



## Quick Reference Guide Hampden-Sydney College

This guide is meant to be a quick reference only.

### OVERVIEW

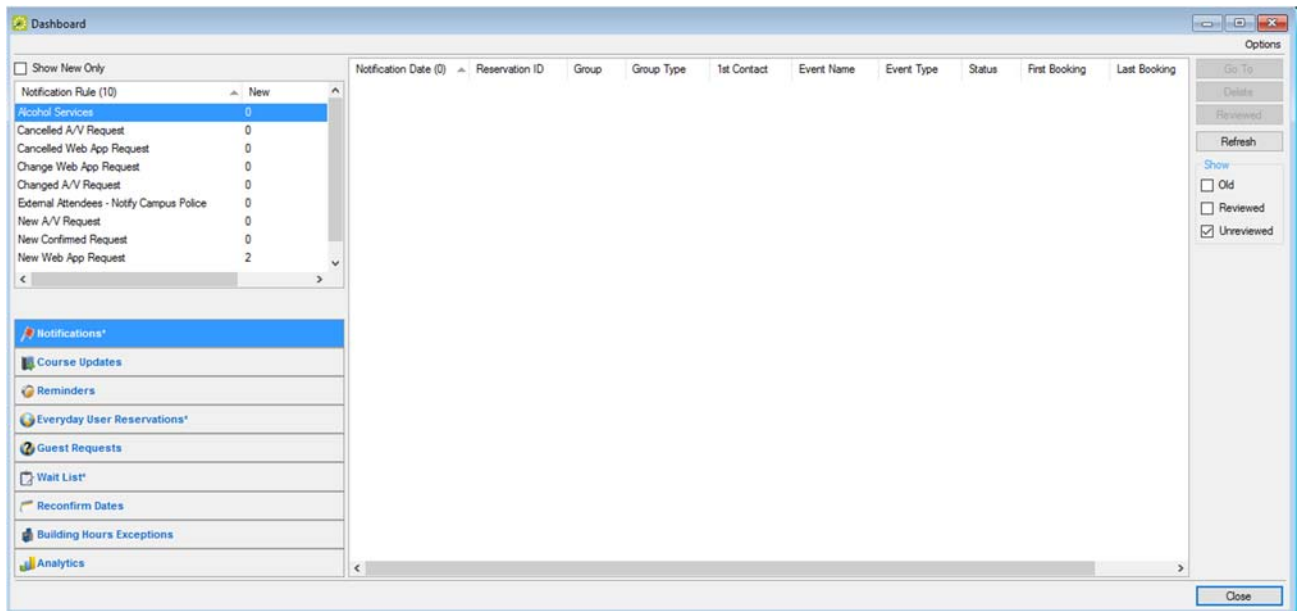
1. **Open a Web Application Request from Everyday User Reservations or Notifications in the Dashboard**
2. **Approve, Deny, or Cancel a Request**
3. **Mark Notification as Reviewed**
4. **Create a Single Day Reservation from the Book**
5. **Add Furniture or Other Resources to Your Reservations**

- **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.

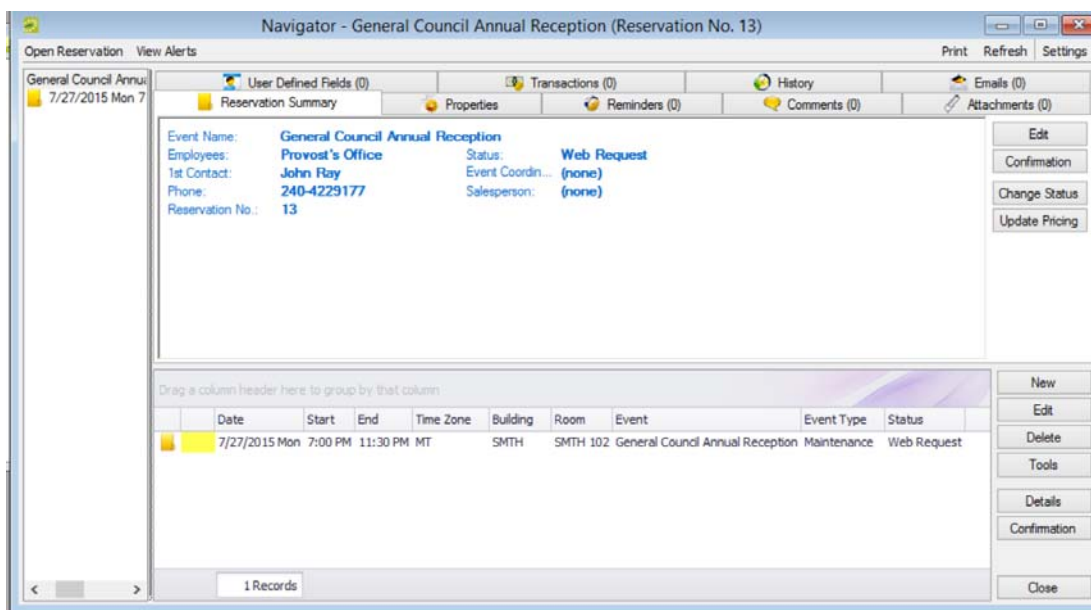




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Notification Rule (5)	Notification Date (10)	Type	Booking Date	Start	End	Building	Room
Catering Change Order	7/30/2008 3:27 PM	Change	8/19/2008 Tue	8:00 AM	12:00 PM	UK - CW	10.Enzo - All
New AV Request and/or Change Request	8/19/2008 11:37 AM	Change	8/28/2008 Thu	6:00 AM	7:30 AM	UK - CW	10.Enzo - South
New Catering Order	8/19/2008 11:37 AM	Change	8/28/2008 Thu	7:00 AM	9:30 AM	UK - CW	10.Enzo - South
New Web Request	10/15/2008 1:57 PM	Change	10/29/2008 Wed	9:00 AM	10:00 AM	UK - CW	10.Enzo - North
New/Changed Video-conference	12/10/2008 10:40 AM	Cancelled	12/18/2008 Thu	3:00 PM	5:00 PM	UK - CW	10.Enzo - South
	12/11/2008 1:48 PM	Change	12/18/2008 Thu	8:30 AM	11:30 AM	UK - CW	CQ02 - Conferen
	1/14/2009 9:27 AM	Change	1/16/2009 Fri	8:00 AM	10:00 AM	UK - CW	CQ02 - Conferen
	7/1/2009 2:42 PM	Change	7/16/2009 Thu	8:15 AM	11:15 AM	UK - CW	10.Enzo - South
	7/16/2009 1:20 PM	Change	7/21/2009 Tue	8:00 AM	10:00 AM	UK - CW	CQ02 - Conferen
	7/24/2009 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.



- **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.

(Reservation No. 13) - Change Booking Status

Status:  Current Reservation Status: Web Request

Reconfirm Date:

Update Reservation Status:

Send Confirmation If Successful:

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.

(Reservation No. 13) - Change Booking Status

Select Bookings:

Date	Weekday	Start	End	Building	Room	Event	Status	Service
7/27/2015 Mon	Monday	7:00 PM	11:30 PM	SMTH	SMTH 102	General Council Annual Reception	Web Request	

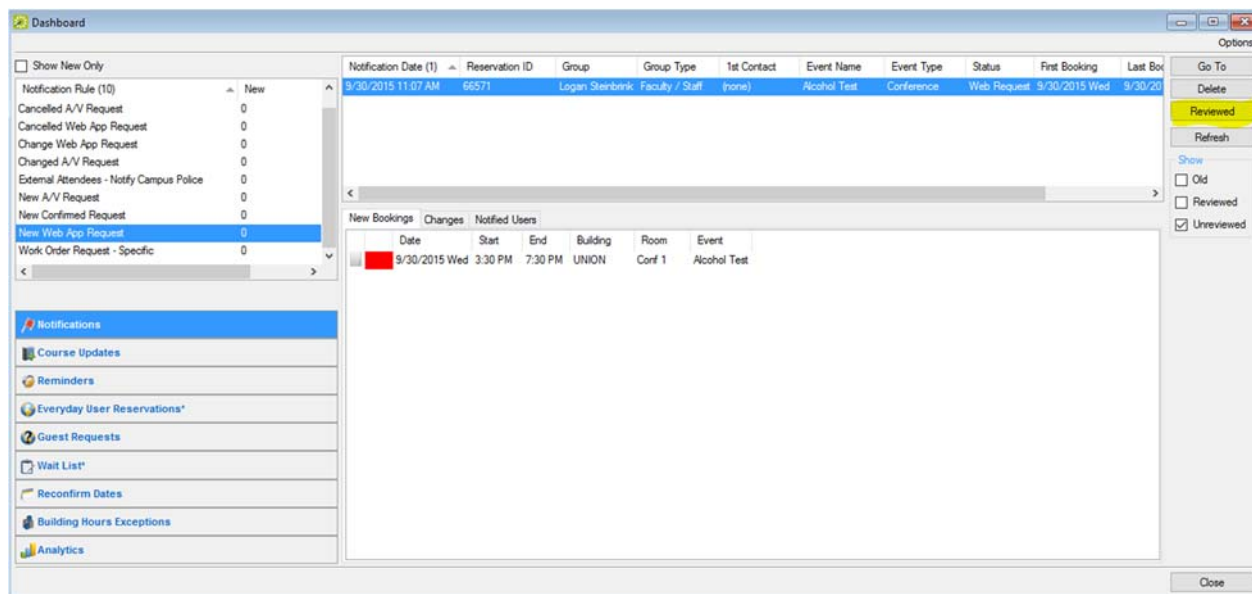
Hide Cancelled Bookings:  Hide Old Bookings:

Cancel < Previous Finish

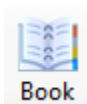


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- **Mark Everyday User Reservation Notification as Reviewed in the Dashboard**
  - Now that you are finished working on the reservation, close the reservation Navigator to return to the Dashboard.
  - In the “Everyday User Reservations” area of the 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*.



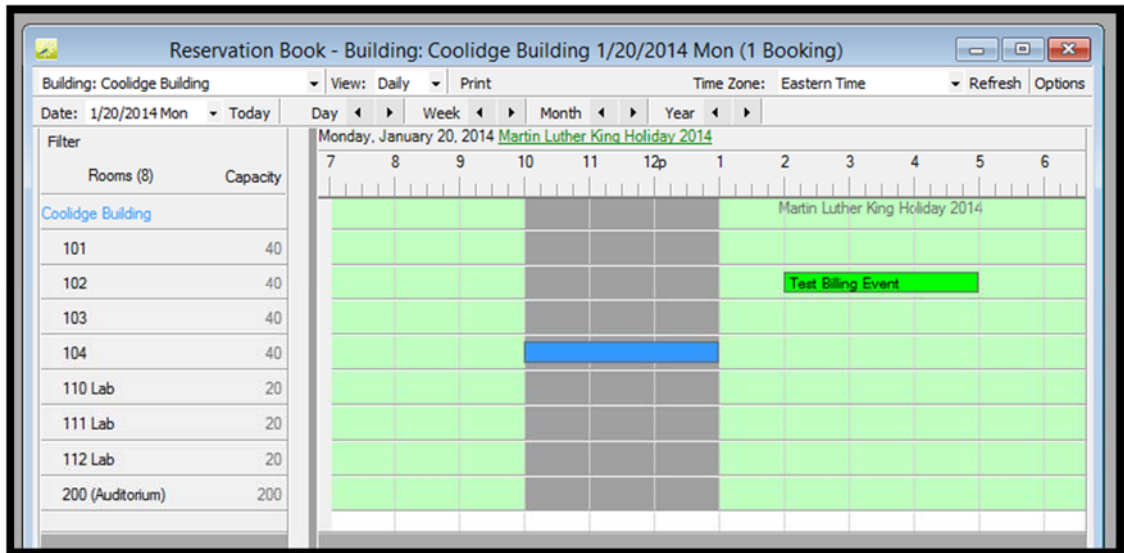
- **Create a Single Day Reservation from the Book**



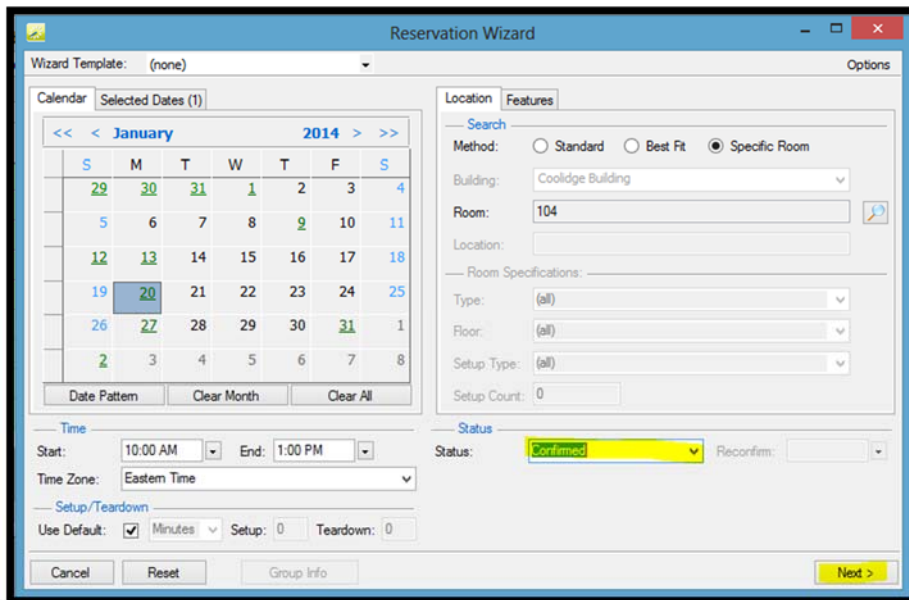
- Select the Book button from the toolbar.
- In the book, on the row that represents the room you want to reserve, click on the time that you want the event to begin, and drag to the time you want the event to end.



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- 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*.



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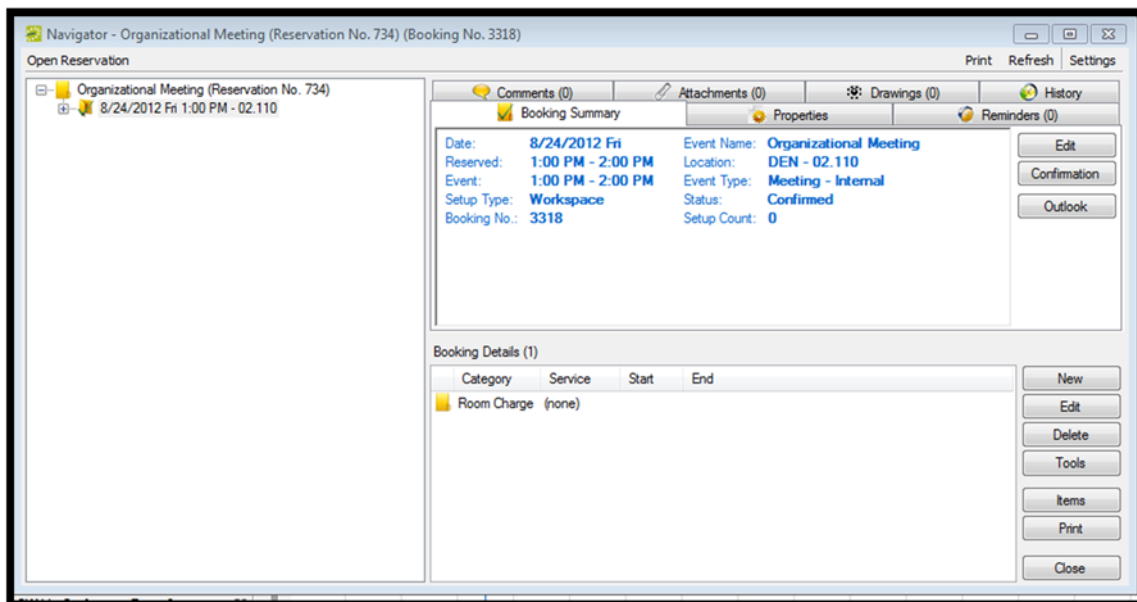
A screenshot of the 'Reservation Wizard' software window. The window title is 'Reservation Wizard'. At the top left, there is a dropdown menu for 'Wizard Template' set to '(none)'. Below this, the 'Event' section contains fields for 'Event Name' (Advisee Meeting), 'Event Type' (Meeting), 'VIP Event' (checkbox), and 'Source' (Phone). The 'Group/Contacts' section includes a 'Group' dropdown (Chemical Engineering), '1st Contact' (Carolyn Bertozzi), 'Temp Contact', 'Business Manager' (none), and another 'Temp Contact'. Contact information fields for the 1st contact include 'Phone' (123.444.5555), 'Fax', and 'Email Address' (carolyn@mit.edu). At the bottom, there are tabs for 'Room Setup', 'Billing', 'Other', 'Virtual', and 'User Defined Fields'. The 'Room Setup' tab is active, showing 'Setup Type' (Classroom Style) and 'Setup Count' (10). Navigation buttons at the bottom include 'Cancel', 'Group Info', '< Previous', and 'Finish'.

- Add Furniture or Other Resources to an Event



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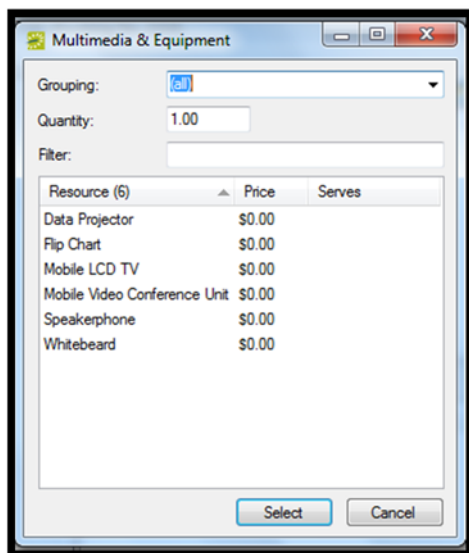
- Select the booking level for the appropriate date and location that you would like to add a resource to.



- 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:
  - o Standard Fit – EMS searches for room(s) that are available on ALL dates/times requested
  - o 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
  - o 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