



# Entity Event Management

## Introduction

The Workspace Entity Event Management module is designed to allow key events or milestones to be managed across the business. Event sets can be applied to any entity in the system i.e. projects, contacts, enquires, organisations. to ensure that essential procedures relating to the creation of, for example, a new project are followed to set deadlines. Event Management is not designed to replace a full project plan, but to aid management and provide better visibility of the key issues involved across the whole business.

## Main features

- A different event set can be created for each entity type, e.g. project, organisation, person, that needs to be managed. Applicable events can be further defined by classification of the particular entity type so that different types of projects, for example, can reference a different set of events.
- For new projects, issues that need close management are often the health and safety plan, production of the master programme or forwarding health and safety information to planning.
- For new suppliers it may be important to track sending of the supplier appraisal form, review of financial report or supplier approval etc.
- Each separate event can be managed in terms of who can complete it, when it has to be completed by, and who is notified if the due date is approaching or passed.
- Events can be flagged to re-occur throughout the life of the entity. Once the current instance has been marked as complete the next occurrence can be created.
- Completion of the event can sometimes involve the production of forms and documents; these are linked to the event and are created automatically through the Workspace templating system.
- Web site links can also be attached to events to help the actioner if they need further information from the intranet or the internet.
- Event completion dates can be derived from other events or dates in the system e.g. project start or finish dates.
- Only specified users can change event dates and when they do so the action is logged by the system for reporting and future reference.

## Who uses it?

This module has wide appeal in the client base as it provides a level of QA management not normally available. It is typically implemented to help control the key processes concerned with starting new projects but ultimately is used for managing all sorts of key milestones across the business.