

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.

Show New Only			Notification Date (0) - Reservation ID	Group	Group Type	1st Contact	Event Name	Event Type	Status	First Booking	Last Booking	Go To
Notification Rule (10)	A New	^										
Alcohol Services	0											
Cancelled A/V Request	0											
Cancelled Web App Request	0											Refresh
Change Web App Request	0											Show
Changed A/V Request	0											Old
External Attendees - Notify Campus Police	0											Reviewed
New A/V Request	0											Unreviewed
New Confirmed Request	0											C overenewed
New Web App Request	2	~										
د		>										
/ Notifications'												
Course Updates												
🤪 Reminders												
Everyday User Reservations*												
@ Guest Requests												
🔂 Wait List*												
CReconfirm Dates												
Building Hours Exceptions												
Analytics			<								>	



Show New Only		Notificat	tion Date (10)	. Туре	Booking Date	Start	End	Building	Room	Go To
Notification Rule (5)	New	7/30/20	08 3:27 PM	Change	8/19/2008 Tue	8:00 AM	12:00 PM	UK-CW	10.Enzo - All	Delete
Catering Change Order	0	8/19/20	08 11:37 AM	Change	8/28/2008 Thu	6:00 AM	7:30 AM	UK-CW	10.Enzo - South	Reviewed
New AV Request and/or Change Request	0	8/19/20	08 11:37 AM	Change	8/28/2008 Thu	7:00 AM	9:30 AM	UK-CW	10.Enzo - South	
New Catering Order	0	10/15/2	008 1:57 PM	Change	10/29/2008 Wed	9:00 AM	10:00 AM	UK-CW	10.Enzo - North	Refresh
New Web Request	0	12/10/2	008 10:40 AM	Cancelled	12/18/2008 Thu	3:00 PM	5:00 PM	UK-CW	10.Enzo - South	Show
New/Changed Video-conference	0	12/11/2	008 1:48 PM	Change	12/18/2008 Thu	8:30 AM	11:30 AM	UK-CW	CQ02-Conferen	VIII Old
_		1/14/20	09 9:27 AM	Change	1/16/2009 Fri	8:00 AM	10:00 AM	UK-CW	CQ02-Conferen	Reviewed
		7/1/200	9 2:42 PM	Change	7/16/2009 Thu	8:15 AM	11:15 AM	UK-CW	10.Enzo - South	
		7/16/20	09 1:20 PM	Change	7/21/2009 Tue	8:00 AM	10:00 AM	UK-CW	CQ02 - Conferer	Unreviewed
		7/24/20	09 11:37 AM	Change	7/28/2009 Tue	8:00 AM	10:00 AM	UK-CW	CQ02-Conferen	

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

7/27/2015 Man 7	_	ation Summary		Transactions (0)					🤣 History 📩		
		CORP. CONTROL &		Propert	ies	🥝 F	Reminders (0)	🤜 Co	mments (0)	1	Attachments (0)
	Event Name:				Reception						Edit
	Employees: 1st Contact:	Provost's C John Ray	Mfice	Status: Web Request Event Coordin (none)							Confirmation
	Phone:	240-42291	77				(none)				Change Status
	Reservation No.: 13								Update Pricing		
	Drag a column hear	der here to grou									New
	Date	Start	End 1	Time Zone	Building	Room	Event		Event Type	Status	Edit
	7/27/20	15 Mon 7:00 PM	1 11:30 PM F	ИТ	SMTH	SMTH 102	General Council Ann	ual Reception	Maintenance	Web Request	Delete
	7/27/20	15 Mon 7:00 PM	1 11:30 PM 1	AL.	SMTH	SMTH 102	General Council Ann	ual Reception	Maintenance	Web Request	Delete Tools
		15 Mon 7:00 PM	1 11:30 PM 1	ИТ	SMTH	SMTH 102	General Council Ann	ual Reception	Maintenance	Web Request	

• 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.



• Click the Change Status button located on the right side of the Navigator window.

	(Reservation No. 13) - Change Booking Status	
Status:	Confirmed Current Reservation Status: Web Request	ŀ
Reconfirm Date:	×	l,
Update Reservation Status:		ľ
Send Confirmation If Successful:	✓	
		ŀ
		l
		a
Cancel	Next >	

- 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.

Select Bo	okings:									
Date	- V	Veekday	Start	End	Building	Room	Event		Status	Serv
7/27/201	5 Mon M	londay	7:00 PM	11:30 PM	SMTH	SMTH 102	General Council	Annual Reception	Web Reques	t
٢										
	celled Boo	okings:	Hide Ol	d Bookings	. V			Select	All Unsel	lect Al



- <u>Mark Everyday User Reservation Notification as Reviewed in the Dashboard</u>
 - 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" are of the dashboard, highlight the room request you just responded to and click *Reviewed*.

2 Dashboard													
													Option
Show New Only			Notification Date (1) - F	Reservation ID	Group	Group Type	1st Contact	Event Name	Event Type	Status	First Booking	Last Box	Go To
Notification Rule (10)	- New	^	9/30/2015 11:07 AM 6	6571	Logan Steinbrink	Faculty / Staff	(none)	Acohol Test	Conference	Web Reques	t 9/30/2015 Wed	9/30/20	Delete
Cancelled A/V Request	0												Reviewed
Cancelled Web App Request	0												Refresh
Change Web App Request	0												
Changed A/V Request	0												Show
External Attendees - Notify Campus Police	0												DIO []
New A/V Request	0		¢									>	Reviewed
New Confirmed Request	0	_	New Bookings Changes	Notified Users									Unreviewed
New Web App Request	0		Date	Start End	Building	Room Eve	nt						C
Work Order Request - Specific	0	*	9/30/2015 Wed	3:30 PM 7:30 P	M UNION	Conf 1 Alcoh	ol Test						
<		>	_										
A Notifications													
Course Updates													
@Reminders													
GEVeryday User Reservations*													
@ Guest Requests													
Wait List													
C Reconfirm Dates													
Building Hours Exceptions													
Analytics													
													Close

• Create a Single Day Reservation from the Book

- Select the Book button from the toolbar. Book
- 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.



Buildin	g: Coolidge Buildir	g	ب ا	/iew:	Daily	-	Print					1	Time	Zone:	Eastern	n Time		- Ref	fresh Opt	ons
Date:	1/20/2014 Mon	 Today 				Week								•						
Filter				Monday, January 20, 2014 Martin Luther King Holiday 2014																
	Rooms (8)	Capacity	7		8	9)	10)	11	1.	2p	1		2	3	4	5	6	
Coolid	ge Building														Martin L	uther Ki	ng Holid	ay 2014		
101	1	40																		
102	2	40						-							Test 8	Billing Ev	ent			
103	3	40																		
104	4	40						(
110) Lab	20																		
111	I Lab	20																		
112	2 Lab	20																		
200	(Auditorium)	200						1												

• The Reservation Wizard window will open. Choose a status and click next.

2							Rese	ervation Wizar	đ		x
Wiza	rd Templat	e: (no	ne)				•			c	ptions
Cale	ndar Se	lected Da	tes (1)					Location Fea	tures		
	< < :	Januar	y		20	014 >	>>	— Search —			
	S	м	т	W	т	F	S	Method:	Standard Best Fit Specific Room		
_	<u>29</u>	<u>30</u>	<u>31</u>	1	2	3	4	Building:	Coolidge Building	~	_
-	5	6	7	8	2	10	11	Room:	104		<i>></i>
-	12	<u>13</u>	14	15	16	17	18	Location: — Room Spec	ifications:		
_	19	<u>20</u>	21	22	23	24	25	Type:	(all)	~	
	26	27	28	29	30	31	1	Floor:	(all)	~	
-	2	3	4	5	6	7	8	Setup Type:	(all)	v	
	Date Pat	tem	Clea	r Month		Clear A	U	Setup Count:	0		
_	Time							Status			
Star	t;	10:00 A	M	End:	1:00 PI	м .		Status:	Confirmed Reconfirm:		
Time	Zone:	Eastern	Time				~				
	Setup/Tea	rdown —									
Use	Default:	✓ Mir	nutes 🗸	Setup	0	Teardown	n: 0				
0	ancel	Ber	uet		Group In	fo				Ne	xt>
	u nou	1100	~		on yoly at					- INC	

• 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*.



2		Reserve	ation Wizard			- 🗆 🗙
Wizard Template: (r	none) 👻					Options
Event		1.5				2
Event Name:	Advisee Meeting		VIP Event:			
Event Type:	Meeting	~	Source:	Phone	~	
Group/Contacts						
Group:	Chemical Engineering			× 🔎		
1st Contact:	Carolyn Bertozzi	¥ [Phone: +	123.444.5555 F	ax: 👻	
Temp Contact:			Email Address:	carolyn@mit.edux		
Business Manager:	(none)	~			ax: 👻	
and the second second second second	(incle)	*	Phone: -		aX; *	
Temp Contact:			Email Address.			
Room Setup Billing	Other Virtual User Defined Fields					-
Setup Type:	Classroom Style	¥				
Setup Count:	10					
Cancel	Group Info				< Previous	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.

🛞 Navigator - Organizational Meeting (Reservation No. 734) (Bo	ooking No. 3318)		
Open Reservation		Pri	nt Refresh Settings
⊡ Organizational Meeting (Reservation No. 734) ⊕ - ₩ 8/24/2012 Fri 1:00 PM - 02:110	Comments (0)	History Reminders (0)	
	Date: 8/24/2012 Fri Reserved: 1:00 PM - 2:00 PM Event: 1:00 PM - 2:00 PM Setup Type: Workspace Booking No.: 3318	Event Name: Organizational Meeting Location: DEN - 02.110 Event Type: Meeting - Internal Status: Confirmed Setup Count: 0	Edt Confirmation Outlook
	Booking Details (1)		
	Category Service Start	End	New
	Room Charge (none)		Edit
			Delete
			Tools
			Items
			Print
			Close

- 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.





• 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:
 - o 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



- 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)
 - o 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