Introduction to Reminders

The Reminders feature enables users to track the renewal and expiration dates of permits, regulations, etc. When permits and regulations are first set up, you have the option of entering the Issue, Expiration, Renewal Due and Renewal Start Dates. When this is done, it automatically creates calendar events and reminders in EMFACT. You can also set up independent calendar events for other reasons (e.g. audit reminders, etc.).

This guide contains the following sections. Click on the title to advance to that section.

Section 1. Calendar Events
This section provides a brief description of the Reminder/Calendar Event feature in EMFACT.

Section 2. Managing Calendar Events Coming Due
This section describes the process for accessing calendar events that are overdue or coming due within 30 days. This section also explains how to close an event.

Section 3. Setting Up Independent Calendar Events
This section will help you set up events that are not triggered by permit expiration dates.

Section 4. Adding Event Detail
This section describes how to add optional event details, as well as how to make the same event recur at a set frequency (e.g., weekly, monthly, etc.).

Section 5. Parent-Child Relationship of Events
This section describes the relationship between "parent" events and "child" events, once recurrence is established.

Section 6. Closing Out an Event
This section explains how to close out an event.

EMFACT
Energy & Materials Flow and Cost Tracker

Calendar Events

This section contains the following:

1. Calendar Events
2. Managing Calendar Events Coming Due
3. Setting Up Independent Calendar Events
4. Adding Event Detail (including how to create recurring events)
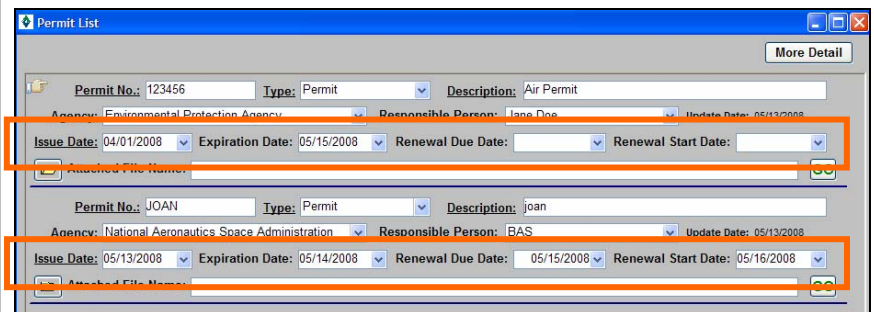5. Parent-Child Relationship of Events
6. Closing an Event

Please review the Quick Start Guide section before starting.

Note: A Cue Card is not available for reminders. Instead, windows are accessed directly from the **Reminders** option on the main menu, as well as the **Reminders** button on the **EMFACT Dashboard** window.

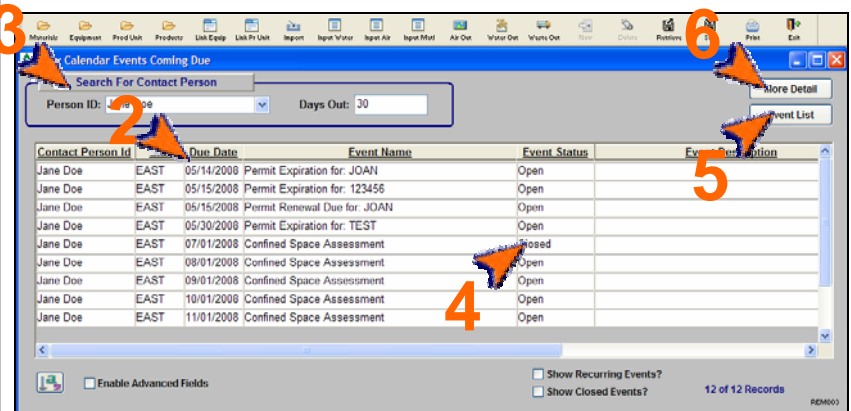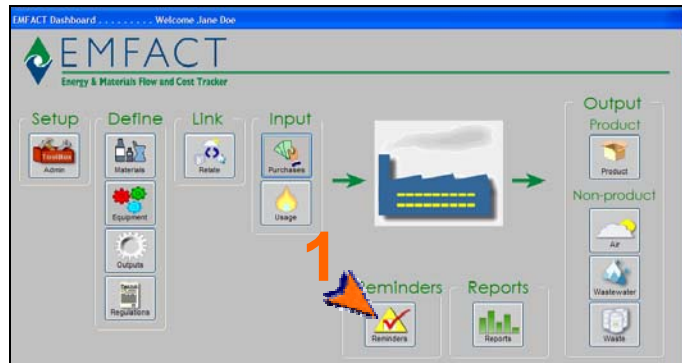| **1**	**Calendar Events**	
	When permits and regulations are set up on the **Permit List** window (shown to the right), the **Issue**, **Expiration**, **Renewal Due** and **Renewal Start Dates** automatically schedule calendar events and reminders in EMFACT. Refer to the module on defining permits and regulations for more information. You can also set up your own independent events. Refer to Step 3 for more information.	

Calendar Events, cont.

2	**Managing Calendar Events Coming Due (as needed)**

You will know when there is a calendar event that is either overdue or coming due within the next 30 days because the **Reminders** button on the EMFACT Dashboard will flash.

1 > Click **Reminders** (![icon]). The **View Calendar Events Coming Due** window will open and display any overdue/coming due events with the **Event Status** = **Open**.

2 > Review the details of the events.

3 > *Optional*: Use the filters at the top of the window to change the **Contact Person** or number of **Days Out**.

4 > To close a calendar event, select **Closed** from the **Event Status** dropdown. Refer to Step 6 for more information if necessary.

*Note: Closed calendar events will not display on this window unless the **Show Closed Events?** checkbox at the bottom of the window is checked.*

5 > To add a new event that is not associated with a permit, click **Event List**. The **Calendar Event List** window will open (see next step).

6 > *Optional*: Click **More Detail** to maintain additional details about the event. The **Calendar Event Detail** window will open (see Step 4).

Calendar Events, cont.

3

Setting Up Independent Events

In addition to calendar events that are driven by permit renewal dates, any type of calendar event can be set up in EMFACT.

1 > Select **Reminders > Calendar Reminder List** from the main menu. Or, click **Event List** on the **View Calendar Events Coming Due** window. The **Calendar Event List** window will open and display all events where the **Event Status** is **Open**.

2 > Click **New**. A blank row will display.

3 > Complete the **Due Date** field.

4 > Complete the **Event Name** field.

5 > The **Init Reminder** and **Final Reminder** fields default to 30 days and 10 days before the **Due Date** (respectively).

Use the scroll bar to view the following:

6 > The **Event Status** defaults to **Open** and should be closed when it is appropriate.

7 > The **Contact Person** defaults to the currently logged on user.

Complete the remaining optional fields as needed.

8 > Click **Save**. The **Event No.** field will fill.

Note: If you are making a change to an existing event, search for it by completing at least one field in the **Filter Data** *section then click* **Refresh Data.**
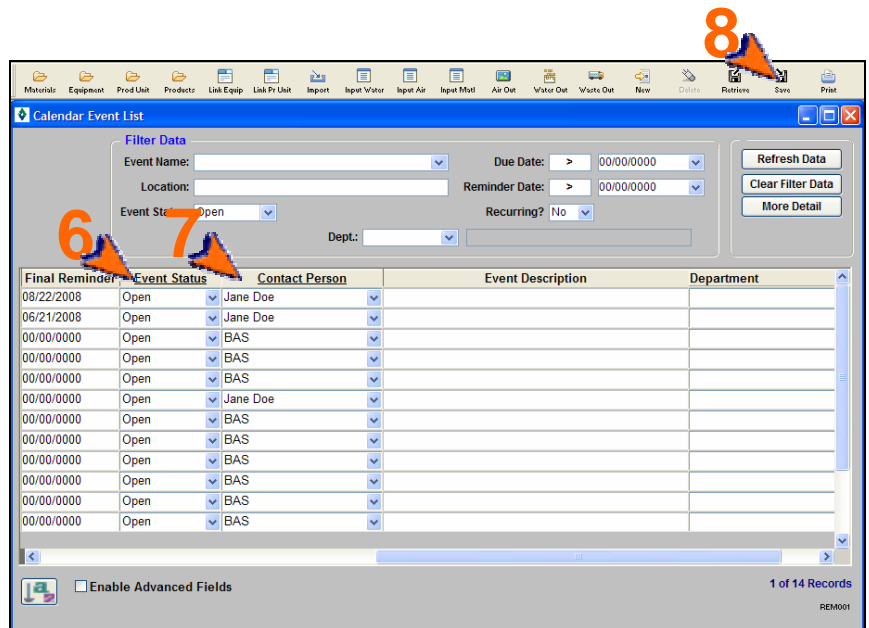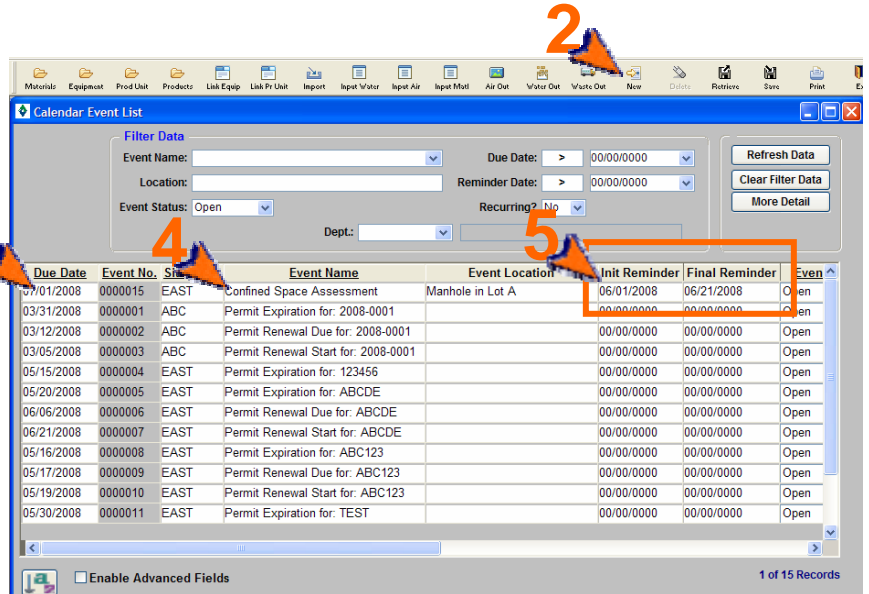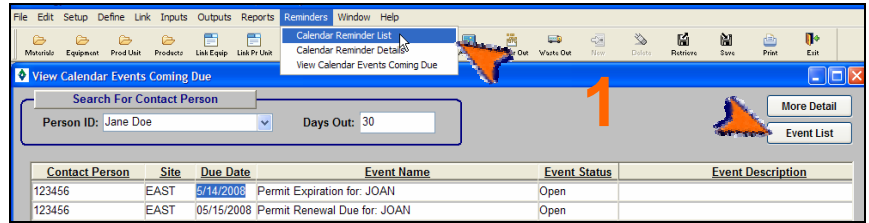
Calendar Events, cont.

4	**Adding Event Detail**

Follow these steps to add optional details about a calendar event.

1 > Click your cursor on the event and then click **More Detail** on either the **View Calendar Events Coming Due** window or the **Calendar Event List** window. The **Calendar Event Detail** window for the highlighted event will display.

Note: Alternatively, you can select ***Reminders > Calendar Reminder Details*** *from the main menu; complete the* ***Event No.*** *field on the* **Calendar Event List** *window; and click* ***Retrieve*** *in the toolbar.*

You must be an Advanced User or click the ***Enable Advanced Fields*** *checkbox to perform the remainder of this step.*

2 > Make any necessary changes to the window.

To make same event recur at a set frequency (e.g., weekly, monthly, etc.):

3 > Check **Yes** for the **Recurring?** field.

4 > Make a selection from the **Frequency** dropdown.

5 > Enter a **# of Occurences**.

6 > Click **Save**.

7 > Click **Create Recurring Events**. The **Create Recurring Events** popup displays.

8 > Click **Yes** or **No** depending on whether you want to append new events after the existing event or create new events. The **Recurring** tab will populate with the new events.

9 > Use the VCR buttons to advance to the new event (or type the number in the **Event No.** field).
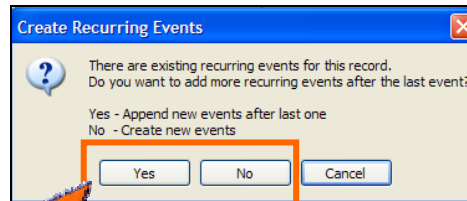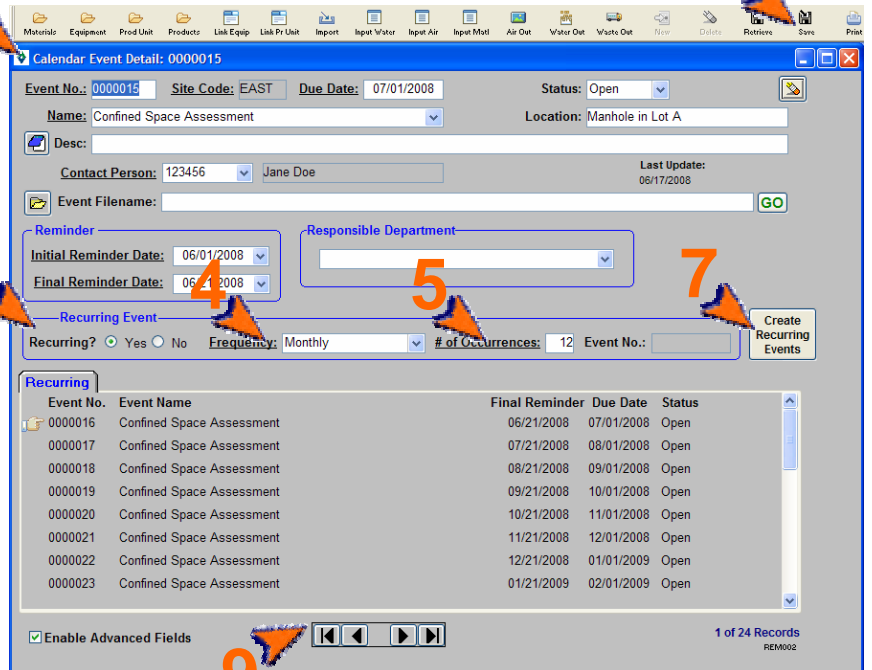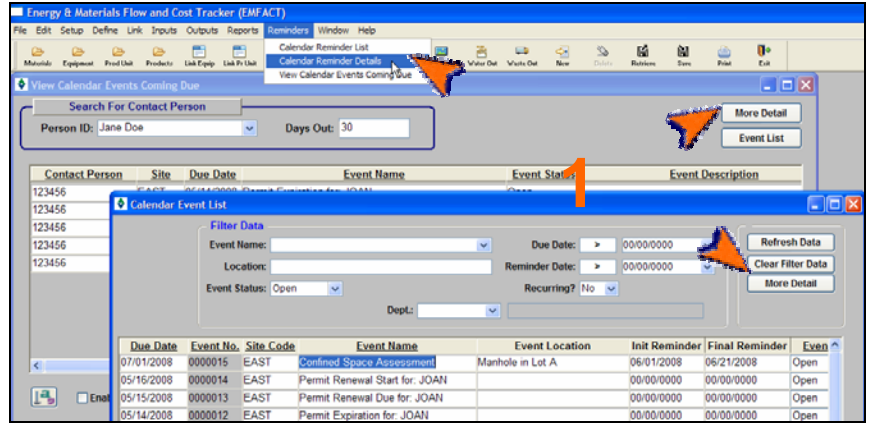
Calendar Events, cont.

5	**Parent-Child Relationship of Events**	**Child Event:**

Once you establish recurrence for an event, a "parent-child" relationship is formed. The "parent" record contains all "child" events, and it contains the specifications (reminders, number of recurrences, etc.) for the child event(s). A "child" record, however, contains information for that "child" event only.

When on the **Calendar Event Detail** window for a child event number **(A)**, there is a cross-reference for the parent event number **(B)**. When on the **Calendar Event Detail** window for a parent event number **(C)**, you can view the recurring child events on the **Recurring** tab **(D)**.

*Note: Double-click on an **Event No.** on the **Recurring** tab to advance to that child event.*

Child Event:

Parent Event:

Calendar Events, cont.

6	**Closing an Event**
	When it is time to close out an event, it is done on any of the event windows.
	1 > On the **Calendar Event List** window or the **View Calendar Events Coming Due** window, locate the event and select **Closed** from the **Event Status** dropdown.
	or
	2 > On the **Calendar Event Detail** window, select **Closed** from the **Status** dropdown.
	3 > Click **Save**.

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