Working through your workflow/processing event requests

For gatekeepers – R25

Open R25

Double click on (unread) to open your workflow

Hit [SEARCH]

Double click on space to open the request (sorry I currently have nothing in my workflow to show you what it would look like by you saw it today)

Black checks someone in your security group addressed this event

Circles event cancelled (changing timeline will create these too)

Event will look something like this:
When booking remember to work top left to right

Check for notes or set ups to scheduler here if white there is nothing there

Review the name: should be proper

Adjust timeline per notes: set up (15 minutes) all spaces for exit and enter needs
(1 hour) all spaces that require set ups from PHP or requesting change in room default

pre / post enter per per notes from client

Now work the bottom left to right

Check the space availability / book
Check for resources requested

Review and add set up if any

Set state
to confirmed if you are assigned space(s) for date(s) - solid blue box on date bar
to tentative if you requested space from a gatekeeper or CSS – outline blue box on date

<table>
<thead>
<tr>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tentative</td>
</tr>
<tr>
<td>Draft</td>
</tr>
<tr>
<td>Tentative</td>
</tr>
<tr>
<td>Confirmed</td>
</tr>
<tr>
<td>Sealed</td>
</tr>
<tr>
<td>Cancelled</td>
</tr>
</tbody>
</table>

Save and close X

Step by Step Instructions next page:
Check for notes or set ups to scheduler here 📒 if this is white there are no notes process with the 15 min default set up and take down

- The extra time will be entered here
- This will be dropped into the space assignment later

- Time listed here from client for setting out materials go in the pre and post fields

- 15 minutes all requests for exit and enter needs and required setting between courses and events

- 1 HOUR for spaces that require PHP set up (MCH100, Woolfe Hall, etc)
Check Custom Attributes

For Scheduling services: for sponsored events
   And PS for request to serve
   for music at event

For Catering staff: for will UST Catering provide food (see photo)

If you need to add an attribute hit the down arrow at the Attribute Label field,
Select attribute, enter details if required and hit [add] [Update]
Check the space availability / book

If you adjusted timeline you will get a review window, select [Continue]

Select space(s) and hit [Assign]

*a blue box should appear on the date(s) for spaces that you are the gatekeeper for,

a secondary window will open stating that you are REQUESTING the space for those you do not have assignment rights to and you will not see a blue box on the date

**you must go through the assign process for spaces you do not own to push to the proper gatekeeper if you are speedbooking a request for yourself / your department.

If you are speedbooking and need to fill out the space preference there are three ways to complete this:
Know the room number:

Requesting one of your favorite spaces:

Sometimes when addressing workflow you get no result with the [CHECK] even though there is a check mark in the Space Preferences box. This usually means that the requestor typed in their space and forgot the space between the building and room number or have typed in more than one space. Simply hit the [set] button in this area to view what was entered and correct the settings:
If there is an X over the date you can double click on the date to get the space calendar to view what the conflict is. Sometimes it is just that the events set up or takedown goes over the building hours (there will be nothing showing in the calendar) if this is the case, check the Overrides box on the assignment page and re-hit [CHECK]. [Assign]

If the event goes past the building hours you need to email the client that their event runs past normal building hours and that they will need to work with Public Safety if they wish the building to remain unlocked until the end of their event or that they should make an announcement to guests if they step outside of building for a smoke break or to use their cell the doors will be locked and they will not be able to reenter the building.

If there is an event blocking you can hover over it to view the timelines, if the set up / take down of 15 minutes is the issue you can uncheck the setting on the request you are working on. **you can only remove 1 - 15 minute setting.

All others you will need to email the client that you cannot process their request due to a conflicting event previously booked in the space they are requesting. Ask if there is an alternative space you would like to request on their behalf or if you own multiple rooms, find and alternative and inform client you had to assign and alternative room to please update their agenda and guests of the new location.
Check for resources requested

Click the preferences folder

If something shows here you need to click on it and hit the assign (for each one)

After you assign it the date will appear here

Review and add set up if any

Verify that all details are showing on the review/modify page
timeline, space(s), Blue box or outline on the date side
resources if requested
ADD SET UP if one was requested in the notes to scheduler here if white there is nothing there

Click on the space name

Click on the date, then right click on the date

Select Edit Space Instructions:

Enter set up

Always enter starting at the front of the room (stage or podium)
close with the X

Set state to confirmed

![State drop-down menu]

Save and close X

** NOTE:

If you share workflow and cannot complete the assignment; are waiting for reply to an email or phone call to the client Make yourself the scheduler

Hit the scheduler bubbles

Click on scheduler to activate [Select]

Click on [Select]

Type the first 3 letters of your last name proper (capital, small )

Hit enter on your keyboard or hit the go button

Select your name (double click to auto push to the add side)

Or hit add

Once your name is on the right click [OK]

Close window X

Leave in Draft or Tentative state

Save

Close x
Quick view making yourself scheduler