

Active Data Calendar Space Reservation Workflow

The roles, workflow and approval process described below are based on the requirements outlined in the College's Space Reservation Policy.

The reservation process involves:

1. Event Organizer - Creation of the event and approval/rate category request to Dean/VP
2. Dean/VP - Event review and rate category selection for event
3. Event Organizer - Modification and release of event for Space Manager approval
4. Space Manager - Review and approval/denial of facility request
5. (Optional if facility request is denied) Event Organizer - Request of alternative facility

1. Event Organizer - Creation of Event and Rate Category Request to Dean/VP

The Event Organizer will create an event using the calendar administrative interface (similar to the current process) selecting a facility and saving the event. Using the "Send Notification" option the Event Organizer will notify Dean/VP of event and request comment on event priority (priority rating, rate category, etc.). Event will only be visible to the Event Organizer at this point and no workflow for facilities will be kicked off.

A step-by-step guide of adding an event to the calendar and booking a facility is available at [Active Data Training Calendar Training Guide - Adding an event to the calendar](#)

1. Create an event.

The screenshot shows the 'Add Event - General Details' form in the Active Data Calendar interface. The form includes the following fields and options:

- *Event Name:** Text input field containing 'Sample Event'.
- *Department:** Text input field containing 'Baruch Computing and Technology Center (BCTC)'.
- Publish on Selected Calendar(s):** Dropdown menu set to 'Public'.
- *Category(s)/Subcategory(s):** Dropdown menu set to 'Special Events'.
- *Event Description:** Rich text editor with a toolbar (bold, italic, underline, list, link, etc.) and a text area.
- Event Date:** Date picker set to 5/31/2014.
- Start Time:** Time picker set to 9:00 AM.
- Duration:** Duration picker set to 2 Hours and 0 Minutes.
- All Day:** Unchecked checkbox.

At the bottom of the form, there are navigation tabs: 'Main Information', 'Scheduling & Facilities', 'Request Resources', 'Images & Attachments', and 'Details & Registration'. The 'Main Information' tab is currently selected. There are 'CANCEL' and 'PREVIEW' buttons at the bottom.

2. Make the facility request.

Available Room(s)

The facility selection made has been saved.

Availability Level: Matching 1 Occurrences

Location - Building: [Baruch College - 137 East 25th Street](#)

Select	Matched/ Unmatched	Room	Room Type	Setup Option	Capacity	Setup	Tear Down
<input checked="" type="checkbox"/>	1 / 0	Room 831					

Setup Time: Tear Down Time: Setup Count:

Setup Notes:

Schedule Facility Booking(s):

Room 831 (1)

Facility	Setup Option	Capacity	Room Setup	User Setup	User Tear Down	Room Tear Down	Setup Count	Setup Notes
Baruch College - 137 East 25th Street - Room 831 (view)			0 mins	0 mins	0 mins	0 mins		(View)

3. Check yes or no for the "Attendees to be Charged?" section. Set the Rate Category to "TBD by Dean or VP" as this information will be received later on.

Contact Information

Name:

Phone:

Email:

Other Event Information

Schools/Departments: Academic Administration
 Accountancy
 Administration and Finance
 Advisement and Orientation

Student Clubs and Orgs 85 Broads
 Absolute Adrenaline
 Accounting Society
 Actuarial Science Society

Enable Registration

Internal Information

(Not viewable on user display.)

*Promote in CUNY Calendar

Attendees to be charged? Yes
 No

Rate Category -[see Space Policy](#)

Internal Notes:

4. After finalizing the event, select "Save Event" and "Go to Event Notification Page" so the event is not published (no facility request will be made) and you will proceed to a screen that will allow you to notify your Dean/VP.

Event Details

Save Event

Release Event

Go to Event Notification Page

Do not notify category or event subscribers of this event change.

Facilities Marketing Internal

COMMENTS

Details	Event Date/Time	Facility Request
View	5/31/2014 (9:00 AM - 11:00 AM)	137 East 25th Street - Room 831

Event Facility Details:

Booking ID:	N/A	Room Setup Notes:	<input type="text"/>
Location:	Baruch College	Room Features:	<input type="text"/>
Location Owner(s):	1	Room Notes:	<input type="text"/>
Room Setup Option:	N/A		
Room Setup:	0 mins		
Room Tear Down:	0 mins		
User Setup:	0 mins		
User Tear Down:	0 mins		
Setup Count:	N/A		

Event Details

remind me notify me add to my calendar email a friend

[Go Back](#)

Sample Event

Start Date: 5/31/2014 **Start Time:** 9:00 AM
End Date: 5/31/2014 **End Time:** 11:00 AM

Event Description
Event Description

Location Information
Baruch College - 137 East 25th Street
Room: Room 831

Contact Information
Name: Event Contact Name
Phone: Event Phone

Main Information Scheduling & Facilities Request Resources Images & Attachments Details & Registration

CANCEL

Open Print Window

FINISH

5. On the "Event Notification" page, select "Email Includes Internal Notes and Comments Log" and "Third Party Recipients" where you will enter your Dean/VP's email address. Enter a subject and message then click "Submit".

It is recommended that for the recipient's convenience to include the following text below within the body of the email. This will allow the recipient to quickly review the rate categories.

For a list of rate categories, please see Appendix B under the Space Reservation Policy: <http://www.baruch.cuny.edu/spacepolicy>

Send Event Email Notice

Your event was successfully saved.

Event Name: Sample Event

Start Date: 5/31/2014

Start Time: 9:00 AM

Email Includes Internal Notes and Comments Log

Calendar Super User

All Calendar Administrators

All Calendar Category Owners

All Calendar User Accounts

Selected Calendar User Accounts

Admin, ActiveData (Super User)
Washington, Gregory (Admin)
Ko, Sidney (Admin)
Malatesta, John (Admin)

Third Party Recipients

*(Unlimited email addresses may be entered.
Please separate each with a comma.)*

ypemailaddress@baruch.cuny.edu

All Event Subscribers

[View List](#) [Download List](#)

Event Registrant(s):

All

Pending (0)
Approved (0)
Denied (0)
Cancelled (0)

***Message Subject:**

Rate Category Request

***Create Custom Email Message:**

HTML Email

Event Name: Sample Event
Start Date/Time: 5/31/2014 9:00 AM
End Date/Time: 5/31/2014 11:00 AM

For a list of rate categories, please see Appendix B under the Space Reservation Policy: <http://www.baruch.cuny.edu/spacepolicy>

CANCEL

RESET

SUBMIT

6. The following screen will show an overview of the message. Click "Submit" to send the notification.

Send Event Email Notice

Subject:

Event Name: Sample Event
Start Date/Time: 5/31/2014 9:00 AM
End Date/Time: 5/31/2014 11:00 AM

For a list of rate categories, please see Appendix B under the Space Reservation Policy: <http://www.baruch.cuny.edu/spacepolicy>

Click the link to view the details of the event and to add a comment back to this calendar user.
<http://ersdev01.baruch.cuny.edu/calendartest/EventCommentView.aspx?Eid=14233&Iid=32250&ref=2a5d76fc-f983-da11-bf2e-000f1f6e42f0>

CANCEL

BACK

SUBMIT

2. Dean/VP - Event review and rate category selection for event

This section has been amended to remove the use of comments in the workflow. Please use email to communicate the rate category to the event organizer.

The Dean/VP will receive an email and click on a link in the email to view the event details. A single web page will present the event details.

1. You will receive an email with a link to the event details. Click on the link to see the event details.

To: [Redacted]
Cc: [Redacted]
Subject: Rate Category Request

Event Name: Sample Event
Start Date/Time: 5/31/2014 9:00 AM
End Date/Time: 5/31/2014 11:00 AM

For a list of rate categories, please see Appendix B under the Space Reservation Policy: <http://www.baruch.cuny.edu/spacepolicy>

Click the link to view the details of the event and to add a comment back to this calendar user.
<http://ersdev01.baruch.cuny.edu/calendartest/EventCommentView.aspx?Eid=14233&Iid=32250&ref=2a5d76fc-f983-da11-bf2e-000f1f6e42f0>

2. On the event detail page you will review the event details (date, time, description, and location), as well as any notes included in the "Internal Notes". **You will then email the event organizer by replying to the email shown above with the rate category** (from Appendix B of the Space Reservation Policy).

Public Calendar Event Notice For Baruch College

Internal Notes:

*Add Your Comments:

*First Name:

*Last Name:

ADD

Internal Event Comment Log:

There are no comments for this event.

[View Category Approval](#)

Event Details

[Go Back](#)

Sample Event

Start Date: 5/31/2014 **Start Time:** 9:00 AM
End Date: 5/31/2014 **End Time:** 11:00 AM

Event Description

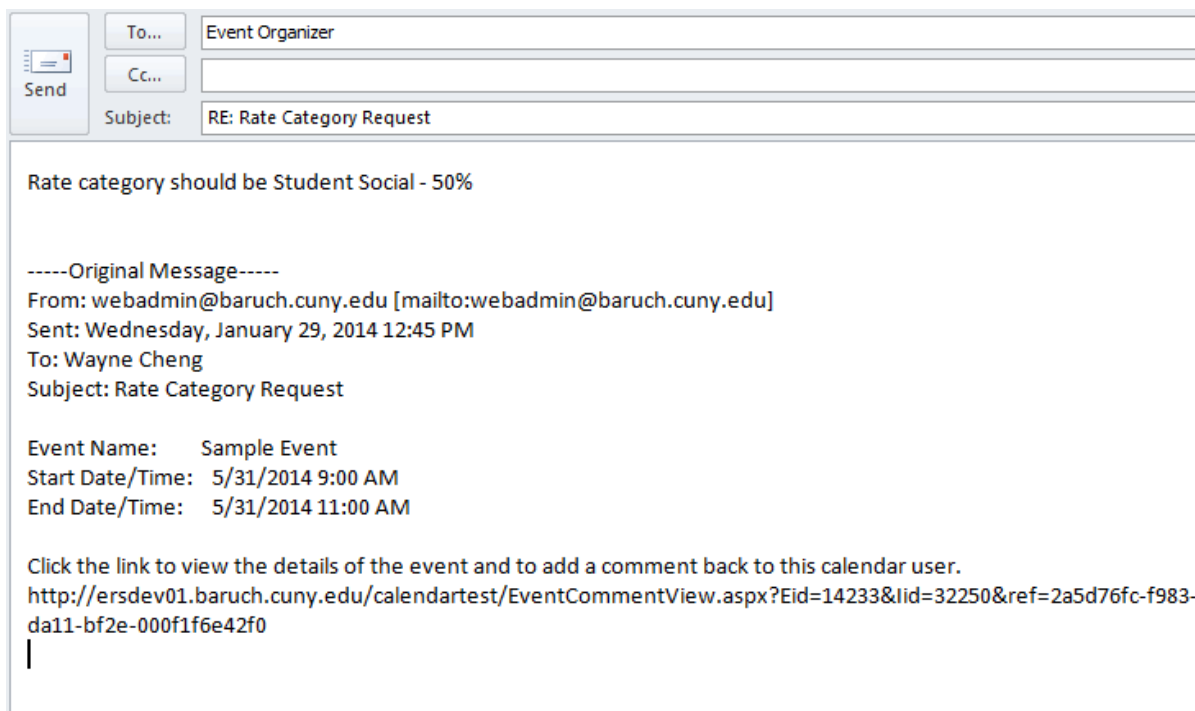
Event Description

Location Information:

Baruch College - 137 East 25th Street
Room: Room 831

Contact Information:

Name: Event Contact Name
Phone: Event Phone



3. The Dean/VP workflow process is completed for the event after emailing the Event Organizer the rate category.

3. Event Organizer - Modification and release of event for Space Manager approval

The Event Organizer will check their email to see if a rate category has been sent by the Dean/VP. If an email has been received, the Event Organizer will set the rate category, as indicated in the email and the event will be released. If event's facility is within the Event Organizer's jurisdiction, the event will show up in calendar upon the event's release. If the event's facility is outside of Event Organizer's jurisdiction, release of event will trigger facility workflow. The event will not show up in public calendar until the facility is approved.

1. Check your email to see if a rate category has been sent by the Dean/VP.

From: Sent
 To:
 Cc:
 Subject: RE: Rate Category Request

Rate category should be Student Social - 50%

-----Original Message-----

From:
 Sent: Wednesday, January 29, 2014 12:45 PM
 To:
 Subject: Rate Category Request

Event Name: Sample Event
 Start Date/Time: 5/31/2014 9:00 AM
 End Date/Time: 5/31/2014 11:00 AM

Click the link to view the details of the event and to add a comment back to this calendar user.
<http://ersdev01.baruch.cuny.edu/calendartest/EventCommentView.aspx?Eid=14233&lid=32250&ref=2a5d76fc-f983-da11-bf2e-000f1f6e42f0>

- Log into your account or click "Main Menu" if already logged in. Access/modify your saved event by clicking action and selecting modify. **Please take care if using this method to edit the event as accidentally selecting delete and clicking off of the drop-down menu will delete your event with no confirmation.** You can also access/edit the event through the traditional method by clicking "Events: Modify/Cancel/Delete" and finding your event on the list.

Calendar Administration Main Menu - Marketing Welcome Event Organizer! Today is January 28, 2014.

Events Pending Approval MARKETING FACILITIES RESOURCES

Select Department/Category: (D) Baruch Computing and Technology Center (BCTC) Display 10 Display All

Enter Keywords/Event Name:

Department/Category	Event Name	Start Date/Time	User	Action
There are currently no pending events. You will be notified when events are pending.				

Approve Selected Deny Selected Delete Selected Approve All Deny All Delete All

Your Upcoming Events - Status

Select Department/Category: Display 10 Display All

Enter Keywords/Event Name:

Department/Category	Event Name	Start Date/Time	Approval Status	Action
Baruch Computing and Technology Center (BCTC) (D)	Sample Event	5/31/2014 9:00 AM	Saved	<div style="border: 1px solid red; padding: 2px;"> Select ▼ Select Delete Modify </div>

Copyright 2014. Powered by [Active Data](#), a master calendar management platform from [Active Data](#). POWERED BY exchange

- Upon modifying the event, you will see your event information. Proceed to the "Details & Registration" tab on the bottom of the page.

Modify Event - General Details [Sample Event]

***Event Name:**

***Department:**
 Baruch Computing and Technology Center (BCTC)

Publish on Selected Calendar(s):

Event Status:

***Category(s)/Subcategory(s):**

***Event Description:**

B *I* U [List Icons] [Link Icon] [Unlink Icon] [Text Color Icon] [Background Color Icon]

Font Name Real...

Event Description

Design HTML Preview

Internal Event Comments Log x

Add New Comments

4. Here is the "Details & Registration" tab where you will select the rate category given in the email by the Dean/VP and whether or not attendees are to be charged.

After you've set the rate category and whether or not attendees are to be charged, click "Preview" on the bottom right of the page.

Internal Information
 (Not viewable on user display.)

***Promote in CUNY Calendar**

Attendees to be charged?
 Yes
 No

Rate Category -see Space Policy

Internal Notes:

5. Now you may select "Release Event" and click "Finish".

Event Details

Save Event

Release Event

Go to Event Notification Page

Do not notify category or event subscribers of this event change.

Facilities	Resources	Marketing	Internal	COMMENTS
Details	Event Date/Time	Facility Request		
View	5/31/2014 (9:00 AM - 11:00 AM)	137 East 25th Street - Room 831		
Event Facility Details:				
Booking ID:	N/A	Room Setup Notes:		
Location:	Baruch College	Room Features:		
Location Owner(s):	1	Room Notes:		
Room Setup Option:	N/A			
Room Setup:	0 mins			
Room Tear Down:	0 mins			
User Setup:	0 mins			
User Tear Down:	0 mins			
Setup Count:	N/A			

Event Details

remind me notify me add to my calendar email a friend

[Go Back](#)

Sample Event

Start Date: 5/31/2014 Start Time: 9:00 AM
End Date: 5/31/2014 End Time: 11:00 AM

Event Description
Event Description

Location Information
Baruch College - 137 East 25th Street
Room: Room 831

Contact Information
Name: Event Contact Name
Phone: Event Phone

Main Information	Scheduling & Facilities	Request Resources	Images & Attachments	Details & Registration
CANCEL	<input type="checkbox"/> Open Print Window			FINISH

6. Upon submission of the event, you will see a message indicating that the event will be put into the workflow instead of the normal successful publish to calendar message. In this case, the Space Manager will receive an email.

Modify/Cancel/Delete Event

The event has been modified successfully and notice has been sent to the appropriate department administrator(s) and/or category owner(s) that need to take further action on the event.

4. Space Manager - Review and approval/denial of facility request

The Space Manager will check if a rate category has been set and approve or deny the facility request, triggering email to the Event Organizer. Approval of facility will result in event being displayed in calendar. Denial of facility request will require the Event Organizer to select an alternative facility and release the event, triggering facility workflow again.

1. Space Manager will receive an email indicating a facility request for an event with event details in message.

To:
Cc:
Subject: Modified Event Notification for Event that includes a Facility you Own/Manage

An event has been modified which includes a facility that you manage. Please login to the Calendar administration area in order to review the details of the event changes. You are required to approve/process associated facility request(s).

User Account Modifying Event: Event Organizer
Facility(s): Baruch College, 137 East 25th Street, Room 831
Event Name: Sample Event
Event Start/End Date: 5/31/2014
Event Start/End Time: 9:00 AM - 11:00 AM
The URL for accessing the Calendar administration area for modifying this event is:
<http://ersdev01.baruch.cuny.edu/calendartest/login.aspx>

- Click on the "Facilities" button highlighted below to see your facility request queue. Click on either the "Event Name" link to go into further detail for the event or select "Approve" or "Deny" from the Action drop-down for instant approval/denial.

Calendar Administration Main Menu - Facilities Welcome Space Manager! Today is January 28, 2014.

Facility Requests Pending Approval **MARKETING** **FACILITIES** **RESOURCES**

Select Location/Building/Room: Display [Display All](#)

Enter Keywords/Event Name:

Facility	Event Name	Start Date/Time	User	Action
<input type="checkbox"/> Room 831	Sample Event	5/31/2014 9:00 AM	Organizer, Event	<input type="button" value="Select"/> <input type="button" value="Select"/> <input type="button" value="Approve"/> <input type="button" value="Deny"/>

Approve Selected Deny Selected Delete Selected Approve All Deny All Delete All

- Space Managers should check and verify that a rate category has been set by clicking on the "Event Name" link and then the "Internal" button (highlighted in image below). **If the rate category is set to "TBD by Dean or VP" or empty, the request should be denied.**

Facilities **Resources** **Marketing** **Internal** [PRINT ALL](#) - [PRINT](#) - [BACK TO PENDING LIST](#)

Internal Information:

Internal Notes:

Promote in CUNY Calendar No. Do not make this event visible in the CUNY Calendar.

Attendees to be charged? No

Rate Category - see Space Policy
Student Social - 50%

Event Owner Details:
Owner Name: Event Organizer
Owner Email:

Event Details [Go Back](#)

- If you clicked on the "Event Name" link and then the "Facilities" button (highlighted in image below), you will see an overview of the event with options to approve/deny the event. Check the checkbox underneath "Action" and then click approve or deny to take action on the

event.

Calendar Administration Main Menu - Facilities

Facilities Resources Marketing Internal PRINT ALL - PRINT - BACK TO PENDING LIST

Details	Action	Event Date/Time	Facility Request	Status
View	<input type="checkbox"/>	5/31/2014 (9:00 AM - 11:00 AM)	137 East 25th Street - Room 831	Pending

Event Facility Details: COMMENTS CHANGE LOG SEND NOTIFICATION

Booking ID:	N/A	Room Setup Notes:	<div style="border: 1px solid black; height: 20px;"></div>
Location:	Baruch College	Room Features:	<div style="border: 1px solid black; height: 20px;"></div>
Location Owner(s):	1	Room Notes:	<div style="border: 1px solid black; height: 20px;"></div>
Room Setup Option:	N/A		
Room Setup:	0 mins		
Room Tear Down:	0 mins		
User Setup:	0 mins		
User Tear Down:	0 mins		
Setup Count:	N/A		

Event Details

[Go Back](#)

Sample Event

Start Date: 5/31/2014 **Start Time:** 9:00 AM
End Date: 5/31/2014 **End Time:** 11:00 AM

Event Description
Event Description

Location Information
Baruch College - 137 East 25th Street
Room: Room 831

Contact Information
Name: Event Contact Name
Phone: Event Phone

5. If the Space Manager denies the event, they will receive a prompt to indicate the reason for denial. The Event Organizer will receive a message indicating the request was denied and will have to restart the facility request process.

Calendar Administration Main Menu - Facilities

Facilities Resources Marketing Internal PRINT ALL - PRINT - BACK TO PENDING LIST

Details	Action	Event Date/Time	Facility Request	Status
View	<input checked="" type="checkbox"/>	5/31/2014 (9:00 AM - 11:00 AM)	137 East 25th Street - Room 831	Pending

Event Facility Details: COMMENTS CHANGE LOG SEND NOTIFICATION

Booking ID:	N/A	Room Setup Notes:	<div style="border: 1px solid black; height: 20px;"></div>
Location:	Baruch College	Room Features:	<div style="border: 1px solid black; height: 20px;"></div>
Location Owner(s):	1	Room Notes:	<div style="border: 1px solid black; height: 20px;"></div>
Room Setup Option:	N/A		
Room Setup:	0 mins		
Room Tear Down:	0 mins		
User Setup:	0 mins		
User Tear Down:	0 mins		
Setup Count:	N/A		

Deny Facility Request(s) x

Please enter comments for the reason this facility request is being denied. These comments will be sent back to the user who last added this event and will allow them to update the event and resubmit for processing.

Denied

[Go Back](#)

To:
 Cc:
 Subject: Facilities Have Been Denied for the Event "Sample Event"

The facility requests below have been denied by the facility administrator(s) and have been removed from the corresponding event occurrences. If you have any questions regarding this denial, please contact the facility administrator.

NOTE: These occurrences will continue through processing without facilities.

Reasons for denying this Facility Request:
 Denied

Facility Request Denied
 Event Start/End Date: 5/31/2014
 Event Start/End Time: 9:00 AM - 11:00 AM
 Location Name: Baruch College
 Building Name: 137 East 25th Street
 Room Name: Room 831
 Room Setup Option:

Event Name: Sample Event
 Event Start/End Date: 5/31/2014 to 5/31/2014
 Event Start/End Time: 9:00 AM to 11:00 AM

The URL for accessing the Calendar administration area for modifying this event is:
<http://ersdev01.baruch.cuny.edu/calendartest/login.aspx>
 This calendar is Powered by Active Data Calendar, a master calendar management platform from Active Data Exchange. Visit <http://www.activedatacalendar.com> to learn more.

- If the Space Manager approves the event, the event will be published into the calendar. The Event Organizer will receive a message indicating the request was approved.

Calendar Administration Main Menu - Facilities


Facilities Resources Marketing Internal PRINT ALL - PRINT - BACK TO PENDING LIST

Details	Event Date/Time	Facility Request	Status
View	5/31/2014 (9:00 AM - 11:00 AM)	137 East 25th Street - Room 831	Approved

Event Facility Details: COMMENTS CHANGE LOG SEND NOTIFICATION

Booking ID:	N/A	Room Setup Notes:	
Location:	Baruch College	Room Features:	
Location Owner(s):	1	Room Notes:	
Room Setup Option:	N/A		
Room Setup:	0 mins		
Room Tear Down:	0 mins		
User Setup:	0 mins		
User Tear Down:	0 mins		
Setup Count:	N/A		

Event Details

To:
Cc:
Subject: Calendar Event Facility Request for Baruch College has been Approved
Attachments:  Event.ics (828 B)

Your event room reservation facility request has been approved for the following event

Event Name: Sample Event

Facility Request Approved
Event Start/End Date: 5/31/2014
Event Start/End Time: 9:00 AM - 11:00 AM
Booking ID: 315000000000176
Location Name: Baruch College
Building Name: 137 East 25th Street
Room Name: Room 831
Room Setup Option:

5. Event Organizer - Request of alternative facility if request was denied

1. If your facility request has been denied, you will receive the following email:

To:
Cc:
Subject: Facilities Have Been Denied for the Event "Sample Event"

The facility requests below have been denied by the facility administrator(s) and have been removed from the corresponding event occurrences. If you have any questions regarding this denial, please contact the facility administrator.

NOTE: These occurrences will continue through processing without facilities.

Reasons for denying this Facility Request:
Denied

Facility Request Denied
Event Start/End Date: 5/31/2014
Event Start/End Time: 9:00 AM - 11:00 AM
Location Name: Baruch College
Building Name: 137 East 25th Street
Room Name: Room 831
Room Setup Option:

Event Name: Sample Event
Event Start/End Date: 5/31/2014 to 5/31/2014
Event Start/End Time: 9:00 AM to 11:00 AM

The URL for accessing the Calendar administration area for modifying this event is:

<http://ersdev01.baruch.cuny.edu/calendartest/login.aspx>

This calendar is Powered by Active Data Calendar, a master calendar management platform from Active Data Exchange. Visit <http://www.activedatacalendar.com> to learn more.

2. Log into your account or click "Main Menu" if already logged in. Access/modify your event by clicking action and selecting modify. **Please take care if using this method to edit the event as accidentally selecting delete and clicking off of the drop-down menu will delete your event with no confirmation.** You can also access/edit the event through the traditional method by clicking "Events: Modify/Cancel/Delete" and finding your event on the list.

Events Pending Approval

MARKETING FACILITIES RESOURCES

Select Department/Category: (D) Baruch Computing and Technology Center (BCTC) Display 10 Display All

Enter Keywords/Event Name: SEARCH

Department/Category	Event Name	Start Date/Time	User	Action
<input type="checkbox"/> Baruch Computing and Technology Center (BCTC) (D)	Sample Event	5/31/2014 9:00 AM	Organizer, Event	Select

Approve Selected Deny Selected Delete Selected Approve All Deny All Delete All

Your Upcoming Events - Status

Select Department/Category: Select Display 10 Display All

Enter Keywords/Event Name: SEARCH

Department/Category	Event Name	Start Date/Time	Approval Status	Action
Baruch Computing and Technology Center (BCTC) (D)	Sample Event	5/31/2014 9:00 AM	View	Select Select Delete Modify

- If your request was denied to a rate category not being set, please complete steps 2 (Dean/VP - Event review and rate category selection for event) and 3 (Event Organizer - Modification and release of event for Space Manager approval) to select a rate category and proceed below.
- Proceed to the "Scheduling & Facilities" tab to request a new facility. The previous requested facility is automatically removed from your event when it has been denied by the Space Manager.

Available Room(s)

The facility selection made has been saved.

Availability Level: Matching 1 Occurrences

Location - Building: Baruch College - 137 East 25th Street

Select	Matched/Unmatched	Room	Room Type	Setup Option	Capacity	Setup	Tear Down
<input checked="" type="checkbox"/>	1 / 0	Room 831					

Setup Time: Select Hours Select Minutes Tear Down Time: Select Hours Select Minutes Setup Count:

Setup Notes:

Schedule Facility Booking(s):

Room 831 (1) Add More Rooms

Facility	Setup Option	Capacity	Room Setup	User Setup	User Tear Down	Room Tear Down	Setup Count	Setup Notes
Baruch College - 137 East 25th Street - Room 831 (view)			0 mins	0 mins	0 mins	0 mins		(View)

<https://www.baruch.cuny.edu/confluence/display/calendar/Active+Data+Calendar+Training+Guide#ActiveDataCalendarTrainingGuide-Addinganeventtothecalendar>