

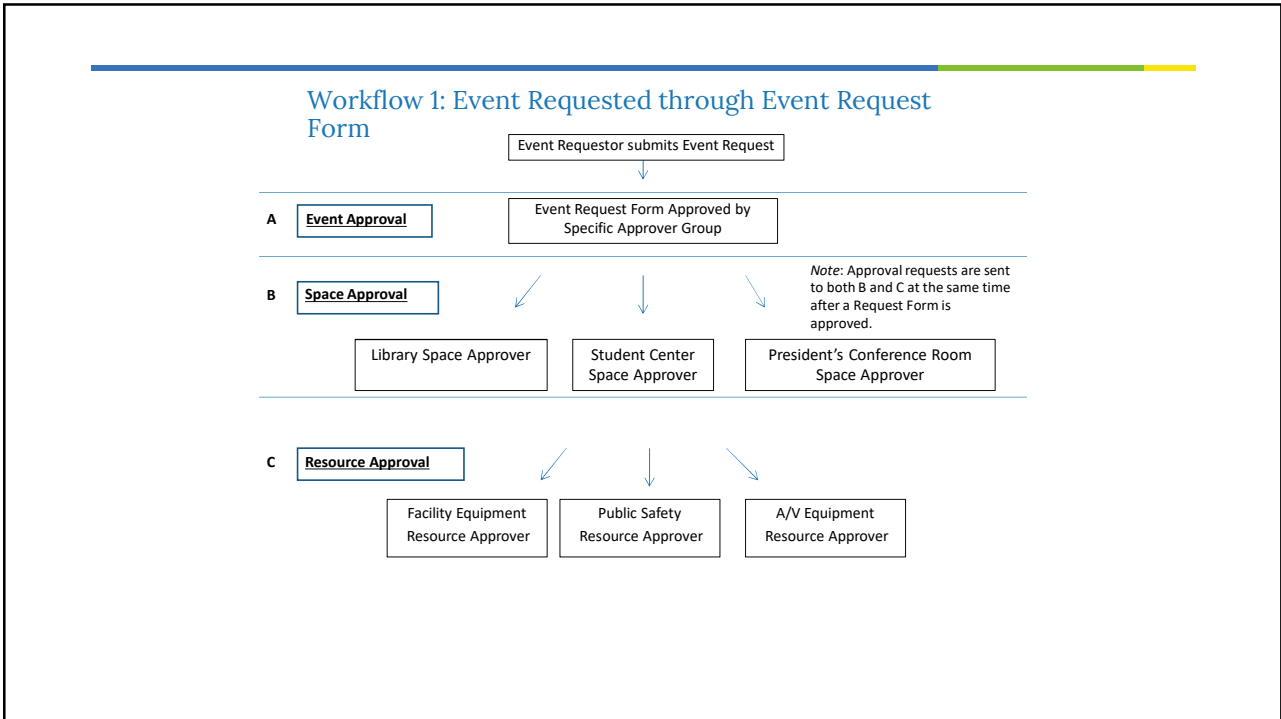


The Nitty Gritty of Events Workflow

Agenda

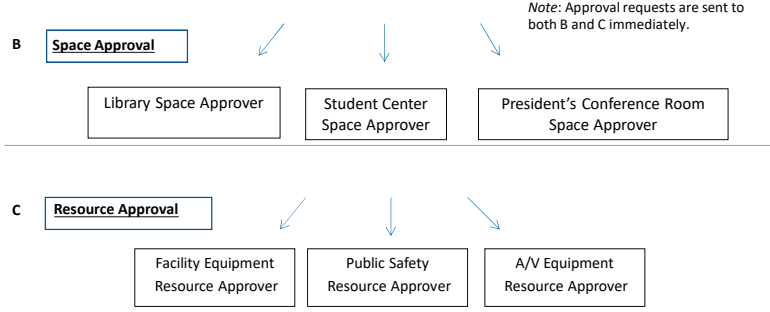
- The Flow of the Workflow
- The Workflow Setup
- Workflow Tips & Tricks

The Flow of the Workflow



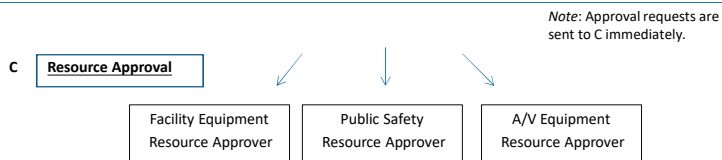
Workflow 2

A user with Event Scheduling permissions creates a new event in Astra Schedule through the Advanced Event Form or through the Quick Event Add. The user creates their Event Meetings and adds a room(s) and resource(s) to the event.



Workflow 3: Resource (only) Requested through Event Form or Quick Add from Scheduling Grid

A user with Event Scheduling **and** Room Scheduling permissions creates a new event in Astra Schedule through the Advanced Event Form or through the Quick Event Add on the Scheduling Grid. The user creates their Event Meetings and **reserves (schedules)** room(s) to the event. (The room choice is limited to the rooms specified in their Role.) Then the user requests the appropriate resource(s) for their event.



Workflow Setup

Workflow Setup

- Centralized: Event Requests
 - Create Event Request Template(s)
 - Create Approval Group(s)
 - *Edit Role Permissions as needed*
 - Common Hiccup: My workflow isn't triggering, and my events are going straight to a scheduled status.
- Decentralized: Room OR Resource Requests
 - Create Approval Group(s)
 - *Edit Role Permissions as needed*
 - Common Hiccup: There's an event in an incomplete status, but no one has a notification for it.

Workflow Tips & Tricks

Workflow Tips & Tricks

- Event Request Forms
 - Assigned to roles (Guest, Faculty/Staff, Student, etc.)
 - Can link directly to form WITHOUT the user having to sign in for GUEST forms
 - Can break apart “Add a Meeting” - previously known as the meeting generator
 - Custom Display Content
 - Request meeting with only resources

Workflow Tips & Tricks

- Secondary Approval
 - Setup as equipment & services
 - *Resource Group*
- Tentative/Pending Events
 - After approving an event, if the event is saved in a pending/tentative status, the workflow does NOT trigger.
- Notification List: Filter Panel
 - *Is Notification - No, Is Active - Yes*
 - Save & Default
 - My Preferences - Emails