Quick Reference Guide
Hampden-Sydney College

This guide is meant to be a quick reference only.

OVERVIEW
1. Open a Web Application Request from Everyday User Reservations or Notifications in the Dashboard
2. Approve, Deny, or Cancel a Request
3. Mark Notification as Reviewed
4. Create a Single Day Reservation from the Book
5. Add Furniture or Other Resources to Your Reservations

- **Open a Request from the Dashboard:**
  Open the Dashboard button to review all Everyday User reservations that are awaiting approval.

- Notifications: The left-hand window will display each notification rule and the number of new notifications that are applicable to each notification rule. Select a notification rule to see the new notifications. See sample screen shot below.
Room Moderator with Booking Access

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- Double-click on the room request in the right-hand window to open the reservation in the Navigator.

- **Approve or deny a request from the Navigator:**
  - Review the events scheduled in rooms around this request and determine if this request is suitable.
  - Right-click and select “Go to Book” to see other bookings in that room and the surrounding rooms.
  - Select the Reservation level of the reservation. This is the top layer in the left-hand pane just like in the image above.
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- Click the Change Status button located on the right side of the Navigator window.

- MODERATORS should uncheck the Send Confirmation – only Cameron and DeAnna will confirm event requests. NO WAY to automate this being unchecked.

- Choose the appropriate status for this request (choose Moderator Approved or Moderator Denied)

- Select the individual bookings that you would like to change. Click Finish.
• **Mark Everyday User Reservation Notification as Reviewed in the Dashboard**
  • Now that you are finished working on the reservation, close the reservation Navigator to return to the Dashboard.
  • In the “Everyday User Reservations” area of the dashboard, click *Refresh*. Requests that were processed will disappear from the list.
  • If you were working in the “Notifications” area of the dashboard, highlight the room request you just responded to and click *Reviewed*.

• **Create a Single Day Reservation from the Book**
  • Select the Book button from the toolbar.
  • In the book, on the row that represents the room you want to reserve, click on the time that you want the event to begin, and drag to the time you want the event to end.
The Reservation Wizard window will open. Choose a status and click next.

Complete the reservation by indicating the event name, Add your group and the person in your department you are booking for (if you do not see the person you are booking for, please contact Cheryle Dixon (223-6856), and other critical event information. Information that is required will have a red button next to it. Click Finish.
- **Add Furniture or Other Resources to an Event**
Select the booking level for the appropriate date and location that you would like to add a resource to.

Click the New button in the bottom right-hand portion of the window and select the category of resources that you would like to add for this event. OR right click on the booking listing on the left hand side of the screen, then scroll to “new” and select the appropriate category.

A pop up Resource Window will appear. In this example the Category of Multimedia & Equipment was selected.
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- Select the item that you would like to add, insert the quantity in the quantity field, and click Select to add the item to this event.

TIPS:
To Add Reservations directly into EMS:
- Use Wizard to add a recurrence, a multi-room reservation or to search for specific availability by filter options:
  - Standard Fit – EMS searches for room(s) that are available on ALL dates/times requested
  - Best Fit – EMS find rooms that are available on one or more dates/times requested for you to mix and match rooms across dates requested
  - Specific Room – You choose a specific room
- Use Book to add single day/single time reservations, if you find it easier than using the Wizard.

To Search for existing reservations.
- Use Navigator to open a recently closed reservation or to search by reservation number.
- Use Browser to supply filter criteria and receive a list of results.
- Use Calendar to supply filter criteria and receive a grid of results.

Within the Navigator:
- Use Tools > Wizards to change a property (e.g., room, status, booking detail) on more than one booking at the same time.
- Use Comments to attach notes about why something was done.

All Users should set the following Options:
- In Navigator > Settings > Options
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- At a Glance > Check the following:
  - Reservation Reminders, Attachments, User Defined Fields, Comments.
  - Booking Reminders, Attachments, User Defined Fields, Comments.
- In Book > Options
  - Automatically Refresh: Every 2, 5 or 10 Minutes (default is Never)
  - Show ‘(all)’ in Building List
  - Review Tool Tip Display tab and check/uncheck items you would like to see or not see when you hover over an event in the Book