

# Active Data Calendar Training Guide

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## General Calendar Instructions

### Logging into the calendar

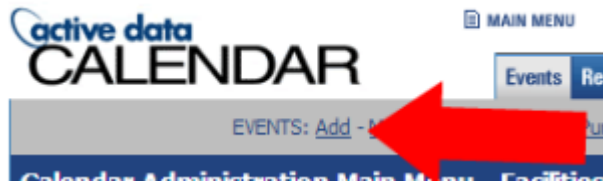
1. Go to <http://www.baruch.cuny.edu/calendar/> or click "Calendar" from the Baruch homepage
2. Click "Submit Events"
3. Click "Administrative login"
4. The username/password is the same as the one you use to login to the computer (Active Directory)

### Adding an event to the calendar

1. In the calendar service, click the "Events" tab



2. Click "Events: Add". This will bring you to the "Main Information" tab for your event.



## Main Information Tab

### Add Event - General Details [Open House Event]

**\*Event Name:**

Open House Event

**\*Department:**

BTC

**Publish on Selected Calendar(s):**


Public ▼

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

Open Houses ▼

**\*Event Description:**

Open House Event

**Event Date:** 3/26/2013  **Start Time:** 11:30 AM **Duration:** 4 ▼ Hours and 0 ▼ Minutes ☐ All Day

Main  
Information

Scheduling &  
Facilities

Details &  
Registration

CANCEL

PREVIEW

1. Fill out the event name.
2. For "Publish on Selected Calendar(s)", you may have the following options described below. If you are unsure of what to select but would like your event to be visible on the public calendar, select "Public".

**Publish on Selected Calendar(s):**



Both  
Select  
Public  
Private  
Both

Category(s)/Subcategory(s):

- a. **Select** - This will not display your event anywhere on the calendar. This option should only be used if you only wish to book a facility, but do not wish to have event information anywhere on the calendar.
  - b. **Public** - This will display the public categories available to you and will display your event on the public calendar (<http://www.baruch.cuny.edu/calendar>) under the category you specify.
  - c. **Private** - This will display the private categories available to you. These categories are not exposed on the public calendar, but the event may be accessible through the private calendar and through direct links to your event.
  - d. **Both** - This will display the public and private categories available to you. You will need to use this option if you wish to select multiple categories that are from both public and private categories for your event.
3. Select the category/subcategory that best fits your event with the drop-down menu.
  - a. If there are multiple categories the event applies to, click "Select Multiple" for the category selection. If you select this option, a screen will pop up where you can check off the categories you want the event to be under. Check those off and then click "Submit".

**Select Category(s)/Subcategory(s)** X

(+) ☐ Academic Calendar

☒ Alumni

☐ Conferences - OCM

☐ Conferences & Workshops

☐ Exhibits

☐ Hold

☒ Lectures

☒ Open Houses

☐ Performing Arts & Film

☐ Special Events

☐ Sports

☐ Student Events

CANCEL DESELECT ALL SELECT ALL SUBMIT

4. Fill out the event description
5. For the event date, start time, and duration, you can opt to fill it out here or in the next screen under "Scheduling & Facilities".
6. Click the next tab "Scheduling & Facilities" to proceed to the next screen.

## Scheduling & Facilities Tab

The Scheduling & Facilities tab is where you can book a facility or facilities for your event date(s). If you are not the Space Manager (owner) of the facility or facilities, a facility request will be sent to the Space Manager of the requested facility after you finalize your event. Your event will not be published in the calendar until the Space Manager approves your facility request.

For more information regarding this workflow, please visit the [Active Data Calendar Space Reservation Workflow guide](#).

active data  
**CALENDAR**

MAIN MENU FACILITIES CALENDAR PUBLIC CALENDAR PRIVATE CALENDAR ? HELP ABOUT LOGOUT


Events Registration Workflow Facilities Resources Categorization Marketing


EVENTS: Add - Modify/Cancel/Delete

### Add Event - Schedule & Request Facility [Event Name]

☒ Select Event Date(s) - (No Facility Required) (Help)  
☐ Select Event Date(s) to find available Facilities  
☐ Select Facility to find available Date(s)

**Event Date(s)**

\*Start Date: 3/26/2013 

\*End Date: 3/26/2013 

RECUR PATTERN CUSTOM SCHEDULE

**Event Time(s)**

☐ All Day Event

Start: 11:30 AM End: 2:30 PM

☐ Schedule in  min. intervals between hours:

Start:  End:

GENERATE SCHEDULE

Main Information Scheduling & Facilities Request Resources Details & Registration

CANCEL PREVIEW

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POWERED BY 

1. You will see three options at the top when on the Scheduling & Facilities page. Only the first two options are relevant.

- a. **Select Event Date(s) - (No Facility Required)** - Pick this option if your event **does not have a room**.
- b. **Select Event Date(s) to find available Facilities** - Pick this option if you want a room for your event.

**NOTE: Classrooms included in the calendar do not currently include academic class schedules so availability information will not be accurate. Availability of classrooms can be confirmed by the Office of the Registrar.**

2. If you filled out the event date, start time, and duration on the "Main Information" tab, you will find it populated on the screen here. If you did not, fill it out the Start Date / End Date fields and the Start and End times under "Event Time(s)".

- a. If you have **multiple dates** for your event, you may click "**Custom Schedule**" to pick out the dates your events fall upon. In the image below, we select March 26, 29, and the 30th.

### Event Date(s)

\*Start Date: 3/26/2013

\*End Date: 3/26/2013

RECUR PATTERN CUSTOM SCHEDULE

Start Month: March Start Year: 2013

# Months: 4

March 2013							April 2013							May 2013						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	25	26	27	28	1	2	31	1	2	3	4	5	6	28	29	30	1	2	3	4
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24	25	26	27	28	29	30	28	29	30	1	2	3	4	26	27	28	29	30	31	1
31	1	2	3	4	5		5	6	7	8	9	10	11	2	3	4	5	6	7	8

June 2013						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

March 26, 29, and 30th dates selected.

3. After you've selected a facility option and start/end dates, click "Generate Schedule".

### Event Time(s)

☐ All Day Event

Start: 11:30 AM End: 2:30 PM

☐ Schedule in Select min. intervals between hours:

Start: End:

GENERATE SCHEDULE

- a. If you would like the event to only be displayed during a certain date range, visible after a certain date, or hidden from the calendar after a certain date, fill out the following section that will be displayed after clicking "Generate Schedule":

Specify the range when this event is accessible to public users.

**Publish Date/Time:**  

**Unpublish Date/Time:**  

**Location Search** ([Clear Selections](#))

4. You will now see a list of your event date(s) and time(s) under "Current Schedule". You may correct the start/end date(s) and time(s) here if necessary.

### Current Schedule

[Select All](#) [Select All Future](#) [Deselect All](#)

		Start Date		End Date		Start Time	End Time		
<a href="#">Add / Delete</a>	<input checked="" type="checkbox"/>	3/28/2013		3/28/2013		11:30 AM	3:30 PM	<input type="checkbox"/>	All Day 4.0 hours
<a href="#">Add / Delete</a>	<input type="checkbox"/>	3/29/2013		3/29/2013		10:30 AM	2:00 PM	<input type="checkbox"/>	All Day 3.5 hours
<a href="#">Add / Delete</a>	<input checked="" type="checkbox"/>	3/30/2013		3/30/2013		10:00 AM	2:00 PM	<input type="checkbox"/>	All Day 4.0 hours

NEW SCHEDULE

CHANGE TIME

ADD OCCURRENCES

ADD INTERVALS

5. Please read the appropriate section below depending upon the facility option you've selected.

### Select Event Date(s) - (No Facility Required) Option Selected - You do not need a room for your event

1. If you've picked "Select Event Date(s) - (No Facility Required)", you can proceed to the "Details & Registration" tab to finalize your event details.

### Select Event Date(s) to find available Facilities Option Selected - You want a room for your event

1. If you've picked "Select Event Date(s) to find available Facilities", check off the event date(s) you wish to book a room for under "Current Schedule". Note that you may only book the same set of rooms for the selected dates so if you have three dates in three different rooms, you will go through this process three times.

### Current Schedule

[Select All](#) [Select All Future](#) [Deselect All](#)

	Start Date	End Date	Start Time	End Time	
<a href="#">Add / Delete</a> <input checked="" type="checkbox"/>	3/28/2013	 3/28/2013	 11:30 AM	3:30 PM	<input type="checkbox"/> All Day 4.0 hours
<a href="#">Add / Delete</a> <input type="checkbox"/>	3/29/2013	 3/29/2013	 10:30 AM	2:00 PM	<input type="checkbox"/> All Day 3.5 hours
<a href="#">Add / Delete</a> <input checked="" type="checkbox"/>	3/30/2013	 3/30/2013	 10:00 AM	2:00 PM	<input type="checkbox"/> All Day 4.0 hours

NEW SCHEDULE

CHANGE TIME

ADD OCCURRENCES

ADD INTERVALS

2. Once you've selected your event date(s), scroll down and you will see the "Facility Search" area and some other options (room type, features, setup). You can either type in a particular facility you wish to reserve in the Location Keyword Search ("14-250") and click "Filter Facility Checklist" **or** check off the rooms you wish to search and then click the blue "Search" button.

If you are not sure which room you wish to book, you can check off "Baruch College" and click the blue "Search" button to see a full list of all rooms available.



**Facility Search** (Clear Selections)

Location Keyword Search:  [Filter Facility Checklist](#)

Location/Building/Room(s):

- ☐ ARC Arena (Senior Day)
- (-) ☐ Baruch College
  - (+) ☐ 137 E. 25th St.
  - (+) ☐ 151 East 25th St
  - (-) ☐ Administrative Building
    - ☒ Eli and Claire Mason Seminar Room, 3rd Fl.
    - ☐ Room 301 – Administrative Lounge

Room Type(s):

- All
- Auditoriums
- Classrooms
- Conference Rooms
- Lab Rooms
- Multi-purpose

Feature(s):

- Instructor Podium
- Projector
- Projector Screen
- Smartboard
- Tables
- TV / DVD
- Whiteboard

Setup Option(s):

- All
- Conference Style
- Hollow Square
- Multi-Row
- Open
- Square
- U-Shape

Min. Capacity:

Max. Capacity:

☒ Display Availability for All Series Dates

☐ Display Availability for Each Series Date

**SEARCH**

---

**Schedule Facility Booking(s):**

Unbooked (1)

3/27/2013 11:30 PM - 3/28/2013 3:30 PM

3. Once you've selected a room, click "Search". You will then see a new area called "Available Room(s)". Click the checkbox under "Select" for the room and click "Save".

Some rooms may have setup options that describe how you wish for the room to be arranged. Some rooms may also have setup and tear down times. **If the room is a Conference Services owned room, please do not modify these times.** For non Conference Services owned rooms, the setup time is how much earlier you need to be in the room to prepare and the tear down is how much later you need to be in the room to clean up.

Available Room(s)

Availability Level: Matching 1 Occurrences

Location - Building: Baruch College - Administrative Building

Select	Matched/ Unmatched	Room	Room Type	Setup Option	Capacity	Setup	Tear Down
<input checked="" type="checkbox"/>	1 / 0	Eli and Claire Mason Seminar Room, 3rd Fl.					

Setup Time:  
 Tear Down Time:  
 Setup Count:

Setup Notes:

**IMPORTANT** - If you receive an error after searching the room that states, **"There are no rooms that match your search criteria or can be scheduled for this event."**, this means that the room is not available for your request event date and time. You will have to search for another room.

- You should see the room now listed in the "Schedule Facility Booking(s)" area. This means the room is now attached to your event and you can proceed to the "Details & Registration" tab to finalize your event.

**You can also remove a room in this area by clicking the tab with the room name you wish to remove and then clicking "RESET".**

Schedule Facility Booking(s):

Eli and Claire Mason Seminar Room, 3rd Fl. (1)

Facility	Setup Option	Capacity	Room Setup	User Setup	User Tear Down	Room Tear Down	Setup Count	Setup Notes
Baruch College - Administrative Building - Eli and Claire Mason Seminar Room, 3rd Fl. <a href="#">(view)</a>			0 mins	0 mins	0 mins	0 mins		<a href="#">(view)</a>

- Repeat this process for any other event date(s) that may need a room.
- To confirm that all event date(s) have rooms associated with them, scroll down to the "Schedule Facility Booking(s)" area. If you see a tab labeled "Unbooked", the number in the parentheses indicates how many event dates do not have a room. If you click this tab, it will display the event date that does not have a room.

**Schedule Facility Booking(s):**

Eli and Claire Mason Seminar Room, 3rd Fl. (2)

Unbooked (1)

Add More Rooms

3/29/2013 (10:30 AM - 2:00 PM)

7. Once you've confirmed that your event date(s) are properly booked, proceed to the "Details & Registration" tab to finalize your event details.

## Details & Registration Tab

### 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:

1. Fill out the contact information. For the other boxes under "Other Event Information", check them off if it is appropriate for your event. For example, if it is a school or department event, check off the school or department that is holding it. If you do not find your school or department in the list, please send a request to the BCTC Help Desk to have this added.
2. If you would like your event listed in the CUNY Calendar (<http://events.cuny.edu/>), select "Yes. Make this event visible in the CUNY Calendar" for the "Promote in CUNY Calendar" box, otherwise select "No. Do not make this event visible in the CUNY Calendar".

If your event is in a private category or "Select", select "No. Do not make this event visible in the CUNY Calendar" as private events and select events are not published to the CUNY calendar.

3. If attendees will be charged for your event, check "Yes", otherwise "No".
4. For the "Rate Category", please see below:
  - a. If your Dean/VP has not given you a rate category, you should set it to "TBD by Dean or VP".

As part of the Space Policy, you must get a rate category from your Dean/VP. You must **save** the event afterwards and send your event information to the Dean/VP.

- b. If your Dean/VP has given you a rate category for your event, you should set it to the rate category they've given you here.

5. Click "Preview" at the bottom right of the screen.

## Preview Screen

On the preview screen you can opt to save the event or release the event. See below for which option you should select.

- The **"Save Event"** option will not publish your event to the calendar or send a facility request to a Space Manager. An event should be saved when you have not received the rate category from your Dean/VP yet (Any rate category other than "TBD by Dean or VP") or if you are missing event information and wish to fill it in at a later time.

**In order to receive a rate category from your Dean/VP, you must send them the event information by following the instructions further below.**

- The **"Release Event"** option will send a facility request to the Space Manager (if there is a facility requested) and publish your event to the calendar (if it's a public/private event).

**If your event has a rate category of "TBD by Dean or VP" and it is released with a facility request, it will not be approved by the Space Manager. Your Dean/VP will give you a rate category for your event after you send them the event information. Steps for sending them the event information can be found further below.**

See the appropriate section below dependent upon whether or not the rate category was given by the Dean/VP.

## Rate Category was received from Dean/VP and set to anything other than "TBD by Dean or VP"

1. Click "Finish" at the bottom right of the screen if you have a rate category set to anything other than "TBD by Dean or VP".

You have now successfully added an event to the calendar and a facility request will be made if you have requested a facility.

**IMPORTANT** - If your event is booked for a facility that you are not the Space Manager of, the event will not be published into the Calendar until the facility request has been approved.

#### Event Details

☐ Save Event

☒ Release Event

☐ Go to Event Notification Page

Marketing

Internal

COMMENTS

Event Date/Time	Registration	Max Registrants	Registration Deadline	Cancellation Deadline	Standard Cost
11/16/2012 (9:30 AM - 2:30 PM)	Disabled				

#### Event Marketing Details:

Department: BCTC

Event Type: Public

Highlight: No

#### Categorization:

Open Houses

#### Event Details



remind me



notify me



add to my calendar



email a friend

[Go Back](#)

#### Open House Event

Start Date: 11/16/2012 Start Time: 9:30 AM

End Date: 11/16/2012 End Time: 2:30 PM

#### Schools/Departments:

Baruch Computing and Technology Center

#### Event Description

Open House Event

#### Location Information

Baruch College - 151 East 25th St

Room: Room 252

#### Contact Information

Name: BCTC

Phone: 646-312-1010

Email: [helpdesk@baruch.cuny.edu](mailto:helpdesk@baruch.cuny.edu)

Main  
Information

Scheduling &  
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Registration

CANCEL

FINISH

**Rate Category has not been received from Dean/VP and is set to "TBD by Dean or VP"**

1. If you have your rate category set to "TBD by Dean or VP", make sure your event is set to "Save Event" and check off "Go to Event Notification Page". Then 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

Marketing

Internal

COMMENTS

Details	Event Date/Time	Facility Request
<a href="#">View</a>	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		
Location Owner(s):	1	Room Features:	
Room Setup Option:	N/A		
Room Setup:	0 mins	Room Notes:	
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

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Registration

CANCEL

☐ Open Print Window

FINISH

2. This will bring you to the "Event Notification" page. On this page, select "Email Includes Internal Notes and Comments Log" and "Third Party Recipients" where you will enter your Dean/VP's email address. Enter "Rate Category Request" for the subject and any additional information into the body of the message then click "Submit".



## 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.)

youmailaddress@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

3. The following screen will show an overview of the message. Click "Submit" to send the notification to your Dean/VP.

**Send Event Email Notice**

**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-dall-bf2e-000f1f6e42f0>

✎

CANCEL

BACK

SUBMIT

4. You are done with the event for now. The Dean/VP will send you the rate category through email (Please see the [Space Reservation Workflow - Step 3](#)), where you will then modify your event, put in the rate category, and then select "Release Event" and "Finish" in order to make the facility request to the Space Manager.

If you do not know how to modify your event, see the section below.

## Modify/cancel/delete an existing event

If you wish to modify, cancel, or delete an existing event, you may do so by following these instructions.

- In the calendar service, click the "Events" tab
- Click "Events: Modify/Cancel/Delete".
- Select the event from the left-hand list and click "Submit". You can also double-left click the event you wish to modify. If you do not see the event, use the keyword search on the right if you know the event name.

Select Event to  
Modify/Cancel/Delete

[View List](#)

[Download List](#)

Transfer Orientation Reservation, 12/7/2012 12:00

Freshman Orientation Reservation, 1/17/2013 8:30

CANCEL

SUBMIT

Search for Events

Select Saved Search:

Select

# of Events Displayed:

25

Event Type:

All

Department Name:

Select

Search By Category(s)/Subcategory(s):

(-) Academic Calendar

- Fall
- Spring
- Summer
- Winter

\*AdmissionsAlumniConferences & WorkshopsExhibits

Location:

Select

Keyword Search:

Select Events for a Specific Date Range

Range of Dates:

Select

Exact Dates:

Start Date:

11/1/2012

End Date:

11/30/2012

Select Events for a Specific Time Range

Range of Time:

Select

Exact Times:

Start Time:

End Time:

Save for Current User Login Session

Save for all Future Sessions

Name this Search:

RESET

SEARCH

**Other useful search options:**

**Select Events for a Specific Date Range** - You can specify the start/end date to show events during this time period.

**Save for Current User Login Session** - If you expect to modify the same set of events during your current session within the Calendar, saving this will prevent you from having to search for it again for the duration of the session.

**Save for all Future Session** - If you expect to use this search again in the future, you can save the search by selecting this option and putting in a name for the search. In the future, you can access the same search by using the drop-down menu by "Select Saved Search".

- If you have more than one occurrence in your event (more than one event date), you will see the screen below. You can modify the series or an individual occurrence of the event. When you've selected which set you'd like to modify, click "Submit".

**Modify/Cancel/Delete Event**

[Search Again](#)

☒ **Modify Event**

Select

Select

Modify the Series

Modify an Occurrence(s) in the Series

Occurrences (DEFAULT)

☐ Modify Details For The Entire Event Series

☐ **Cancel Event**

Select

☐ **Delete Event**

Select

CANCEL

SUBMIT

- Modifying the event is similar to adding an event. You can proceed through the tabs and make edits where needed. If you wish to delete or cancel an event, you can select these options on the first tab shown in the image below. When you're done with your edits, just click "Preview" and you can save or release the event.

**Modify Event - General Details [Freshman Orientation Reservation]**

DELETE EVENT CANCEL EVENT COPY CHANGE LOG

\*Event Name:  
Freshman Orientation Reservation

\*Department:  
Orientation

Publish on Selected Calendar(s):  
Private

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

\*Event Description:  
Freshman Orientation copy

Internal Event Comments Log  
There are no comments for this event.

Add New Comments

ADD

Main Information Scheduling & Facilities Details & Registration

CANCEL PREVIEW

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## Removing a room from an event

If you wish to remove a room from an event date, you will click on the "Scheduling & Facilities" tab at the bottom of the page.

Design HTML Preview

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

CANCEL PREVIEW

Scroll down to the bottom of the page where you will see the "Schedule Facility Booking(s)" area. Click on the room (the tab) you wish to remove and then click "RESET". The room will then be removed. Make sure to click "Preview" and then "Finish" at the bottom right of the screens to finalize your changes.

Schedule Facility Booking(s):

Room 14-220 (1)
Room 14-267 (1)
Room 14-280 (1)
Room 14-285 (1)
Room 14-269 (1)
Add More Rooms

Facility	Setup Option	Capacity	Room Setup	User Setup	User Tear Down	Room Tear Down	Setup Count	Setup Notes
Baruch College - Newman Vertical Campus - Room 14-220 <a href="#">(view)</a>	Theatre/Rows of Seats	300	2 hrs	0 mins	0 mins	2 hrs	300	<a href="#">(View)</a>

RESET

SEARCH

If you have multiple dates using the room that is being removed, you should modify the occurrence date where the room is not needed and follow the instructions above. You can select an occurrence by following the instructions from the above section "Modify/cancel/delete an existing event"

## Changing/Removing Event Date(s) or time for an Event

**IMPORTANT** - Changing the event date/time for an event date where the room has already been approved will require the Space Manager to approve/deny your request again. The room will be available for others to request until the Space Manager approves your request.

If you wish to change/remove an event date or time for your event, you will click on the "Scheduling & Facilities" tab at the bottom of the page.

Design
HTML
Preview

Main Information

Scheduling & Facilities
Request Resources
Images & Attachments
Details & Registration

CANCEL
PREVIEW

You may make your changes on the "Current Schedule" table. If you need to remove a date, you can click the "Delete" link next to the date. Don't forget to click "Preview" and then "Finish" to finalize your changes.

## Add Event - Schedule & Request Facility [Event]

- ☐ Select Event Date(s) - (No Facility Required)
- ☒ Select Event Date(s) to find available Facilities
- ☐ Select Facility to find available Date(s)

### Current Schedule

[Select All](#) [Select All Future](#) [Deselect All](#)

		Start Date		End Date		Start Time	End Time		
<a href="#">Add / Delete</a>	<input checked="" type="checkbox"/>	2/22/2014		2/22/2014		5:00 PM	6:00 PM	<input type="checkbox"/>	All Day 1.0 hours
<a href="#">Add / Delete</a>	<input checked="" type="checkbox"/>	3/13/2014		3/13/2014		5:00 PM	6:00 PM	<input type="checkbox"/>	All Day 1.0 hours
<a href="#">Add / Delete</a>	<input checked="" type="checkbox"/>	3/14/2014		3/14/2014		5:00 PM	6:00 PM	<input type="checkbox"/>	All Day 1.0 hours
<a href="#">Add / Delete</a>	<input checked="" type="checkbox"/>	4/23/2014		4/23/2014		5:00 PM	6:00 PM	<input type="checkbox"/>	All Day 1.0 hours

NEW SCHEDULE

CHANGE TIME

ADD OCCURRENCES

ADD INTERVALS

## Modifying Events with Registration / Active Registrants

Please follow these instructions if you wish to modify an event that accepts RSVPs on the calendar.

**Please note that it is not possible to change the event date, start time, or end time when you have people registered for your event.** If you only wish to change the time of the event, it is recommended the registrants are emailed with the new time and the new time can be noted in the event description.

If you need to reschedule the event for another date, it is recommended that you email all registrants and notify them of the new date, cancel the event (which will send cancellation emails to all registrants), and reschedule the event. The registrants cannot be carried over.

When you cancel an event, it will give you an option to reschedule the event. Rescheduling the event will allow you to create the event again with all of the information from the previous event already populated.

**\*If you delete (not cancel) an event with registrants, all of the registration information will be lost.\***

## Event Details

Are you sure you want to cancel the following event(s)?

Event Name: Test event

☐ Yes ☒ No

After this event has been cancelled would you like to Reschedule?

☒ Yes ☐ No

## Space Manager (facility owner) Instructions

### Approving or Denying a Facility Request for Space Managers

1. If you are a Space Manager of a facility, you may receive facility requests for events booked for your facility via email.

From: ignorethisemail@baruch.cuny.edu Sent: Wed 5/29/2013 4:28  
To: Wayne Cheng  
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: Regular User  
Facility(s): Baruch College, Newman Vertical Campus, 14th Floor  
Event Name: This is an event  
Event Start/End Date: 5/31/2013  
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>

2. To view these facility requests, login to the calendar and click the "Facilities" button on the "Main Menu" page.


Calendar Administration Main Menu - Facilities Welcome ActiveData Admin! Today is January 24, 2014.

Facility Requests Pending Approval MARKETING FACILITIES RESOURCES

Select Location/Building/Room:  Display 10

Enter Keywords/Event Name:

Facility	Event Name	Start Date/Time	User	Action
----------	------------	-----------------	------	--------





3. To take action on these facility requests, 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	<a href="#">Sample Event</a>	5/31/2014 9:00 AM	Organizer, Event	<div><div>Select</div><div>Select</div><div>Approve</div><div>Deny</div></div>

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

4. You 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](#)

5. 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**

FacilitiesResourcesMarketingInternal

[PRINT ALL](#) - [PRINT](#) - [BACK TO PENDING LIST](#)

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

**Event Facility Details:**

COMMENTSCHANGE LOGSEND NOTIFICATION

**Booking ID:** N/A  
**Location:** Baruch College  
**Location Owner(s):** 1  
**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

**Room Setup Notes:****Room Features:****Room Notes:**

APPROVEAPPROVE ALLEDENYDENY ALL

**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

6. If you deny an event, you will receive a prompt to indicate the reason for denial. The Event Organizer (submitter of the event) will receive an email with the reason indicated in this window. The facility will also be removed from their event and they will have to initiate a new facility request.

Calendar Administration Main Menu - Facilities

Facilities Resources Marketing Internal

PRINT ALL - PRINT - BACK TO PENDING LIST

Details	Action	Event Date/Time	Facility Request	Status
<a href="#">View</a>	<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

Location:

Baruch College

Location Owner(s):

1

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

Room Setup Notes:

Room Features:

Room Notes:

Deny Facility Request(s)

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

CANCEL

FINISH

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.

7. If you approve an event, the event will be published into the calendar and the facility will be booked for the event. 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
<a href="#">View</a>	5/31/2014 (9:00 AM - 11:00 AM)	137 East 25th Street - Room 831	Approved

**Event Facility Details:** [COMMENTS](#) [CHANGE LOG](#) [SEND NOTIFICATION](#)

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

**Event Details**

To: [Redacted]  
Cc: [Redacted]  
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

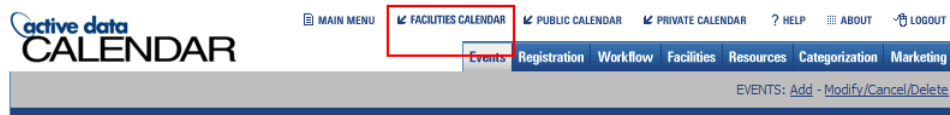
Facility Request Approved  
Event Start/End Date: 5/31/2014  
Event Start/End Time: 9:00 AM - 11:00 AM  
Booking ID: 315000000000176  
Location Name: Baruch College  
Building Name: 137 East 25th Street  
Room Name: Room 831  
Room Setup Option:

## Facilities Calendar Instructions - Seeing Room Availability

Using the Facilities Calendar to see room availability before adding an event

The Facilities Calendar allows you to see what rooms are available, requested, booked over a series of dates in a gantt chart.

1. Click "Facilities Calendar"



2. Check off the rooms you wish to see information for within the "Event Location" area

**Facilities Calendar**

**Display Format:** Facility Gantt View

**Facility Gantt View**

**Advanced Search (New Search)**

Start Date: 2/27/2014  
 End Date: 2/27/2014  
 Start Time: 5:00 AM  
 End Time:  
 Time Range: Select  
 Keyword/ID:  
☐ Show All Requested Facilities  
☐ Show All Booked Facilities  
☐ Show All Available Facilities  
☐ Show All Facilities

**Event Location**  
 Location Keyword Search:  
 Location/Building/Room(s):  
 (-) Baruch College  
 (+) 137 East 25th Street  
 (+) 25th Street Plaza  
 (+) Administrative Building  
 (-) Information & Technology Building (Library Building)  
   Atrium, Rackow Room and Lounge - Rooms 750 and 760  
   President's Dining Room - Room 761  
   Room 130  
   Room 135  
   Room 320A (The Edward and Daisy Ross Electronic Resources)

Room Type(s):  
 Auditorium  
 Classroom  
 Computer Lab  
 Conference  
 Feature(s):  
 Audio Access  
 Chairs  
 Computer Podium  
 Conference Table Phone (Polycom)  
 Setup Option(s):  
 Bleachers  
 Board Room  
 Classroom  
 Computer Lab  
 Capacity: SEARCH

3. Fill in your start/end date parameters
4. Select your filter option (described below)
  - a. Show All Requested Facilities - Shows all facilities selected that have requests that have not yet been approved
  - b. Show All Booked Facilities - Shows all facilities selected that have requests that have been approved
  - c. Show All Available Facilities - Shows all facilities selected with availability anywhere on the schedule
  - d. Show All Facilities - Shows all facilities selected regardless of availability
5. Click "Search"
6. Rooms and their availability will be shown on the bottom of the page.

☒ Show All Facilities

Room: Setup Tear Down User: Setup Tear Down  
 Closed Pending Review Approved

download print report

[\[Expand Gantt View\]](#)

**Thursday, Feb 27, 2014**

**Location:** Baruch College  
**Building:** Information & Technology Building (Library Building)

Room Name	5:00 AM	6:00 AM	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM
Atrium, Rackow Room and Lounge - Rooms 750 and 760										
President's Dining Room - Room 761										
Room 130										

## Registration / RSVP Instructions

## Add Registration to an Event

If you would like to add a registration form to the event, please follow the steps below.

1. On the "Details & Registration" tab when adding/modifying an event, you should see an "Enable Registration" checkbox. If you do not see this, make sure that your event date is set correctly. If it is in the past or day of, it will not allow you to set registration. Check off "Enable Registration" and the options below should appear.

☒ **Enable Registration**

**Registration Form Template:**

**Registration Rules:**

**Maximum Registrants:**  ☐ Unlimited

**Registration Deadline:**

**Cancellation Deadline:**

☒ **Date:**  **Time:**

☐ **Hours:**

**Display registration spaces still available:** ☐ Yes ☒ No

**Display text when no spaces are remaining:**

**Additional Registrant Information**

**Type:**

**Display Name:**

**Registrant Type Limit:**  ☐ Unlimited

**Include in Spaces Remaining Count:** ☐

**Current Status:**

**Require Additional Information:** ☐

**Include information on Name Tags:** ☐

2. For "Registration Form Template", it is advised to set up your own template as this allows you to control the different options of the form. If you wish to do this, please see the section below. The standard form has a set of options that cannot be changed. The options are noted in the list below. If these options are satisfactory, then select "Use Standard Form" as the registration form template.
  - The standard form sets all registrants to "pending" which means you will have to go into the system and manually approve people who have registered for the event.
  - The standard form emails the user who created the event with a notification every time someone registers for the event
  - The standard form only asks for the user's first name, last name, and email address.
3. For "Registration Rules", this only applies to an event with multiple occurrences (for example, an open house event that occurs every two weeks with registration). The following options are available:
  - Single Occurrence Level Registration Only Enforced - a registrant can only register for one occurrence (can only attend one open house)

- Multiple Occurrence Registration Allowed - a registrant can register for all open house events
4. Make sure to set the following fields as they are required
    - Maximum Registrants - Check unlimited if you do not want a limit. **If you set a limit, please be advised that the limit only counts towards registrants who have been approved for the event. If your form automatically approves registrants, they will all count towards this limit. If they are set to pending first, no registrants will be counted for the limit until you go into the registration and approve users.**
    - Registration Deadline
    - Cancellation Deadline - When the user registers for an event, they also receive a link to cancel their registration. This will set a deadline for allowing cancellations
  5. You can also set the event to display if registration spaces are still available. Setting it to yes will show how many spaces are still available.
  6. You can ignore the "Additional Registrant Information" as this is not normally used.
  7. The registration portion is done, you can proceed with other event changes or click "Preview" and finalize the event.

## Create a Registration Form Template

1. To create a customized registration form, in the calendar service click the "Registration" tab.

2. Click "Forms: Add". You will see the screen below.

---

**Form Name:**

**Form Type:**

**Form Status:**

**Send Confirmation Email:**  ☐ Do Not Send iCal Invite

---

**Users/Groups to Assign Form to Events**  
**Find Available User(s)/Group(s)**

Keyword:

**User(s)/Group(s) Available**

- Arefeen, Abdullah
- Battista, Daniel
- BRAMWELL, MARISA
- Cabatbat, Amanda
- Chambers, Sonji
- Charlebois, Alison
- Cheng, Wayne

▼ ADD ▼ ADD ALL ▲ REMOVE

**User(s)/Group(s) Selected**

**Users/Groups to Receive Registration Emails**  
**Find Available User(s)/Group(s)**

Keyword:

**User(s)/Group(s) Available**

- Ackerman, Patrick
- Admin, ActiveData
- Arefeen, Abdullah
- Battista, Daniel
- BRAMWELL, MARISA
- Cabatbat, Amanda
- Chambers, Sonji

▼ ADD ▼ ADD ALL ▲ REMOVE

**User(s)/Group(s) Selected**

---

**Users/Groups to Process Form Registrants**  
**Find Available User(s)/Group(s)**

Keyword:

**User(s)/Group(s) Available**

- Ackerman, Patrick
- Admin, ActiveData
- Arefeen, Abdullah
- Battista, Daniel
- BRAMWELL, MARISA
- Cabatbat, Amanda
- Chambers, Sonji

▼ ADD ▼ ADD ALL ▲ REMOVE

**User(s)/Group(s) Selected**

**Users/Groups who can Modify/Delete Registration Form**  
**Find Available User(s)/Group(s)**

Keyword:

**User(s)/Group(s) Available**

- Arefeen, Abdullah
- Battista, Daniel
- BRAMWELL, MARISA
- Cabatbat, Amanda
- Chambers, Sonji
- Charlebois, Alison
- Cheng, Wayne

▼ ADD ▼ ADD ALL ▲ REMOVE

**User(s)/Group(s) Selected**

---

3. Type in the Form Name
4. Select "Registration Form without Payment" for Form Type.
5. For "Send Confirmation Email", you can opt to send a confirmation email to the user when they register. If you do not wish for them to receive a confirmation email, select "Do Not Send Confirmation to Registrants".
6. You will see four boxes with a list of users. To add a user, select the user in the box and then click "Add". Here's what each box does.
  - Users/Groups to Assign Form to Events - These are users who can use this form for their events.



- Users/Groups to Receive Registration Emails - Users selected here will receive an email every time someone registers for an event using this form. **If you do not wish to receive any emails, it is recommended you add "Admin, ActiveData" to this section with no one else. If you leave this section blank, a registration email will be sent to the user who created the event using this form.**
- Users/Groups to Process Form Registrants - Users added here will be able to add/delete/approve/reject users who register.
- Users/Groups who can Modify/Delete Registration Form - Users added here can modify this form template or delete it.

7. After you are done with this section, click "Next". You will see the screen below.

### Add Form - Registration (Text Configurations)

**Form Name:** Form

Set New Registrants to: Approved

☐ Send email reminder  days  hrs  mins before event.

**Description:** (Internal Use Only)

**Form Text**

**Text to appear at top of form:**  
Please complete the fields below in order to register for this event. All fields marked with an (\*) are required fields for completion.

**Text to appear at bottom of form, above buttons:**  
Please verify that you have completed all required fields above and then use the buttons below to either submit your registration request or you may cancel out of this registration process.

**Text to appear on preview/payment selection screen:**  
This screen allows you to preview your registration submission one final time before finalizing your submission. We encourage you to print out this screen for your records. You will also receive an email notification with your registration information once you click the final submission button below. Your registration submission is not complete until you click

**Text to appear on final confirmation page:**  
Event Registration – Thank You!  
You have successfully completed your event registration request. You will receive an email shortly with the details of your registration. Please save the email for future reference and in case you need to withdraw

**Form Buttons** (click name to see image)  

Submit

Choose File No file chosen

Back

Choose File No file chosen

Finish

Choose File No file chosen

Reset

Choose File No file chosen

Cancel

Choose File No file chosen

**Email Text**

**Select Email:** Registration Confirmation

**Email Opening Text:**  
Thank you for your event registration request. Please print out this email since it can be used to request a later date/time if necessary.

**Email Closing Text:**

☒ Click the link below to withdraw/cancel your event registration request. If you have registered for multiple events in a series, you will see all event dates/times and you can choose to withdraw/cancel from only specific event dates.

☐ This calendar is powered by Active Data Calendar, an events planning and marketing calendar solution from Active Data Exchange. Visit <http://www.activedatacalendar.com> to learn more.

**Send emails from:** emailaddressstosendfrom

CANCEL

BACK

NEXT

FINISH

- "Set New Registrants" allows you to set users to either approved or pending. If you set users to pending, you will have to approve them in the system when users register for an event.
- You can send an email reminder to people who have registered for your event with a time you specify.
- The form text area allows you to change the wording on the registration form for the event.
- The email text area allows you to change the wording on the various emails sent out to registrants. The different types of emails are as follows
  - Registration Confirmation - This email is sent to users when the form is configured to set new registrants as pending (requiring approval). This email does not get sent out if you have the form configured to automatically approve users.
  - Registration Approved - This email goes out as the first email if the form is set to automatically approve registrants otherwise it is sent out after you've manually approved a registrant.
  - Registration Denied - Sent out when you deny a registrant in the system
  - Registration Deleted - Sent out when you delete a registrant in the system

- Registration Cancelled - Sent out when a user cancels their registration or when you cancel the event which automatically sends out a cancellation email to all registrants
- Registration Reminder - Sent out if you have the email reminder function checked off

12. You can set a "From" email address by filling out the "Send emails from" field. If this is blank, the from email address will be from the user who created the event.

13. Click "Next" when you're done. You will see the screen below. This is where you can specify the fields the user sees when registering for the event.

**Form Name:** Form

### Standard Contact Fields

☐ All Standard Contact Fields (Domestic)

☐ All Standard Contact Fields (International)

First Name: Default Field (Required)

Last Name: Default Field (Required)

Email: Default Field (Required)

☐ Company ☐ Required

☐ Job Title ☐ Required

☐ Address ☐ Required ☐ Domestic ☐ International

Address 1

Address 1

Address 2

Address 2

City

City

State

State/Province/Prefecture

Zip/Postal Code

Zip/Postal Code

County

Country

☐ Phone ☐ Required

☐ Fax ☐ Required

☐ Do not display county/country

### Additional Fields

Select the field type and then you will be prompted to make additional selections and/or enter field labels in order to continue building your form.

**Field Type:**

**Text Area**

**Field Label:**

**Field Identifier:**

**Max Characters:**

**Field Data Type:**

**Width:**  px **Height:**  px

☐ Field only available from registrant administration area.

☐ Required

14. As a default, the first name, last name, and email address will always be requested in the form. If you only want these three fields then you do not need to select anything on the screen and can proceed by clicking "Next".
15. Selecting "All Standard Contact Fields (Domestic)" or "All Standard Contact Fields (International)" will include all fields displayed on the screen. This includes the following fields: Company, Job Title, Address (Domestic/International format depending upon what you selected for "All Standard Contact Fields"), Phone, and Fax.
16. If you only want some fields from this screen, check them off. If you wish for "Job Title" to be required, then check off the required checkbox next to the field. If you do not wish to add a custom field, just click "Next" to proceed.

☒ Company ☐ Required

☒ Job Title ☒ Required

17. If you want to add a field (custom) that is not shown on this screen, click the drop-down menu next to "Field Type" in the "Additional Fields" section. Select the field type that works best for your field.
  - Checkbox - A field where multiple values can be selected/are true. For example, the field "Which CUNY Schools have you visited?" could have multiple choices that would be applicable.
  - Comma Separated Text Field - Allows users to enter different values separated by comma into a text field (rarely used)
  - Dropdown - Similar to radio button, but the interface is a drop-down menu. This is useful for fields with a large amount of choice but only allows the user to pick one (such as what state the registrant is from).
  - Radio Button - Similar to dropdown, but all of the answers are displayed on the screen instead of in a drop-down menu. This is preferred for questions with a small amount of choices such as gender of the registrant where the user can only pick one choice.
  - Text Area - Similar to text field, but allows for more text. This should be used when the user is expected to type more than one line of text.
  - Text Field - Similar to text area, but should be used for one line text. This could be a field where a phone number is requested or how many guests the user is bringing to the event.
  - Date Selector - This is a text field, but with a button that displays a calendar with dates to select from. This should be used for anything using a date such as birth date of the registrant.
18. Once you've selected a custom field type, there are some parameters to fill in. We'll go over them below. Some of the field types have very similar parameters so they are lumped together below.
  - a. **Checkbox, Dropdown, and Radio Button Field Types**

#### Checkbox Field Type

Field Label:  ☐ Required

Field Identifier:

##### Checkbox Selection Options:

Type the specific answers to your question in the text area below. Each answer should be entered on a new line.

Allow Write-In Response: ☒ No ☐ Yes

Selection Display: ☒ Horizontal ☐ Vertical

# Per Row

☐ Field only available from registrant administration area.

- Field Label - This is the text that will show up on the form itself and be visible to the registrant. You can check off "Required" here to make this whole field required for submission.
- Field Identifier - This is an arbitrary identifier for the form and is only handled on the back-end. It is recommended you put something that describes what this field is (for instance, gender).
- Checkbox/Dropdown/Radio Selection Options - These are the choices provided to the user for this field. Please enter every new value on a new line.
- Allow Write-In Response - Allows user to put in a response not shown in the list
- Selection Display (Checkbox / Radio only) - Controls whether the answers are shown vertically or horizontally.
- # Per Column - How many answers to show per column

b. **CS Text Field, Text Area, Text Field**

**Text Area Type**

Field Label:  ☐ Required

Field Identifier:

Max Characters:

Field Data Type:

Width:  px  Height:  px

☐ Field only available from registrant administration area.


- Field Label - This is the text that will show up on the form itself and be visible to the registrant. You can check off "Required" here to make this whole field required for submission.
- Field Identifier - This is an arbitrary identifier for the form and is only handled on the back-end. It is recommended you put something that describes what this field is (for instance, gender).
- Max Characters - It is not necessary to fill this out, but this is the amount of characters the user can put in.
- Field Data Type - This allows you to restrict the input to either alphabet/numbers/alpha-numeric
- Width - You can specify how wide you want the field to be, but it is not required
- Height (Text Area only) - You can specify how long you want the field to be, but it is not required


c. **Date Selector**

**Date Selector Field Type**

Field Label:  ☐ Required

Field Identifier:

Start Date:  

End Date:  

☐ Field only available from registrant administration area.

- Field Label - This is the text that will show up on the form itself and be visible to the registrant. You can check off "Required" here to make this whole field required for submission.
- Field Identifier - This is an arbitrary identifier for the form and is only handled on the back-end. It is recommended you put something that describes what this field is (for instance, gender).
- Start Date - Allows you to set the earliest date on the calendar popup button
- End Date - Allows you to set the latest date on the calendar popup button

19. Once you are done setting these parameters, you can click "Preview" to see a preview of your newly created custom field or click "Add" to add it to the form. It will not be displayed on this screen when you add it, but will be shown on the preview screen. Click "Next" to proceed to that screen.

20. After you've clicked next, you're now shown a preview of the form itself.

## Event Registration

Please complete the fields below in order to register for this event. All fields marked with an (\*) are required fields for completion.

☒ [Register for Other Series Dates:](#) Please click here if you would like to see all dates in the series to register for multiple or all series events.

### Registration Event

Start Date: 10/29/1982 End Date: 10/29/1982

Start Time: 10:00 AM End Time: 2:15 PM

\*First Name:

\*Last Name:

\*Email Address:

Test

[Modify/Delete](#)

Please verify that you have completed all required fields above and then use the buttons below to either submit your registration request or you may cancel out of this registration process.

CANCEL

SUBMIT

CANCEL

BACK

NEXT

FINISH

21. You don't have to do anything on this screen, but do verify all the fields you selected/added are shown, and then you can click "Finish". You're now done and should be able to add/modify an existing event and use this form for registration.

## Managing Registrants

1. In the calendar service, click the "Registration" tab

2. Click "Registrants: Active". You will see the screen below.

active data  
CALENDAR

MAIN MENU PUBLIC CALENDAR PRIVATE CALENDAR ? HELP ABOUT LOGOUT

Events Registration Workflow Facilities Categorization Marketing Reports Configuration

PAYMENT: [Add - Modify/Delete - View](#) FORMS: [Add - Modify/Delete - View](#) REGISTRANTS: [Active - Archive - Types](#) EXPORT: [Add - Modify/Delete - View](#)

### Manage Event Registrations

5 Total Events with Active Registrations

Department:

From Date:  To Date:   [Event Registration Report](#)  
[download](#)

Event Start Date	Event Name (+ ADD Registrant)	Maximum Registrants	Pending Registrants	Approved Registrants	Denied Registrants	Cancelled Registrants	Action
11/17/2012 12:00 AM	(+) Test event	442	0	3	0	0	<a href="#">Disable</a> <a href="#">Download</a>
11/20/2012 10:00 AM	(+) Open House	Unlimited	0	0	0	0	<a href="#">Disable</a> <a href="#">Download</a>
11/22/2012 12:00 AM	(+) Registration Test	141	0	0	0	0	<a href="#">Disable</a> <a href="#">Download</a>
11/26/2012 10:00 AM	(+) Registration test1	100	2	2	0	0	<a href="#">Disable</a> <a href="#">Download</a>
12/12/2012 12:00 AM	(+) Registration Test	141	0	0	0	0	<a href="#">Disable</a> <a href="#">Download</a>

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## Download CSV Export for Event

1. Follow steps for "Managing Registrants" above
2. If you wish to get a CSV export with the registrants, click "Download" on the right side of the screen for the event.

## Increase/Decrease Maximum Registrants for Event

1. Follow steps for "Managing Registrants" above
2. If you click the link with the number of maximum registrants, this will allow you to increase/decrease registrants for this event.
  - a. You cannot decrease the number of registrants to an amount lower than the number of people registered for your event. If you have 8 people registered, you can only set this number to 8 at the lowest which effectively closes registration since the maximum number has been met.

## Approve / Deny / Cancel Registrants from Event

1. Follow steps for "Managing Registrants" above
2. If you click the link with the number of pending, approved, denied, or cancelled registrants, this will show you a list of registrants with the specified status for that event. This screen is shown below.

Manage Approved Event Registrants

Event Details

Test event

Start Date: 11/17/2012

Start Time: 12:00 AM   End Time: 11:59 PM

VIEW PENDING

VIEW DENIED

VIEW CANCELLED

[Back to List of Registration Events](#)

Approved Registrants

3 Approved Registrants

There are 439 registration spaces remaining for this event.

Email <a href="#">Select All</a>	Change Status	Name	Registrant Email	Registration Date/Time	Registration Number	Action
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Doe, John</a>	<a href="#">johndoe@email.com</a>	11/14/2012 2:33 PM	H492AF-4921F-924CE	Select ▼
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Doe2, John</a>	<a href="#">johndoe2@email.com</a>	11/14/2012 2:33 PM	H2F122-2F091-5E1B3	Select ▼
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Doe3, John</a>	<a href="#">johndoe3@email.com</a>	11/14/2012 2:33 PM	H6A333-6A2A1-D45D4	Select ▼

SELECTED:

☐ Approve

☐ Deny

☐ Delete

☐ Cancel

ALL:

☐ Approve

☐ Deny

☐ Delete

☐ Cancel

SUBMIT

- To change the status of only one registrant, click the drop-down menu under "Action" for the individual's row and select an action (approve/deny/delete/cancel). After selecting the action, the calendar service will automatically perform the given action.
- To change the status for multiple individuals, but not all, check the "Change Status" checkbox next to their name. Then click the action (approve/deny/delete/cancel) next to "SELECTED:". Click "Submit".
- To change the status for all listed, click the action (approve/deny/delete/cancel) next to "ALL:". Click "Submit".

## Email Registrants from Event

- Follow steps for "Managing Registrants" above
- If you click the link with the number of pending, approved, denied, or cancelled registrants, this will show you a list of registrants with the specified status for that event. This screen is shown below.

Manage Approved Event Registrants

Event Details

Test event

Start Date: 11/17/2012

Start Time: 12:00 AM   End Time: 11:59 PM

VIEW PENDING

VIEW DENIED

VIEW CANCELLED

[Back to List of Registration Events](#)

Approved Registrants

3 Approved Registrants

There are 439 registration spaces remaining for this event.

Email <a href="#">Select All</a>	Change Status	Name	Registrant Email	Registration Date/Time	Registration Number	Action
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Doe, John</a>	<a href="#">johndoe@email.com</a>	11/14/2012 2:33 PM	H492AF-4921F-924CE	Select ▼
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Doe2, John</a>	<a href="#">johndoe2@email.com</a>	11/14/2012 2:33 PM	H2F122-2F091-5E1B3	Select ▼
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Doe3, John</a>	<a href="#">johndoe3@email.com</a>	11/14/2012 2:33 PM	H6A333-6A2A1-D45D4	Select ▼

SELECTED:

☐ Approve

☐ Deny

☐ Delete

☐ Cancel

ALL:

☐ Approve

☐ Deny

☐ Delete

☐ Cancel

SUBMIT



3. To email registrants, either click "Select all" if you wish to email all registrants or click the individual's checkbox under "Email". Click "Submit". The email screen is shown below.

**Event Name:** Test event  
**Start Date:** 11/17/2012 **End Date:** 11/17/2012  
**Start Time:** 12:00 AM **End Time:** 11:59 PM

☐ **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)  
Cheng, Wayne (Admin)  
Espinet, Traci (Admin)  
Preuss, Adrienne (Admin)

▲  
☰  
▼

---

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

johndoe2@email.com,johndoe3@email.com

↵

---

☐ **All Event Subscribers** [View List](#) [Download List](#)

---

**Event Registrant(s):**

☐ All  
Pending (0)  
Approved (2)  
Denied (1)  
Cancelled (0)

▲  
▼

---

**\*Message Subject:**

ActiveData Admin wanted you to know about this event at Baruch College

↵

**\*Create Custom Email Message:** ☐ HTML Email

Event Name: Test event  
Start Date/Time: 11/17/2012 12:00 AM  
End Date/Time: 11/17/2012 11:59 PM

↵

**Add Email Attachment:**  No file chosen

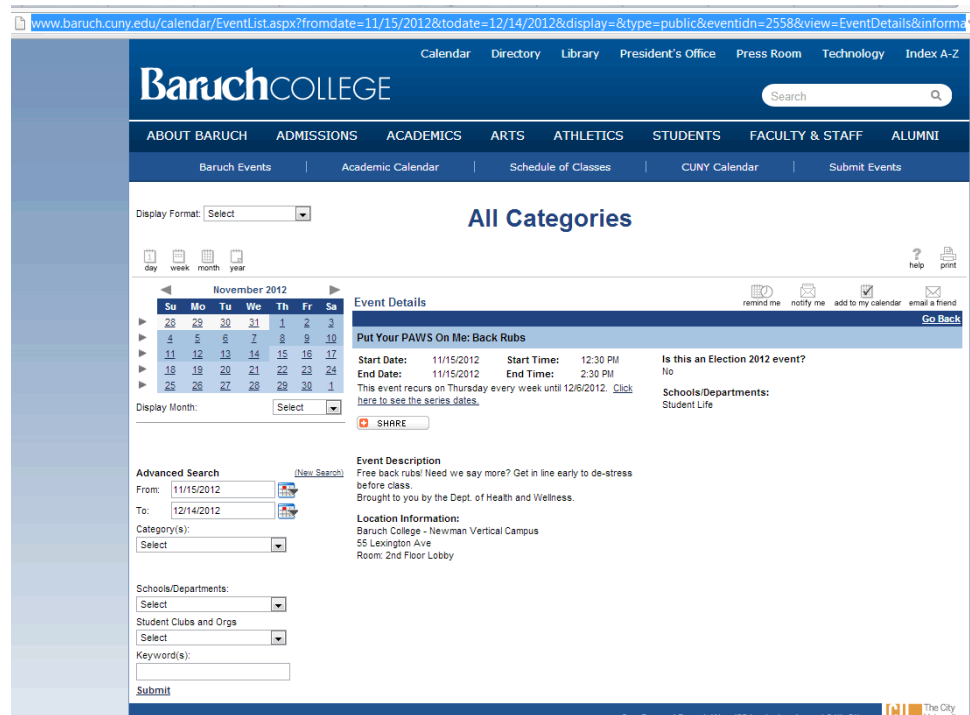
4. You should see the registrants' emails in the textbox labeled "Third Party Recipients". You may add additional email addresses if you wish.
5. Fill out the "Message Subject" and the body labeled "Create Custom Email Message". When you're ready to send the email to your registrants, click "Submit". The next screen will show you a preview of your message. You can click "Submit" again to send the email.

# Marketing an Event Instructions

## Creating a link to a specific event for distribution

If you wish to send a link to users to a specific event, please follow the steps below:

1. Go to the Baruch Calendar (<http://www.baruch.cuny.edu/calendar> )
2. Find your event on the calendar and click on it. You should see the screen below after doing so.



3. In the address bar (highlighted in blue at the top of the image), copy this URL/address. This is the link that you can distribute to users to see your event specifically in the calendar.

## Creating a link to a set of events for distribution

If you wish to create a link to a set of events to distribute to users, such as all of your open houses, please follow the steps below.

1. In the calendar service, click "Marketing" tab

2. Click "Generate: Quick Link". You will see the screen below.

## Generate Quick Links

View Type:

Event Type:

Category(s)/Subcategory(s):

Location(s)/Building(s)/Room(s):

Is this an Election event?

Schools/Departments:

- ☐ Academic Administration
- ☐ Accountancy
- ☐ Administration and Finance
- ☐ Advisement and Orientation

Student Clubs and Orgs

- ☐ 85 Broads
- ☐ Absolute Adrenaline
- ☐ Accounting Society
- ☐ Actuarial Science Society

☐ Select Events for a Specific Date Range

Range of Dates:

Exact Dates: Start Date:

End Date:

Select Events from Current Date to Future Date or # of Days

☐ Current Date to # of Days:

☐ Current Date to Specific End Date:

☐ Display # of days prior to current date:

☐ Select Events for a Specific Time Range

Range of Time:

Exact Times: Start Time:

End Time:

RESET

SUBMIT

3. Let's go over the view type which controls how your set of events will be displayed in the calendar. Options detailed below. It's recommended that you use "Summary" as the view type, but you can choose from one below.

- Grid - Shows events in a grid

- Category - Shows events in a list, organized in sets by category

## Open Houses

Start Date and Time	Event Details
Thursday, November 15, 2012	
6:00 PM - 7:30 PM	<a href="#">Baruch Health Care Administration MBA Info Session</a> Information Session specifically for those interested in our Baruch Graduate Program in Health Care Administration. Come meet alumni, current students, faculty and staff. Plenty of time for discussion and Q & A. Space is limited, RSVP Required. RSVP at: <a href="http://tinyurl.com/8jhxjq">http://tinyurl.com/8jhxjq</a>

- DateTime - Shows events in a list, organized in sets by Date/Time – Similar to Summary view, but shows some description text of the event and the time is listed in the left-column

Thursday, November 15, 2012	
All Day	<a href="#">International Education Week Awards Ceremony</a> International Education Week Awards Ceremony
9:30 AM	<a href="#">Running Club</a> Get in shape and run a 5K. If you love to run and are interested in joining the Cross Country team, send an email to: <a href="mailto:blue_runner55@hotmail.com">blue_runner55@hotmail.com</a> Brought to you by the Dept. of Health and Wellness. Co-sponsored by P.A.W.S., Health & Fitness, and Absolute Adrenaline. Stop by the Health & Wellness Suite (NVC 3-241) to get a waiver form.

- Location - Shows events in a list, organized in sets by location

### Baruch College - Administrative Building - (Room 301 – Administrative Lounge)

Start Date and Time	Event Details
Wednesday, November 28, 2012	

6:00 PM - 7:30 PM

[SPA Director's Briefing](#)

- Summary - Show events in a list, organized in sets by Date/Time - Similar to Date/Time, but shows minimal information for the event (Image of Event (if any), Event Title, Start-End Time, Location)

Sunday, November 18, 2012



[Rabbi Joseph Telushkin: From Eastern Europe to the Lower East Side](#)  
12:30 PM - 1:30 PM

Newman Vertical Campus

- Gantt - Shows events in a gantt chart



4. Look through the other options to find out the settings you want. For example, if we want to only show events for Open House events from the Accountancy department from the current day up to next year, we would do the following:

- Category(s)/Subcategory(s) - Select "Open Houses"
- Schools/Departments - Select "Accountancy"
- Check off "Current Date to # of Days" and type in 365

5. When you are done, click "Submit". Scroll up and you will see a new window labeled "Retrieve Quick Link". Copy this link, this will be the link you distribute to the users.

**Generate Quick Links**

View Type: Summary

Event Type: Public

Category(s)/Subcategory(s):  
Open Houses

Location(s)/Building(s)/Room(s):  
Select

Is this an Election event?  
Select

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

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

☐ Select Events for a Specific Date Range  
Range of Dates: Select  
Exact Dates: Start Date: 11/1/2012  
End Date: 11/30/2012  
Select Events from Current Date to Future Date or # of Days  
☒ Current Date to # of Days: 365  
☐ Current Date to Specific End Date: 12/31/2012  
☐ Display # of days prior to current date:

☐ Select Events for a Specific Time Range  
Range of Time: Select  
Exact Times: Start Time:  
End Time:

RESET SUBMIT

Retrieve Quick Link

http://www.baruch.cuny.edu/calendartest/default.aspx?type=&view=Summary&category=9-0&numdays=365&cf4\_0=Accountancy