About this guide

This guide is meant to be a quick reference only. Full explanations of all steps are included in more detail in the EMS Knowledge Base, available in the EMS desktop client under Help > Contents.
Navigating the Book:

- Select the Book button from the toolbar.
- In the top left-hand corner of the book you’ll find the list of buildings that are available for you to view or book under. You can sort by Building, sort by Area (collections of buildings), or by View (collection of rooms).
- You will also find a date selection tool by hitting the drop down next to the date field where you can select a specific date other than today; or you can toggle back and forth by day, week, month or year by using the left and right arrows. Click on the Today button to bring you back to the current date.
- Use the Filter to further narrow down results within buildings, areas or views by using filters for Floor, Room Type or Capacity.
- On the left-hand side of the book there is a list of rooms that appear by building with the corresponding capacities for each room. You can click on each room to view the room details to see features, setups, capacities and room properties.
Options/Settings within the Book:

- Within the book, select the *Options* button on the top-right corner.
- Please apply the following settings to be consistent with how your team will be utilizing the book:
  1. Start hour – 7am
  2. Automatically refresh – Every 2 Minutes
  3. Display = Event Name
  4. Time Display Interval = 15 Minutes
  5. Maximum Number of Rooms = 750
  6. Booking Colors Based on = Status
  7. Room Display = Room Description
  8. Building Display = Building Description
  9. Check the following boxes
     1. Go to today on startup
     2. Show (all) in building list
     3. Show capacity

Optionally, you may check “highlight rooms” under Rooms without bookings. This will highlight rooms that have no meetings or reservations in them so you can more quickly identify open spaces. Set the color to a darker color so it’s easy to see.
Open a Request from the Dashboard

- Open the Dashboard button to review all room requests that are awaiting approval.

- Everyday User Reservations: The left-hand window will display all available statuses and all areas/buildings/views. Select the “Pending Approval” status and select the views you are responsible for to see a list of new requests. See screen shot above.

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

Approve, deny, or cancel a request from the Navigator:

- Review the service details added to the room request to determine if additional time is needed.
  
ap. If yes, add setup and or breakdown time by editing the booking.
• Optionally, review events scheduled in rooms around this request and determine if this request is suitable.
• Select the Reservation level of the reservation (the top folder in the left-hand pane).
• Click the Change Status button located on the right side of the Navigator window:

![Change Status Button](image1)

• Choose the appropriate status for this request > Next:

![Choose Status Window](image2)
• Select the individual bookings that you would like to change:

![Change Booking Status](image)

• Click *Finish*. Email the customer a confirmation report if applicable.

**Mark as Reviewed in the Dashboard**

• Now that you are finished working on the reservation, close the reservation Navigator to return to the Dashboard.

• Since you were working in the “Everyday User Reservations” area of the dashboard, click *Refresh*. Requests that were processed will disappear from the list.

![Dashboard](image)
Send a Confirmation Email

- Select the Reservation level of the reservation. This is the top folder in the left-hand pane of the Navigator.
- Click the Confirmation button on the right side of the Navigator window.
- Select a pre-configured confirmation from the “Setup” dropdown menu in the top left corner of the window. Examples include Summary of Event, Guest Speaker Contract.
- If the report you need isn’t already saved, visit each tab (Date Range, Buildings, Categories, Statuses, Options, & Email Options) to select the appropriate information for this reservation. Once selections are made, click Save to save the report setup for later.
- Optionally, click Print Preview to see the confirmation and review for accuracy.
- Close the preview and click Email to send the Confirmation Email.
• An email message will open.
• Review for accuracy. Optionally, update the email text if needed and click Send.

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*, event type, the employee hosting* the event, their contact information*, setup count*, and other critical event information. Click Finish.
  
i. * Denotes required information
Create a Multi-Day Reservation from the Wizard – Same Room for all Dates

- On the toolbar, click the Wizard icon. The Reservation Wizard opens.

- If the event dates follow a pattern (week, monthly) click *Date Pattern* to open the Date Pattern dialog box shown below.

- Enter your start/end dates choose Daily, Weekly, or Monthly and make your date selections > OK

- The selected dates tab, shown below, is updated with the dates you selected.
• If one of the dates selected is a holiday, a message will open indicating this. If you wish to remove the holiday, go to the Selected Dates tab, select the date, and click Remove.

• Specify the event time > Choose the **standard search** method to look for a room that is available for all dates > Choose a Status > Next

• A list of rooms that are available for all dates appears. Choose a room (or multiple rooms) by moving it from the left to the right column > Next
• Complete the reservation by indicating the event name, event type, the employee hosting the event and other critical event information. Click Finish.

Create a Multi-Day Reservation from the Wizard – If No One Room is Available for all Dates

• On the toolbar, click the Wizard icon. The Reservation Wizard opens.

• If the event dates follow a pattern (week, monthly) click Date Pattern to open the Date Pattern dialog box show below.

• Enter your start/end dates choose Daily, Weekly, or Monthly and make your date selections > OK
• The selected dates tab, shown below, is updated with the dates you selected.

![Calendar: Selected Dates (5)](image)

• If one of the dates selected is a holiday, a message will open indicating this.

• Specify the event time > Choose the **best fit** search method if no one room is available for all requested dates > Choose a Status > Next

![Reservation Wizard](image)
• A list of rooms that are available for some of the requested dates appears. At the top of the list are rooms that are available for most dates. At the bottom of the list are rooms that are available for the least dates:

• Choose a room by moving it from the left to the right column. The room will be assigned for the dates it is available. If the room was not available on particular dates, the Rooms column remains blank.

• Choose another room by moving it from the left to the right column. That room will be assigned for the dates it is available. Continue until all dates have a room assigned or until no rooms remain > Next
• Complete the reservation by indicating the event name, event type, the employee hosting the event and other critical event information. Click *Finish*.

• Click *Finish*. To email a confirmation, see the email instructions section.

Add Furniture, AV, or Other Resources to an Event

• Select the booking level for the 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 for the category selected:

![Resource Window]

• Select the item that you would like to add, type the quantity in the quantity field, and click Select to add the item to this event.

Reservation Navigator – Tips:

• Open any reservation either by entering a Reservation Number in the Navigator tool or by double clicking on a Booking within the Book.

![Reservation Navigator]

• On the top left corner of the reservation navigator, you’ll find the Reservation level. This contains the “Who” and “What” information of the reservation. The Edit button to the right will allow you to edit data elements on this level specifically.
i. From the reservation level you can hit the new button to add additional bookings.

ii. The Reservation Level has several tabs on the right-hand side where we can view email communications to the client as well as view the history of changes made to the reservation.

- Immediately below the reservation level you’ll find the Booking level that could contain a booking (for one space/date/time) or several bookings (recurring meetings, multiple room meetings). The booking level contains the “Where” and the “When” information. The Edit button to the right will allow you to edit data elements on this level specifically.

i. From the booking level you can hit the new button to add services
• The Booking Level also has a history tab to track changes made to the booking.

![History Tab]

• You may upload Attachments on either the Reservation or Booking level depending on if the information is relevant to the whole reservation or to only a specific booking. To add an attachment, simply click new, enter a description, select an attachment type and then use the magnifying glass to locate the attachment on your desktop.

![Attachment Tab]

  i. Please note attachments are limited only to the attachment types listed. Please do not upload sensitive or confidential information into EMS.

Using the Dashboard - Settings:

• Select the Dashboard button from the toolbar.

• In the upper right-hand corner click on Options. Please apply the following settings to be consistent with how your team will be utilizing the Dashboard:
Using the Dashboard - Notifications:

- Select the *Dashboard* button from the toolbar.
- Click on the *Notifications* tab on the lower left-hand side. Note – in order to see notifications, you must be selected to be the recipient of one in the configuration of the notification rule. If you do not see notifications as an option, you will not need to worry about this section.
• Under the notifications area, you’ll see the name of the notification rule, and how many are waiting for you to review (new).
• Highlight the notification and you will see the details regarding that notification in the lower pane. You may double click or highlight and click Go to. To view that reservation in the navigator.
• When you are finished. Simply mark the notification as reviewed to have it disappear from the dashboard. Click yes when prompted.

Using the Dashboard - Reminders:

• Select the Dashboard button from the toolbar.
• Click on the Reminders tab on the lower left-hand side.

To view upcoming reminders, set your filters accordingly:
  o Responsible Users – sort by all to see everything for a given time period, or select yourself or another user you’d like to view.
  o View – sort by different time periods, OR select (user specified) to view your own custom date range.
• After getting your results, you may *Mark as Completed*, *Go to* (to see the entire reservation in the navigator) or *Reassign* (if a new user should be completing the task instead).

![Dashboard Screenshot](image)

**Using the Dashboard – At a Glance:**

• Select the *Dashboard* button from the toolbar.

• Click on the *At a Glance* tab on the lower left-hand side.

![At a Glance Screenshot](image)

• The purpose of *At a Glance* is to show simple statistics for a particular day. It is simple in design in that you can only filter on *Status* and *Building (or areas/views)*. To use At a glance, select a date, filter on status and building. Last, select the data type you’d like to see. Your choices are Category, Event Type, Group Type, Reservation Source, Room type and Status.
Once you’ve selected the criteria a simple bar graph will show the statistics you are looking for. For example, confirmed bookings in all offices by event type.