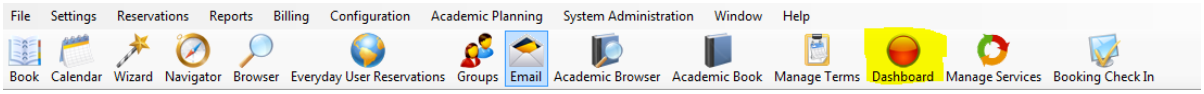
Desktop Client Event Scheduling Quick Reference Guide
Shippensburg University

This guide is meant to be a quick reference only. Full explanations of all steps are included in more detail in the *EMS User Manual* on https://www.ship.edu/about/offices/web/ems/ . Access to EMS is now a desktop client.
NOTE: Do not use VirtualEms (events.ship.edu) for scheduling events in spaces where you have approval status. This will delete the reservation completely.

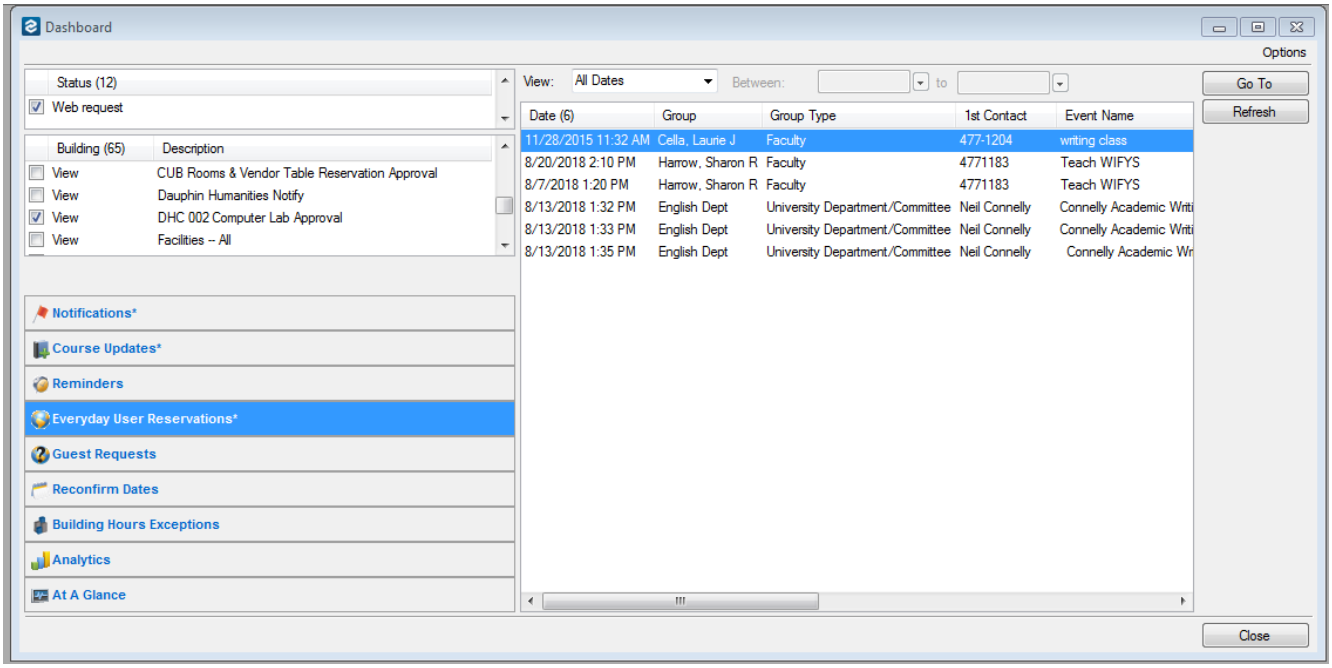
OVERVIEW

1. **Open a Request (or Notification) from the Dashboard**
2. **Approve, Deny, or Cancel a Request**
3. **Send a Confirmation Email**
4. **Mark Notification as Reviewed**
5. **Create a Single Day Reservation from the Book**
6. **Add Furniture or Other Resources**

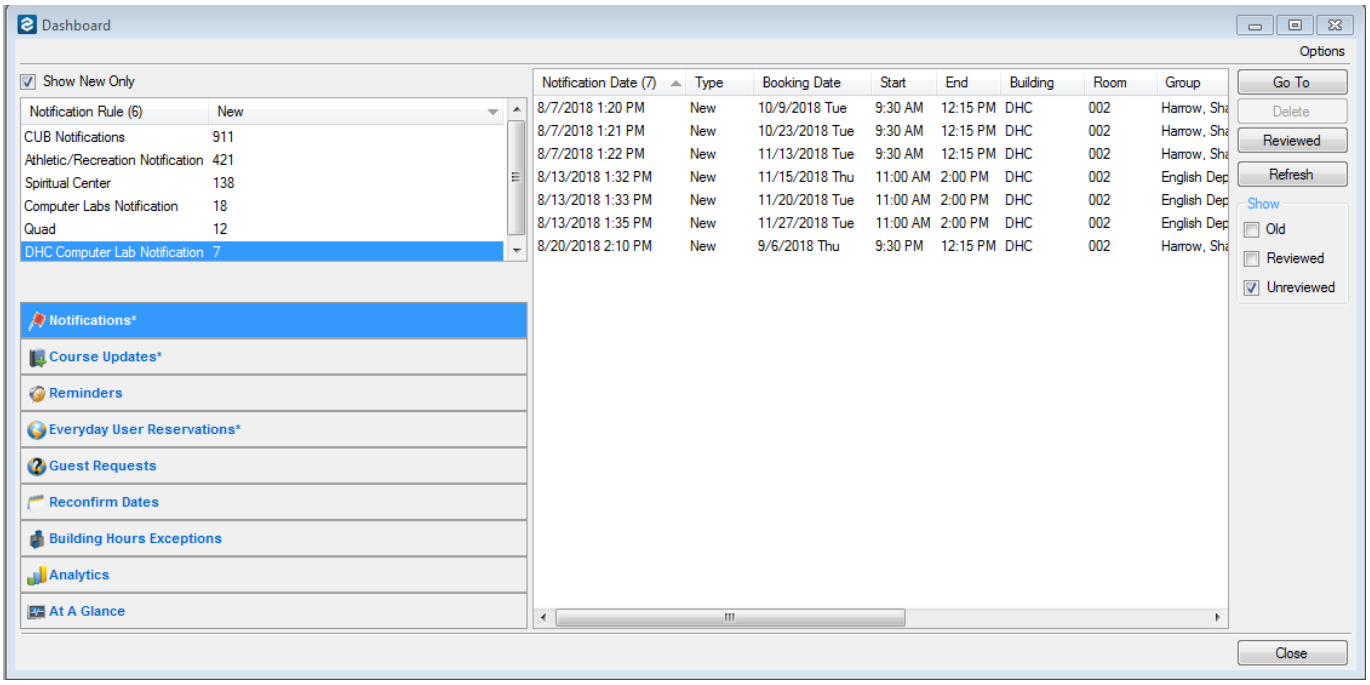
1. **Open a Request from the Dashboard:**
   - Open the Dashboard button to review all web reservations and notifications that are awaiting approval.



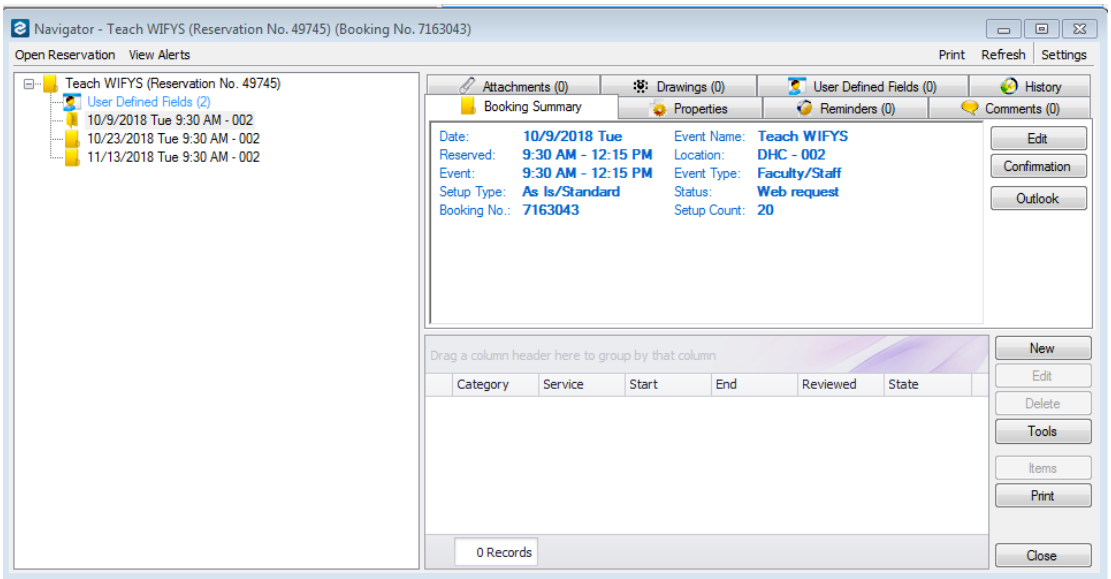
   - **Everyday User Reservations:** The left-hand window will display all available statuses and all areas/buildings/views. Select "Web Request" status and select the areas/buildings/views you are responsible for to see a list of new requests. See sample screen shot below.



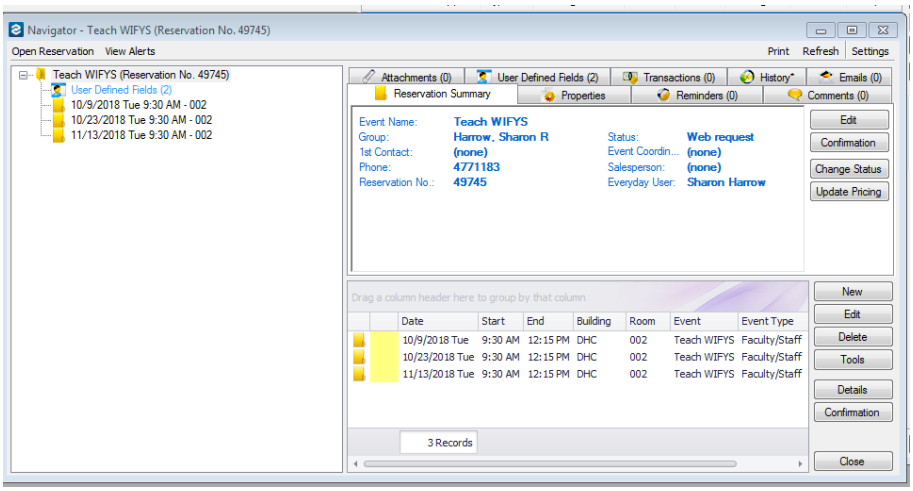
- **Notifications:** The left-hand window will display each notification rule and the number of new notifications that are applicable to each notification rule. Select a notification rule to see the new notifications. See sample screen shot below.



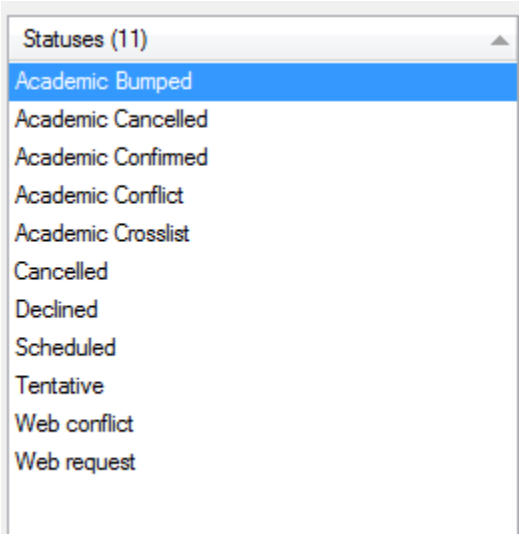
- Double-click on the room request in the right-hand window to open the reservation in the Navigator.

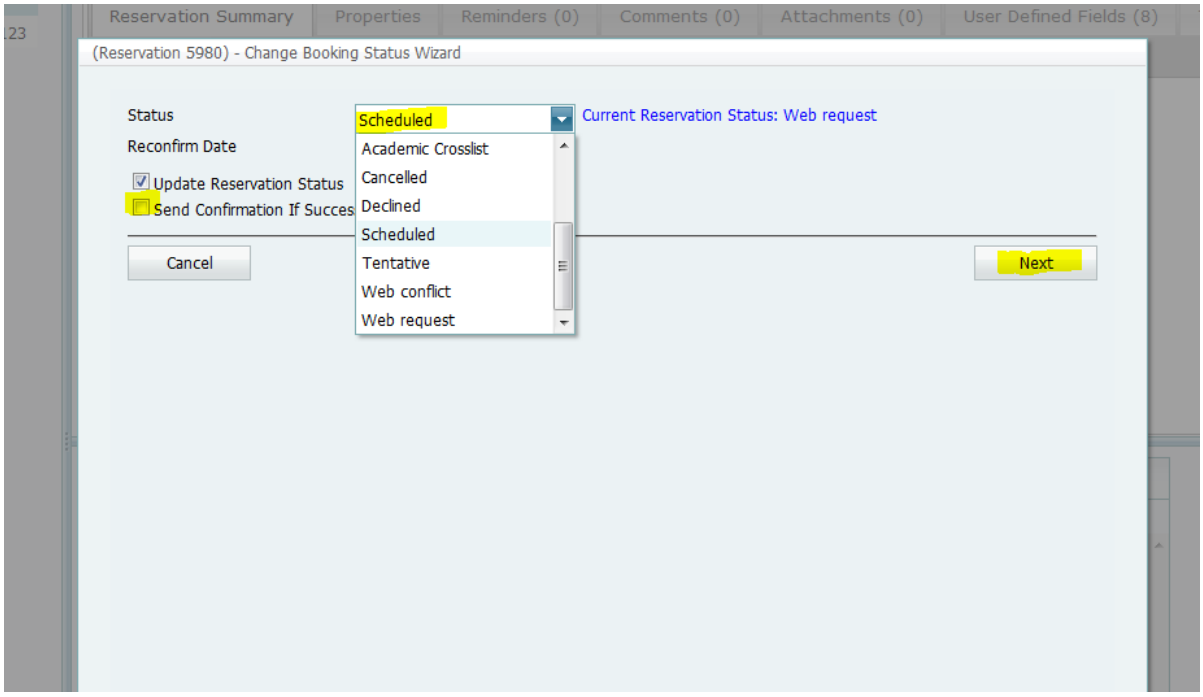


2. **<u>Approve, deny, or cancel a request from the Navigator:</u>**
   - Review the service details added to the room request to determine if additional time is needed.
   - Review the events scheduled in rooms around this request and determine if this request is suitable.
   - Select the Reservation 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.
   - Choose the appropriate status for this request.

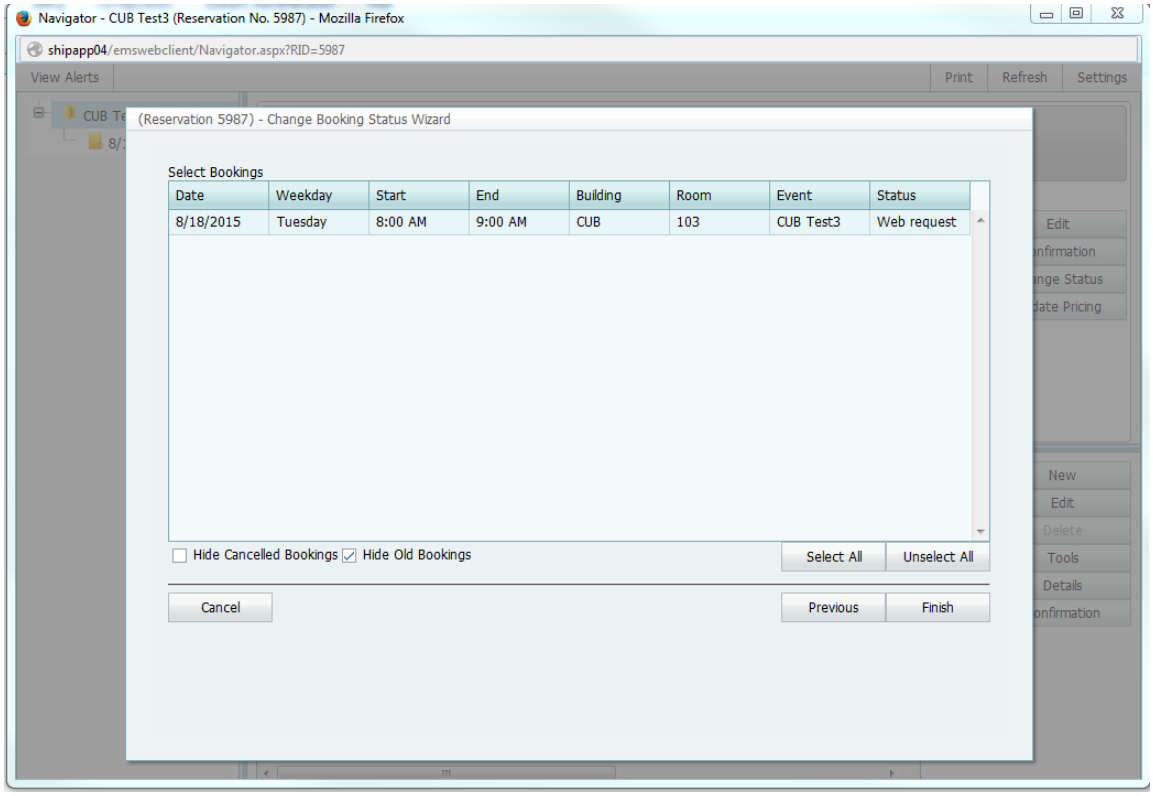


- Options are



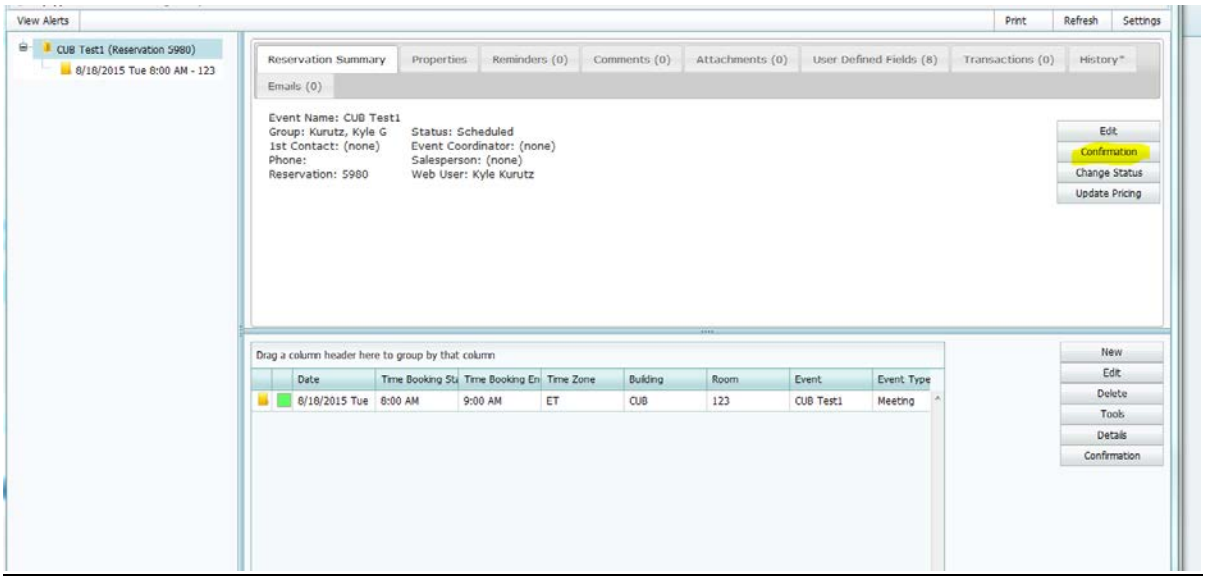


- Select the individual bookings that you would like to change (screen show below). Click Finish.

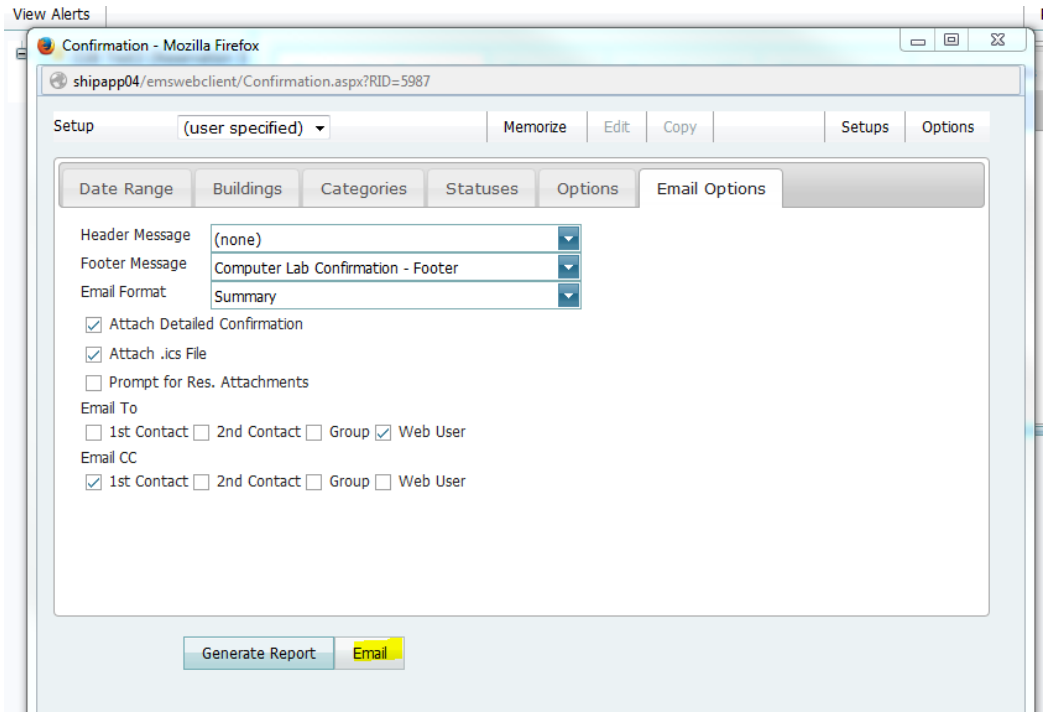


3. **Send a Confirmation Email**
   - Select the Reservation level of the reservation. This is the top layer in the left-hand pane of the Navigator.

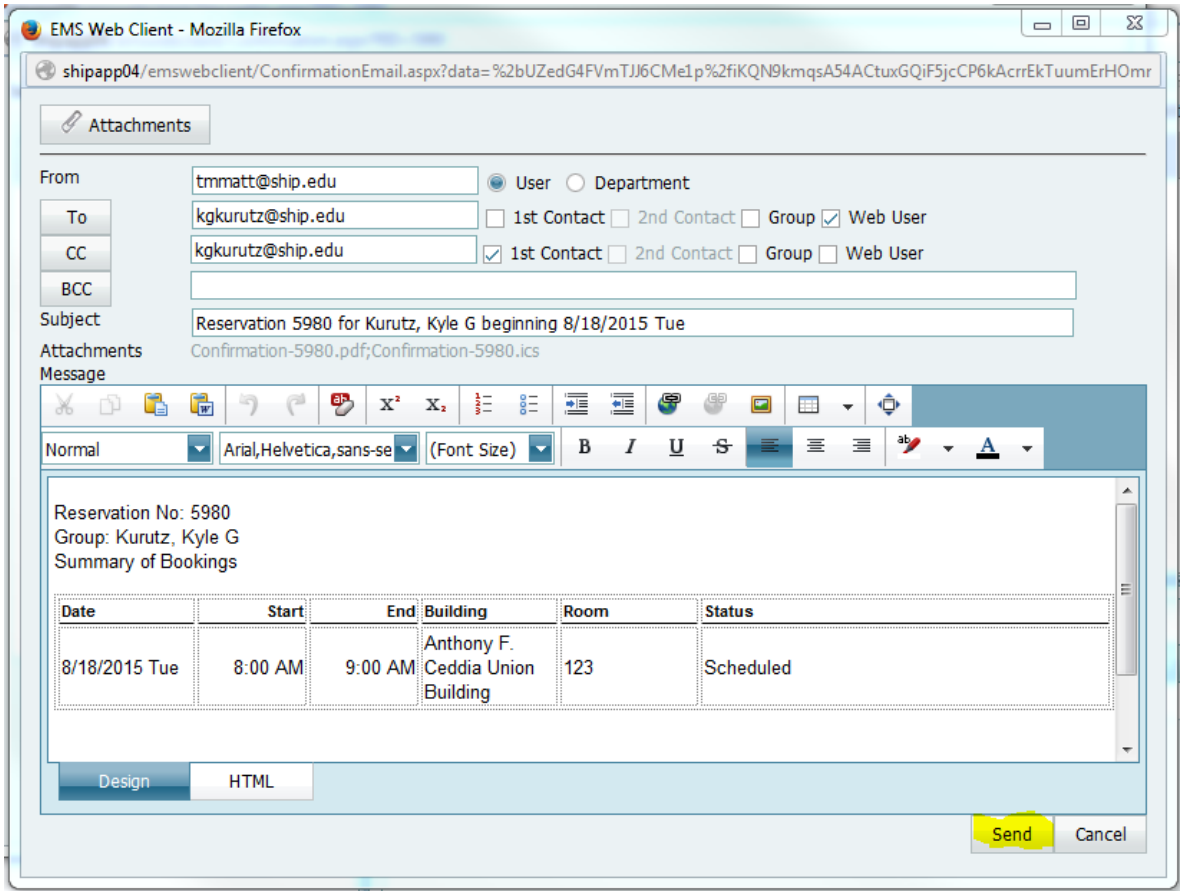
   - Click the Confirmation button on the right side of the Navigator window.



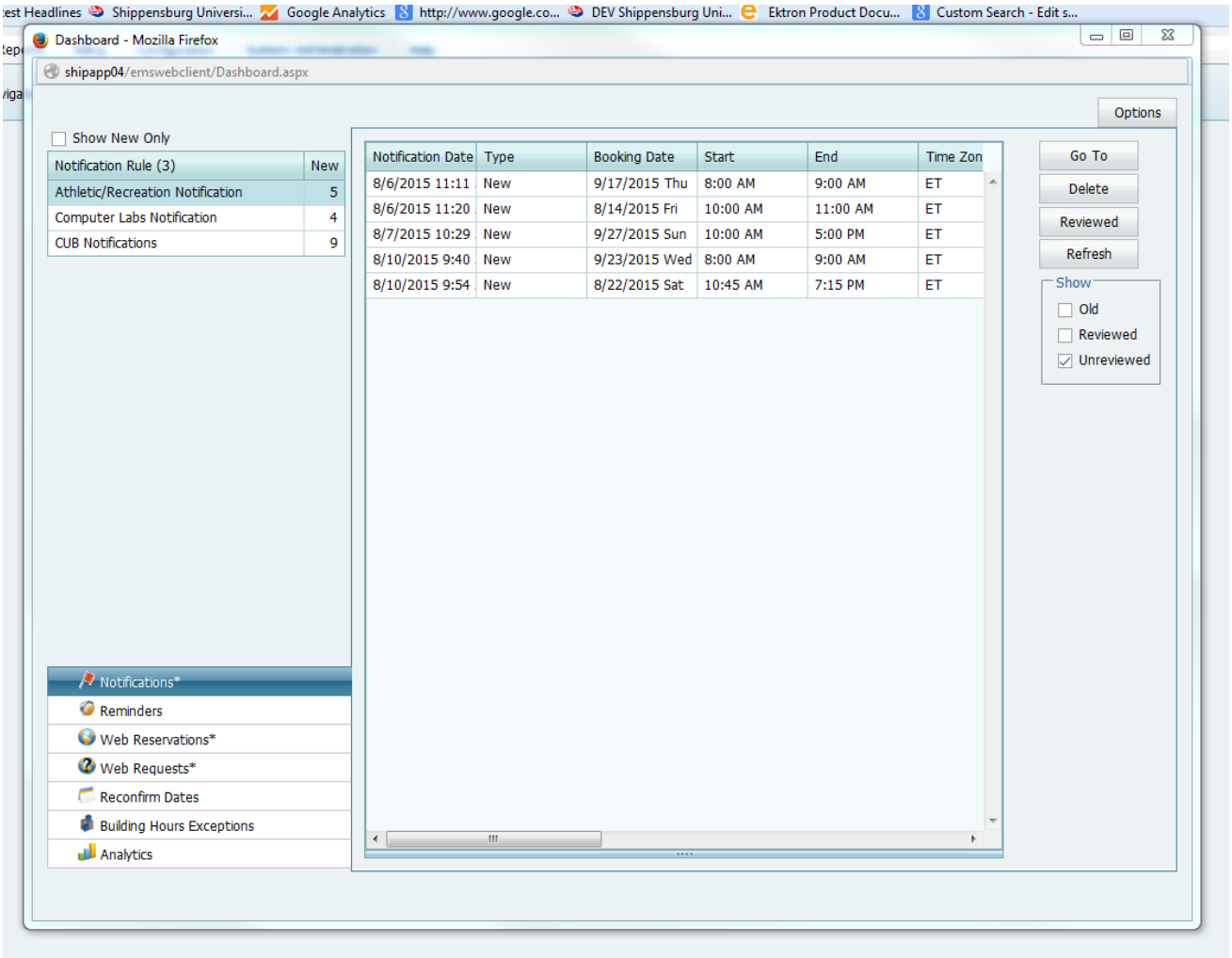
   - Do one of these things:
     a. Select a pre-configured ("memorized") confirmation from the Setup: dropdown menu in the top left corner of the window.
     b. Visit each of the tabs (Date Range, Buildings, Categories, Statuses, Options, & Email Options) to select the appropriate information for this reservation. See screen shot below.



- Select email. It will show you a final preview. You can add message and cc others at this point. Review and seltect If information is correct.



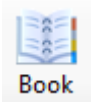
4. **Mark Notification as Reviewed in the Dashboard**
    - Now that you are finished working on the reservation, close the reservation Navigator to return to the Dashboard.
    - If you were working in the "Web Reservations" area of the dashboard, click *Refresh*. Requests that were processed will disappear 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*.



5. Create a Single Day Reservation from the Book

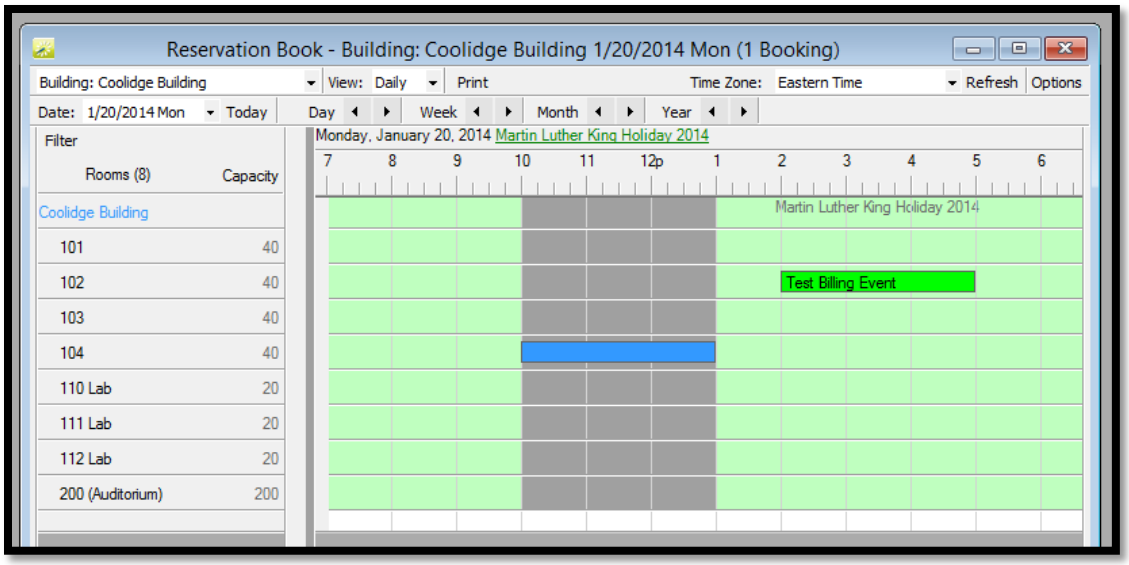
Note: If you need to book multiple rooms and/or multiple days, use the Wizard instead of the Book. See the Tips section at the end of this document for information on the Wizard.

- Select the Book button from the toolbar

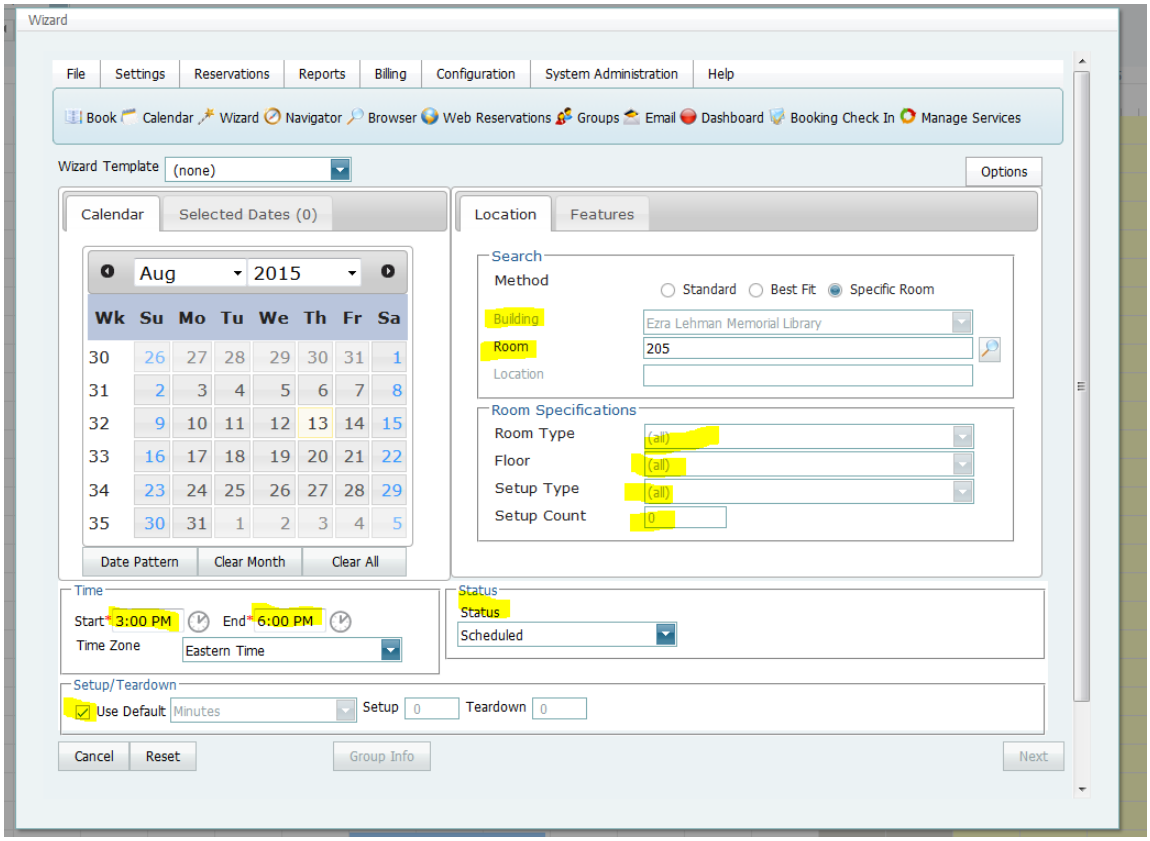


.

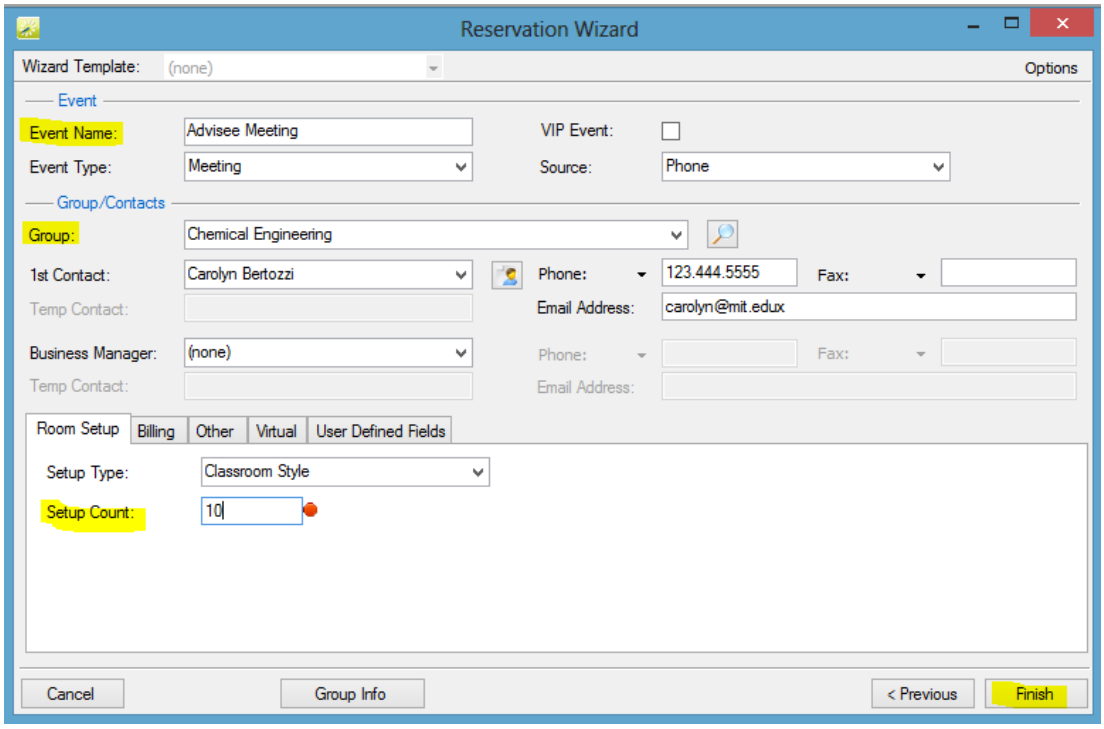
- In the book, on the row the represents the room you want to reserve, click on the time that you want the event to begin, and drag to the time you want the event to end.



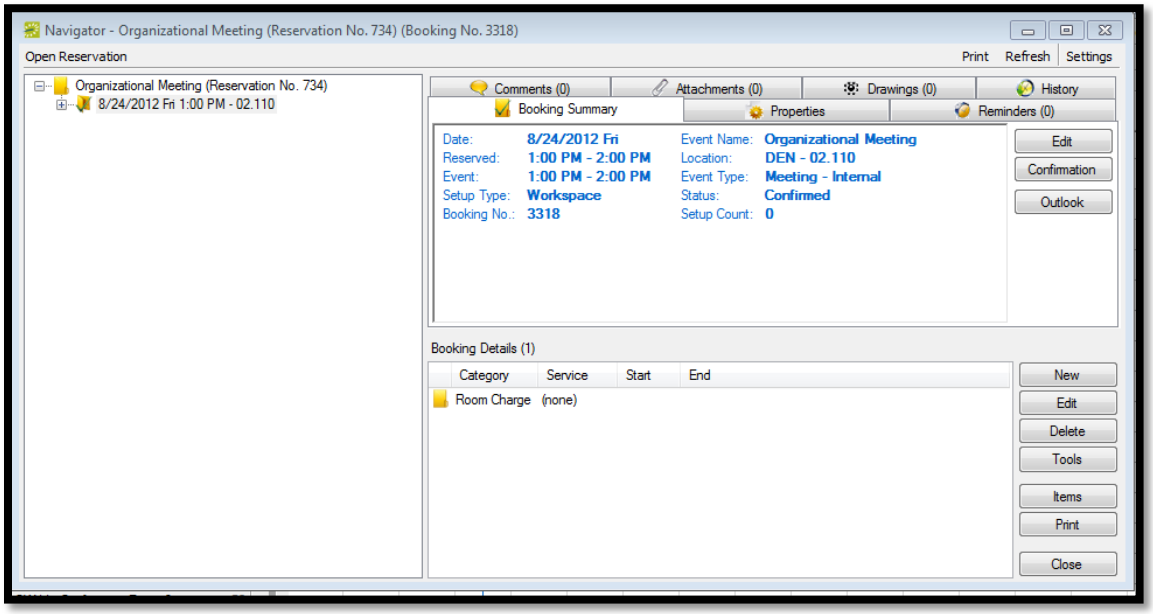
- The Reservation Wizard window will open. Choose a status and click next.



- Complete the reservation by indicating the event name, the group sponsoring the event, and other critical event information. Click *Finish*.

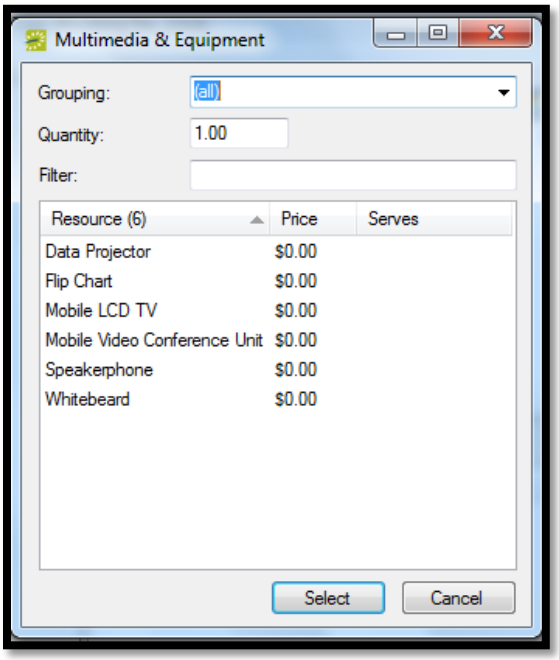

Reservation Wizard
Wizard Template:
(none)
Options
Event
Event Name:
Advisee Meeting
VIP Event:
Event Type:
Meeting
Source:
Phone
Group/Contacts
Group:
Chemical Engineering
1st Contact:
Carolyn Bertozzi
Phone:
123.444.5555
Fax:
Temp Contact:
Email Address:
carolyn@mit.edux
Business Manager:
(none)
Phone:
Fax:
Temp Contact:
Email Address:
Room Setup
Billing
Other
Virtual
User Defined Fields
Setup Type:
Classroom Style
Setup Count:
10
Cancel
Group Info
< Previous
Finish

6. **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.

   - A pop up Resource Window will appear. In my example I selected Multimedia & Equipment.



- 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.
- Use *Groups* Rolodex to review reservations for a specific customer.
  - Add comments to Groups to track important information of which all schedulers should be aware.
  - Add attachments to Groups (e.g., insurance policies).
  - Add reminders to Groups, such as when insurance policy expires.
  - Add permanent contacts to Groups and set contact default, if desired.

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.
- Use memorized Confirmations to make sending of Final Confirmations faster.

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)
  - 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

Reports

The following reports may be useful to run on a daily, weekly or as needed basis. Reports can be emailed, printed, memorized (saved).

- Setup Worksheet
- Events Schedule
- Memorize other reports as needed