CUNY Event Project Template Guide - Outline

3/12/25

1) The Project Due Date is the first date of the event
    a. If the client has yet to pick a specific date for the event, the Project Due Date will need to be the earliest date option from the list they're considering. The project due date and task due dates can be changed later in the process if necessary.
2) Each project is created with a set of **core tasks**. These are general tasks that can be completed at any time before the event date and are not reliant on the client choosing a specific date and schedule for their event:
    a. Contact List: a list of key contacts from both the client group and the college; to be shared with all people involved in the event
    b. Final Review: this task is automatically configured with a due date set two weeks before the project due date (first day of the event). This is set to allow for a final review of all necessary information and outstanding issues.
        i. RSVP List to Public Safety
        ii. Send delivery/pickup info to Central Receiving
        iii. Confirm Contact List
        iv. Signage Review
        v. Final Agenda
        vi. Tech Requests/Media for AVS
    c. EMS STATUS: Event Ready: when the Final Review is complete and the EMS status can be set to Event Ready, that indicates that the event is ready to go and no further work is needed
3) If the client has chosen a specific date, start time, and end time for their event, the **Confirm event dates & schedule** task should be completed. Completing this task will trigger a rule to add several other tasks to the project and begin the workflow.

Additional tasks:

- DoIT Services
    - To add DoIT services and billing to the project workflow, complete the **Add DoIT Services** task in the Additional Tasks section.
- Event Fee Waiver
    - To add an Event Fee Waiver to the project workflow, complete the **Event Fee Waiver Requested** subtask within the **Received Estimate Approval from Client** task in the Estimate section. This will add a task titled **Event Fee Waiver** in the Additional Tasks section. *(This task will only appear after the task **Send estimate to Client** has been completed.)*
    - Complete the **Event Fee Waiver** task in the Additional Tasks section to begin the waiver workflow.