EMFACT Reminders - Procedure Flow

The Energy & Materials Flow and Cost Tracker (EMFACT)application assists small and medium size enterprises manage their fuel, water and materials usage. Using EMFACT, companies can track air emissions, wastewater, solid/hazardous waste, and related costs associated with the day-to-day operations of their business. The Reminders feature of EMFACT helps by automatically creating calendar events when permit renewal dates are entered. Users also have the ability to set up independent calendar events for any expiration or due date.

This procedure flow identifies the minimum-required fields necessary to utilize the Reminders feature in EMFACT. Refer to the EMFACT User Guide for more details. Note: There are two permission levels in EMFACT: the *Basic User* and the *Advanced User.* The overall procedure is the same for both users, however, the Advanced User has the capability of completing additional fields that the Basic User can not.

1 — View Calendar Events Coming Due

View Calendar Events Coming Due Window

Review the contents of the window.

To close an event:
☐ Event Status = Closed

Optional: Click **More Detail** to add additional details about the event.

2 — Setting Up Independent Events

Calendar Event List Window
Click **New** to create a blank row

☐ Due Date
☐ Event Name
☐ Init Reminder *(defaults to 30 days before the due date)*
☐ Final Reminder *(defaults to 10 days before the due date)*
☐ Event Status *(defaults to Open)*
☐ Contact Person *(defaults to current logged on user)*

3 — Adding Event Detail (as needed)

Calendar Event Detail Window
Review the contents of the window and make any necessary changes

To make a recurring event:
☐ Recurring? = Yes
☐ Frequency
☐ # of Occurrences

Click **Save**
Click **Create Recurring Events**

Create Recurring Events Popup
Click **Yes** or **No**

4 — Closing an Event

View Calendar Events Coming Due Window

or

Calendar Event List Window
☐ Event Status = Closed

Calendar Event Detail Window
☐ Status = Closed