Importing Events in Active Data Calendar 3.7 – Unlocked Facility

- When the user imports two or more events into an unlocked facility for the same date and time and for the same room, all the events will be set to a status of approved for the facility (room).

- All of those event facility requests will show up on the Facility GANTT chart as approved.

- None of the events will show up on the Exceptions Report.

- If the events included marketing categorization on import, and the user performing the import is at a permission level that allows for their marketing requests to go live automatically (without administrator review), and the categories assigned to the events are not locked, then the events will also appear on the designated marketing calendar(s). This rule is based on the fact that the facility and marketing requests are both being imported with the status of approved.

Importing Events in Active Data Calendar 3.7 – Locked Facility

- When the user imports two or more events into a locked facility for the same date and time and for the same room, only the first event will show up as approved. The remaining events will show up in a "review" state.

- The first event facility request will show up on the Facility Gantt chart as approved, with the remaining event facility requests showing up in a review state.

- The conflicted events (those in "review" state) will show up in the Exceptions Report and will require some action by the user accessing the exceptions information to modify or delete the facility request in order to move the event facility request off the exception report and in order for the event to be able to proceed forward in the marketing workflow process.

- If the events included marketing categorization on import, and the user performing the import is at a permission level that allows for their marketing requests to go live automatically (without administrator review), and the categories assigned to the events are not locked, then:

    o For the event that shows the Facility request as "Approved": The event will also automatically show on the selected marketing calendar(s) as well.

    o For the events that show the Facility request at "Review": The event facility requests associated with these events will first need to be modified in order to either select a new facility that is available, remove the facility request completely (no facility required) or the user may go to the Exception report area in order to reassign which of the events imported should be the event that has this facility as the approved assignment (this will cause the original event that was imported in the approved state to then be reassigned to the "review" state and require further action). Events cannot be on the marketing calendar with a facility request in review state.

*Recommendation: If you always want to enforce the inability for events to be double booked in room(s) on events coming in from an import, then all rooms should be locked.

Importing Events in Active Data Calendar 3.8.1 – Unlocked Facility

- When the user imports two or more events into an unlocked facility for the same date and time and for the same room, all the events will be set to a status of approved for the facility (room).

- All of those event facility requests will show up on the Facility GANTT chart as approved.

- None of the events will show up on the Exceptions Report.

- If the events included marketing categorization on import, and the user performing the import is at a permission level that allows for their marketing requests to go live automatically (without administrator review), and the categories assigned to the events are not locked, then the events will also appear on the designated marketing calendar(s). This rule is based on the fact that the facility and marketing requests are both being imported with the status of approved.

Importing Events in Active Data Calendar 3.8.1 – Locked Facility

There is a new configuration setting in the 3.8.1 version that will allow the Calendar to be configured to "override" the double-booking rules that is automatically enforced for locked facilities. This override will allow all the events being imported into a locked facility, for the same date and time, to be set to a status of approved.

The configuration option: General System Settings -- Allow Imported Events to Override Double Booking Rules (Yes/No). The default is set to "No".

- Configuration set to "No": The application will set the first event to "approved" and then the remaining to "review" on the Facility GANTT View and the conflicted events (those in a review state) will show on the Exceptions Report.

   If the events include marketing categorization on import, and the user performing the import is at a permission level that allows for their marketing requests to go live automatically (without administrator review), and the categories assigned to the events are not locked, then:

   o For the event that shows the Facility request as "Approved": The event will also automatically show on the selected marketing calendar(s) as well.

   o For the events that show the Facility request at "Review": The event facility requests will first need to be modified in order to select a new facility that is available, remove the facility request completely (no facility required) or reassign which of the events imported should be the event that has this facility as the approved assignment. Events cannot be on the marketing calendar with a facility request in review state.

- Configuration set to "Yes": When the configuration is set to "Yes", the application will allow the double-booked events to be set to a status of approved. In addition, the events will not show up on the Exceptions Report and will show on the Facility Gantt View as approved.

   If the events included marketing categorization on import, and the user performing the import is at a permission level that allows for their marketing requests to go live automatically (without administrator review), and the categories assigned to the events are not locked, then the events will also appear on the designated marketing calendar(s) since the facility is automatically showing as approved and the marketing requests are auto-approved as well.

*Recommendation: If you always want to enforce the inability for events to be double booked in room(s) on events coming in from an import, then all rooms should be locked and you should maintain the default configuration setting of "No".