated back to the Main Menu.

*NOTE: Room Types cannot be deleted if they are applied to at least one room.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your action. You can also use the CANCEL button at the bottom of the screen to cancel out of this delete action but you will be navigated back to the Main Menu. The BACK and NEXT buttons are disabled on this screen.

VIEW ROOM SETUP OPTIONS

The list that is presented is a display of ALL Room Setup Options in the Calendar database. The total number of Room Setup Options currently added to your installation of Active Data Calendar will display at the top of the screen.

The columns of information displayed for Room Setup Options includes:

- Room Setup Option
- Internal Notes
- # of Rooms: The number of rooms that are currently using this room setup.
- View Rooms: If there are rooms currently using this room setup, then a View Rooms link displays in this column and if selected, allows the user to view a list of the rooms currently attributed with this room setup.

The top of the list also displays the total number of Room Setup Options currently active with your installation of Active Data Calendar.

Add Room Features

Example Room Features include: Whiteboard, Adjustable Lighting, Carpeted Floors, Teleconference Phone, Internet Access, etc. Room Features are essentially those items that come automatically with the room if it is booked. Room Features can be added by entering each room feature "name" in the fields provided.

- Room Feature: By default five (5) Room Feature text fields are provided where you can enter Room Features. The fields allow for up to 100 characters to be entered to create each Room Feature.

If you would like to add more than five (5) Room Features at any one time, please click the ADD MORE button, available at the bottom of the list of Room Feature fields to automatically refresh the screen to include an additional five (5) fields.

You can click the ADD MORE button as many times as you like in order to add the complete list of Room Features.

Modify/Delete Room Features – Select Room Feature

This function is used to Modify/Delete a current Room Feature within your installation of Active Data Calendar. You can either modify a Room Feature's name and notes or completely delete the Room Feature from the system.

Use the following instructions to begin the modification/deletion process:

- Select a Room Feature: Use the drop-down to select the name of the Room Feature that you would like to modify or delete. The Room Feature names are listed in alphabetical, ascending order.

Then select the action you would like to take from the two radio button options:

- Modify: Allows you to change Room Feature information including name and notes. Any room feature can be modified. If modified the new room feature will be automatically applied to any room that was previously tagged with the original room feature.
- Delete: Navigates you to the Delete Room Feature confirmation area where once you confirm your action will remove the Room Feature completely from the Calendar database and it will no longer be available for any purposes in the Calendar application.

*NOTE: Room features cannot be deleted unless no rooms are currently using that room feature.

Click the SUBMIT button to finalize your action and proceed to either the first step in the modification process or to the Delete Room Feature confirmation page.

Modify Room Feature

This function allows you to modify:

- Room Feature Name
- Internal Notes

Navigation Options Within This Area

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your modification. You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu. The BACK and NEXT buttons are disabled on this screen.

Delete Room Feature

This function includes options for confirming or canceling out of your DELETE action. Use the following instructions to complete the delete Room Feature process.

- Room Feature Name: The room feature name is listed here.
- Room Feature Internal Notes: The room feature internal notes are listed here.
- Yes/No Radio Selection: Click the radio button associated with the action that you would like to take. Select "Yes" if you do want to finalize the delete process. Select "No" if you want to end this action. You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your selection.

You can also use the CANCEL button at the bottom of the screen to cancel out of this delete action but you will be navigated back to the Main Menu.

*NOTE: Room Features cannot be deleted if they are applied to at least one room.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your action. You can also use the CANCEL button at the bottom of the screen to cancel out of this delete action but you will be navigated back to the Main Menu. The BACK and NEXT buttons are disabled on this screen.

Add Room Subdivisions

This function includes options for entering in an unlimited number of subdivided spaces for the room selected.

Add Room Division Names:

There will be five (5) Room Division Name fields displayed by default. You can click on the ADD MORE button in order to automatically add an additional five (5) Room Division Name fields available for entry of your Room Subdivided spaces. Continue to click the ADD MORE button to append the available fields for entering your Room Subdivisions.

To the right of each Subdivision Name there is a checkbox entitled "Subdivision Information". If selected, this navigates the user to Modify/Delete Subdivision Information screen.

Subdivision Setup & Features

Subdivisions automatically assume the following attributes of the room from which they were subdivided and the attributes listed cannot be modified at the subdivision level:

- Facility Ownership rules and assigned Owners.

- Images & Attachments
- Room Type
- Room Availability Schedule and Booking Rules

Subdivisions also automatically assume the following attributes of the room and these attributes are pre-populated in the fields displayed for modifying the room subdivision information. However, the following fields may be modified at the room subdivision level:

ROOM SUBDIVISION DETAILS

- **Phone/Extension**: Alpha-numeric text field that allows for up to 50 characters.
- **Size**: Includes fields for entering length, width and floor area. (Note: Length and width values are in feet. Floor area value is in square feet.)
- **Notes**: This open text field allows for up to 1,000 characters to be entered.

ROOM SUBDIVISION SETUP OPTION(S)

Use the following steps to complete selecting your room setup options and features.

- Setup Option: Drop-down with available room setup options. If a setup option is selected, then a maximum capacity number must be entered.
- Maximum Capacity: This is a numeric value (max characters 10) that is directly applied to the room if the setup option is selected. Registration and other functions in the software are directly tied to this value. You may not have more than the maximum capacity number of registrants for any event that is occurring in the room subdivision if this setup option is selected.
- Setup Time Required: There are two drop-down fields; hours and minutes. The hour drop-down allows you to select hourly increments from 1 – 24. The minutes drop-down field allows you to select 5 minute increments starting at 5 and going up to 60. If you select nothing from the setup area, then the system will assign a "0" minute setup time requirement.
- Tear Down Time Required: There are two drop-down fields; hours and minutes. The hour drop-down field allows you to select hourly increments from 1 – 24. The minutes drop-down field allows you to select 5 minute increments starting at 5 and going up to 60. If you select nothing from the tear down area, then the system will assign a "0" minute tear down time requirement.

If the ADD button is selected, then the new setup option is added to a list on the screen displaying all available setup options and associated values. The table includes the following columns, actions and options:

- Delete: Removes the setup option from the room subdivision as an available option for selection by event owners.
- Setup Option
- Capacity
- Setup Time
- Tear Down Time
- Default Room Setup: If this checkbox is selected for any setup option (can only be selected for one in the list), then the setup option becomes the default displayed for the room whenever the room details/options are presented to event owners.

ROOM SUBDIVISION FEATURES

There are no limits to the number of features that can be assigned to a room subdivision. To add a feature to a room subdivision, select from the pre-determined drop-down values and click the ADD button.

View Room Features

The list that is presented is a display of ALL Room Feature(s) in the Calendar database. The total number of Room Feature(s) currently added to your installation of Active Data Calendar will display at the top of the screen.

The columns of information displayed for Room Features includes:

- Room Feature
- Internal Notes
- # of Rooms: The number of rooms that are currently using this room feature.
- View Rooms: If there are rooms currently using this room feature, then a View Rooms link displays in this column and if selected, allows the user to view a list of the rooms currently attributed with this room feature.

The top of the list also displays the total number of Room Feature(s) currently active with your installation of Active Data Calendar.

View Location - Details

The location details that display are for the location name selected from the list screen.

The detailed information displayed for the selected location includes:

- Location Name
- Building Name
- Location Address Information: Address 1, Address 2, City, State (Province/Prefecture), ZIP/Postal Code, County (or Country if International Options are enabled)
- Phone Number
- Internet Address
- Internal Notes

The top right hand side of the screen also includes a link "Back to Full List".

To navigate to the View Locations functionality, click on the LOCATIONS tab and select LOCATION(s): VIEW. The list that is presented is a display of ALL Locations in the database.

The columns of information displayed for each Location in the list includes:

- **Location Name**: This displays as a link and if selected, takes the user to the Location Details screen. This is also the column that the list is sorted by with the list displaying in alphabetical, ascending order, starting with “A” at the top of the list.
- **Building Name**: Only displays if there was a building name associated with the Location. To the right of the Building Name there may be a link entitled "(show rooms)". If this link displays then the Building includes Rooms that are available for adding and managing events. Click the link to expand the list and view the list of Rooms.

The top of the list also displays the total number of Locations currently active within your installation of Active Data Calendar.

Matrix of Facilities Rules

FACILITIES: MANAGE (ADD, MODIFY ROOMS – ADDING AND DELETING ROOM ATTRIBUTES)

Action	Effect	Email/Error Message
Modify Room – Delete Setup Option(s)	Effected events are set back to Pending status. When user clicks event name there is an error message at top of facility tab. The user must modify their event to select a facility setup option.	An event below includes a facility that no longer offers your selected setup option. Please modify the event to select a new setup option or facility.
Modify Room – Add Setup Option(s)	No affect to events.	
Modify Room – Modify Setup Option(s)	No affect to events.	
Modify Room – Delete Feature(s)	No status change on events, but email can be sent to users as FYI. Then it is up to user to decide if they need that room feature or if they need to modify their event to request a new facility.	Room features can be modified - (1) Show List of Affected Events w/Option to Download List. User can cancel out or continue with modification. (2) Allow modifying user to enter notes to include in email to event owners
Modify Room – Add Feature(s)	No affect to events.	

FACILITIES: MANAGE (ADD, MODIFY/DELETE LOCATIONS, BUILDINGS AND ROOMS – MODIFYING AVAILABILITY)

	Location Availability	Building Availability	Room Availability
Add Location, Building or Room	Availability schedule cascades to Buildings and Rooms.	When adding a building, the schedule that was added at the location level displays in the “Current Schedule” drop-down, however, the user can modify any of the current schedules or add new/different scheduling rules with no restrictions. A building can be marked as Open event if the location is marked as Closed.	When adding rooms to a building, the schedule that was added for the building automatically is applied to all rooms. In the Add Room Wizard, on the schedule screen, the “Current Schedule” drop-down shows the initial buildings schedule(s) and the user has the option to further restrict the room availability. A room schedule can be set to have open times that fall outside of the building availability. If the room is modified to have unique

			open times that do not correspond with the building schedule, then a warning message will display but the user will be allowed to proceed.
Modify Location, Building or Room	Location availability does not dictate when buildings can be available. It is only a fast path for populating building level availability. When modifying a location availability schedule, the new schedule only is applied to new buildings. Existing Buildings and Rooms are NOT affected by the location schedule change.	If a building schedule is modified to be less restrictive than the previous saved schedule, then there are no restrictions applied to the modification of the building. If a building schedule is modified to be open more than at least one room within that building, then the room schedule should not be affected by the building change. If a building schedule is added (during a modify process) or modified from its previous saved state, and there are rooms within that building that do not already have a room schedule set, then the building availability schedule will be applied to those rooms that do not already have a saved availability schedule. If there are rooms with events that will be affected by the building availability modification, then (1) Show List of Affected Events w/Option to Download List. User can cancel out or continue with modification. (2) Allow modifying user to enter notes to include in email to event owners (3a) Send EMAIL to event owners (3b) Set affected Events back to "Review" (4) Users must select a new facility or different date/time.	If modified and there are affected events: (1) Show List of Affected Events w/Option to Download List. User can cancel out or continue with modification. (2) Allow modifying user to enter notes to include in email to event owners (3a) Send EMAIL to event owners (3b) Set affected Events back to "Review" (4) Users must select a new facility or different date/time.
Delete Location, Building, Room	Cannot delete a location if it is being used by at least one event.	Cannot delete a building if it is being used by at least one event.	Cannot delete a room if it is being used by at least one event.

Facilities: Setup (Modify/Delete Room Features)

Modify Room Features	Can always modify a room feature name.
Delete Room Features	Users cannot delete features from the "Delete Feature" menu if it is applied to at least

	one room.

FACILITIES: SETUP (MODIFY/DELETE ROOM SETUP OPTIONS)

Modify Room Setup Options	Can always modify the name with no affect.
Delete Room Setup Options	Cannot delete room setup options if they are applied to at least one room.

Rules for Locking Locations, Buildings and Rooms

1. If a location, building or room is locked but no owner is assigned, then the Super User is automatically assigned as the owner until another owner is selected.
2. A location does NOT have to be locked in order for the buildings beneath it to be locked.
3. A building does NOT have to be locked in order for the rooms beneath it to be locked.

MODIFICATION OF FACILITY OWNERSHIP BUSINESS RULES

	Location	Building	Room
Add Process	Locked and Owner assigned. If a Location is locked and an owner(s) is assigned, then all new buildings and rooms added beneath the location are automatically locked as well and assigned the same owner(s).	Location locking and ownership automatically cascades to Building. Building Ownership can be modified, the owner can be changed and or more owners added just for the building. The building can also be "unlocked".	Building locking and ownership automatically cascades to new Rooms added beneath the building. If the building ownership rules have been modified from the location ownership rules, it is the building ownership rules that are always applied to the rooms of each particular building. Room Ownership can be modified, the owner can be changed and or more owners added just for the room. The room can also be "unlocked".

Modify Process	A locked location that is modified to be unlocked does not affect any buildings or rooms beneath that location. An unlocked location that is modified to be locked, does cascade the new locked status and ownership assignments down to any buildings or rooms under that location. If a building or room under the location had already been locked and assigned ownership, then the ownership will simply be updated with the new location ownership assignments. If an existing owner is removed from location ownership, then the owner is also removed from all buildings and rooms beneath that location. If a new owner is added to a location, then the owner is added as an owner to every building and room that is currently locked.	A locked building that is modified to be unlocked does not affect any buildings or rooms beneath that location. If an existing owner is removed from building ownership, then the owner is also removed from all rooms beneath that building. If a new owner is added to a building, then the owner is added as an owner to every room that is currently locked.	A room can be modified to be locked or unlocked at any time. Ownership can also be modified at any time to change from one owner to another or add additional owners.

RESOURCES: MODIFY/DELETE RESOURCES

Modify Resource	Can modify the resource name and internal notes – (1) Show List of Affected Events w/Option to Download List. User can cancel out or continue with modification. (2) Allow modifying user to enter notes to include in email to event owners (3a) Send EMAIL to event owners
Delete Resource	Can delete the resource – will send an EMAIL to all event owners (users) who have an event that is requesting or approved for that resource notifying them of the change.

Calendar Workflow

Workflow in Active Data Calendar is broken down into three main areas:

- Marketing Workflow
- Facilities Workflow
- Resources Workflow

Any event can potentially funnel through all three workflow areas.

Clients that license any of the Open Entry Modules will also have an additional workflow to set up as it relates to how Open Entry submissions funnel into the system. Clients with any of the Open Entry Modules should refer to the *Workflow Tip Sheet for Open Entry Clients* to see best practices for overlaying the Open Entry workflow with the other three main areas of product workflow noted in this user guide.

Marketing Workflow Rules Breakdown

- Marketing workflow and approvals are required if an event has been selected to be marketed on either the public or private Calendar(s).
- An event may be approved for facility and resource usage but not be approved for marketing. If this is the case, then the event will still display on the Facility Calendar but not on the Public and/or Private Calendars.
- Events may be marketed without a facility and/or resource identified for the event.
- The event may be modified, after already being marketed, to add a facility or resource request. If this is the case, the event will be retained on the marketing calendar it was previously approved for and the facility and/or resource workflow is kicked off independently. If the facility or resource is denied, it will be up to the event owner to decide if the event should be maintained on the marketing calendar, rescheduled for a different date/time when the facility or resource is available for their usage or cancel/delete the event from all Calendars.
- Marketing workflow is a combination of department approval for any unlocked category(s) and category owner approval for any locked category(s).

Details of Marketing Workflow

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 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.

Overview of the Facilities & Resources Workflow

There are two main rules that dictate the majority of the workflow rules surrounding the Facilities and Resources workflow approval in Active Data Calendar Facilities Planning.

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.

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/admin removes it.
- If there are multiple requests pending for the same facility and one request is approved, then all other requests are placed into a “Review” status and the events are automatically added to a waiting list. Users are notified when their events are placed into a Review/Wait List State and it is up to the user who added the facility request to decide if they want to remain on the waiting list or modify their event to select a different date/time and/or facility.
- If the facility request is maintained in a “Review” status and the facility once again becomes available for their event timeframe, then the events in “Review” for that facility are automatically placed back into a Pending status and it is up to the facility owner to select which event is approved for the facility.
- If an event added through Open Entry is placed into a Review/Wait List state, the Open Entry submitter will receive an email notification that their event has been wait-listed and they may either withdraw their request and resubmit to request an alternate facility, or allow the Open Entry events administrator (selected on setup of the Open Entry form) to modify their event within the administration area to request/suggest an alternate facility that will meet their needs.

When an Open Entry facility request is placed into a Review/Wait List state, the Open Entry administrator(s) are also notified via email and the event is placed on their Facility Main Menu as "Review". The Open Entry administrator(s) may elect to maintain the event in the "Review" status and allow the Open Entry submitter to decide to withdraw or maintain the Wait List status, or the Open Entry administrator may elect to modify the event to request an alternate facility on behalf of the Open Entry submitter. If the facility that is requested by the

Open Entry administrator is locked and owned by another user account within the Calendar, then an email is sent to the Facility Owner(s) and they may process the request to approve or deny the request. It is possible that the Open Entry administrator may also select a) a facility that is not locked or b) a facility for which they are the owner. In either of those cases, the facility is auto approved and the Open Entry submission may proceed forward into Marketing Workflow if marketing selections (categorization) was selected by the Open Entry submitter.

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.

Getting Help with Calendar Administration

From the login screen, and throughout the calendar administration screens, you can click the 

icon, in the upper right hand corner, at any time to get to a description of the page currently displayed. These help topics include information on the many different areas of the calendar product.

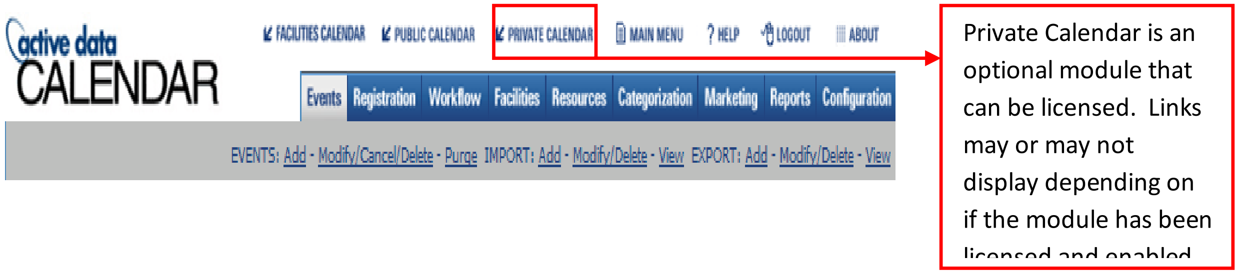
Additional help can be received by contacting your organizations calendar administrator or by calling Active Data Exchange, Inc.'s support hotline at 610.997.8100 or e-mailing support@activedataX.com.

Main Administration Calendar Menu

Once you've logged in to Active Data Calendar you will be presented with the main administration screen for your “user account level”. All levels of user accounts have the ability to add, update and delete events.

There are three different views of the Main Administrative Menu of the calendar administration area. These are based on whether the user account logged in is established as a "Super User" level account, an "Administrative" level account, or as has a standard "User" level account role. The difference in views and functionality is described below:

Super User/ Administrative/User View(s)

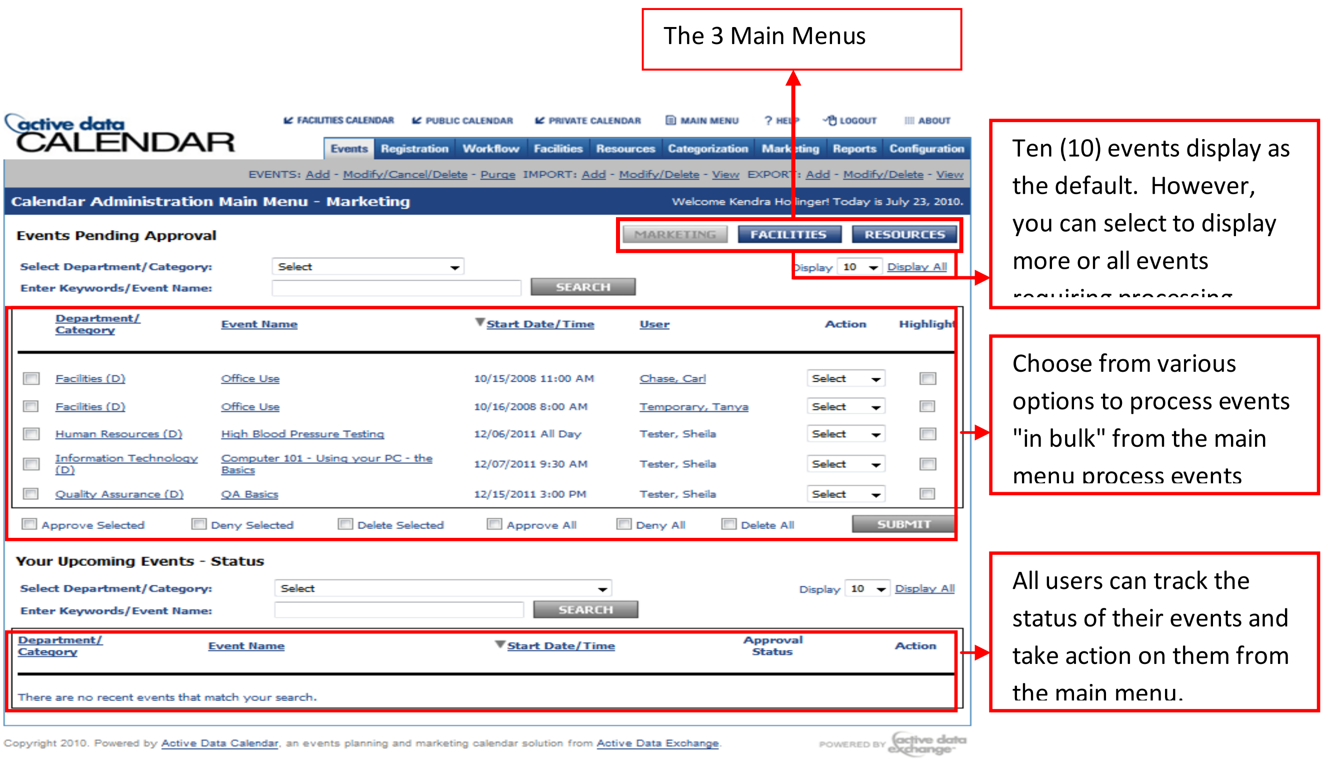


Main Navigation Panel of Active Data Calendar

Main Menu Event Management Areas

The main menu of Active Data Calendar 3.12 includes a fast path dashboard that is customized based off your specific user privileges/permissions.

There are three main menus that can be viewed and used for overall event processing requests: Marketing, Facilities and Resources. All users will see the buttons to access each of the main menus. The default menu can be set in the “My User Profile” area of the system located under Workflow: Users.



Administrative Users

Administrative Users can access two fast path areas on their main menu.

Events Pending Approval: By default, each user's main menu is sorted by the event Start Date/Time with the next upcoming event listed first and then the remaining events are listed in descending order. There is a configuration setting where users may select to have the main menu sorted by either the Department/Category column or the Event Name column. You can select to display additional events for processing by using the drop-down option provided, or click the Display All link to display all events that currently require your action.

This fast path area is intended to allow Administrators to make quick approvals or denials of events.

- If **Approve** is selected for an event, then it is automatically approved for the Department and/or Category(s) that you administer and the event is added to the live Calendar(s).
- If **Deny** is selected for an event, then it is automatically denied and an email is sent to the user who entered the event. You will not have the capability to enter in comments regarding why you are denying the event from this fast path menu area. If you would like to add comments or use other options for processing events, go to the "Process Pending Events" area to approve/deny/modify events within your administrative control.
- **NOTE FOR SUPER USER and DEPARTMENT ADMINISTRATORS:** Other options from the fast-path drop-down list include Modify and Delete which navigate the Super User to the respective area of the application with the event already pre-selected.

FAST APPROVAL OR DENIAL OF EVENTS

Actions that can be performed from the Pending Marketing Requests area of the Main Menu include:

- **Approve:** This selection removes the event from the Pending screen and adds it to the appropriate Calendar(s).
- **Deny**: This selection denies the event and sends the standard denial email to the user who entered the event. The event is maintained in the calendar database, but it is removed from the pending screen and the user who submitted the event is instructed that they can login, go to Modify Event in order to make changes and resubmit for further processing.
- **Highlight Event**: If this checkbox is selected for an event, the Administrator and/or Category Owner can deselect the event so that it will not display as a highlighted event. If the event checkbox is NOT selected for an event, then the Administrator and/or Category Owner can select to make the event highlighted. This column will only display if an Administrator and/or Category Owner was given the privilege to be able to highlight events.
- **Approve Selected**: If the checkbox to the left of each event in the Process Pending list is selected and the checkbox for "Approve Selected" is selected, along with the SUBMIT button, then ALL events that were marked for acceptance will be approved and display on the appropriate Calendar(s).
- **Deny Selected**: If the checkbox to the left of each event in the Process Pending list is selected and the checkbox for "Deny Selected" is selected, along with the SUBMIT button, then ALL events that were marked for denial will be denied and the user who submitted each event will receive an email notification. When using this "mass deny" option, you will not have an opportunity to enter in notes on why are you are denying each event.
- **Delete Selected**: If the checkbox to the left of each event in the Process Pending list is selected and the checkbox for "Delete Selected" is selected, along with the SUBMIT button, then ALL events that were marked for deletion will be deleted completely from the Calendar database. *NOTE: You will not receive a chance to confirm/change this delete action if you select it from this menu. This is considered a "Fast Track" delete option and should be used cautiously.
- **Approve All**: If this checkbox is selected and the SUBMIT button is clicked, ALL events currently displayed on the Process Pending Event list will automatically approve and display on the appropriate Calendar(s).

- **Deny All**: If this checkbox is selected and the SUBMIT button is clicked, ALL events currently displayed on the Process Pending Event list will automatically be denied and the user who submitted each event will receive an email notification. When using this "mass deny" option, you will not have an opportunity to enter in notes on why are you are denying each event. .
- **Delete All**: If this checkbox is selected and the SUBMIT button is clicked; ALL events currently displayed on the Process Pending Event list will automatically be deleted completely from the Calendar database. *NOTE: You will not receive a chance to confirm/change this delete action if you select it from this menu. This is considered a "Fast Track" delete option and should be used cautiously.

Facilities Main Menu

This menu includes the ability to process Facilities requests for events as well as track the current status of a facility request for users who have submitted requests that are still pending, denied, expired or in review/wait list status.

Facility Owners

Facility Owners can access two fast path areas on their facilities main menu.

Event Facilities Requests Pending Approval: This area includes the ten (10) most recent un-processed Facilities requests at a given time as the default. However, you can select to display additional events for processing by using the drop-down option provided, or click the Display All link to display all events that currently require your action.

There are two search options on this screen:

- Select Location/Building/Room: One selection can be made at a time to narrow the list.
- Search by Keywords/Event Name: This field allows for a comma separated string of up to 100 characters to be entered in order to search off the same fields that other keyword search fields throughout the calendar admin search within.

Facilities Fast Path Approval

The fast path approval area of the screen includes the following columns of information on each facility request:

- Facility (Room)
- Event Name
- Start Date/Time
- User
- Action

NOTE: If an event includes multiple occurrences (series) and there are various facilities requested across the occurrences, then each facility owner will see the event on their menu for each occurrence that includes a facility request for a facility that they own/manage. There will also be an additional arrow icon beside that facility request that denotes it is part of a series. If the arrow icon is selected, then each occurrence in the series will be automatically “checked” so they can be processed “in bulk” from the main menu. Otherwise, you can always select the event name to navigate to the “Process Event Details” screen in order to view all details about an event, including the facility requests for each occurrence in the series.

This fast path area (Action column) is intended to allow Facility Owners to make quick approvals or denials of events.

- If "Approve" is selected for a facilities request, then it is automatically accepted for the date/time and facility that is selected.
- If "Deny" is selected for a facilities request, then it is automatically denied and an email is sent to the user who entered the request. Users will not have the capability to enter in comments regarding why they are denying the request from this fast path menu area.
- **NOTE FOR SUPER USER**: Other options from the fast-path drop-down include Modify and Delete which navigate the Super User to the respective area of the application with the event containing the facility request already pre-selected.

NOTE: Facility Owners cannot modify or delete events created by others, that they process. They *can* modify and delete their own events.

Processing Facility Requests in Bulk

In the far-left column, beside each Facility request, there is a checkbox that can be selected in order to utilize any of the bulk processing options at the bottom of the pending approval area. If facility requests are checked off and the following actions are taken, the results are as listed:

- **APPROVE SELECTED** - Approves the facility requests for each of the checked requests. Emails are sent to each of the event owners and if marketing selections were made to the event, the workflow continues through to the marketing area.
- **DENY SELECTED** - Denies the facility requests for each of the checked requests. Emails are sent to each of the event owners (the Facility Owner taking the deny action does not have the option to enter in comments if the deny action is being taken in bulk from this screen) and the event does not continue forward in the marketing workflow. Event Owners (users) who have their facility request denied, will receive the denial email as well as the event will display on their Facility Main Menu under the area for "Your Upcoming Events - Facility Status" with the approval status of "Denied" and they can choose to take action from the main menu on that request.
- **DELETE SELECTED** - Marks all Facilities Requests as Deleted but does not delete the entire event. The event may be modified and sent through appropriate workflows based off the modification made.
- **APPROVE ALL** - Approves all Facility Requests being viewed on the main menu screen. There is no need for the user to select the checkboxes beside each Facility Request.
- **DENY ALL** - Denies all Facility Requests being viewed on the main menu screen. There is no need for the user to select the checkboxes beside each Facility Request. NOTE: Please be careful as this action cannot be undone.
- **DELETE ALL** - Deletes all Facility Requests being viewed on the main menu screen. There is no need for the user to select the checkboxes beside each Facility Request. NOTE: Please be careful as this action cannot be undone.

To utilize any of the Facility Processing options in bulk, you must make your appropriate checkbox selections and then click the SUBMIT button at the bottom of the Action column

Your Upcoming Events – Facility Status

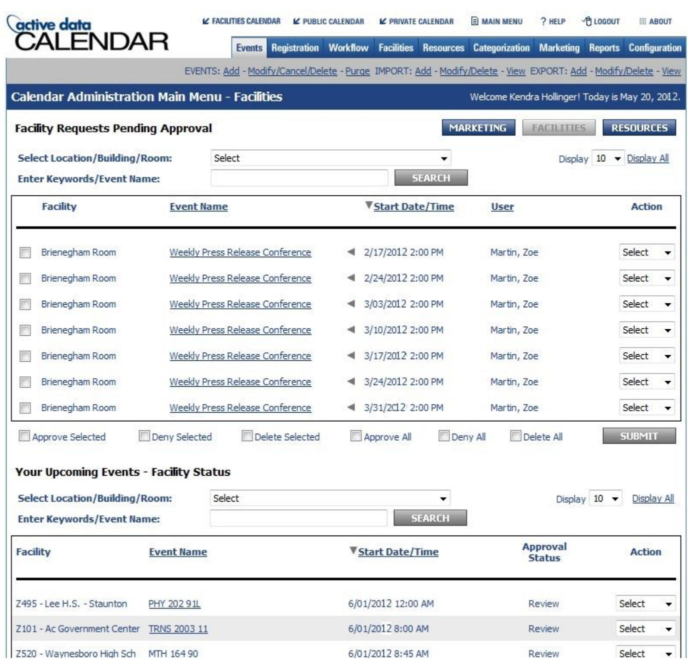
The bottom portion of your facilities main menu will include the ten (10) next upcoming facility requests that you have added, which still require action (Saved, Pending, Denied or Expired) as a default.

- Facility (Room)
- Event Name
- Start Date/Time
- Approval Status:
  - **Saved**: The event was saved during the "Add process" and the user may select to modify the event and release it through workflow or delete the event.
  - **Pending**: The event was released through workflow and the facility request is still pending review/approval by the Facility Owner.
  - **Denied**: The event was denied by the Facility Owner and the user may select to modify the event and request an alternate facility, remove the facility from their event request so it may continue through workflow or delete the event completely.
  - **Expired**: The event date/time has passed while the event was still in Save, Denied or Pending Status. The user can either modify the event to push the date/time out to a date/time in the future or delete the facility request or entire event.
  - **Review**: The event facility request has been placed into a "Review/Wait List" state due to another event being approved for the same facility at the date/time of the event facility request displayed. The user may select to maintain the event facility request in a Review state and if the facility becomes available once again, their event facility request will be placed back into a pending state and the Facility Owner may then elect to approve or deny the event for the facility at the date/time requested. If the user does not want to maintain their "Review/Wait List" status, they may select to modify their facility request, change their event date/time or delete the facility request or entire event. An email is sent to the event owner when their event is placed into a "Review/Wait List" status. An email is also sent to the event owner when a facility is changed from a Review/Wait List status into a Pending status.
- **Action**: A drop-down displays with options for Modify and Delete for all statuses. If the event is Pending, then an additional option displays in the drop-down for "Resubmit". If "Resubmit" is selected, then an email notification will be sent out to the Facility Owner that still requires processing for the selected event.

STANDARD USERS

Standard Users will only see the "Your Upcoming Events – Facility Status" area of the main menu.

Processing Pending Requests



This screen can be accessed by Department Administrators, Category Owners, Resource Owners or Facility Owners. The screen includes different functionality/options based off who is accessing the event details and based off the current event status. The Process Pending details screen includes a preview of the current event details at the bottom of the screen and the top of the screen includes a dynamic window with four tab options for selection: Facilities, Resources, Marketing and Internal.

The tab and details that are displayed as the default view on navigating to the Pending details screen depends on the menu that the user was viewing when they clicked on the event/request from the main menu. For example: If the user clicks the event/request from the marketing menu, then they navigate to the Process Pending details screen with the event marketing details displayed and they also have the option to click on either the Facilities or Resources tab.

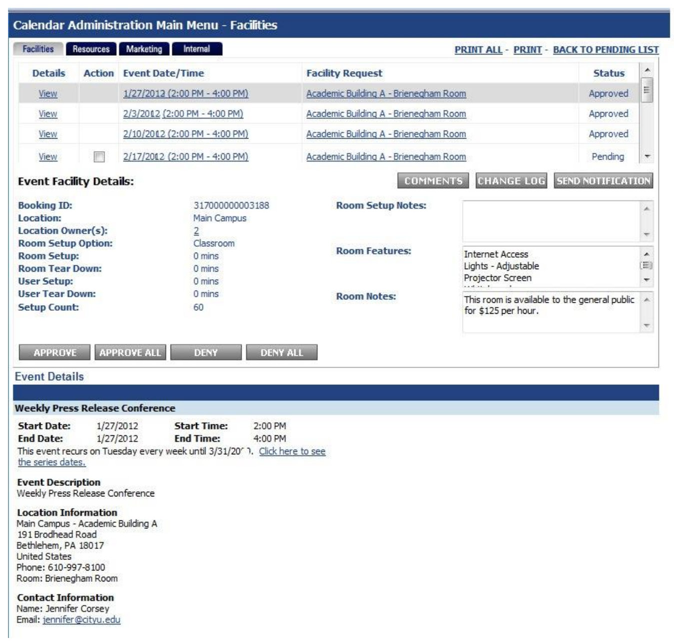
Details displayed regarding events entered include information under two possible tabbed areas:

- Marketing
- Internal

Facilities Tab

A message under this tab indicates if no facilities have been selected for the event. Otherwise, the Facilities tab shows:

- **DETAILS "VIEW" LINK COLUMN**: This column includes a "View" link beside each row that can be selected in order to change the facility details at the bottom of the tab function window to reflect the details for the particular facility request selected.
- **ACTION CHECKBOX COLUMN**: This column includes a checkbox field beside each row that can be processed by the facility owner viewing this area. Non facility owner user accounts that are accessing this event details area within the admin will see all of the information regarding the status of the facility request(s) but they will not see a checkbox in this column since they can only view the facility requests/status and not process them. It is possible that various facilities (with different owners) are being requested. If this is the case, then there is a possibility that some facility requests will show with checkboxes for processing by a specific facility owner, but others will not. When a facility is denied or approved, it is maintained in the list with the appropriate status and the checkbox is removed for processing.



- **EVENT DATE/TIME**: Each occurrence within a series that includes a facility request will be listed separately. If a specific date/time includes more than one facility request, then that particular date/time will be displayed multiple times in the list for each facility needed. The event date/time is always clickable and if selected refreshes the facility tab window to launch the facilities calendar (Gantt chart view) that shows the date/time selected for the associate room. It also shows the other rooms that match the criteria of the room selected that are also within the same building and are available on that date/time. Location Owners can then check the availability of the room and usage prior and after event as well as other similar rooms in case the request cannot be accommodated as submitted.
- **FACILITY REQUESTED (BUILDING : ROOM)**: This information displays as a link and if selected, opens a pop-up window with the details of that room or room subdivision.
- **STATUS**: Pending, Approved or Denied.

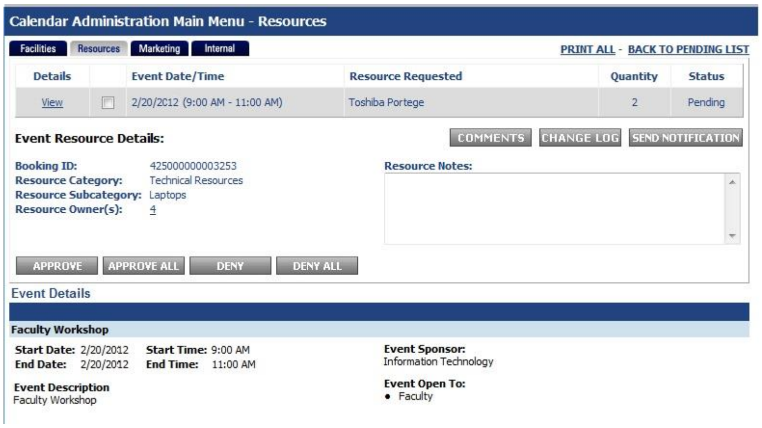
Facility Details included at the bottom of the facility tab area includes the following information:

- Booking ID
- Location: Main Location Name Displays
- Location Owner(s): Number displays as a link that can be clicked to open a pop-up with the name of the owners. (same pop-up displayed other places)
- Room Setup Option
- Room Setup Time
- Room Tear Down Time
- User Setup Time
- User Tear Down Time
- Setup Count
- Room Setup Notes
- Room Features
- Room Notes

All of this information is non-editable from this screen.

Action options from this screen include:

- Approve
- Approve All
- Deny
- Deny All



The checkbox in the column for “Action” works along with these action buttons and allows the facility owner to accept facility requests individually by clicking the checkbox(s) and then clicking “Approve” or deny facility requests individually by clicking the checkbox(s) and then clicking “Deny”. Using the Approve All and Deny All buttons will automatically select all facilities managed by that owner that are included for the event and either globally accept them or deny them (based off the option chosen).

Possible Messaging/Error Notices on Facilities Tab

If there is a possible conflict with an occurrence facility request, then the facility request that is questionable will be highlighted in red in the list and a message will be displayed on the top of the tab function window that states:

“A conflict has been identified with at least one facility listed below. Please click on the VIEW link to see the details of the request and associated conflict information.”*

*Please note, this message may be slightly different since it is a configurable text element per install.

When the VIEW link is selected for the facility with the possible conflict, then the details area on the bottom of the tab window will show the possible conflict in red (setup time or tear down time). Also, there will be a message that states:

“The setup time has been modified to less than the default setup for this room/room setup option.” Or, “The tear down time has been modified to less than the default tear down time for this room/room setup option.”

Another possible conflict warning may be related to the fact that a facility may have been modified (setup or tear down time for a specific setup type was modified and therefore affected a particular event (or multiple events). This type of change sets the event back to a pending status and requires the user to review the event and there may be associated conflicts. If an event has a conflict based off the time of the event and the room, then the following conflict warning is displayed:

“This event has a possible scheduling conflict. Please either adjust the time of the event, setup or tear down time or select an alternate date or facility for your event and resubmit for processing.”

NOTE: By default, the bottom of the facility tab window shows the facility details for the date that is shown in the preview (First date of event). If no location is selected then it says “There is no facility/location selected for this event.” If a location was selected, but it is not a locked/managed location, it shows the location and status shows as “Open Location”.

Processing Pending Facility Requests – Facility Gantt

For each facility request listed on the Facility tab, there is a date and time for the event facility request. Each date/time is linkable. If you select the link, the facility tab area will be refreshed to show the facility Gantt chart for that specific date/time for the chosen facility. From the Gantt view you can also see all other rooms in the same building (as your selected room) that are also available for the date/time of your event.

If the event date that you selected to view had a conflict displayed on the initial facility tab view, then you can use the Gantt view in order to see a visual representation of where the conflict is before and/or after your event.

You can mouse over the other events in your managed room on the chosen date to see the setup of the room for the event before and after your event. This may help you in determining if in fact the event can be approved for the chosen time slot.

Use the “Back to Facilities Request” link in the upper right hand area of the Gantt in order to navigate back to the list of facilities requested for the event/series and to make your workflow selections (Approve, Deny).

Internal Tab

This tab will always include at least one field: Internal Notes. However, up to four other fields/types may be included within this window as well. The field types, labels and data are configured under the Configuration Tab/Setup Options/Custom Event Administration Information.

Event Conflict Notifications

On various event details screens throughout the Calendar Administration area, users may notice a red warning message at the top of their event details notifying and warning them that a possible scheduling conflict may have been identified for their event.

- Add Event
- Modify/Cancel/Reschedule Event
- Process Pending Event Details

When displayed the conflict warning message will include a link to open a pop-up message that includes the details of the possible conflicting events:

Users can click on the name of the user account who added the "conflicting event" and it will open their default email client with the email address for the other user account automatically populated. This allows them to start an email dialogue with the other user on why the events are overlapping or represent a possible conflict with one another.

Conflict warning messages are for informational purposes only and no rules for how to handle these types of events are automatically included in Calendar. When conflicts are identified, user accounts can still continue with the process that they are within, use the wizard back button to go and make event modifications or cancel out of their current action and be returned to the main menu.

Internal Tab Details

Internal Notes: Text field with any internal notes entered when the vent was added or last updated.

Up to four additional custom internal fields and data may display as well.

Facilities Calendar

Any user can access the Facilities Calendar inside the Calendar admin area. The events and details that are displayed on the Facility Calendar are dependent on the user's permissions level:

The Facility Calendar includes the following Display Formats:

- Facility Gantt View
- Location List View
- Facility Summary View
- Resource Gantt View

Facilities Calendar Rules Detailed The Main Facilities Calendar is linked from a button within the administration area of Calendar. It is not configurable and includes three view options: Facilities Gantt View, Location List View and Facilities Summary View.

When accessed from the admin menu, the following rules apply for which users can access which events and details from the Facilities Calendar:

- **SUPER USER**: Can see all event names and bookings and click to view details of bookings
- **DEPARTMENT ADMINISTRATORS AND USERS**: Can see all public booking details and private booking details only if they have the ability to View Private Events. Otherwise, any time slot reserved for a private event will show as "Private" but the quick link will show only basic information with no event name or description and the user cannot click the link to go to the booking details.
- **FACILITY OWNERS**: Can see all public booking details and private booking details only if they have the ability to View Private Events and can automatically see any private event that is booked for their facility

or pending for their facility even if they are not granted overall “View Private Event” privileges. If they are not granted full “View Private Events” privilege, then any time slot reserved for a private event that is for a facility that they DO NOT manage, will show as “Private” but the quick link will show only basic information with no event name or description and the user cannot click the link to go to the booking details.

- **Resource Owners**: Can see all public booking details and private booking details only if they have the ability to View Private Events and can automatically see any private event that is booked for their resource or pending for their resource even if they are not granted overall “View Private Event” privileges. If they are not granted full “View Private Events” privilege, then any time slot reserved for a private event that is for a facility or resource that they DO NOT manage, will show as “Private” but the quick link will show only basic information with no event name or description and the user cannot click the link to go to the booking details.

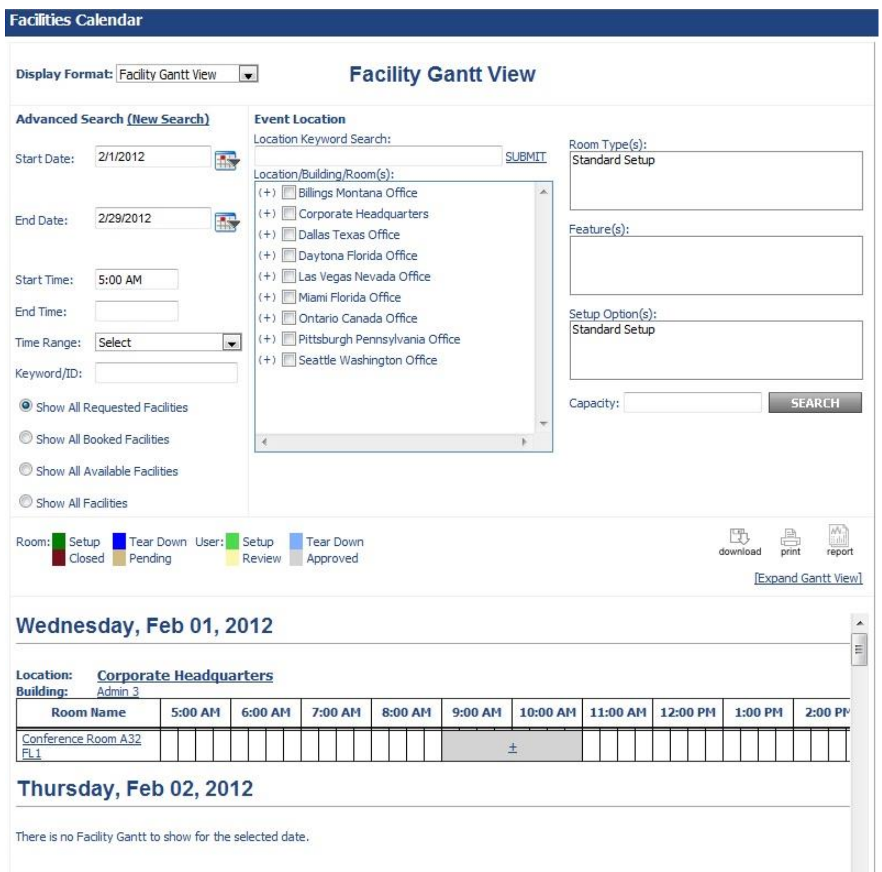
Facility Calendar - Gantt View

The Facilities Calendar Gantt View allows you to search and display multiple days instead of just one day. Search options for the Facility Gantt View include the following advanced search options.

NOTE: The Facility calendar’s Gantt view shows all bookings, but tailored to the audience. An *administrator* sees event details, but an external user (such as a Calendar visitor) sees just the time blocked out. External users only need to know the times that are already reserved for a facility (and its available times), so this is what they see-not event details beyond timing.

Advanced Search

- **Start Date**: User can select a start date as the first date in their search.
- **End Date**: User can select a date as the last date to display in the Gantt View.
- **Start Time**: The start time selected will determine the starting time for the Gantt chart displaying the bookings for the date selected and only those events starting at the time selected or after will display.
- **End Time**: If an end time is selected with a start time, then only those events occurring between the start time and end time will



display in the Gantt area.

- **Time Range**: Use this drop-down in order to select a range of time including options for Midnight - 5am, 5am - Noon, Noon - 5pm and 5pm - Midnight.
- **Keyword**: Keywords entered into this text field will search off fields

NARROW RESULTS BY BOOKING STATUS:

- Show All Requested Facilities
- Show All Booked Facilities
- Show All Available Facilities
- Show All Facilities

Search for only those events occurring at specific locations or to find available rooms that meet specific criteria.

EVENT LOCATION

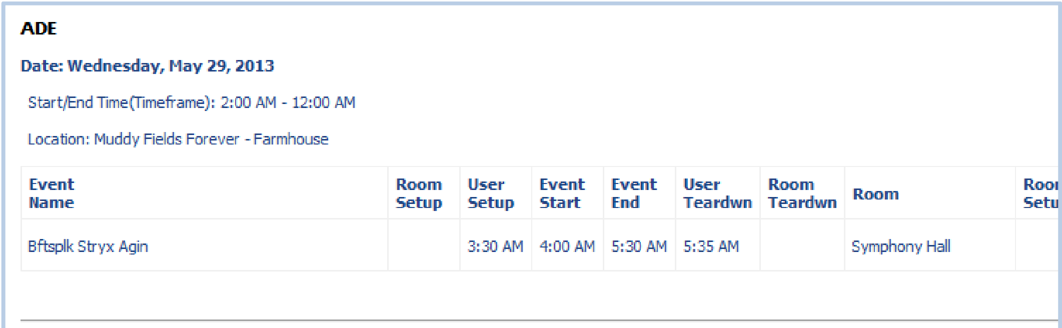
- **Location/Building/Room**: Select the (+) in order to expand a location to see all buildings at that location or expand the (+) at the building level in order to view the list of rooms available to search. Click the checkbox beside any location(s), building(s) and room(s) in order to make your search selections.
- **Room Type**: Select one or multiple room type(s) in order to narrow your search results to only those facilities that have been classified as the selected room type(s). Use the CTRL key in order to select multiple.
- **Setup Options**: Select one or multiple room setup option(s) in order to narrow your search results to only those facilities that have the available room setup option(s).
- **Features**: Select one or multiple room feature(s) in order to narrow your search results to only those facilities that have include the selected room feature(s).
- **Capacity**: Open text field for entering in a maximum capacity up to 12 numeric digits.

The main “View” area includes a list of all events with matching facility bookings based off the criteria entered. It is possible to have more than one “Gantt” chart area based off the number of locations and buildings selected for the search. Each location and building has its own Gantt Chart area with all associated rooms that match the search selected. The Location Names, Building Names and Room Names all appear as links to open their respective pop-up window showing the details of that Facility.

ADVANCED OPTIONS AVAILABLE FOR EACH VIEW SCREEN

- **DOWNLOAD**: Use this icon to launch a window with selections for downloading all current Facility Bookings for the date being viewed. Options for downloading include CSV and XML. Choose your file type from the available selections and click the SUBMIT button to begin the download process. You will be prompted to also select if you would like to SAVE or OPEN the downloaded file. From the Gantt View the event facility details will be downloaded for all pending and approved event facility requests. In the download file, each occurrence facility request will include a status column showing the pending or approved status.
- **PRINT**: Use this icon to launch a printer-friendly view of the current list that you are viewing. Once the printer-friendly screen is opened, you will be prompted by your printer setup options on the steps required to print the screen view.

- **REPORT**: Use this icon to launch a window showing a report of all events with facility reservations for the current day(s) being viewed. This *Daily Facility Booking/Setup Report* page provides options for downloading the report in CSV and XML formats, or for printing a printer friendly report. Here is an example of the report (showing approximately the left half of the report, with major event details):



ADE

Date: Wednesday, May 29, 2013

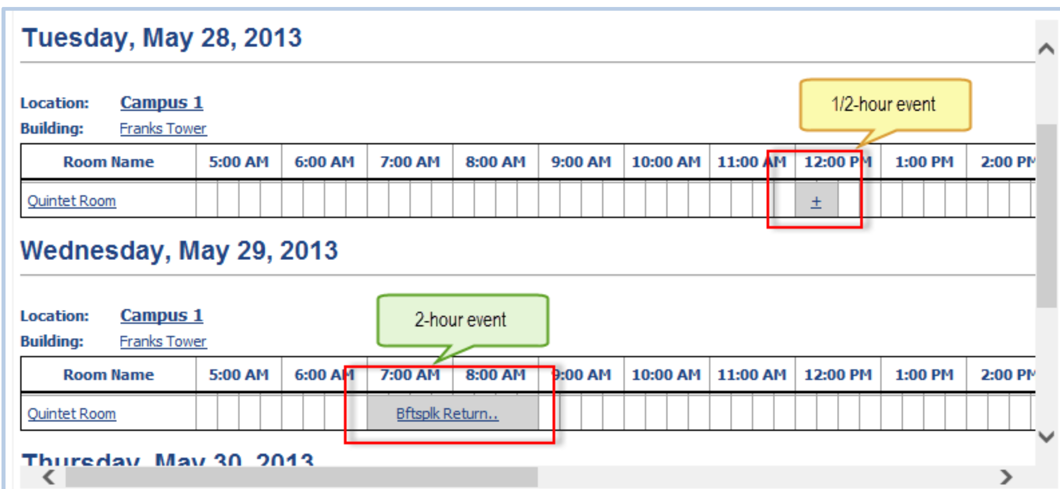
Start/End Time(Timeframe): 2:00 AM - 12:00 AM

Location: Muddy Fields Forever - Farmhouse

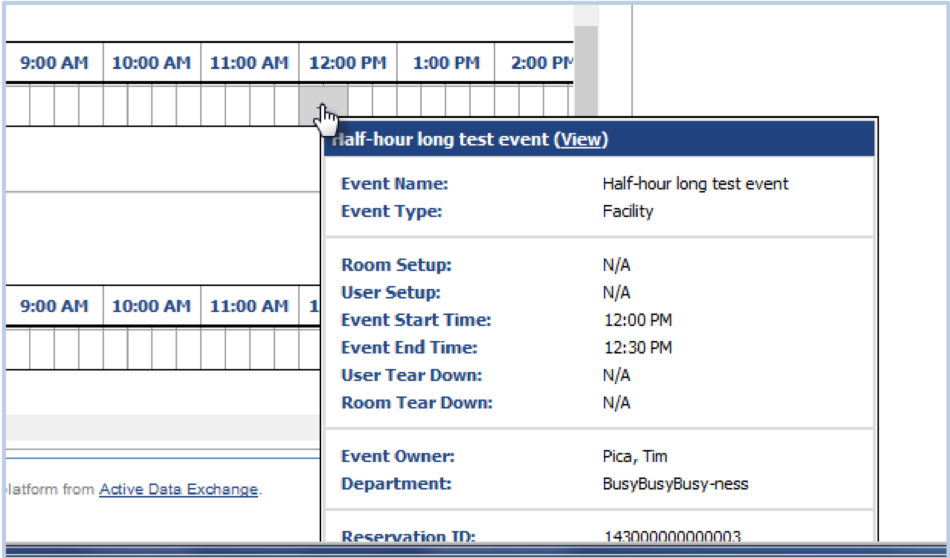
Event Name	Room Setup	User Setup	Event Start	Event End	User Teardwn	Room Teardwn	Room	Roo Setu
Bftsplk Stryx Agin		3:30 AM	4:00 AM	5:30 AM	5:35 AM		Symphony Hall	

The Gantt Chart area lists the 24 hours of the date selected broken down in 5-minute increments. Time "slots" that include scheduled events show as booked and the name of the event is listed within the reserved area.

If the user accessing the Facilities Calendar does not have the ability to view private events and an event is private only, then the word "Private" is displayed in the reserved area on the Gantt chart. If the event is shorter than 45 minutes' duration, a "plus symbol" link replaces the event name:



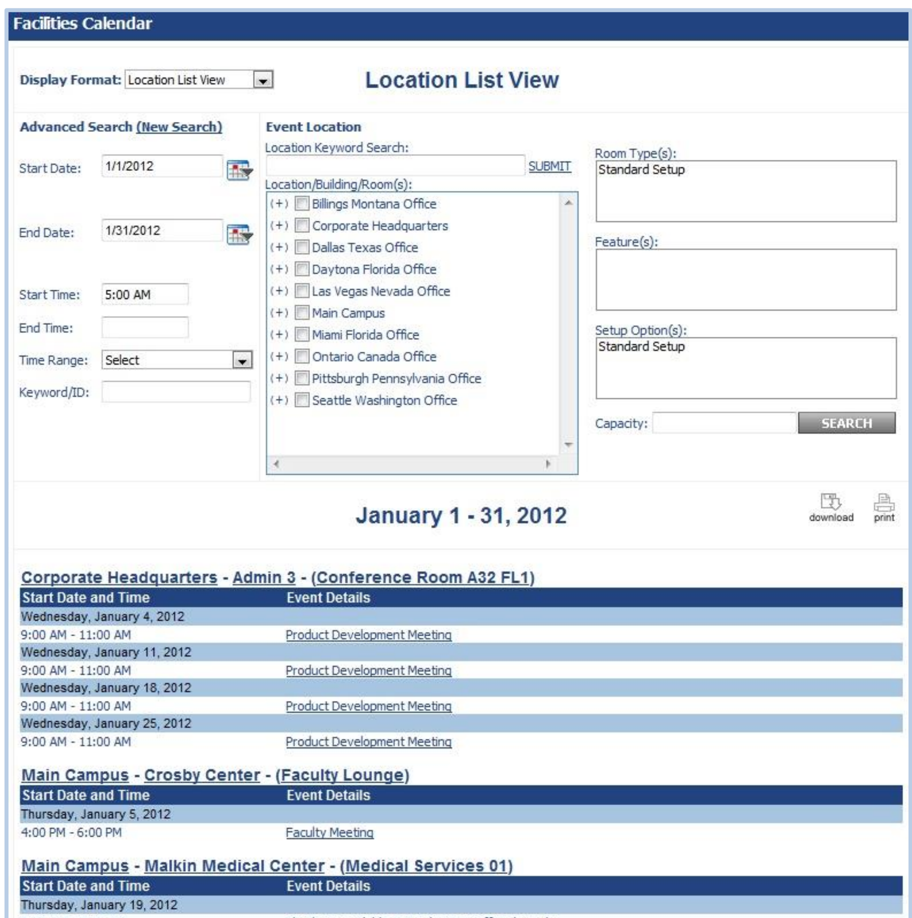
Mouse over the link to reveal the event quick tip, or click the link to view the event's facility details:



- **Room Setup**, User Setup and User Tear Down and Room Tear Down Times are also blocked off on the Gantt chart with associated colors that are identified in the main Facilities Calendar "key".

Facility Calendar - Location List View

The Location List View in the Facility Calendar allows you to view multiple days in a date range. Search options for the Facility Location List View include the following advanced search options.



Advanced Search

- **Start and End Date**: User can select the start date and end date to view all facility bookings that are scheduled during the date range selected.
- **Start and End Time**: User can select the start time and end time to view all facility bookings that are scheduled during the date range and time range selected.
- **Time Range**: Use this drop-down in order to select a range of

time including options for Midnight - 5am, 5am - Noon, Noon - 5pm and 5pm - Midnight.

- **Keyword**: Keywords entered into this text field will search off fields

Search for only those events occurring at specific locations or to find available rooms that meet specific criteria.

EVENT LOCATION

- **Location/Building/Room**: Select the (+) in order to expand a location to see all buildings at that location or expand the (+) at the building level in order to view the list of rooms available to search. Click the checkbox beside any location(s), building(s) and room(s) in order to make your search selections.
- **Room Type**: Select one or multiple room type(s) in order to narrow your search results to only those facilities that have been classified as the selected room type(s). Use the CTRL key in order to select multiple.
- **Setup Options**: Select one or multiple room setup option(s) in order to narrow your search results to only those facilities that have the available room setup option(s).
- **Features**: Select one or multiple room feature(s) in order to narrow your search results to only those facilities that have include the selected room feature(s).
- **Capacity**: Open text field for entering in a maximum capacity up to 12 numeric digits.

The main “View” area includes a list of all events with matching facility bookings based off the criteria entered.

The Location Names, Building Names and Room Names all appear as links to open their respective pop-up window showing the details of that Facility.

ADVANCED OPTIONS AVAILABLE FOR EACH VIEW SCREEN

- **PRINT**: Use this icon to launch a printer-friendly view of the current list that you are viewing. Once the printer-friendly screen is opened, you will be prompted by your printer setup options on the steps required to print the screen view.
- **DOWNLOAD**: Use this icon to launch a window with selections for downloading all events within your current Calendar view. Options for downloading include CSV and XML. Choose your file type from the available selections and click the SUBMIT button to begin the download process. You will be prompted to also select if you would like to SAVE or OPEN the downloaded file. From the Facility Calendar - Location List View the event facility details will be downloaded for only approved event facility requests.

VIEWING EVENTS IN THE FACILITY CALENDAR - LOCATION LIST FORMAT

The event list includes those events that match your selected search criteria and are sorted in groups by the Location, Building and Room(s) to which they have been classified.

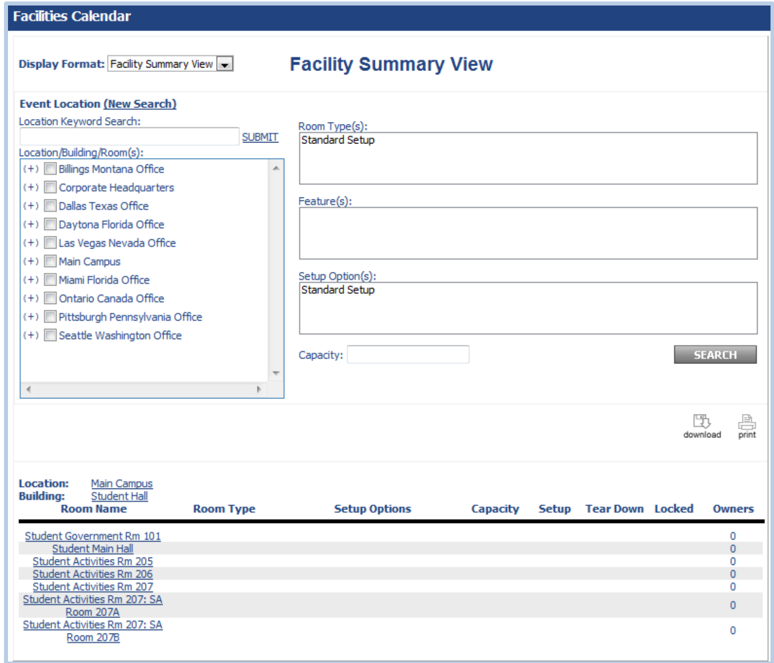
There are two columns of information that may display for each event:

- **Start Date/Time**: The Start Date and Start Time of each event is displayed. If an event has an end time, then the end time will be displayed as well. All Day events will display “All Day” within the Start Time area.
- **Event Name**: Name of the event that was added by the event administrator. Each event name is displayed as a hyperlink, which if selected will navigate you to the Event Details screen.

FACILITY CALENDAR - FACILITY SUMMARY VIEW

The Facility Summary View is intended to provide a listing of all setup options, features and room types selected for rooms that meet your search criteria.

Search options for the Facility Summary View include the following advanced search options.



- **Location/Building/Room**: Select the (+) in order to expand a location to see all buildings at that location or expand the (+) at the building level in order to view the list of rooms available to search. Click the checkbox beside any location(s), building(s) and room(s) in order to make your search selections.
- **Room Type**: Select one or multiple room type(s) in order to narrow your search results to only those facilities that have been classified as the selected room type(s). Use the CTRL key in order to select multiple.
- **Setup Options**: Select one or multiple room setup option(s) in order to narrow your search results to only those facilities that have the available room setup option(s).
- **Features**: Select one or multiple room feature(s) in order to narrow your search results to only those facilities that have include the selected room feature(s).
- **Capacity**: Open text field for entering in a maximum capacity up to 12 numeric digits.

The main "View" area includes a list of all facilities that match your search criteria along with their associated setup options, features and room types.

The Location Names, Building Names and Room Names all appear as links to open their respective pop-up window showing the details of that Facility.

Advanced Options Available for Each View Screen

PRINT: Use this icon to launch a printer-friendly view of the current list that you are viewing. Once the printer-friendly screen is opened, you will be prompted by your printer setup options on the steps required to print the screen view.

DOWNLOAD: Use this icon to launch a window with selections for downloading all events within your current Calendar view. The only file format option for downloading is CSV. Click the SUBMIT button to begin the download process. You will be prompted to also select if you would like to SAVE or OPEN the downloaded file.

Facility Summary List Area

The facility list includes those room facilities that match your selected search criteria and are sorted in groups by the Location and Building where they are located.

There are eight columns of information that may display for each facility:

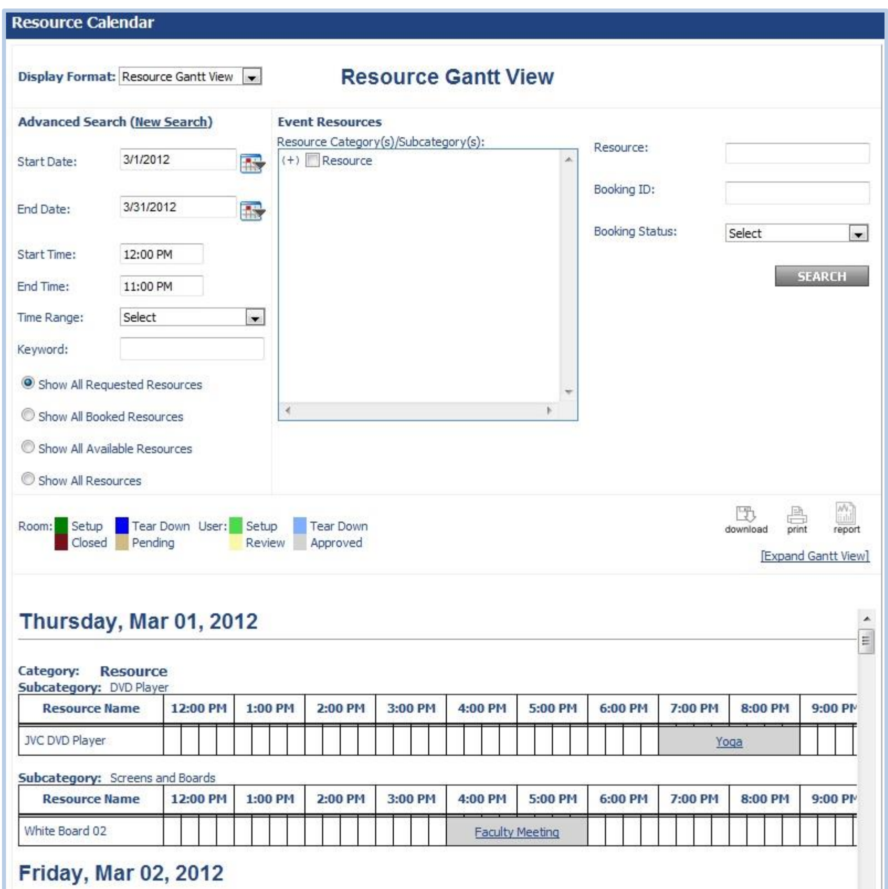
1. Room Name

2. **Room Types:** If there is more than one room type, then there will be a (+) link that can be selected in order to open a pop-up window with a full list of room types selected for this facility.
3. **Setup Options**: If there is more than one setup option, then there will be a (+) link that can be selected in order to open a pop-up window with a full list of room setup options created for this facility. All details for each setup option will be listed in the pop-up window including setup time, tear down time and maximum capacity. The default room setup will also be noted.
4. **Capacity**: The maximum capacity that the room/facility can handle if the associated room setup is selected.
5. **Setup Time**: The default setup time for the room if the associated room setup option is selected. Any user requesting this facility and setup option can choose to request additional setup time, beyond the standard room setup time, if needed.
6. **Tear Down Time**: The default tear down time for the room if the associated room setup option is selected. Any user requesting this facility and setup option can choose to request additional tear down time, beyond the standard room tear down time, if needed.
7. **Locked**: If the room has been locked and requires approval for scheduling/booking, then this column will show with an "X".
8. **Owners**: If the room has been locked then the number of facility owner(s) will display in this column. The number can be clicked in order to open a pop-up window with the names of the facility owner(s) assigned to manage this facility.

Resource Calendar - Gantt View

Search options for the Resource Gantt View include the following advanced search options.

Advanced Search



- **Start Date**: User can select a date to use as the initial date in their search.
- **End Date:** User can select a date to use as the ending date in their search.
- **Start Time**: The start time selected will determine the starting time for the Gantt chart displaying the bookings for the date selected and only those events starting at the time selected or after will display.
- **End Time**: If an end time is selected with a start time, then only those events occurring

between the start time and end time will display in the Gantt area.

- **Time Range**: Use this drop-down in order to select a range of time including options for Midnight - 5am, 5am - Noon, Noon - 5pm and 5pm - Midnight.
- **Keyword**: Keywords entered into this text field will search off fields

Narrow Search Results by:

- Show All Requested Resources
- Show All Booked Resources
- Show All Available Resources
- Show All Resources

Search for only those resource bookings from specific resource category(s)/subcategory(s):

RESOURCE CATEGORY(S)/SUBCATEGORY(S)

- **Resource Category**: Select the (+) in order to expand a resource category to see all subcategories at that category. Click the checkbox beside any resource category or subcategory in order to make your search selections.
- **Resource**: Enter a resource name to perform a quick search for a specific resource.
- **Booking ID**: Enter in a resource booking ID to perform a search and view the reservation containing that resource booking.
- **Booking Status**: Select from the drop-down to view pending, approved or both.

The main “View” area includes a list of all events with matching resource bookings based off the criteria entered. It is possible to have more than one “Gantt” chart area based off the number of categories and subcategories selected for the search. Each category and subcategory has its own Gantt Chart area with all associated resources that match the search selected.

ADVANCED OPTIONS AVAILABLE FOR EACH VIEW SCREEN

PRINT: Use this icon to launch a printer-friendly view of the current list that you are viewing. Once the printer-friendly screen is opened, you will be prompted by your printer setup options on the steps required to print the screen view.

DOWNLOAD: Use this icon to launch a window with selections for downloading all Resource Bookings for the current date being viewed. Options for downloading include CSV and XML. Choose your file type from the available selections and click the SUBMIT button to begin the download process. You will be prompted to also select if you would like to SAVE or OPEN the downloaded file. From the Gantt View the event resource details will be downloaded for all pending and approved event resource requests. In the download file, each occurrence resource request will include a status column showing the pending or approved status.

REPORT: Use this icon to launch a window with a report of all events with resource reservations for the current day being viewed. From this Daily Resource Summary Report page there are options for downloading the report in CSV and XML file formats or for printing the report in a printer friendly format.

The Gantt Chart area lists the 24 hours of the date selected broken down in 5 minute increments. Time “slots” that include scheduled events show as booked and the name of the event is listed within the reserved area.

If the user accessing the Resources Calendar does not have the ability to view private events and an event is private only, then the word “Private” is displayed in the reserved area on the Gantt chart. If the event name cannot fit within the available space where the reservation is displaying on the Gantt Chart then just the (+) symbol will display as the link to open the event quick tip.

Room Setup, User Setup and User Tear Down and Room Tear Down Times are also blocked off on the Gantt chart with associated colors that are identified in the main Resources Calendar “key”.

Administration Area Overview of Wizards

All Administration Screens will include the following

General Links

- **About** - Displays a pop-up window that includes a description regarding Copyright, Version Number and other valuable install information.
- **Logout** - Automatically logs the User out of the software.
- **Help** - Displays a pop-up window with in-context help for each screen.
- **Main Menu** - Returns the User back to the Main Menu.
- **Public Calendar** - Opens the Public Calendar for viewing of event data without logging you out of the Calendar administration menu.
- **Private Calendar** (If licensed and applicable) - Opens the Private Calendar for viewing of event data without logging you out of the Calendar administration menu.
- **Facilities Calendar** (If licensed and applicable) – Opens the Facilities Calendar in order to view facility and resource scheduling in a graphical view.

Main Navigation

- Events
- Registration
- Workflow
- Facilities
- Categorization
- Marketing
- Reports
- Configuration

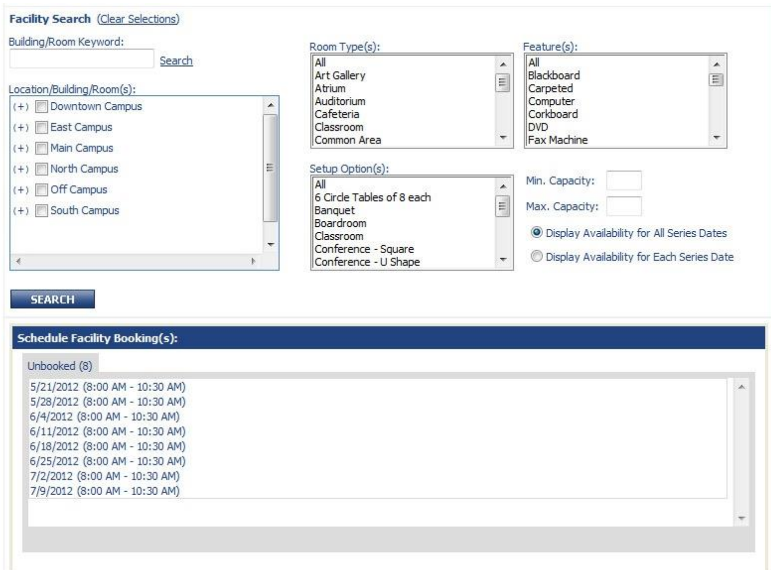
Although all areas display as main navigation links, it is not until a main link is selected that the sub-navigation within that area is displayed for selection. If a user does not have privilege or permission to perform a specific function, then that particular main area “tab” will not display on their system navigation bar.

When a main link is selected, then the display area portion of the screen will always default to the “View” selection within that area since not every user has permission to perform the “Add” function. All users can View the information within the system. The exception to this is the “Events” area and the Users area. Within the Events main navigation area, the default screen is the “Add Event” screen.

Facility Search Options

Search options include: Facility(s): List box where you can use the CTRL key to select multiple locations, buildings or rooms depending on how you want to search and/or classify the locations associated with your event. Above this list box there is a Search option as well to search for only those rooms in a specific building or by a specific location.

Users with the appropriate privileges may add new locations, buildings or rooms from this screen. There are three buttons available and if selected each opens a pop-up window on the right hand side of the screen with the appropriate fields required to complete the add process for the location, building or room. Required fields are noted with an asterisk.

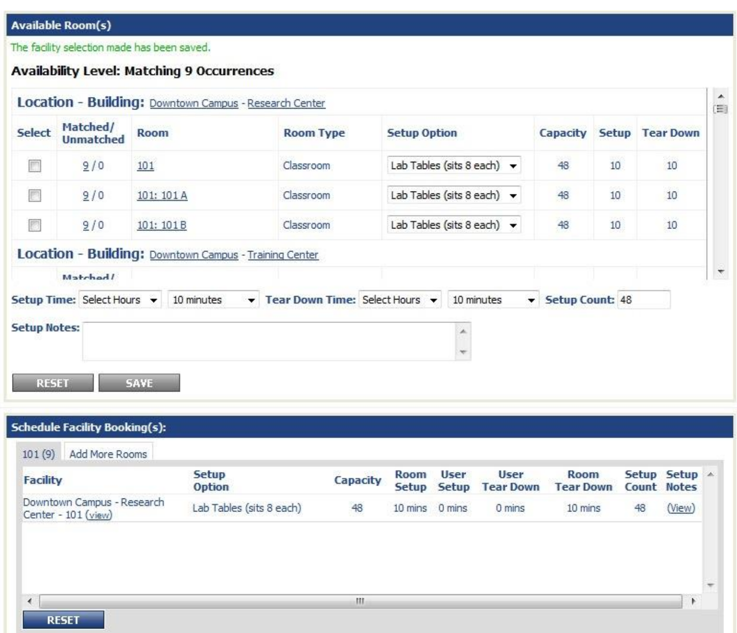


SEARCH OPTIONS INCLUDE:

- **Location/Building/Room(s)**: List box where you can use the CTRL key to select multiple locations. Above this list box there is a search field. If a location, building or room (keyword) is entered in this field and the Search text option is selected, then the list box of results is narrowed to only include those facilities that match the keyword entered. (Partial matches will display as well.)
- **Room Type(s)**: List box where you can use the CTRL key to select multiple
- **Setup Option(s)**: List box where you can use the CTRL key to select multiple
- **Feature(s)**: List box where you can use the CTRL key to select multiple
- **Minimum and Maximum Capacity**: These open text fields allow you to refine the size of the room/location that you are looking for. You can enter in a minimum, maximum or both.
- **SEARCH Button**: Once you have selected your search criteria, select the Search button to see the rooms that are available at the bottom of the screen. By default, all dates/times will show in a tab marked as "Unbooked."

SELECTING AND BUILDING YOUR FACILITY BOOKING(S) LIST

This area displays using a tabbed structure. Initially all event occurrences are shown in a grey tab marked as "Unbooked". This tab can be selected in order to initiate a search for any room(s) that are available based off the last selected Facility Search Criteria and for each occurrence (date/time) currently being displayed in the tab window.



Once a search is performed, this window will refresh to show a new table entitled "Available Room(s)". This new table includes the following information/options:

AVAILABLE ROOM(S)

- **Availability Level/Matching Occurrences**: The number of event dates/times where matches were found for all search criteria. More details on the matching and non- matching occurrences are shown in the table under the column heading of Matched/Unmatched where the numbers are displayed and are linkable. If selected, a pop-up window is opened and includes a list of the dates/times that are matches for the room being shown and those dates/times for which the room shown is not available.
- **Location** - Building: Any Location/Building that contains Rooms that are available based of the search criteria will be displayed. Each Location Name and Building Name shows as links that can be selected in order to open a pop-up window with the details of the location or building. There may be multiple locations -buildings with matching rooms and if so, then each location - building has its own table of matching rooms to select from.
- **Select**: Checkbox that allows you to select the room for your event request.
- **Room**: Displays the Room name matching request.(Linkable to open a pop-up window with the details of the room.)
- **Room Type**: Includes the type of room. If there are multiple room types selected for a room, then the default displayed here will be the default selected when the room was entered.
- **Setup Option**: Includes the room setup option that was selected as the default when the room was added into Calendar. If there is more than one room setup option for the room, then a drop-down will display and you can select any setup option from the list. Based off the setup option selected, the capacity, setup and tear down columns of information may change.
    - **Capacity**: Maximum Capacity is listed for the room if the setup option is selected
    - **Setup**: Default time required for setting up the room. May display hours and minutes.
    - **Tear Down**: Default time required for tearing down the room. May display hours and minutes.
- Room Setup Details
    - **Setup Time**: The setup time that displays in this field is the default setup time for the room/setup option that was selected from the list. This time can be modified to be more than the default time needed to setup the room based off the selected requirements. The time can also be modified to be less than the default, however a warning will be displayed if you click the "SAVE" Button. Any time that is selected, that exceeds the default setup time required for the room setup option selected, is considered by the Calendar system as User Setup Time required and will be displayed as such in the notice sent to the Facility Owner as well as all other areas throughout the administration menu.
    - **Tear Down Time**: The tear down time that displays in this field will be the default tear down time for the room/setup option that was selected from the list. This time can be modified to be more than the default time needed to tear down the room based off the selected requirements. The time can be modified to be less than the default time needed to tear down the room, however a warning will be displayed if you click the "SAVE" button. Any time selected, that exceeds the default tear down time required for the room setup option selected, is considered by the Calendar system as User Tear Down Time required and will be displayed as such in the notice sent to the Facility Owner as well as all other areas throughout the administration menu.
    - **Setup Count**: The setup count that displays in this field will be the maximum capacity that the room holds based off the room and setup option selected. This number can be modified to be less than the maximum capacity but cannot be modified to be more than the maximum capacity allows.

- Setup Notes: An open text field that allows you to enter notes regarding the setup of the room(s) being selected.

Options for finalizing or cancelling your room selection(s):

- **RESET**: Marks currently selected Room and any other setup options entered or chosen back to their default.
- **SAVE**: Saves the room selected, along with the setup time, tear down time, setup count and setup notes associated. All rooms saved for an event show in the Schedule Facility Booking(s) window and can be changed or removed from that window.

Schedule Facility Booking(s)

This window shows tabs for each grouping of occurrences (dates/times) for which a room has been selected. Each room selected for an event (series) shows as a separate tab, along with the number of occurrence(s) for which this room has been applied displaying in the tab area in parenthesis. If the number in parenthesis is selected, a separate pop-up window opens that displays the list of event date(s)/time(s) associated with the room request.

- **Unbooked**: It is possible that if a room is selected that was only available for part of a series, or was only selected for some occurrences and not all, then a tab may display that is entitled "Unbooked". This tab can be selected in order to see all occurrences (dates/times) with no room request as well as automatically search against those dates to find an available room. It is also possible that some occurrences do not require a room reservation and therefore it is possible to finalize the addition of an event with some occurrences showing as "Unbooked."
- **Add More Rooms**: As soon as at least one room has been added to the bookings list for you event, a new tab will display entitled "Add More Rooms." This allows you to search and add multiple rooms for the same occurrences. Directions are included within this tab on how you can select to only add room requests to certain occurrences. The Current Schedule area allows you to tailor and select only to search against specific occurrences or all.

Other options within the Schedule Facility Booking(s) window:

- **RESET**: Resets all selections for the current tab and sets occurrences back to "Unbooked."

Searching and Selecting by Individual Date/Occurrence

You may also select the radio button from the "Facility Search" area entitled "Display Availability for each Series Date." This option assumes that you want to search on an individual date basis and select your room requirements for each date/time individually. If this is selected then there will be no batch/bulk searching and/or options displayed. Searches are conducted and results are displayed as they match on an individual date/occurrence level.

Buttons that will display if this type of search/results are chosen includes:

- **NEXT DATE**: Allows the user to go to the next open date in the series for which they need to select a room. If Next Date is selected, then the function window is refreshed to show the facility options for the next open date in the series. No selections are saved unless the SAVE button is selected.
- **PREVIOUS DATE**: Once a user makes selections for a particular date and navigates to another date, the previous option will display, allowing the user to go back to the last viewed occurrence that was viewed. The previous link will not display on the first screen displayed for making selections since there are no previous views.

- **SAVE**: Saves the room selected, along with the setup time, tear down time, setup count and setup notes associated. All rooms saved for an event show in the Schedule Facility Booking(s) window and can be changed or removed from that window.
- **RESET**: Resets the selections made that have not yet been saved back to the defaults.

OPTION 3: SELECT LOCATION TO FIND AVAILABLE DATE(S)

If this option is selected, then you will see a split screen where the left hand side shows location search options. You may select the specific location or a location criterion that is needed for your event and choose to further refine your search by a date range option on the right hand side. Calendar will display the dates/times when that particular location(s) are available for booking your event.

LOCATION SEARCH OPTIONS

You have the option to select from a variety of fields/choices in order to narrow/refine the list of locations that are applicable for your event. If no fields are selected, and a search is performed, then the default is "ALL" which will display all locations/buildings/rooms available for the dates/times selected. The only locations that will display are those that fit for every date in the series (if the event is a series).

Search options include:

- **Location/Building/Room**: List box where you can use the CTRL key to select multiple locations. Above this list box there is a search field. If a location, building or room (keyword) is entered in this field and the Search text option is selected, then the list box of results is narrowed to only include those facilities that match the keyword entered. (Partial matches will display as well.)
- **Room Type**: List box where you can use the CTRL key to select multiple
- **Setup Options**: List box where you can use the CTRL key to select multiple
- **Features**: List box where you can use the CTRL key to select multiple
- **Minimum and Maximum Capacity**: These open text fields allow you to refine the size of the room/location that you are looking for. You can enter in a minimum, maximum or both.

You can search by location criteria only and will then be presented in the results window with the next available date/time with matching locations that are available. You can then use the Next and Previous buttons to navigate to the next date/time with available matching locations and also go back to previous options. You can also choose to narrow their search by date/time range or for a specific date to see if there are any matches.

AVAILABLE DATE/TIME OPTIONS

This searching is done by narrowing results using the following fields/options:

- Start Date
- End Date
- Timeframe (Hours/Minutes) Needed for Event
- Available Locations

Results are displayed at the bottom of the screen in a Gantt chart view.

Details include:

- **First Date with Available Facilities that Meet Selected Criteria**
- **Jump to Available Date:** Drop-down with all dates with available facilities that meet selected criteria. Click Previous and Next buttons to go through the dates manually one by one or use this "Jump to" drop-down to select a specific date and see the results specific to that date.

- **Location Name:** There may be multiple locations with buildings that have available room facilities. Each Location is listed, along with the matching building and then separate tables showing the rooms available in each respective building. These different location/building tables will be stacked on top of each other.
- **Building Name**

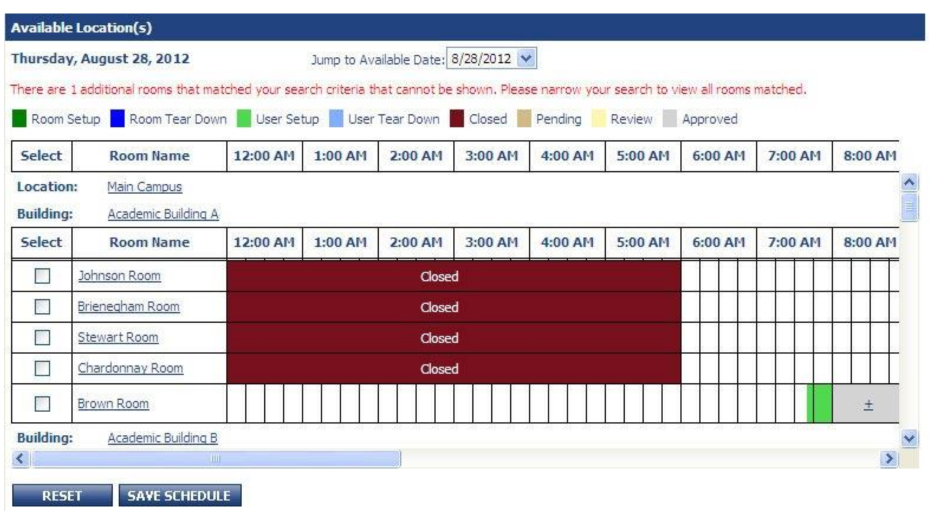
Room List Table:

- **Select**
- **Room Name**
- **Setup**
- **Gantt Chart:** Times of Day broken down into 5 minute increments using a Gantt chart format (A graphical representation of room bookings as segments on a time scale.) The left hand side of the Gantt chart is a column with lists of rooms matching search criteria that are available. The horizontal axis is a time scale, broken down in 5 minute increments.

Within the Gantt chart area, each time segment where a room is booked will be colored (according to the key that identifies room setup, user setup, event time, user tear down and room tear down time).

The name of the event is displayed if there is enough space in the area noting the event booking. However, if the event is a private event and you do not have privileges to view or add private events, then the event name will show as "Private Event". If the event name is too long and cannot fit in the available space on the Gantt chart, then a (+) will be displayed in the space for the event name. If you mouse over the event name or the (+) symbol, an event quick tip will open that will include information about the event.

Setup time and tear down time for an event is noted on the Gantt chart also. If a room is selected from the list, then you will be prompted/required to enter in the desired start time and end time of the event. The default room setup is automatically used for the event, unless you select the setup column in order to see other setup options for the room.



The default setup and tear down time for the room and setup selected is automatically populated in the appropriate fields. Also, the field for Setup Count is automatically populated with the maximum capacity number for the room and setup selected. You can choose to change the setup count to be less than the maximum capacity but it cannot be modified to be greater than the maximum capacity for the room with the selected setup.

Once you select the start and end time for the event and choose to either maintain or modify the setup and tear down times, you can either:

- **RESET**: Clears all values selected within the "Available Locations" function window.
- **SAVE SCHEDULE**: Saves the facility request for the selected date. If the event does not fit within the time required/requested, then a message will be generated and displayed at the top of the function window.

You can continue with your Add Event process, select a different date from the "Available Dates" or conduct a different search on the same screen to make other facility requests as part of the event process.

Once you have saved all of your event date selections/requests, you can click the NEXT button to go to the next step in the Add Event wizard.

REQUEST RESOURCES FOR THIS EVENT

You may also select the checkbox entitled "Request Resources for this Event." If this checkbox is selected, then you will be navigated to a new screen for the selection of resources for the event.

If the checkbox for requesting resources is not selected, and the NEXT button is selected, then you will be navigated to the Contact & Other Information screen of the Add Event wizard.

NAVIGATION OPTIONS WITHIN THIS WIZARD

To CANCEL out of the Add Event Wizard, click the CANCEL button and you will be returned to the main menu of Calendar and no event data will be saved.

Select the BACK button to navigate back to the previous screen in the wizard and make changes. All current information entered about the event will be maintained.

Continue to the next step of the Add Event process by clicking the NEXT button. If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click NEXT.

Click FINISH to complete your event entry and navigate to the Preview and Finalize Event screen. On the Preview and Finalize Event screen you can either SAVE your event as it is currently entered or RELEASE the event live to the Calendar or for processing by the appropriate administrator(s) or category owner(s).

NOTE: When adding or modifying an existing event (via Modify, Cancel or Delete), the *Preview and Finalize* page gives you the option of not emailing subscribers about the change. The option for that is **Do not notify category or event subscribers of this event change**.

Step 4: Add Event - Resources

This function includes options for requesting resources for your event.

To make resource requests users need to select at least one Resource Category/Subcategory from the drop-down list. The only categories/subcategories that will display are those that are labeled for Resources and which include available Resource Items.

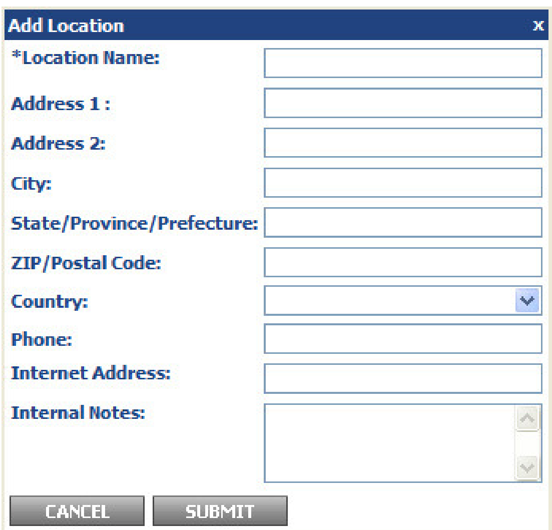
Once a category/subcategory selection is made, then the box directly beneath entitled “Resources/Items in Category Selected” is refreshed to display a list of all available resource items in the category/subcategory selected. To the right of the list box there are two buttons:

- **View**: If a resource item is selected and this button is clicked, then the user will see a pop-up with the details about the resource items (Resource Owner and Notes).
- **Add**: If a resource item is selected and this button is clicked, then the screen will refresh to show the resource item in a list of “Resources/Items selected for your Event”.

Continue to select from the list of resource items or make new category/subcategory selections in order to refresh the available list to choose from. Once you have created your resource request list, you have the option to enter in a quantity beside each resource to show the amount of that resource that you are requesting. You may also enter in Resource Notes that can be viewed by anyone reviewing the event or resource request.

Each resource note can include a maximum of 255 characters.

There is also a DELETE button beside each resource so that you can remove a resource from your request list before proceeding in the Add Event process.



FUNCTION WINDOW FOR ADDING NEW LOCATIONS

This function box, when opened in the right hand area of the screen will allow you to enter in a new Location which will then become available system wide. The only required field that must be entered within this function window is Location Name. The exact location fields displayed in this function window depend on if Domestic or International Location Fields are enabled for your installation. Once the Location information has been entered, you can click the SUBMIT button to save the new location and return to the main Add Event: Contact & Location Information screen. You can also choose to CANCEL out of this function window at any time and you will be returned to the main Add Event: Contact & Location Information screen and the new location information will not be saved.

The location that you add from this function-window will become the default value displayed in your location drop-down on the main Add Event - Contact/Location Information screen.

There is also a similar function window for entering in a new Building and a New Room. Each function window allows you to create a new Building or Room which becomes available system wide. The required fields on each of those screen is noted by the asterisk (*) before the field name.

Once the locations, buildings and/or rooms have been selected, that you want to associate with your event, click the SAVE button to add them to your list. You may choose to add locations, buildings and/or rooms multiple times using the SAVE option until you are ready to go to the next screen.

NAVIGATION OPTIONS WITHIN THIS WIZARD

To **CANCEL** out of the Add Event Wizard, click the **CANCEL** button and you will be returned to the main menu of Calendar and no event data will be saved.

Select the BACK button to navigate back to the previous screen in the wizard and make changes. All current information entered about the event will be maintained.

Continue to the next step of the Add Event process by clicking the **NEXT** button. If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click **NEXT**.

Click **FINISH** to complete your event entry and navigate to the Preview and Finalize Event screen. On the Preview and Finalize Event screen you can either SAVE your event as it is currently entered or **RELEASE** the event live to the Calendar or for processing by the appropriate administrator(s) or category owner(s).

NOTE: When adding or modifying an existing event (via Modify, Cancel or Delete), the *Preview and Finalize* page gives you the option of not emailing subscribers about the change. The option for that is **Do not notify category or event subscribers of this event change**.

Facilities Tab

If no facilities have been selected for the event then there will be a message displayed under this tab: "No facilities have been selected for this event."

Otherwise, the facilities tab includes the following information in table format:

- **Details "View" Link Column**: This column includes a "View" link beside each row that can be selected in order to change the facility details at the bottom of the tab function window to reflect the details for the particular facility request selected.
- **Event Date/Time**: Each occurrence within a series that includes a facility request will be listed separately. If a specific date/time includes more than one facility request, then that particular date/time will be displayed multiple times in the list for each facility needed. The event date/time is always clickable and if selected refreshes the facility tab window to launch the facilities calendar (Gantt Chart View) that shows the date/time selected for the associate room. It also shows the other rooms that match the criteria of the room selected that are also within the same building and are available on that date/time. Location Owners can then check the availability of the room and usage prior and after event as well as other similar rooms in case the request cannot be accommodated as submitted.
- **Facility Requested (Building : Room):** This information displays as a link and if selected, opens a pop-up window with the details of that room.

Facility Details included at the bottom of the facility tab area includes the following information:

- **Booking ID**: Shows as N/A since the facility is still pending and a booking ID is not assigned until after the facility request is approved.

- **Location Owner(s)**: Number displays as a link that can be clicked to open a pop-up with the name of the owners. (same pop-up displayed other places)

- **Location:** Main Location Name Displays
- Room Setup Time
- User Setup Time
- Setup Count
- Room Features
- Room Setup
- Room Tear Down Time
- User Tear Down Time
- Room Setup Notes
- Internal Notes

Resources Tab

If no resources are selected for an event then there will be a message displayed under this tab: "No resource items have been selected for this event."

Otherwise, the resources tab includes the following information in table format:

- **Details "View" Link Column**: This column includes a "View" link beside each row that can be selected in order to change the resource details at the bottom of the tab function window to reflect the details for the particular resource item selected.
- **Event Date/Time**: Each occurrence within a series that includes a resource request will be listed separately. If a specific date/time includes more than one resource item request, then that particular date/time will be displayed multiple times in the list for each resource item needed.
- Resource Requested
- **Quantity**: The number of resource items being requested.

Resource Details included at the bottom of the resources tab area includes the following information:

- Resource Category
- Resource Subcategory
- Resource Owner(s)
- Resource Notes

*NOTE: All information is non-editable from this screen.

Facilities and Resource Workflow Rules

MODIFYING/CANCELLING/DELETING 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	No additional processing is required by Resource Category Owner(s).
Date/Time/Pattern Modified	An email is generated to Resource Category Owner(s) and Resource requests must be re-approved. All Resources requests are set back to Pending.

Location/Facility is Modified	An email is generated to Resource Category Owner(s) but the 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 Resource Requests must be re-approved. All Resource requests 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
Event is Deleted (where resources are pending or approved)	An email is generated to Resource Category Owners
Event is Rescheduled (where resources are pending or approved)	An email is generated to Resource Category Owner(s) and Resource Requests must be re-approved. All Resource requests are set back to Pending. Also, the "Event is Cancelled" email is sent for the original event/resource request that has been cancelled. So the same Resource Category Owner may receive two emails.

MODIFYING/CANCELLING/DELETING AN EVENT – FACILITY 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 Facility Owner(s).
Date/Time/Pattern Modified and/or Facility selection is modified	An email is generated to Facility Owner(s) and Facility request(s) must be re-approved. The original Facility is "re-opened" and the new request sets the facility request status for the event back to Pending. If the event is modified to request less time for the facility booking, then Calendar will look for any events in a Review status for the booked facility that can now be accommodated due to the schedule modification. Events that can now be accommodated will be set back to Pending also.

Event is Cancelled (where Facilities are pending or approved)	An email is generated to Facility Owners informing them. The Facility is re-opened/available for previously booked timeframe. If other events were in a “Review” status for the waiting list, then these events may be considered for approval of their facility request as long as the entire timeframe of their event is now open.
Event is Deleted (where Facilities are pending or approved)	Email generated to Facility Owners. The Facility is re-opened/available for previously booked timeframe. If other events were in a “Review” status for the waiting list, then these events may be considered for approval of their facility request as long as the entire timeframe of their event is now open.
Event is Rescheduled (where Facilities are pending or approved)	Email generated to Facility Owner(s) and the Facility request must be re-approved. Original Facility”re-opened” and new request sets the facility request status for the event to Pending. “Event is Cancelled” email sent for the original event/facility request that has been cancelled. The same Facility Owner may receive two emails.

Import Data

Administrative users with the privilege to Import Data can use this area to import events, categorization or locations.

If events are imported and they include facility selections, and the facilities are also included in the Active Data Calendar product then the following may occur based off the status of the facility for the date/time of the imported events:

Event includes Facility that is Open in Active Data Calendar: Event is added into Calendar for the Facility and the facility request is marked as “Approved”. If there are more than one event in the import that include the same facility request for the same date/time then the first event that is imported that includes the facility for the date/time will be marked as “Approved” and other events imported for the facility at the date/time will be marked as “Review” ( ). It is then up to the user who owns the event to select a different facility in Active Data Calendar or contact the facility owner to resolve the conflict. There is also a setting with the configuration area that allows administrators to “Allow Imported Events to Override Double Booking Rules”. The default for this configuration option is set to “Disable” since the Calendar is structured to avoid double bookings. However, on occasion it is necessary to have more than one event show as booked within a specific facility. If this setting is selected as “Enabled”, then event facility requests for the same room at the same date and time will all come in as Approved on the Facility Calendar and will override the no double bookings rule.

Event includes Facility that is Closed for the Date and/or Time of Event: Event is added into Calendar for the Facility and the facility request is marked as “Review”. The facility shows on the Gantt with the Conflict Icon ( )

and it is up to the user who owns the event to select a different date/time or facility by modifying the event or cancelling and rescheduling the event in Active Data Calendar.

Event includes Facility that is Booked in Active Data Calendar: Event is added into Calendar for the Facility and the facility request is marked as “Review”. The facility shows on the Gantt with the Conflict Icon ( ) and it is up to the user who owns the event to select a different date/time or facility by modifying the event or cancelling and rescheduling the event in Active Data Calendar. There is also a setting with the configuration area that allows administrators to “Allow Imported Events to Override Double Booking Rules”. The default for this configuration option is set to “Disable” since the Calendar is structured to avoid double bookings. However, on occasion it is necessary to have more than one event show as booked within a specific facility. If this setting is selected as “Enabled”, then event facility requests for the same room at the same date and time will all come in as Approved on the Facility Calendar and will override the no double bookings rule.

Event includes Facility that has Pending Facility Requests for Same Date/Time in Active Data Calendar: Event is added into Calendar for the Facility and the facility request is marked as “Approved”. The previously Pending facility requests in Active Data Calendar are marked as “Review”.

Facilities:

Facilities information is not required. If it is supplied, any locations, buildings, rooms, and room divisions which are specified for the event occurrence will be added to the calendar database if they do not already exist.

In order to support the concept of multiple facilities per event occurrence, both the CSV and XML enterprise import formats have been modified. In the XML file format the exact tree structure of the multiple facilities is broken down into elements under a node named “Locations” similar to the XML snippet listed below:

```
<Locations type="group">
<Location type="group">
<LocationName type="text">Rouses Point</LocationName>
<SetupNotes>Facility Notes</SetupNotes>
<Building type="group">
<BuildingName type="text">RP-IT</BuildingName>
<Room type="group" roomsetupname="Double Conference Table" roomsetuptime="0" roomteardowntime="0"
roomcapacity="1000" roomlink="" usersetuptime="0" userteardowntime="0" usersetupcount="1000"
usersetupnotes="">
<RoomName type="text">101</RoomName>
</Room>
</Building>
</Location>
<Location type="group">
<LocationName type="text">Bethlehem</LocationName>
<SetupNotes>Facility Notes</SetupNotes>
<Building type="group">
<BuildingName type="text">Hotel</BuildingName>
<Room type="group" roomsetupname="" roomsetuptime="0" roomteardowntime="0" roomcapacity="0"
roomlink="" usersetuptime="0" userteardowntime="0" usersetupcount="0" usersetupnotes="">
<RoomName type="text">200</RoomName>
```

</Room>
</Building>
</Location>
</Locations>
In the CSV file format, the location, building and room column have been collapsed into a single "Facilities" column which contains a delimited list of the exact facilities associated with the event occurrence. For example, if an event occurrence was assigned to the location "Bethlehem", the building "Hotel", and the room "100" and also the room "202" in room division "202B", the supplied CSV Facilities column would be as follows:

```
Bethlehem::Hotel::100||Bethlehem::Hotel::202::202B
```

Add User Group - Facility Permissions

When a Facility (Location - Building - Room) is being added, the User Account adding the Facility, can choose to lock the facility. When a facility is "locked", then at least one Facility Owner must be selected for management of facility booking requests that are submitted to that particular Facility. However, multiple Facility Owners can be selected for a locked Facility. This step in the "Add User Group" wizard will allow the user to select first if the users in the group should have Facility Owner Permissions or not. If the checkbox is selected, then there are three radio button selection options:

- Add User Group as Facility Owner to All Current Locked Facility(s)
- Add User Group as Facility Owner to Individual Locked Facility(s) and Select Facility(s) Now
- Add User Group as Facility Owner and Select Locked Facility(s) in Add Location – Building - Room Area

If a User Group is added with Facility Owner Permissions to Individual Locked Facility(s) and the Administrator would like to select the Facility(s) from within the Add User Group Wizard

- Click the appropriate radio button "Add User Group as Facility Owner to Individual Locked Facility(s) and Select Facility(s) Now".
- Function window is opened on the right hand side of the screen
- Select from the list of available Locked Facility(s) those which the User Group should manage as the Facility Owner. Facilities are displayed in hierarchical order (Location - Building(s) - Room(s)).
- Click the SUBMIT button to save your selections and return back to the main wizard screen for adding the User Group - Step 4.

If you need to change your selections, click the CHANGE button beside the list box showing your current Locked Facility selections and the function window will launch with the previously selected Facility(s) checked and you will have the ability to make modifications.

***NOTE**: Every time an event is added with a facility request, the Facility Owner for that locked facility is notified that the event facility request requires approval. (All facility requests must be approved for an event before the event proceeds forward in any other marketing workflow within Calendar.)

When a Facility Owner posts an event with a facility requested to which they are the owner, then their event facility request is approved automatically.

NAVIGATION OPTIONS WITHIN THIS AREA

Continue to the next step of the Add User process by clicking the NEXT button. Click the FINISH button to save this User Group at any time. You will receive a message that the User Group has been added successfully.

If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click either the NEXT or FINISH button to complete the process, depending on your intended action.

Step 5: Modify User Group - Facility Permissions

When a Facility (Location - Building - Room) is being added, the User Account adding the Facility, can choose to lock the facility. When a facility is “locked”, then at least one Facility Owner must be selected for management of facility booking requests that are submitted to that particular Facility. However, multiple Facility Owners can be selected for a locked facility. This step in the “Modify User Group” wizard will allow the user to select first if the users in the group should have Facility Owner Permissions or not. If the checkbox is selected, then there are three radio button selection options:

- Add User Group as Facility Owner to All Current Locked Facility(s)
- Add User Group as Facility Owner to Individual Locked Facility(s) and Select Facility(s) Now
- Add User Group as Facility Owner and Select Locked Facility(s) in Add Location – Building - Room Area

If a User Group is Added with Facility Owner Permissions to Individual Locked Facility(s) and the Administrator would like to select the Facility(s) from within the Modify User Group Wizard

- Click the appropriate radio button "Add User Group as Facility Owner to Individual Locked Facility(s) and Select Facility(s) Now".
- Function window is opened on the right hand side of the screen
- Select from the list of available Locked Facility(s) those which the User Group should manage as the Facility Owner. Facilities are displayed in hierarchical order (Location - Building(s) - Room(s)). Click the SUBMIT button to save your selections and return back to the main wizard screen for modifying the User Group

If you need to change your selections, click the CHANGE button beside the list box showing your current Locked Facility selections and the function window will launch with the previously selected Facility(s) checked and you will have the ability to make modifications.

***NOTE**: Every time an event is added with a facility request, the Facility Owner for that locked facility is notified that the event facility request requires approval. (All facility requests must be approved for an event before the event proceeds forward in any other marketing workflow within Calendar.) When a Facility Owner posts an event with a facility requested to which they are the owner, then their event facility request is approved automatically.

Navigation Options Within This Area

Continue to the next step of the Modify User process by clicking the NEXT button. Click the FINISH button to save the changes to this User Group at any time. You will receive a message that the User Group has been modified successfully. If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click either the NEXT or FINISH button to complete the process, depending on your intended action.

Reports

Facility Utilization Report

This report includes the ability to search for facilities by Location (Location, Building, Room) and Date Range.

Location/Building/Room: Select the (+) in order to expand a location to see all buildings at that location or expand the (+) at the building level in order to view the list of rooms available to search. Click the checkbox beside any location(s), building(s) and room(s) in order to make your search selections.

Start and End Date: User can select the start date and end date to view the facility utilization during the date range selected.

Based off the search criteria selected, a report is generated for the date range and the list of results includes the following columns of information:

- Location: linkable to the location details pop-up
- Building: linkable to the building details pop-up
- Room: linkable to the room details pop-up
- # of Bookings: scheduled to occur during the date period selected
- # of Hours Available: total number of hours the room was available during the date range based off the availability calendar for the room
- # of Hours Utilized: total number of hours the room was scheduled during the date range compared to the total
- # of hours it was available for scheduling
- Percent Utilization: the percentage of utilization based off the # of Hours Available divided by the # of Hours Utilized

Download: Use this icon to launch a window with details on downloading all facility utilization data within your current report view. You will be prompted to select if you would like to SAVE or OPEN the downloaded file.

Resource Utilization Report

This report includes the ability to search for Resource Bookings by Keyword and Date Range.

Start Date From and Start Date To: Select the range of dates that to view a report on the events that include resource bookings starting with your "from" date and through your "to" date.

Resource Name/Category/Subcategory Keyword: This open text field allows you to enter up to 50 alpha-numeric characters. The keyword search field searches off the resource category name, resource subcategory name and resource name fields, along with the resource notes field.

Based off the search criteria selected, a report is generated for the date range and the list of results includes the following columns of information:

- Resource Category
- Resource Subcategory
- Resource Name

- # of Bookings: scheduled to occur during the date period selected
- Details Link: If there are bookings for a resource, then the details link navigates you to the details screen that shows the list of events that include bookings during the date range selected for the resource item chosen. Along with the event name, the date and time of the resource booking(s) appear as well.

Download: Use this icon to launch a window with details on downloading all resource report data within your current report view. You will be prompted to select if you would like to SAVE or OPEN the downloaded file.

View Reports - Daily Operations Report

There is no default list presented when first navigating to this report screen. You must select search criteria and click the SEARCH button to see a report.

The Daily Operations Report can be produced by selecting from the search criteria listed below. The only required field for searching is the Start Date.

- Location(s)/Building(s)/Room(s): Select from the list of available Facility(s) those for which you would like to generate an Operations Report. Facilities are displayed in hierarchical order (Location - Building(s) - Room(s)).
- Start Date: Defaults to the current day. You can select any date and Calendar will search to find any events on that day that a facility and/or resource booking. All reservations on that day will display along with their associated booking records.
- Start Time: Defaults to no selection. If maintained, then the report will be generated for the entire day selected. If a start time is entered then the report will include any event reservation that begins on or after the start time selected.
- End Time: Defaults to no selection. If maintained, then the report will be generated for the entire day selected (if not start time was selected either) or for the start time selected until midnight of the start date selected. If an end time is selected, then the report will include any event reservation that begins on or after the start time selected and ends on or before the end time selected.
- Reservation/Booking ID/Keyword Search: This text field searches for any event name, facility name, resource name, reservation ID or Booking ID field to find matching reservations.

To search and find matching events/reservations for inclusion in your report, click the SUBMIT button and the bottom portion of the report screen will be updated to reflect your matching events and reservation/schedule information.

Operations Daily Summary Report

Details included within the report table include:

- Room Setup: This column includes the time that the room is required for setup. If no setup option was selected for the room tied to the reservation or, there is no setup time required for the room for this event, then this column will display blank.
- User Setup: This column includes the time that the room will be setup and the user can begin their setup time. If no additional time was requested by the user, then this column will display blank.
- Event Start: This column includes the time that the event is scheduled to begin.
- Event End: This column includes the time that the event is scheduled to end.

- User Teardown: This column includes the time that user will be tearing down/packing up after the event. If no additional time was requested by the user, then this column will display blank.
- Room Teardown: This column includes the time that the room is required for tear down by facilities. If no setup option was selected for the room tied to the reservation or, there is no teardown time required for the room for this event, then this column will display blank.
- Room: This column includes the room name(s) that is booked for this reservation/booking.
- Room Type: This column includes the room type for the room (default room type). This column may be blank if no room type was selected for the room.
- Event Owner: This column includes the name of the user who entered the event and is the owner of the reservation.
- Setup Notes: This column includes any notes that were entered at the time the reservation/booking was created.
- Phone Number: This column includes the phone number of the event owner.
- RSVN ID: This column includes the reservation ID for the entire event reservation.
- Booking ID: This column includes the booking ID for the facility (if applicable).
- # Bookings: This column includes the number of bookings that comprise the entire reservation.
- Booking Item: This column includes the name of the resource that is booked and displayed beside the associated booking ID. (This field will be blank for the row that includes the facility booking.)
- Count: This column includes the count/quantity of resources that was booked.

OTHER BUTTONS AND FUNCTIONS ON THIS SCREEN

DOWNLOAD: Opens a dialogue box that prompts you to Open, Save or Cancel. The downloaded file is a CSV file of all the data viewed in the current search results.

PRINT: Opens a printer-friendly format of the search results that can be minimized or maximized and printed.

View Reports - Categorization Statistics Report

To navigate to the Categorization Report, click on the main tab entitled REPORTS and then click on Marketing Reports – Category Stats Report in the drop-down menu provided.

The report that is presented is a display of ALL Category(s)/Subcategory(s) in the Calendar database. The total number of Category(s) and Subcategory(s) currently added to your installation of Active Data Calendar will display at the top of the screen.

The columns of information displayed for Categorization includes:

View Reports - Categorizations Statistics Report

# of Categories = 38 **# of Subcategories** = 25

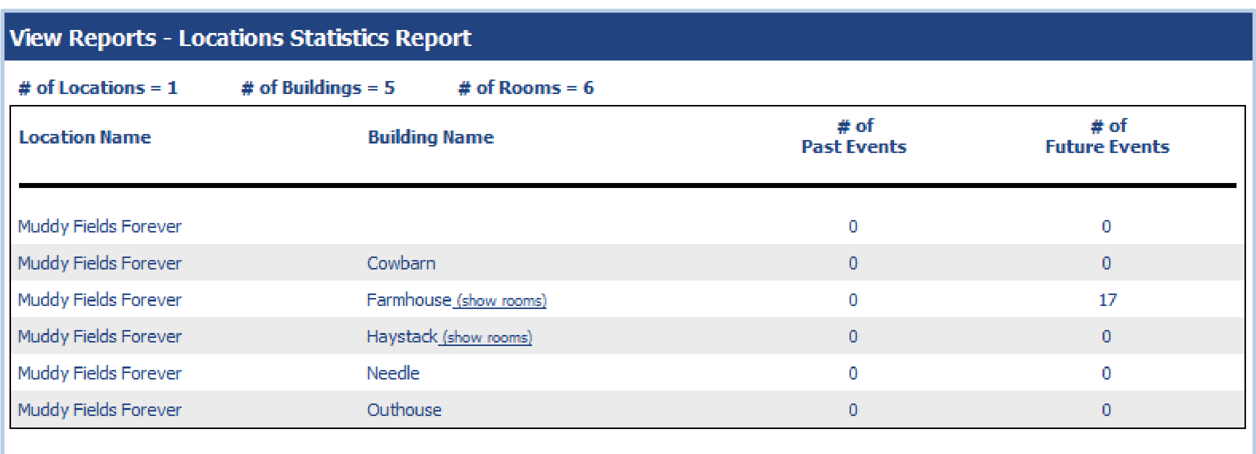
Category Name	Subcategory Name	Locked	# of Owners	# of Past Events	# of Future Events
Academic Calendar		X	2	1	107
Administrative Deadlines			0	2	0
Admissions		X	2	87	127
Admissions	Campus Monterrey		0	9	44
Admissions	Open Houses		0	15	39
Admissions Internal			0	0	0
Alumni			0	104	86
Alumni	East Coast Alumni Group		0	19	11
Alumni	Networking		0	15	10
Alumni	Reunions		0	1	6
Alumni	West Coast Alumni Group		0	3	19
Arts			0	19	40
Arts	Music		0	3	21
Athletics			0	369	76
Athletics	Intramural Sports		0	64	14
Gold Certified Partners			0	1	13
Hospitality Events			0	61	2
International Programs			0	9	45
International Studies			0	17	0
Library and Technology		X	1	31	21
On Campus Interviews/Recruiting			0	25	0
Open Houses			0	27	60
President Schedule		X	1	0	0
Registrar			0	0	5
Restricted Category		X	4	0	0
Security			0	94	119
Students Activities			0	400	83
Students Activities	Arts & Entertainment		0	42	0

- **CATEGORY TYPE**: Public or Private (Displays if the install has Private module enabled) Category Name
- **SUBCATEGORY NAME**: The Category that the Subcategory belongs to is listed beside each Subcategory Name.
- **LOCKED**: This column displays an "X" if the Category is locked.
- **# OF OWNERS**: If the Locked column displays an "X" then this column can either show "0" or any number greater than "0". If "0" is displayed then it means that no Category Owner(s) have been assigned to this Category and any events added to this locked Category will automatically go to the Super User Account for processing until at least one Category Owner is assigned. If the number is greater than "0", then it will display as a link that can be selected in order to open a small pop-up window displaying a list of name(s) for the current Category Owner(s) assigned to the locked Category.
- **# OF PAST EVENTS**: This displays the total number of events that have past for just that category (for Category Name displayed) or displays the number of events that have past for just that Category/Subcategory combination (beside Subcategory name)
- **# OF FUTURE EVENTS**: This displays the total number of upcoming events for just that category (for Category Name displayed) or displays the number of upcoming events for just that Category/Subcategory combination (beside Subcategory name)

The top of the list also displays the total number of Categories and Subcategory(s) currently active with your installation of Active Data Calendar.

Operations - Locations Statistics Report

The statistics report gives the utilization of available locations, presented as shown in this example:



View Reports - Locations Statistics Report

# of Locations = 1 # of Buildings = 5 # of Rooms = 6

Location Name	Building Name	# of Past Events	# of Future Events
Muddy Fields Forever		0	0
Muddy Fields Forever	Cowbarn	0	0
Muddy Fields Forever	Farmhouse (show rooms)	0	17
Muddy Fields Forever	Haystack (show rooms)	0	0
Muddy Fields Forever	Needle	0	0
Muddy Fields Forever	Outhouse	0	0

The fields included on the Location Report screen include:

- **Location Name**: One or more location names as entered in this Calendar.
- **Building Name(s)**: Displays a list of buildings that were entered for a particular location if applicable. Buildings that include room lists that were either entered into the Calendar administration area or uploaded as a room list for that particular building provide a "show rooms" link. Click this link to see the available rooms within that building.
- **# of Past Events**: This displays the total number of events that have past for just that location (for Location/Building Name displayed or for a particular Room if the list was expanded to show events by Room).

- **# of Future Events**: This displays the total number of events that are scheduled for future dates for just that location (for Location/Building Name displayed or for a particular Room if the list was expanded to show events by Room).

The top of the list also displays the total number of main Locations currently active within your installation of Calendar.

To view the details for any of the entities in this report (a location, building or room), use the Facilities tab, then click the View link at the right-hand end of the level-2 menu under Facilities. The first occurrence of a location name is a link to the details page for that location, the first occurrence of a building name a link for that building's details, and so on.

Event Subscribers Report

The default list that is presented when first navigating to this report is the list of all events with active subscribers based off the default search range.

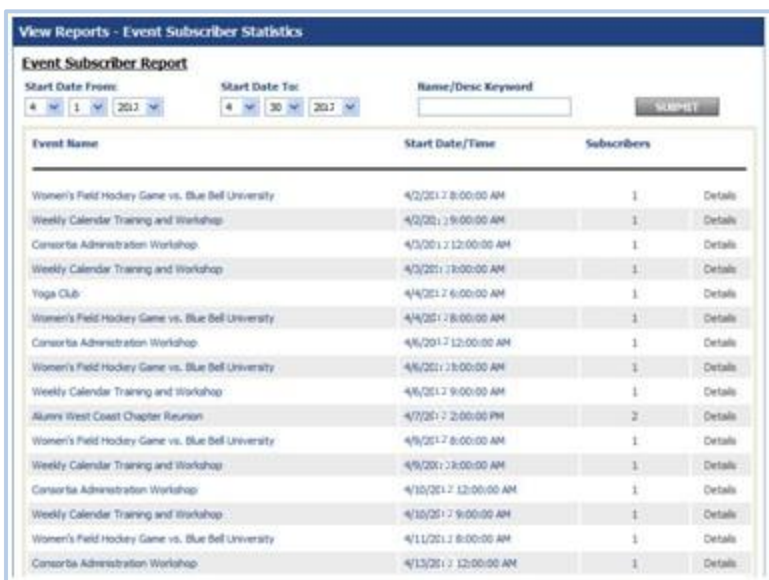
The event subscribers report can be produced by selecting from the following search criteria:

- **Start Date From**: Defaults to the first day of the current month. You can select any date and Calendar will search to find any events that have a start date on or after the date selected.
- **Start Date To**: Defaults to the last day of the current month. You can select any date and Calendar will search to find any events that have a start date based off the "Start Date From" criteria selected, but which also do not have a start date that exceeds the "Start Date To" selected.
- **Event Name/Description Keyword Search**: The keyword search field searches off the event name field to find matching keywords.

To search and find matching events for inclusion in your report, click the SUBMIT button and the bottom portion of the report screen will be updated to reflect your matching events and subscriber information.

Event Subscribers Report Results

Details included within the report table include:



- Event Name: This column includes the event name(s) that match your search criteria.
- Start Date/Time: This column includes the event start date/time for the event name displayed. If the event is part of a series it is possible to have duplicate event names in the event name column, but multiple report line items for each start date/time of each occurrence in the series.
- Subscribers: This column includes the total number of

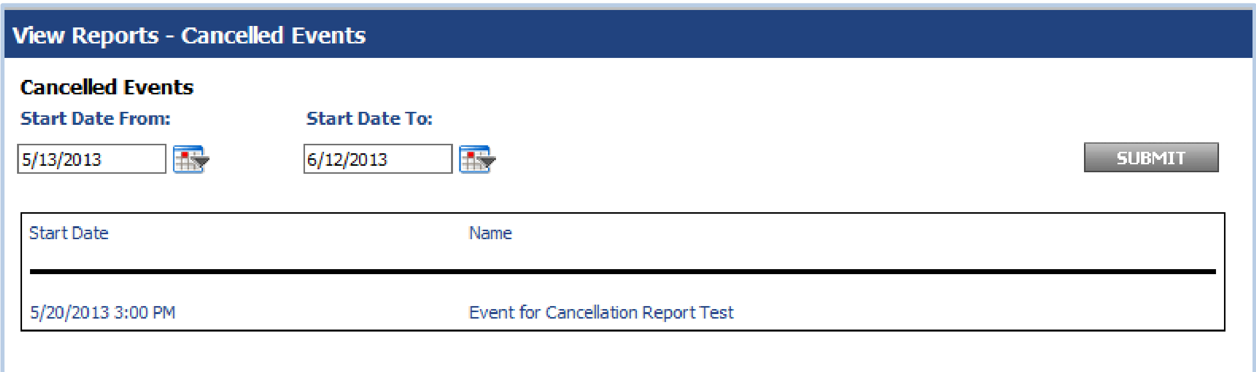
subscribers registered for updates to the event date/time displayed in the report.

To view a list of the actual subscriber information (First Name, Last Name and Email), click on the Details link beside the event line item for which you would like to see a more detailed breakdown of the subscribers.

This report screen also includes totals at the bottom of the screen to show cumulative number of subscribers based off the search results displayed.

Canceled Events Report

As its name implies, this report shows the reports canceled for a ranges of event *start date*s you specify. Here is the page where you both enter the range of dates and receive the report results:



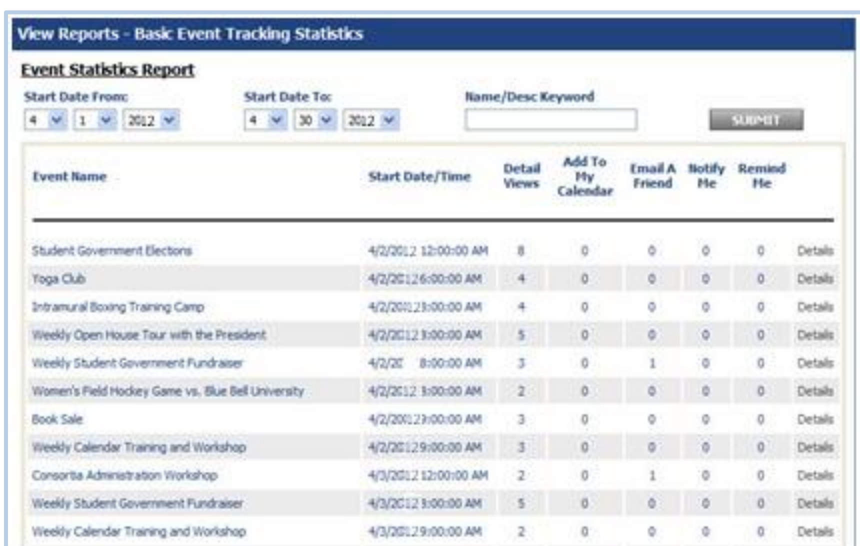
Request the report by entering *from* and *to* dates (or accepting one or both defaults), to be tested against event start dates in your Calendar, and clicking **SUBMIT**.

Event Tracking Statistics Report

The default list that is presented when first navigating to this report is the list of all active events based off the default search range.

The event tracking report can be produced by selecting from the following search criteria:

- Start Date From: Defaults to the first day of the current month. You can select any date and Calendar will search to find any events that have a start date on or after the date selected.
- Start Date To: Defaults to the last day of the current month. You can select any date and Calendar will search to find any events that have a start date based off the "Start Date



From" criteria selected, but which also do not have a start date that exceeds the "Start Date To" selected.
- Keyword Search: The keyword search field searches off the event name field to find matching keywords.

To search and find matching events for inclusion in your report, click the SUBMIT button and the bottom portion of the report screen will be updated to reflect your matching events information.

Event Tracking Report Results

Details included within the report table include:

- Event Name: This column includes the event name(s) that match your search criteria.
- Start Date/Time: This column includes the event start date/time for the event name displayed. If the event is part of a series it is possible to have duplicate event names in the event name column, but multiple report line items for each start date/time of each occurrence in the series.
- Details View: This column includes the total number of visits to the details view page for that particular event.
- Add to My Calendar: This column includes the total number of visitors who completed the action of downloading the event to their personal calendar.
- Email a Friend: This column includes the total number of visitors who completed the action of sending this event to at least one friend.
- Notify Me: This column includes the total number of visitors who completed the action of subscribing to receive event updates for this event.
- Remind Me: This column includes the total number of visitors who completed the action of signing up for an event reminder for this particular event.

To view a detailed breakdown of the dates and times when each action was performed, click on the Details link beside the event line item for which you would like to see a more detailed breakdown of the event actions.

This report screen also includes totals at the bottom of the screen columns to show cumulative number of actions/views based off the search results displayed.

Page View Statistics Report

The default list that is presented when first navigating to this report includes all views for the current month. The page view(s) report can be produced by selecting from the following search criteria:

- Report Date From: Defaults to the first day of the current month. You can select any date and Calendar will search to find any views that occurred between the dates selected.
- Report Date To: Defaults to the last day of the current month. You can select any date and Calendar will search to find any views that occurred between the dates selected.
- Page View (Option): Select the specific page within Calendar for which you would like to see view statistics. Options include the Grid View, List Views (which is all List Views combined), Event Details (all Event Details combined) and RSS Views.

To search and find matching events for inclusion in your report, click the SUBMIT button and the bottom portion of the report screen will be updated to reflect your results.

Page View Report Results

Details included within the report table include:

- Date: This column includes the date of the results. Each day that falls within the date range selected is broken out into an individual line item in this report.
- Page Name: This column includes the name of the page within the application selected.
- Option: This column includes the name of the page that is viewed by your visitors.
- Total Hits: This column includes a total of all view totals for the day.

To view a detailed breakdown of the dates and times when each view was recorded, click on the Details link beside the day line item for which you would like to see a more detailed breakdown of the views.

View Reports – Facility Exceptions

From the facility exception report, various options exist for any events (with room scheduled) that are found to be in conflict with one or more events already in Calendar (with same room scheduled).

There is a possibility that multiple events (with same date, time and room) in import will be in conflict with multiple events already in Calendar, or that events with room requests entered through the Public and/or Private Open Entry forms may create possible schedule conflicts/exceptions.

All events that have a conflict with those already in Calendar will show listed by Event Date and Timeframe.

The event exception report can be produced by selecting from the date range selectors provided. Selecting a starting date and ending date to find all events with room booking exceptions that have an event start date within the range selected. Once the date range is selected, click the SUBMIT button to perform the search.

The results area will display any events that are currently in a "REVIEW" status due to other events already approved within the Calendar for the same room at the same date and time. Information presented regarding each event in REVIEW includes:

- Event Date and Time
- Event Name
- Department
- Facility with Conflict
- Action Option: Within the action drop-down the following options are available:
    - Approve: If selected, then the status of the event in REVIEW is changed to Approved and it is removed from the exception report when the screen is refreshed. The event(s) within the conflicting area can no longer have the same booked space, and therefore will automatically be changed to "Review" status and they will remain on the list under the conflicts area.
    - Deny: If selected, then the status of the event in REVIEW is changed to Denied and it is removed from the exception report when the screen is refreshed. The event stays within the Active Data Calendar and can be modified to select an alternate facility through the Modify Event area or from the event owner's main menu.
    - Modify: If selected, then a new window opens that provides the option for the user to select from a list of alternate facilities that are open for the same date/time and within the same building (no other criteria can be taken into consideration from this screen currently). If you would like to search for alternate facilities available by setup options, features, other dates/times, etc., then it is recommended that you download the list, defer action on the event you would like to modify from the "Action" drop-down and go to Modify Event area of the product to do full searching.)

- Delete: Maintains the event in the database but marks it as deleted. DOES NOT PURGE. Event is removed from the exception report screen when the screen is refreshed.
- Defer Action: Removes the event from the exception report screen when the page is refreshed and it does not change any status of the event. Maintains the event "as is" in the Calendar database (Review Status) and the event shows in Review status on all appropriate areas of the Calendar application: Facility Gantt, Event Owner's Main Menu (or Super User) and the event can be accessed as well from the Modify Event wizard. Once the event is deferred from this screen it no longer displays on this screen.

Report Data Download

The Facility Exceptions report can export its results to a CSV-format file. Applications such as Microsoft Excel can read and display their contents to facilitate analysis of trends, patterns and the like. On the *View Reports - Event(s) Exception Statistics* page, click the Download Report (CSV) link.

View Reports - Registrant Summary Report

The report displays the registrant event information based off of selected search criteria.

Registrant(s) Summary Report - Search Criteria

- First Name
- Last Name
- Email Address
- Company
- **Search Criteria:** Radio buttons for All or Any of the search criterion entered.

Click on the FIND button to query for the registrants. You can then ADD, ADD ALL or REMOVE any Matches Found to the Registrants Selected list. After you select a list of registrants, you can further narrow down the search by utilizing the following fields:

Registration Status: Selectable values include Approved, Denied, Cancelled, and Pending. There is a check box to Select All.
Event Date Range
Start Date: You may either enter in a valid date within the text field provided (mm/dd/yyyy) or you may use the Calendar Date selector to display an interactive Calendar interface to select your start date.
End Date: You may either enter in a valid date within the text field provided (mm/dd/yyyy) or you may use the Calendar Date selector to display an interactive Calendar interface to select your end date.

Results Per Page: Set this field to either 10, 25, 50, 75, or 100. This field determines how many results are returned per page.

Click the GENERATE REPORT button after all the search criteria has been entered.

Registrant Event Summary Details

The top of the report contains all the search criteria that was entered: Registrants Selected; Registration Status; and Event Date Range.

The following columns are displayed on the report:

Total Pending: Total number of pending registrants.

Total Approved: Total number of approved registrants.
Total Denied: Total number of denied registrants.
Total Cancelled: Total number of cancelled registrants.
Total Registration: Total number of registrants.
Displaying the number of records returned
Registration Number
Registrant Name: Formatted as Last Name, First Name
Event Name
Event Start Date/Time
Registrant Status: Approved, Denied, Cancelled, or Pending
Attended: Yes or No

Click on the (+) link to the left of the Registration Number to drill down into more details. Drill down details include the following fields:

First Name: The first name of the registrant
Last Name: The last name of the registrant
Email: The registrant's email address
Phone: The registrant's phone number
Company: The registrant's company name
Event Name: The name of the event
Registration Number: The registrant's registration number
Start Date: Event start date.
Start Time: Event start time.
End Date: Event end date.
End Time: Event end time.
Event Cost: If applicable, the cost of the event.
Total Paid: If applicable, the total paid for the event.
Total Adjustments: If applicable, the total adjustments to the cost of the event.
Registered: The date the registrant registered for the event.
Approved: the date the registrant was approved of the event.

View Reports - Registrant Name Tag Report

The report displays the registrant information based off of selected search criteria.

REGISTRANT(S) NAME TAG REPORT - SEARCH CRITERIA

From Date
To Date
Include Past Events

Click on the SEARCH button to query for events with active registrations. You can then generate a report for one or more events by selecting the checkboxes associated with those events and clicking the SUBMIT button or by clicking the DOWNLOAD FILE link associated with each event. You can configure the report by utilizing the following fields:

Registrant Status: Selectable values include Approved, Pending or Both. This value will determine whether to print only those registrants that have been approved, only those that are awaiting approval, or all registrants.
Modified After: You may choose to run a report on registrants added or modified after a specific date. This allows for last minute printings to only account for registrants that have not been processed since the date specified.

Registrant Name Tag Report Details

The following columns are displayed on the report:

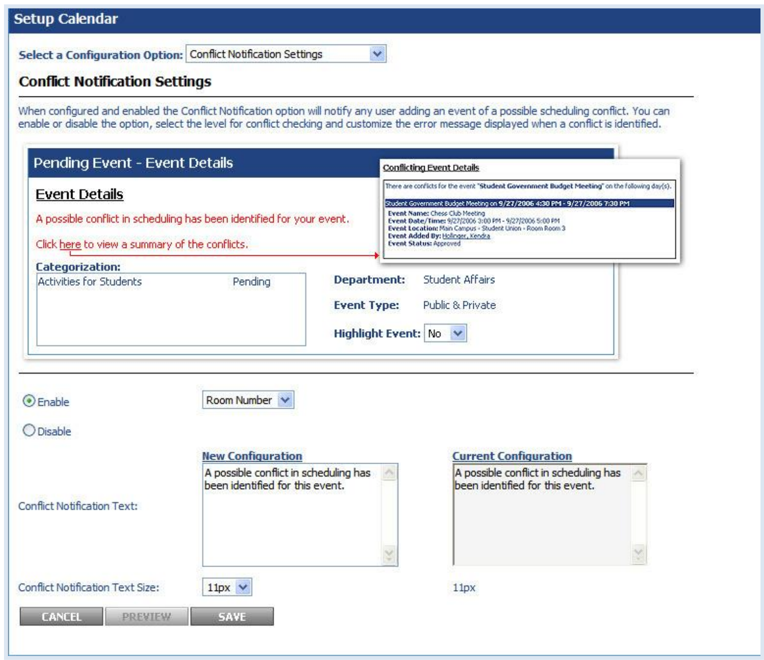
First Name
Middle Initial
Last Name
Age
Gender

If no information is provided for a registrant, the following will appear on the report:
Guest of will show as the First Name, and the name of the primary registrant will appear as the Last Name. (For example, Guest of John Smith)

Configure Calendar

Conflict Notifications

Conflict Notifications help to better manage event data and alert users of possible event scheduling conflicts. Conflict Notification(s) will be displayed based off the “setting” that has been selected by the Calendar Super User or Administrator with the privilege to configure the Calendar. Conflict notifications may display if two or more events have been scheduled at the same Location, Building or Room on the same Date and Time.



Below is a description of how to set up your Conflict Notifications.

ENABLE

With enable selected, you are required to make additional configuration selections to determine the level at which a conflict will be identified. These additional configuration selections are described below.

- **Location**: If location is selected as the level for conflict checking, then a warning notification will be displayed for any event that conflicts with the event being entered based off the criteria of Date/Time and Location. The possible conflicting events and notification information will be available to view by selecting a link displayed at the top of the preview/finalize event screen.
- **Building**: If building is selected as the level for conflict checking, then a warning notification will be displayed for any event that conflicts with the event being entered based off the criteria of Date/Time and Location - Building. The possible conflicting events and notification information will be available to view by selecting a link displayed at the top of the preview/finalize event screen.
- **Room Number**: If Room Number is selected as the level for conflict checking, then a warning notification will be displayed for any event that conflicts with the event being entered based off the criteria of Date/Time and Location – Building – Room Number. The possible conflicting events and notification information will be available to view by selecting a link displayed at the top of the preview/finalize event screen.

DISABLE (DEFAULT)

If disable is selected, then Conflict Notifications will be turned off.

CONFLICT NOTIFICATION CUSTOM ERROR FIELD

Here you are able to create a custom conflict notification message that will display on the preview/finalize event screen if there is a conflict. You can also choose to set the conflict notification warning message font size. Options include 0.5em - 3.4em. If you choose to create a custom notification it will overwrite the default message provided by Active Data Exchange as part of the standard install.

All current configurations will appear in text to the right. Also a preview of the current configuration will display. If you complete your selections and click SAVE, the configuration page resets to its default state. Cick CANCEL to leave the configuration page and return to the Main Menu. Clicking PREVIEW opens a new browser tab showing what the form looks like.

Email Settings

There are a number of email settings on this page that are detailed in this area. However, the only setting related to Facilities Management is *Send Resource Request Email After Facility Approval*.

Without this setting enabled, the Facility Owner and the Resource Owner are notified at the same time by email and the needed approvals show on their respective Main Menu screens for approval.

This setting allows for the Facility Owner to only be notified and make a decision on the facility before asking for Resources to be approved like extra chairs, tables, a podium, etc.

Facilities Open Entry

Facilities Open Entry (FOE) is available to clients with the Facilities Open Entry Module installed. It gives end users a way to create events and request facilities, using a form you define and publish on your own site. Events created this way are published only after being approved by administrative staff as defined in the event approval workflow.

LEGACY AND NEW FORMS

The form has been heavily revised and improved in releases following 3.13.x. Because the new form's behavior is substantially changed, Calendar still provides the legacy version of the form if you still need it. URLs for the two versions of the form are available on the configuration page as described below.

The two versions of the form look and operate differently. Both are described below.

CONFIGURATION SECURITY REQUIREMENTS

The account used to configure the form for Facilities open entry must have access to the configuration area of calendar. You enable this privilege by selecting the *Configure Calendar* option in the *System Administration Privileges* area of User Account Setup.

***NOTE**: Granting this access allows the user to access *all* of the Calendar's configuration pages.

CREATING A FACILITIES OPEN ENTRY FORM

You can create and publish Facilities Open Entry forms if the Facilities Open Entry Module is installed. The Calendar's *Enterprise* license grants the capability of having multiple forms defined in your Calendar.

Configure a Facilities Open Entry form by clicking the CONFIGURATION tab (in the Admin area) and selecting *Facilities Open Entry Configuration* from the *Select a Configuration Option* drop-down list. The configuration page is pictured below. The page provides the form with a name, and options for its content. Clicking PREVIEW opens a new browser tab that shows what the form looks like as you have configured it.

REQUIRED AND OPTIONAL FIELDS

By default, those fields that the Calendar application requires must appear in every open entry form, and cannot be removed. Each required field is marked in the descriptions below with an asterisk (*). The optional fields (those not marked below with an asterisk) are the ones you can choose to add to your form and/or configure.

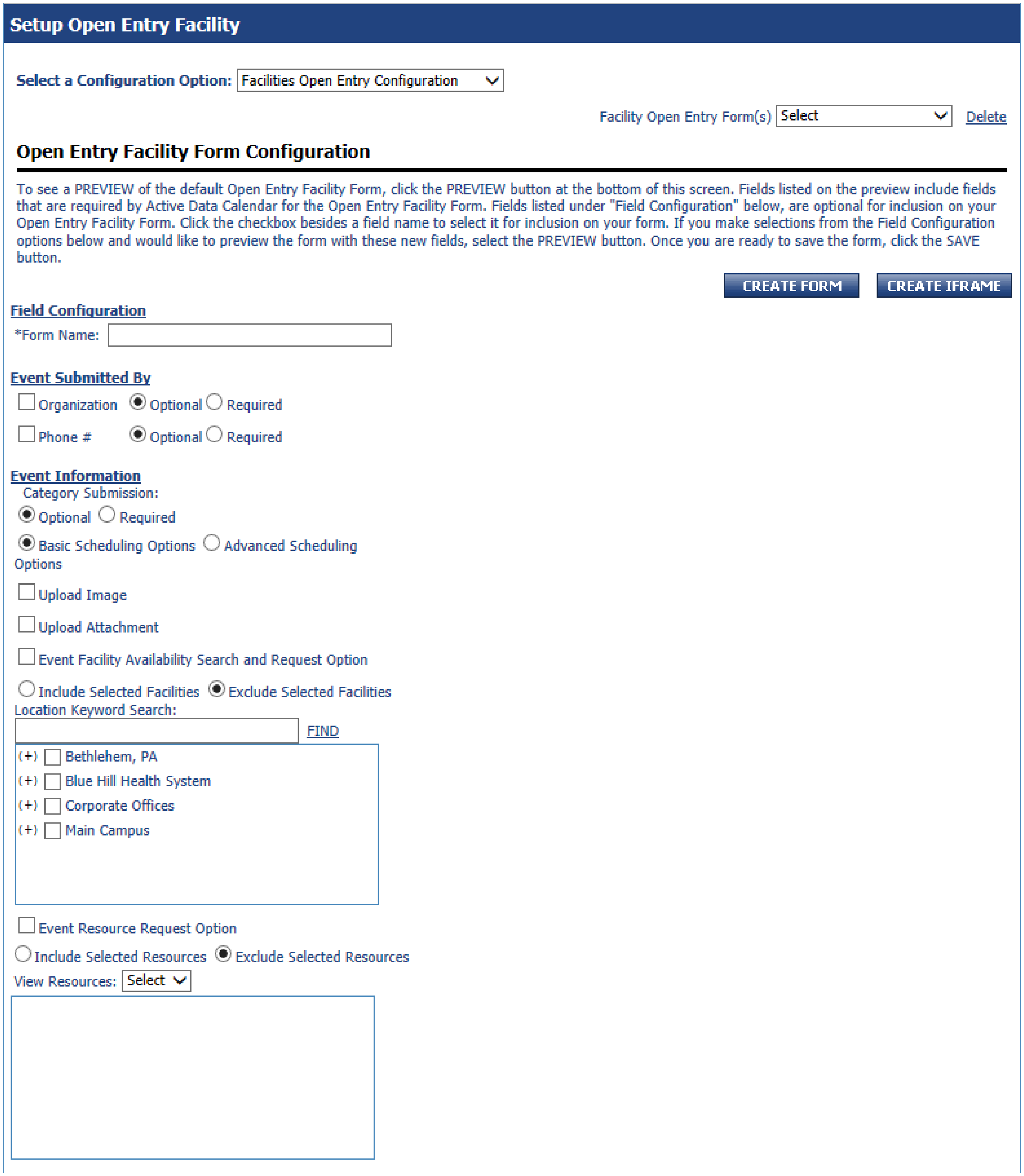
The fields listed under "Field Configuration" on the Open Entry form's configuration page are the optional fields. Select the check box beside a field name to make it appear on the form. The *Required* and *Optional* buttons next to some fields allow you to designate that field as required or optional when the form's ultimate user is creating an event.

PREVIEWING YOUR WORK, THEN SAVING IT

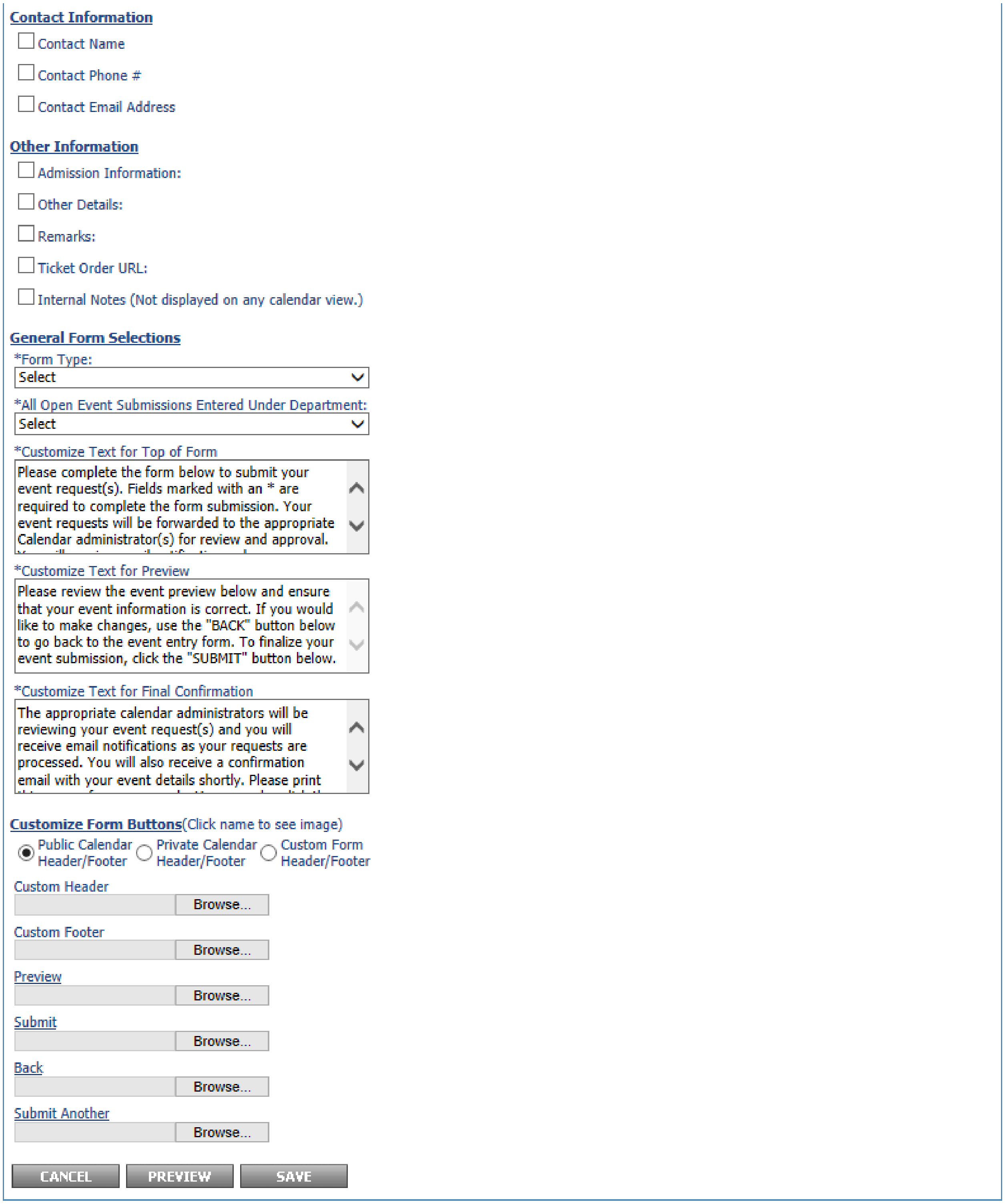
To see the impact of a change that you make to the form, click PREVIEW at the bottom left. A new browser tab opens showing the resulting form. You can continue making changes and viewing the effects of each change this way as you go, until you are satisfied. When your form is ready, click SAVE.

CONFIGURING THE FORM

Here is what the configuration page looks like initially, before you have made any customizations (top half; 1 of 2):



Here is that page's bottom half (2 of 2):



Contact Information

- [ ] Contact Name
- [ ] Contact Phone #
- [ ] Contact Email Address

Other Information

- [ ] Admission Information:
- [ ] Other Details:
- [ ] Remarks:
- [ ] Ticket Order URL:
- [ ] Internal Notes (Not displayed on any calendar view.)

General Form Selections

*Form Type:
Select

*All Open Event Submissions Entered Under Department:
Select

*Customize Text for Top of Form
Please complete the form below to submit your event request(s). Fields marked with an * are required to complete the form submission. Your event requests will be forwarded to the appropriate Calendar administrator(s) for review and approval.

*Customize Text for Preview
Please review the event preview below and ensure that your event information is correct. If you would like to make changes, use the "BACK" button below to go back to the event entry form. To finalize your event submission, click the "SUBMIT" button below.

*Customize Text for Final Confirmation
The appropriate calendar administrators will be reviewing your event request(s) and you will receive email notifications as your requests are processed. You will also receive a confirmation email with your event details shortly. Please print

Customize Form Buttons(Click name to see image)

(•) Public Calendar Header/Footer ( ) Private Calendar Header/Footer ( ) Custom Form Header/Footer

Custom Header
Browse...

Custom Footer
Browse...

Preview
Browse...

Submit
Browse...

Back
Browse...

Submit Another
Browse...

CANCEL PREVIEW SAVE

WHERE TO START

Start by identifying the form you want to work with:

- If you have the Enterprise license, select a form from the Facility Open Entry Form(s) drop-down list to modify an existing form, or enter a name in the *Form Name* field (up to either 100 or 200 characters, as configured in *Configuration: Setup Calendar: General Settings*) to create a new form. If you wish to delete that form, click the Delete link beside the drop-down list.
- If you do not have the Enterprise license, the page opens with the existing form name prepopulated in the *Form Name* field. You can modify the name here if you like, using up to 100 characters to name the form.

CONFIGURATION PAGE FIELDS

As noted, the fields below (and on the configuration page) that are marked with an asterisk (*) are required, and cannot be removed from the form. Some options, however, do modify the *behavior* of required fields. Optional fields on the form (those not marked with an asterisk) appear on the configuration page. They can be added or removed as needed, and configured as provided on this page.

The *Optional* or *Required* choice for some fields refers to whether the field in question can be omitted by the event submitter.

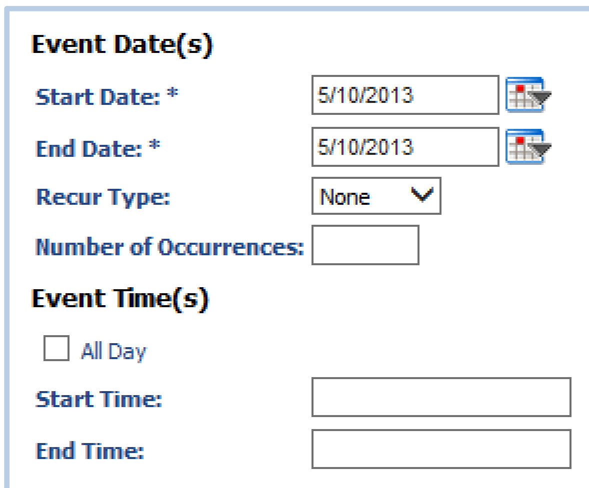
FACILITIES OPEN ENTRY FORM FIELDS

- **Facility Open Entry Form(s):** This drop-down list shows only if you have the Enterprise license. It lists all the forms currently defined in your Calendar. Click here to select the name of an existing form to modify, or enter a new name in the Form Name field to create a new form.
- **Field Configuration:** A label designating the area of the page where you configure your form.
  - **Form Name:* A name uniquely identifying the form you are now creating or modifying, up to 100 characters.
- **Event Submitted By:**
  - **First Name:* A field for the event submitter's first name, up to 50 characters.
  - **Last Name:* A field for the event submitter's last name, up to 50 characters.
  - **Email Address:* A field for the event submitter's e-mail address, up to 100 characters
  - *Organization:* Select the check box to add this field. Select *Optional* or *Required*. Holds up to 50 characters.
  - *Phone Number:* Select the check box to add this field. Select *Optional* or *Required*. Holds up to 20 characters, unformatted.
- **Event Information:**
  - **Event Name:* A name for the event, up to either 100 or 200 characters[1].
  - **Event Categorization:* A drop-down list of categories and subcategories as they appear on the front-end view screens. The event submitter may choose from the categories you select here when creating an event request. Certain categories may not display if they were customized to be not included in the Open Entry Form. The event creator can select one category or category/subcategory combination, multiple or all categories/subcategories, by clicking on the appropriate check boxes.
  - **Event Description:* Up to 1000 or 2000 characters[1] of free-form text providing a full description of the event.

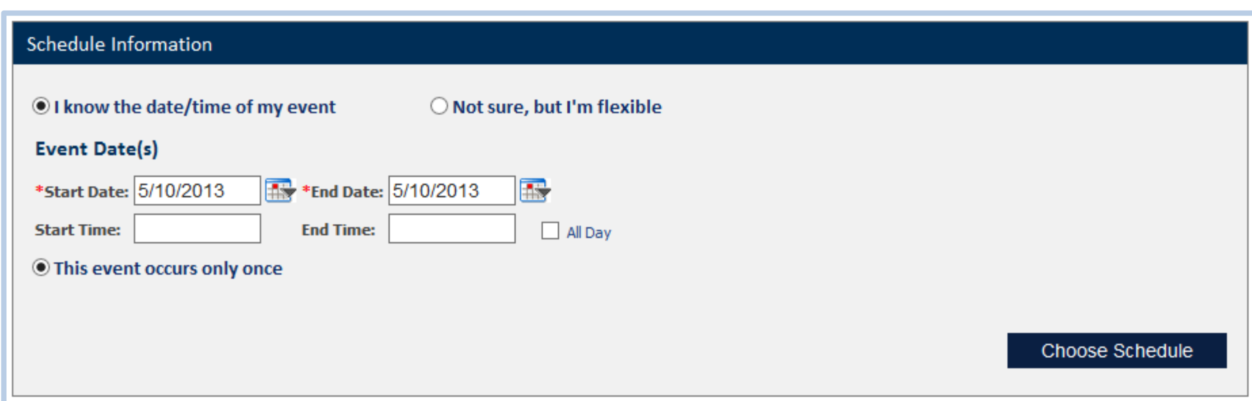
[1] This limit is configured in *Configuration: Setup Calendar: General Settings*.

- *Category Submission:* Controls whether the event submitter must select a category for the event. Choices are *Optional* and *Required*. If this is optional, and the event submitter does not select a category, the event displays only on the Facilities calendar, not on the main (i.e., Public or Private) calendars.
- *Scheduling Options:* Select *Basic* or *Advanced* to specify which type of schedule creation tool the event submitter can use to create a schedule for the event. *Basic Scheduling* provides the ability to only create one-time or multi-day (continuous duration over 24 hours) events. *Advanced Scheduling* provides all event scheduling options, including one-time, multi-day, series recurrence and custom schedule pattern, giving the event creator increased flexibility.

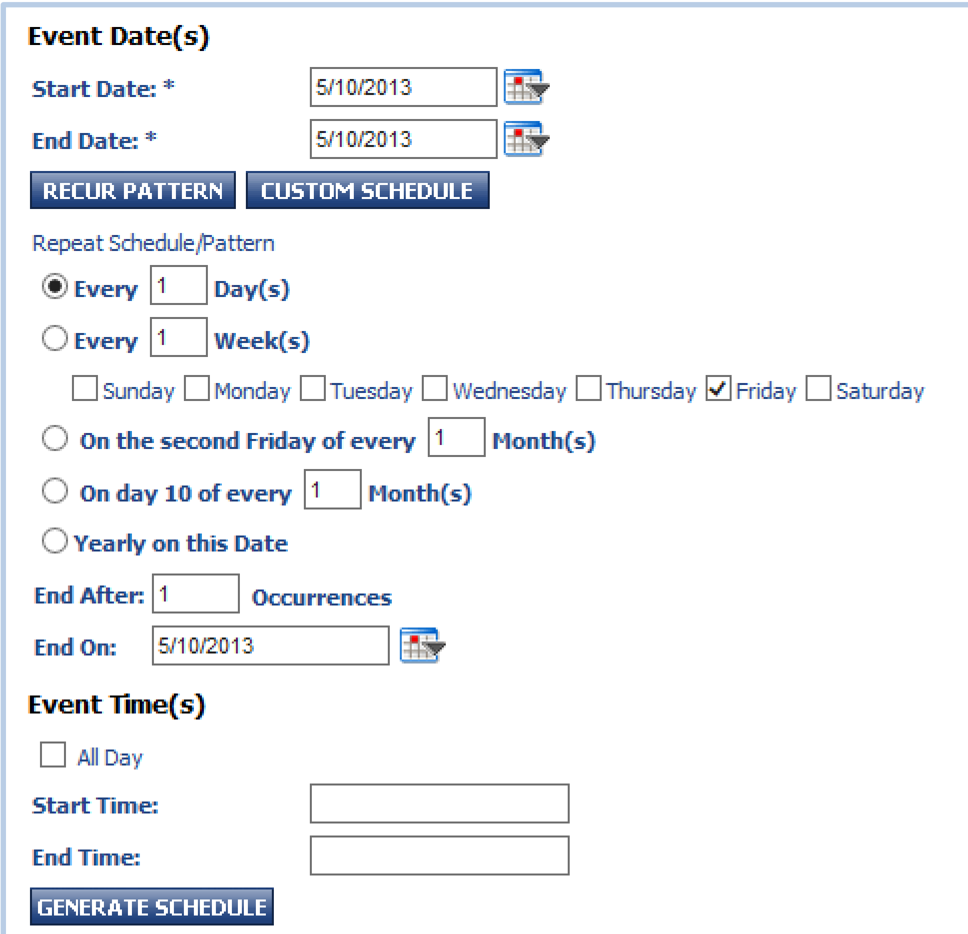
  Here is an example of the “basic” event scheduling functionality section on the *legacy* version of the form:



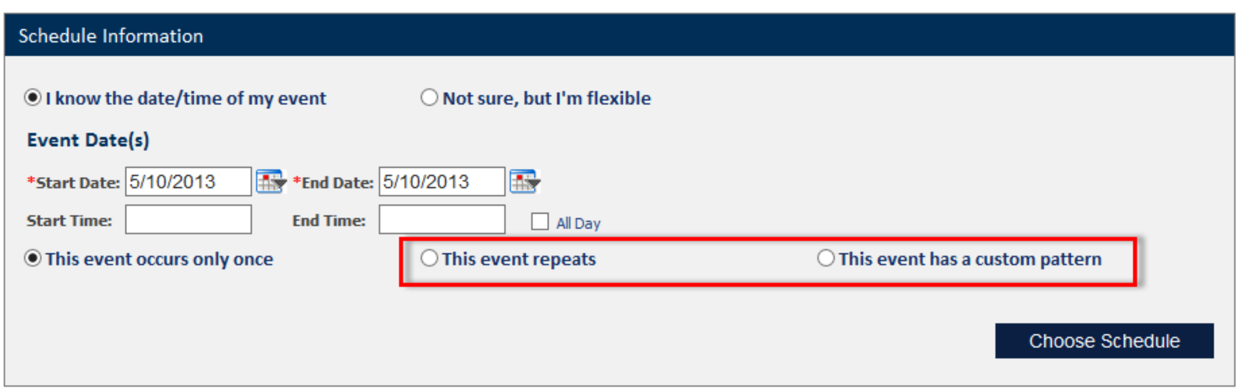
  Here is that same event scheduling functionality section on the FOE form’s *new* version:



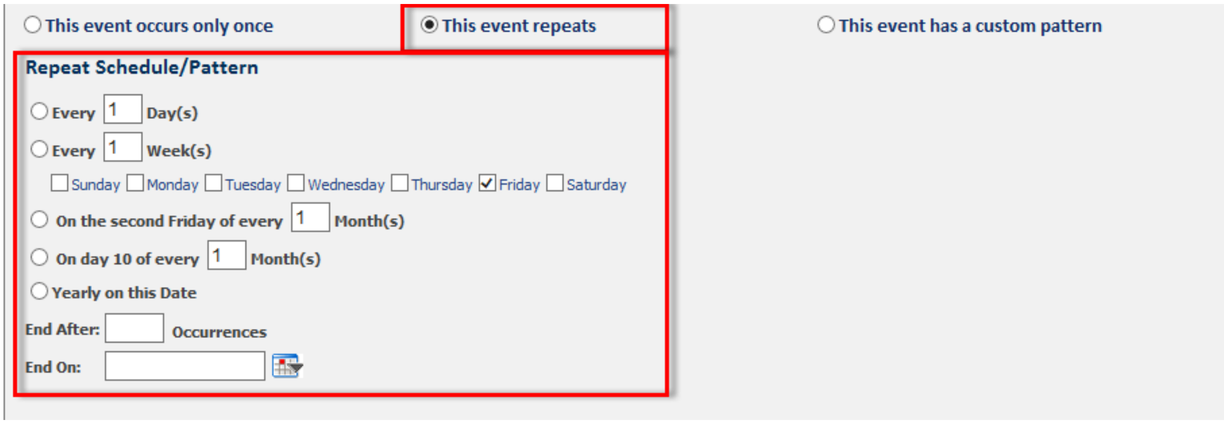
The Advanced Scheduling functionality is much more flexible, but also more complex to use. Here is what the legacy version of that section looks like:

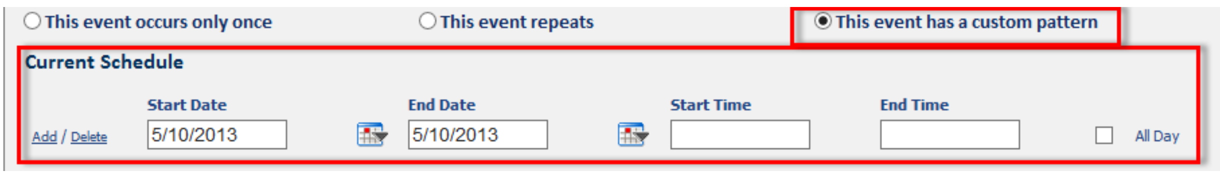


As with the Basic scheduling capability, Advanced scheduling looks different in the new form. It starts with just the two additional options for repeating events:

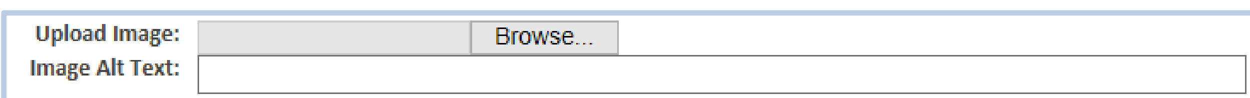


Selecting either of the two options reveals additional choices and fields for setting the event's recurrence parameters, as shown in these two captures:



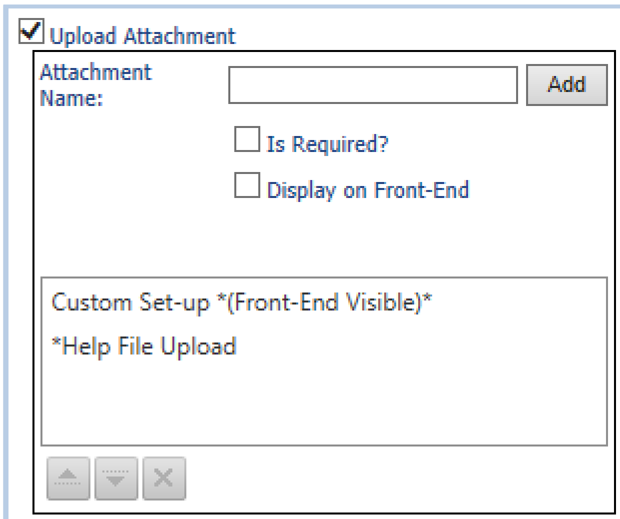


- *Upload Image:* If selected, the event creator may upload an image for display on the Calendar front end along with the event details. The image can be either a .GIF or a .JPG file up to 80K bytes. The image's maximum dimensions are 280 x 280 pixels. The image's aspect ratio is maintained when displayed. If the requestor does supply an image, the *Image Alt Text* also must be supplied (up to 75 characters). On both final forms (that is, new and legacy), this option looks virtually the same:

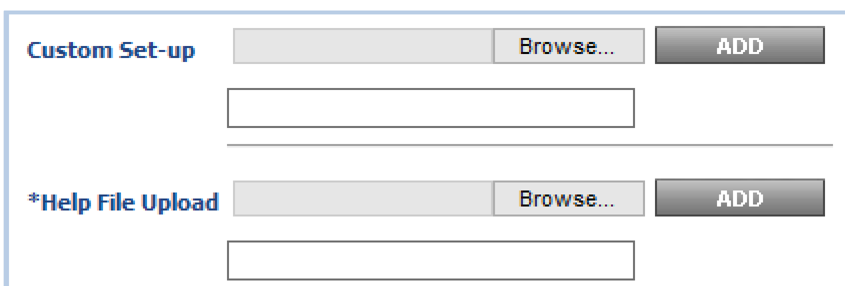


- *Upload Attachment:* If selected, the user submitting an event can upload one or two attachment files related to the event, up to 5 MB size. The file displays as a link on the event details screen of the Calendar's front end. File types supported are: .doc, .xls, .wav, .wmf, .wma, .jpg, .gif, .pdf, .avi, .mp3, .ram, .qt, and .swf.

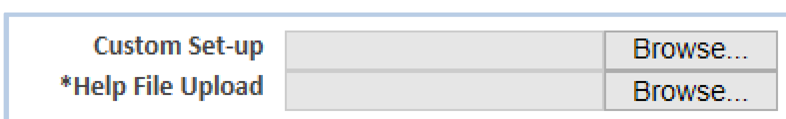
The number of attachments you can add is configured in CONFIGURATION: *Custom Event Administration Settings*: *# of Event Attachments*. To add an attachment, select the *Upload Attachment* check box, then enter an *Attachment Name*. Select or deselect Is *Required* and *Display on Front End*, and click the *Add* button. That attachment name is transferred to the list below it. Once you are finished entering attachments, you can delete or reorder them using the buttons below the list. Here, I have entered two attachments, a Custom Setup that isn't required (notice the asterisk) but had "Display on Front End" selected, and a "Help File Upload" that is required but is not visible on the front end:



The Calendar visitor sees the attachment name as a link for retrieving the file. This is how the form's section appears on the legacy form:



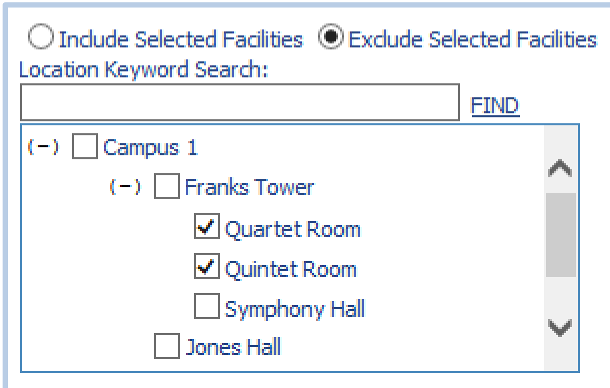
Here is what this option looks like on the new (improved) Open Entry form:



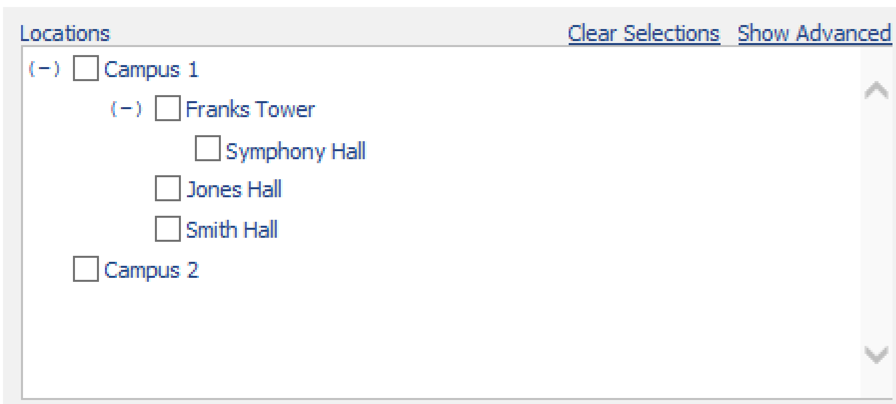
- *Event Facility Search and Request Option:* Adds capability to the form for the event submitter to search the facility database for a location suitable for holding the event. Select this option, and below it appears another one:
  - *Hide Pending Events from Search and Request Option:* This option allows the event creator to see in the search results those locations that are still available because there

are no events booked for those rooms or are requested and pending. Calendar only returns rooms that do not have any requests or approved bookings for consideration.

- *Include or Exclude Selected Facilities:* These options allow you to specify which locations can or cannot be used for events created with this form. To limit the event specifically to one or more locations for example, select the Include Selected Facilities option, then select the facilities to make available. This example shows a configuration that removes two smaller rooms from the list of locations an event created with this form can use:



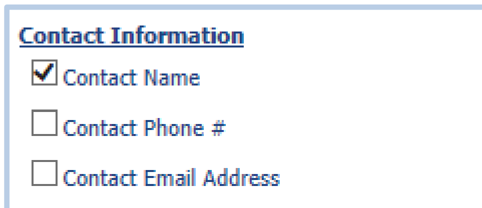
The result of the above settings is that the event creator sees this drop-down list for searching for available locations. Note the absence of the *Quartet and Quintet* rooms:



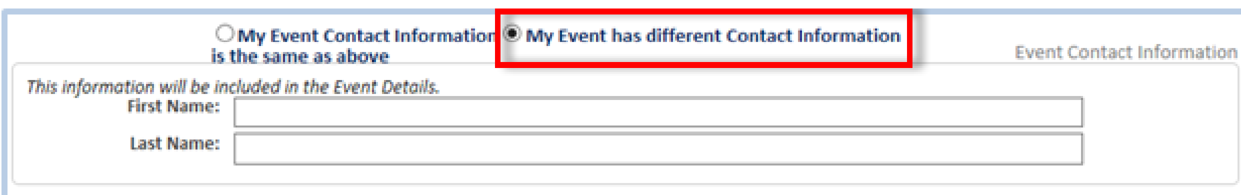
Note that both the legacy and new forms provide the same options, but the new form hides the more advanced search criteria (setup options, features, min and max capacity) by default. Clicking the form's *Show Advanced* link displays these options.

- *Event Resource Request Option:* Select this check box, and the event submitter will be able to search and formulate a request for resources directly in the Open Entry Form. As with location requests above, you can choose to specifically include or exclude some resources, using the *Include Selected Resources* or *Exclude Selected Resources* options.

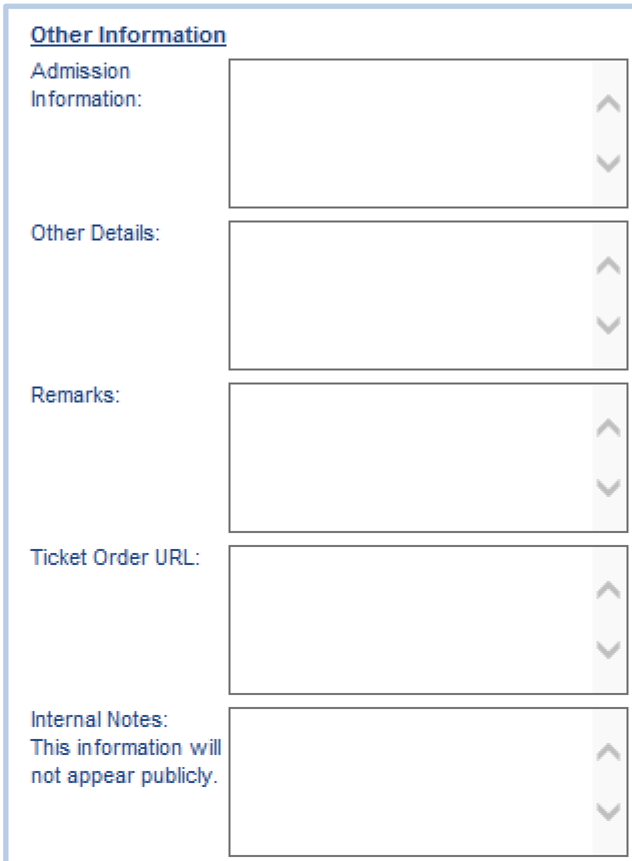
- **Contact Information:** The indentifing information for the person who creates the event request is entered on the form in the form's Submitter Information section. Sometimes the person who creates the event request is not the same as the person to contact with questions about it. The form configuration page provides an option for entering contact information if it's different from the event submitter's information. The fields you can optionally add are:



The fields that you select here appear on the open entry form so that the event submitter can supply them separately from their own personal information if appropriate. Here is what the event submitter sees when choosing the *My Event has different Contact Information* option:



- **Other Information** includes custom fields that you set up in the *Custom Event Administration Settings* area of CONFIGURATION: Setup Calendar. By default, these fields are labeled *Admission Information*, *Other Details*, *Remarks*, a field for a URL if there is a ticket order and *Internal Notes*. All of these fields are optional by default, but can be configured (*Configuration: Setup Calendar: Custom Event Administration Settings*) as required. *Note: The *Internal Notes* field allows the submitter to enter additional information that does not display on the calendar views as part of the event. It is visible to calendar users/administrators only. Here is what these fields look like on the legacy form:



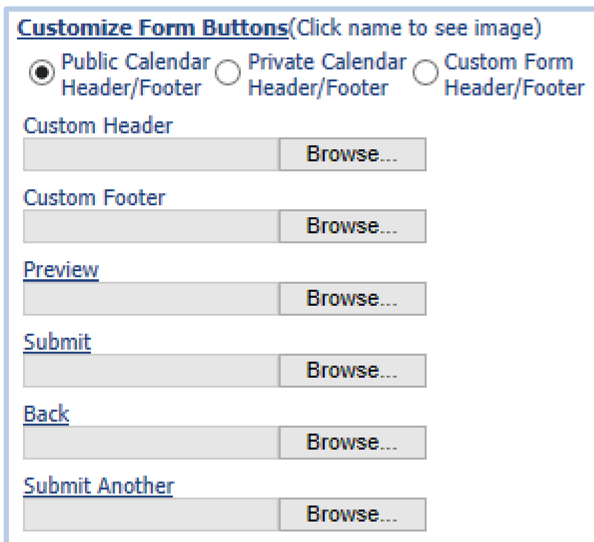
  The new form looks cosmetically slightly different, but has the same information and operation as the legacy form.

- **General Form Selections** provides these options:
  - **Form Type:** Select *Public*, *Private* or *Both* to designate this form as usable to create events in the public calendar, the private calendar, or both calendars.
  - **All Open Event Submissions Entered Under Department:** Select a department here to force open entrants into the workflow you have set up for that department. Events from all open entries are set to user account-level permissions; therefore, administrators for the selected department receive e-mail notification to log into the Calendar and process events created with the open-entry form.
  - **Customize Text for Top of Form:** This open text box holds up to 1,000 characters for insertion at the top of the HTML form page. Editable default text is provided.
  - **Customize Text for Preview:** The "Preview" page is displayed once the open entry form user submits the initial form. It displays an actual preview of how their event will appear if approved

as submitted. You can customize the text that appears at the top of this preview page for your organization, up to 1000 characters. Editable default text is provided.

  - **Customize Text for Final** Confirmation: The "Final Confirmation" page is displayed when the open entry form user submits the final version of their event information (after preview). The final confirmation page shows the final preview of their event as submitted to the calendar administrator(s) for processing. You can customize the text that appears at the top of this confirmation page for your organization, up to 1000 characters. Editable default text is provided.

- **Customize Form Buttons:** Your organization can upload custom button images into the Calendar to replace the supplied ones for use throughout the open event submission process. The headers and footers that appear on the form can be selected from several options also. You do this in the *Customize Form Buttons* area of the configuration page:



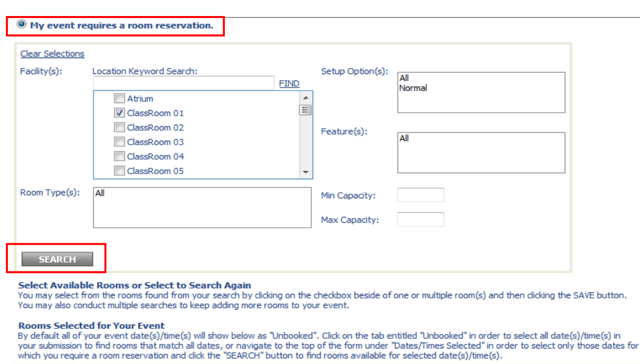
To preview a current button image, click the button's name-link. Click *Browse...* to locate and upload a new image.

Finally, you can choose to place onto this form the header and footer from the public calendar, the private calendar, or a custom header and footer that you have in an HTML-format file. Select the option of your choice, and if you have chosen *Custom Form Header/Footer*, browse for a header file and a footer file.

Booking Facilities using Open Entry

The form displays in a web browser tab when previewed.

Facilities in the open entry form do not display unless the option for “My Event Requires a room reservation” is selected. Selecting the My events requires a room reservation option makes additional options become



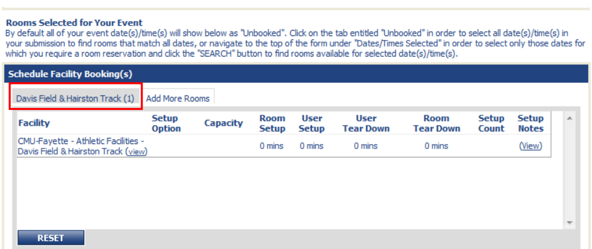
Tip: In order to see the facility options on the Facility Open Entry Form the submitter using the form MUST select “My event requires a room available allowing the submitter the ability to search for a room and setup for their event. The only facilities displayed will be the ones you decided to show based on your inclusion/exclusion selection in the form configuration.

Once the submitter selects the facilities locations they would like to check they will then need to click the search button to see available space for their event.

Facility information will populate in boxes below the facility selection boxes. In order to reserve a room the submitter will need to select the room they wish to use and then click the save button. Until the room selection is saved the event date and time will show in the bottom part of the screen on an "Un-booked" tab. The bottom screen will show what room they have selected only after they click save.

Once they click save they will receive a message "The facility selection made has been saved" the "un-booked" event will now show on a tab that has the room name.

All of this can be tested on the preview before publishing the form



PUBLISHING THE FACILITIES OPEN ENTRY FORM

Once your form appears the way you want you will be able to publish it using an HTML link or an IFrame.

*Note: You must Save the form prior to trying to publish by clicking the Save button. The publish options appear in the upper right of the Facilities Open Entry Configuration form.

Create Form

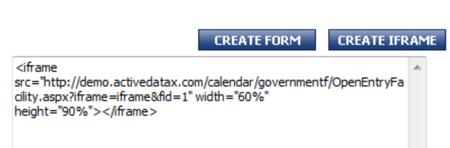
Create form will allow you to create the HTML code that can be placed on you internet/intranet and allow people access to your Facilities Open Entry form.

Once the form is saved click the Create Form button. You will receive a box directly below the create form button with the HTML code needed to access the form.

*Note: This process is used for both Facilities Open Entry as well as Facilities Open Entry Enterprise.

Create Iframe

The Create IFrame button acts just like the Create Form button in that it gives you the needed code to publish your form. This will give you the code in IFrame format.



After saving your form click the Create IFrame button. You will receive a box directly below the button that will give you the needed code.

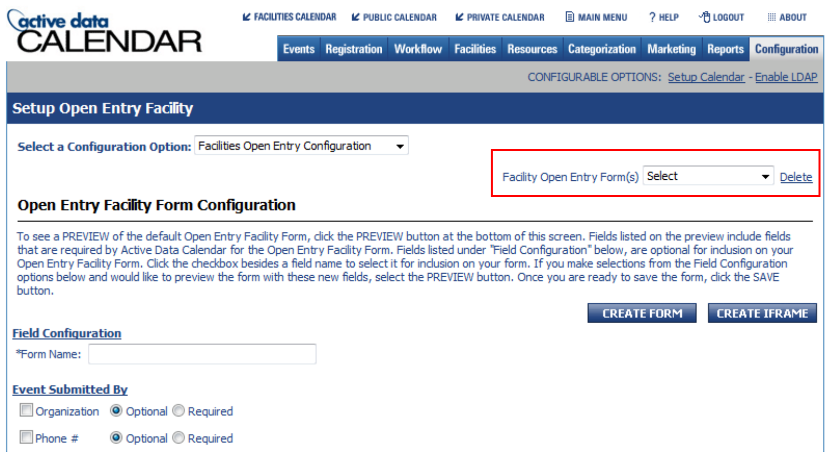
Modifying the Facilities Open Entry Form

Modifying the Facilities Open Entry Form involves enabling and disabling fields in the Configuration section of the calendar. With Facilities Open Entry you can change the configuration at any time by logging into the calendar, selecting Configuration and then selecting Facilities Open Entry Configuration from the Select a Configuration Option menu.

In order to maintain the current form and create an additional form you must have the Facilities Open Entry Enterprise module. Without the Enterprise module you can modify and maintain one form.

Facilities Open Entry Enterprise

Facilities Open Entry is available to clients with the Facilities Open Entry Enterprise Module installed.



Utilizing Facilities Open Entry Enterprise allows your users to enter event information as well as request facilities with their request. This is all accomplished utilizing a form that you create and publish on your internet/intranet site.

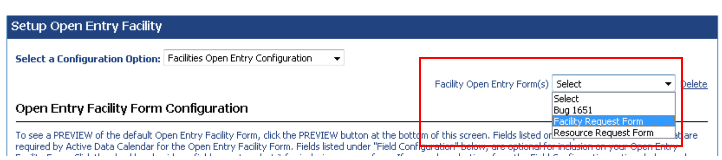
Facilities Open Entry Enterprise has all the same functionality of Facilities Open Entry but also includes the ability to create multiple forms instead of being limited to a single form.

With Facilities Open Entry Enterprise you have the additional field to select a form you want to modify or you can create a new form. You access the configuration area the same as with Facilities Open Entry by clicking on Configuration and then selecting Facilities Open Entry Configuration. The additional field appears at the upper right of the screen.

Modifying a Facilities Open Entry Enterprise Form

You may find it necessary to modify your Facilities Open Entry form. With Facilities Open Entry Enterprise you can have multiple forms so there is a different process established so that you can modify the form of your choice.

1. From your Calendar Administration area click on the Configuration Tab
2. At the top left of the screen next to Select a Configuration Option click the drop down arrow and select Facilities Open Entry Configuration.
3. On the right side in the Facility Open Entry Form(s) click the drop down arrow and select the form you wish to modify.



4. Once you select the form the current settings of that form will display and you will be able to make changes as desired.

Once you modify the form as required click the Save button to save the changes. You can then click Preview to view the form before regenerating the form.

Tip: Remember to regenerate your form by clicking the Create Form or the Create Iframe button (depending on which option you are using) after you are done modifying the form.

DELETING A FACILITIES OPEN ENTRY ENTERPRISE FORM

With Facilities Open Entry Enterprise you can have as many forms as you like for your Open Entry. You may find that for various reasons you may want to delete previously created forms that are no longer used or useful.

To delete a form with Facilities Open Entry Enterprise:

1. From your Calendar Administration area click on the Configuration Tab
2. At the top left of the screen next to Select a Configuration Option click the drop down arrow and select Facilities Open Entry Configuration.
3. On the right side in the Facility Open Entry Form(s) click the drop down arrow and select the form you wish to delete.
4. Once you select the form the current settings of that form will display.

5. Click the Delete link next to the box.
6. One you select the form and click delete the form will be deleted. You will receive a message above the Selection box that states if the form was deleted successfully as shown below.

Workflow

The workflow configuration allows you to specify how events are approved within the Active Data Calendar administration area and how that affects when they can be viewed on the Public and/or Private Calendar.

- Department: If selected, the department administrator is responsible for approving events that have been posted to all unlocked categories. If the department administrator approves the event, it will show up on the public or private calendar(s) under all unlocked categories for which the event was added. Events will show up on the public or private calendar(s) under locked categories as they are approved by the locked category owners. Both the department administrator(s) and the locked category owner(s) receive notifications simultaneously requesting that they process the event. The event does not need to be approved by the locked category owner(s) before it can be posted live for the unlocked categories.

This is the default selection.

- Category: If selected, the workflow email notifications for processing events are sent to all locked category owners and the system requires that all locked category owner(s) approve the event for all locked category(s) specified before any workflow notifications are sent to the department administrator(s) for processing of the event. Once all locked categories are approved, then workflow email notifications are sent to the department administrator(s) and they can process the event for all other unlocked categories.

***Please Note**: The event will appear under all locked categories once it has been approved for all locked categories that were selected for the event. If the event is approved for the locked categories but then denied later by the department administrator(s), then it will remain in the locked categories until the event is deleted or modified and sent for further processing.

Click the **SAVE** button once you have made your selection and would like to save the change. Click **CANCEL** to exit out of this configuration area and be returned to the Main Menu of Calendar without saving your changes

WCAG Conformance

Some pages of the Active Data Calendar are now in conformance with the Web Content Accessibility Guidelines (WCAG) version 2.0, Level A. The areas covered by this conformance include all Calendar front-end views, the event views, and the new version of the registration form (not the legacy version).

Implementation of these guidelines provides persons having certain disabilities with access to web-based services and information such as our Active Data Calendar. More information on these guidelines is available from the W3C website, at http://www.w3.org/WAI/intro/wcag.php.

Further Information

FAQ's and Tip Sheets

FAQ's and Tip Sheets are available to assist with your Calendar. They are available on your Client Portal Page at http://www.activeddatax.com. These sheets cover information such as Import/Export, Installation help, basic configuration and many other pieces of information to configure and maintain your calendar.

***Note**: This area requires an ID and Password to access the information. Please see your Calendar Administrator to obtain this information.

User Guides

Active Data Exchange provides multiple modules and User Guides to support these modules on the Client Portal Page at http://www.activedatax.com. These guides include:

- **Active Data Calendar User Guide** – Available to all Active Data Calendar Clients
- **Active Data Calendar Facilities User Guide** – Available to Clients with the Facilities Module installed.
- **Active Data Calendar PayFlow Pro User Guide** – Available to Clients using the PayFlow Pro payment gateway.

Other Guides

These Guides will be made available soon:

- **Active Data Calendar Open Entry User Guide** – Available to Clients with the Open Entry Module installed. This guide includes Public and Private Open Entry as well as Facilities Open Entry.
- **Active Data Calendar Custom Text Settings User Guide** – Available to Clients with the Custom Text Module installed.
- **Active Data Calendar Advanced Registration User Guide** – Information on Advanced Registration is currently available in the Active Data Calendar User Guide. It will soon have its own User Guide.

If you are interested in obtaining further information on any of the above documentation or in looking at some of the Modules offered by Active Data Exchange please contact your Account Executive at Active Data Exchange or call 610-997-8100.

Active Data Calendar Help and Support

If you have any questions or require assistance with the Calendar application please contact Active Data Exchange Support:

- Email: Support@ActiveDataX.com
- Phone: 610-997-8100

Glossary

Below you will find definitions for commonly used terms in Active Data Calendar.

Account – An account is made up of the combined user information, including a Login ID and password, which is added to Active Data Calendar to allow users to login and use the calendar product.

- **USER LEVEL ACCOUNT** – This account role can log into the calendar and perform functions. Key information for this account level:
  - Add, update, and delete events within their associated department.
  - When adding and updating events to the calendar this user will require an administrator within their department or a Super User to approve the events.
  - This level can also update their login information.
- **ADMINISTRATOR LEVEL ACCOUNT** – A department often has an administrator assigned to it. Key information for this account level:
  - This account role can add, update, and delete events in their associated department.
  - Events added by an Administrator will automatically post live to the calendar.
  - They may also process pending events from the "User" level accounts in their department.
- **SUPER USER LEVEL ACCOUNT** – The Super user level account is created at the time of the install of Active Data Calendar. Key information for this account:
  - Provided to your organization
  - Performs any function within the calendar product
  - Primarily used to setup the initial configuration and framework of the calendar
  - Only account that can add other administrative user accounts
  - Receives notifications to process any events pending approval
  - Can process any other event inside the Calendar regardless of Department or Locked Category status.

Category – A category is used to group events and help people using your calendar find events more efficiently.

- Events can be displayed by category when viewing the calendar.
- Categories are not specific to a department.
- Categories are available to all users of the calendar.

Department – A department is used to group people together.

- Groups Administrative and Users accounts
- Uses logical groupings by work function/responsibilities
- Examples include but are not limited to "Human Resources", "Marketing", "Admissions", "Student Services", etc.

Event – An event is a gathering/occasion on your calendar.

- Combines date, time and details of a scheduled meeting, concert, sports matches, dinners, fund raisers, etc.
- All users of the calendar can add, update and delete events.

Pending Event – An event waiting to be approved by an Administrator or the Super User

- All user level accounts must have events the submit/update approved
- Until the event is approved it is placed in pending status.

LDAP – Stands for Lightweight Directory Access Protocol. It is an Internet protocol that email and other programs use to look up information from a server.

Location – A location is used to allow for a "quick list" of physical locations to be used when adding events. There are three (3) divisions in Locations:

- Locations – Main locations and/or areas where buildings are clustered
- Buildings – Physical buildings, centers or areas at a defined location.
- Rooms – Located inside buildings, centers or areas at a defined location.

Login ID – Information used to log into the calendar program. A Login ID is often referred to as a user account.

RSS – Really Simple Syndication – Allows users to subscribe to their favorite content

- Delivers its information as an XML file called an RSS feed
- Simple XML-based system
- Formats are specified in XML (a generic specification for data formats)
- A program known as a feed reader or aggregator can check a list of feeds on behalf of the user.
- A feed reader displays any updated information (or events) that it finds.

Subcategory – Subcategories are used to further classify events on the calendar.

- When viewing the calendar users can further refine event listings
- Subcategory's are not required but are recommended.