

## Space Scheduling Reference Guide

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*, available in the EMS Campus desktop client under *Help > Contents*.

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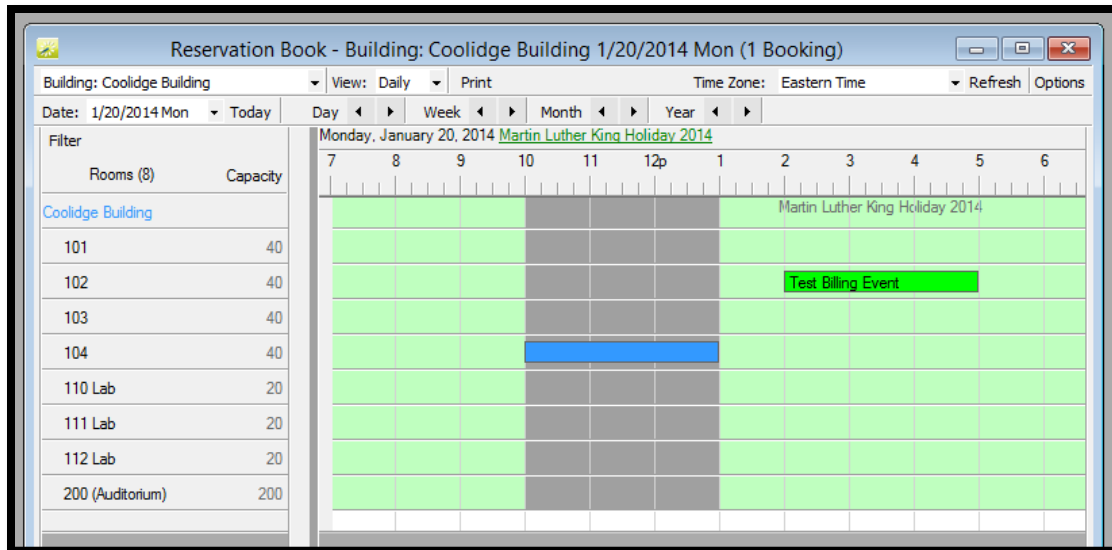
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### 1. Create a Single Day Reservation from the Book



1. Select the Book button from the toolbar.
2. 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.

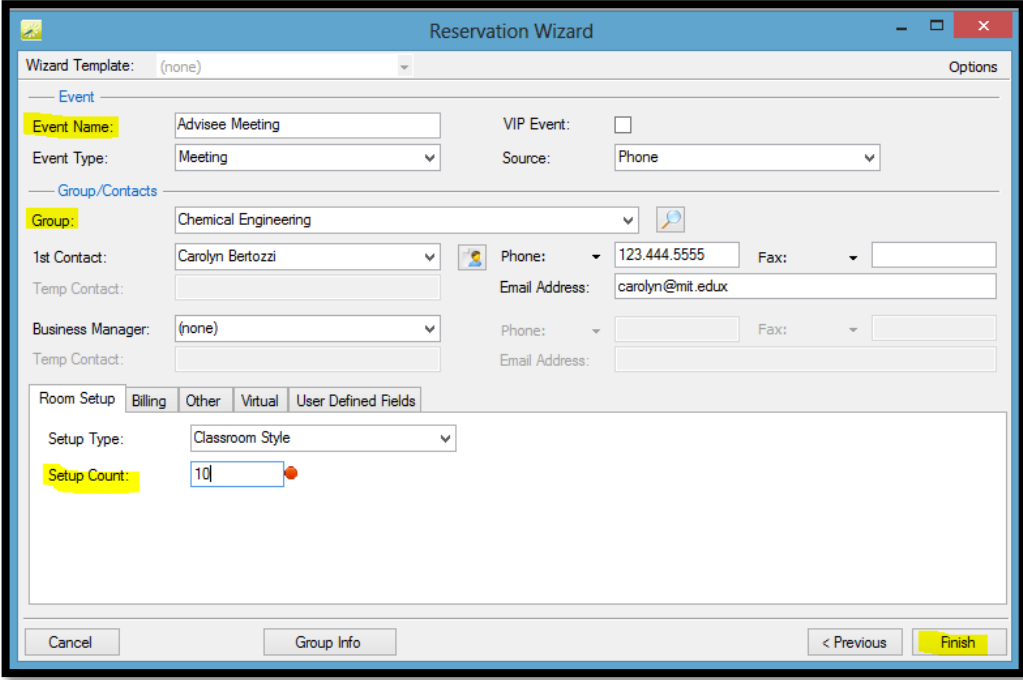


3. The Reservation Wizard window will open. Choose a status and update the Setup/Teardown Time, if applicable, if you will need services such as Facilities to update the room configuration or catering setup before the meeting. Then click 'Next'.
- Standard Setup/Teardown Time = 1hr, but for large and complex events it should be more.



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4. Complete the reservation by indicating the event name, the group sponsoring the event or the requestor holding the meeting, and other critical event information. On the **Virtual Tab**, search and select the **Web User** and **Web Process Template** that applies to that user (Examples: Staff or Faculty = Staff & Faculty Space Reservation, Grad Student = Grad Student Space Request Form, Ugrad Student = Undergrad Student Space Request Form). This will add their reservation to Virtual EMS online so that they can view their reservations and don't have to contact you again to ask where and when it is, the requester can then choose to add it to their personal calendar from Virtual EMS online).
5. Click *Finish*.



The screenshot shows the "Reservation Wizard" window with the following fields and values:

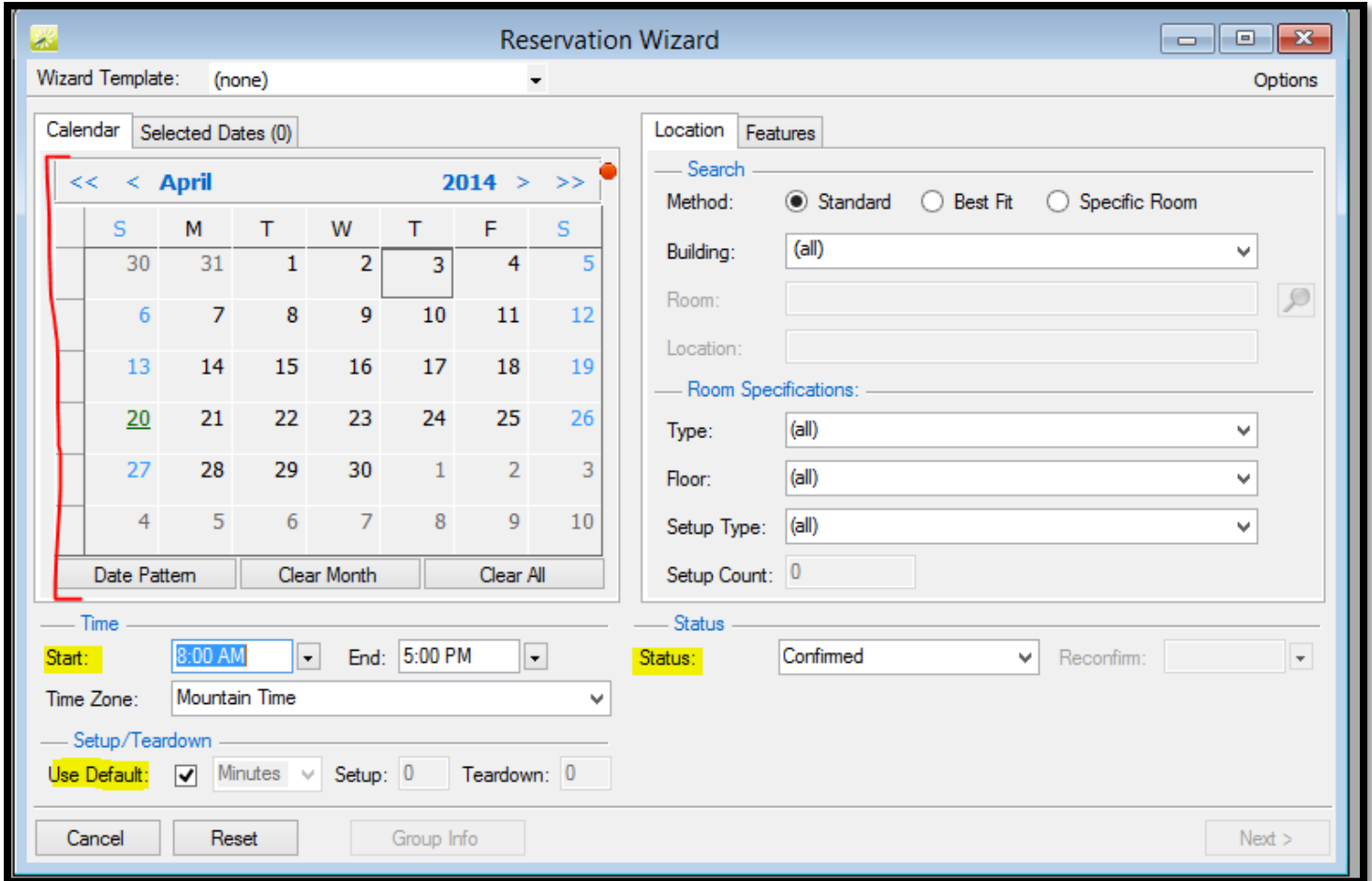
- Wizard Template:** (none)
- Event Section:**
  - Event Name:** Advisee Meeting
  - Event Type:** Meeting
  - VIP Event:** ☐
  - Source:** Phone
- Group/Contacts Section:**
  - Group:** Chemical Engineering
  - 1st Contact:** Carolyn Bertozzi
  - Temp Contact:** (empty)
  - Business Manager:** (none)
  - Temp Contact:** (empty)
  - Phone:** 123.444.5555
  - Fax:** (empty)
  - Email Address:** carolyn@mit.edu
  - Phone:** (empty)
  - Fax:** (empty)
  - Email Address:** (empty)
- Room Setup Section:**
  - Setup Type:** Classroom Style
  - Setup Count:** 10
- Navigation:** Cancel, Group Info, < Previous, Finish

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### 2. Create a Reservation from the Reservation Wizard



1. Select the Wizard button from the toolbar.
2. Select the date or dates that need a space, input the event time, setup type, setup count, and status. Optional information includes adding setup time, teardown time, and using any of the search filters. Click *Next*.

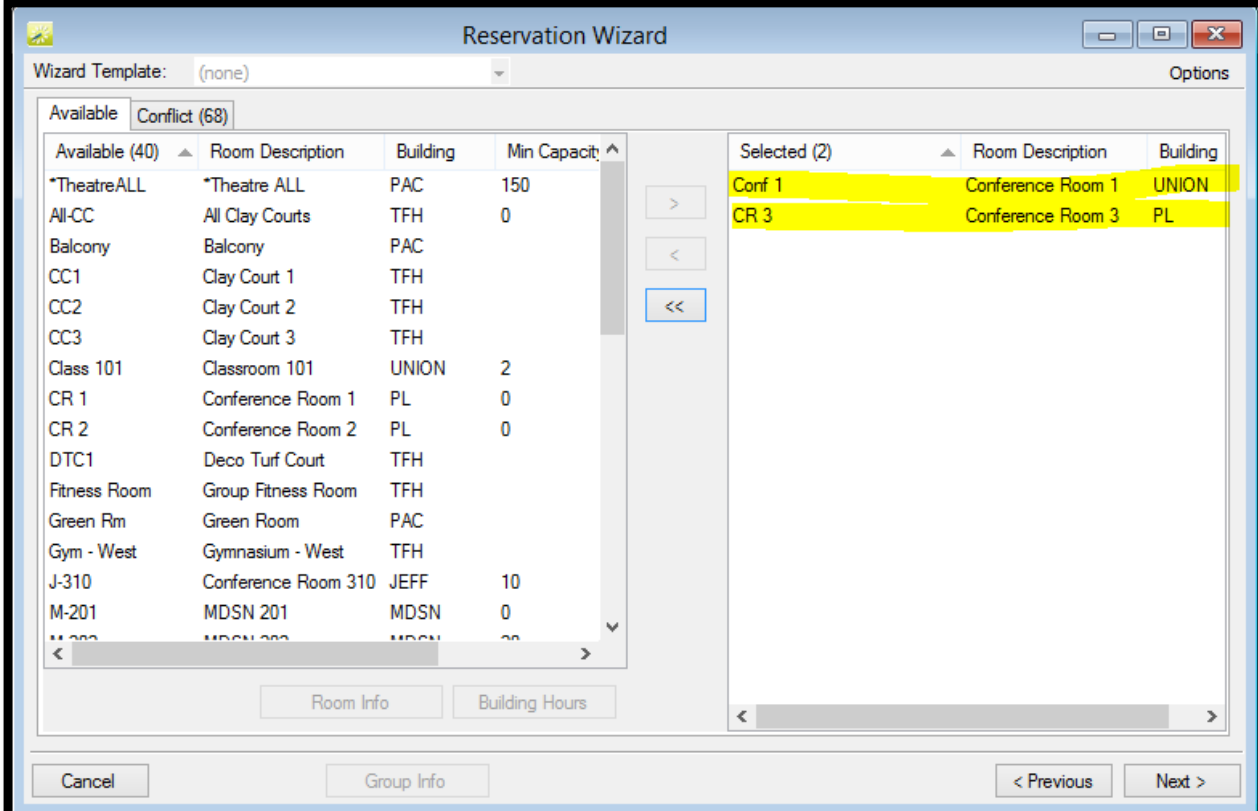


The screenshot shows the "Reservation Wizard" window with the following sections:

- Wizard Template:** (none)
- Calendar:** A calendar for April 2014. A red box highlights the dates 30, 31, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10. Below the calendar are buttons for "Date Pattern", "Clear Month", and "Clear All".
- Location:**
  - Search:**
    - Method: ☒ Standard ☐ Best Fit ☐ Specific Room
    - Building: (all)
    - Room:
    - Location:
  - Room Specifications:**
    - Type: (all)
    - Floor: (all)
    - Setup Type: (all)
    - Setup Count: 0
- Time:**
  - Start: 8:00 AM
  - End: 5:00 PM
  - Time Zone: Mountain Time
- Status:**
  - Status: Confirmed
  - Reconfirm:
- Setup/Teardown:**
  - Use Default: ☒ Minutes
  - Setup: 0
  - Teardown: 0
- Buttons:** Cancel, Reset, Group Info, Next >

- *Standard Search* will return all spaces that are available for all requested dates.
  - *Best Fit Search* is best used when trying to find a single room for a recurring date pattern.
  - *Specific Room Search* is used when there is a specific space that is needed and you know it is available.
3. The second window of the Reservation Wizard returns available spaces based on your search criteria from the previous screen. You can also see conflicts from the *Conflicts* tab. Select a space by moving it from the left to the right. When using a Standard Search method you can select multiple spaces if necessary. Select at least one space and click *Next*.

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The screenshot shows the 'Reservation Wizard' window with the 'Room Selection' tab active. It features two main tables: 'Available (40)' and 'Selected (2)'. The 'Available' table lists various rooms with their descriptions, buildings, and minimum capacities. The 'Selected' table shows two rooms chosen for the reservation.

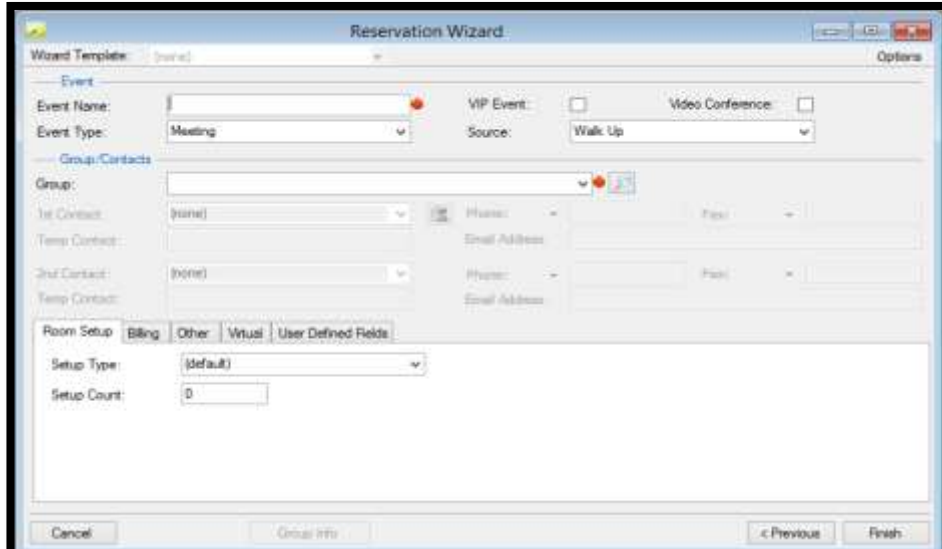
Available (40)	Room Description	Building	Min Capacity
*TheatreALL	*Theatre ALL	PAC	150
All-CC	All Clay Courts	TFH	0
Balcony	Balcony	PAC	
CC1	Clay Court 1	TFH	
CC2	Clay Court 2	TFH	
CC3	Clay Court 3	TFH	
Class 101	Classroom 101	UNION	2
CR 1	Conference Room 1	PL	0
CR 2	Conference Room 2	PL	0
DTC1	Deco Turf Court	TFH	
Fitness Room	Group Fitness Room	TFH	
Green Rm	Green Room	PAC	
Gym - West	Gymnasium - West	TFH	
J-310	Conference Room 310	JEFF	10
M-201	MDSN 201	MDSN	0
M-202	MDSN 202	MDSN	0

Selected (2)	Room Description	Building
Conf 1	Conference Room 1	UNION
CR 3	Conference Room 3	PL

Navigation buttons at the bottom include 'Cancel', 'Group Info', '< Previous', and 'Next >'.

- Complete the reservation by indicating the event details, the group sponsoring the event, and other critical event information in the tabs along the bottom. On the **Virtual Tab**, search and select the **Web User** and **Web Process Template** that applies to that user (Examples: Staff or Faculty = Staff & Faculty Space Reservation, Grad Student = Grad Student Space Request Form, Ugrad Student = Undergrad Student Space Request Form). This will add their reservation to Virtual EMS online so that they can view their reservations and don't have to contact you again to ask where and when it is, the requester can then choose to add it to their personal calendar from Virtual EMS online).
- Click Finish to complete the reservation and transition to the Navigator screen where you will add notes, services, etc.



The screenshot shows the 'Reservation Wizard' window with the 'Event Details' tab active. It contains fields for event information, group contacts, and room setup options.

**Event Details:**

- Event Name: [Text Field]
- Event Type: Meeting (Dropdown)
- VIP Event: [Checkbox]
- Video Conference: [Checkbox]
- Source: Walk Up (Dropdown)

**Group/Contacts:**

- Group: [Text Field]
- 1st Contact: [Text Field] | Phone: [Text Field] | Fax: [Text Field]
- 2nd Contact: [Text Field] | Email Address: [Text Field]
- 3rd Contact: [Text Field] | Phone: [Text Field] | Fax: [Text Field]
- 4th Contact: [Text Field] | Email Address: [Text Field]

**Room Setup:**

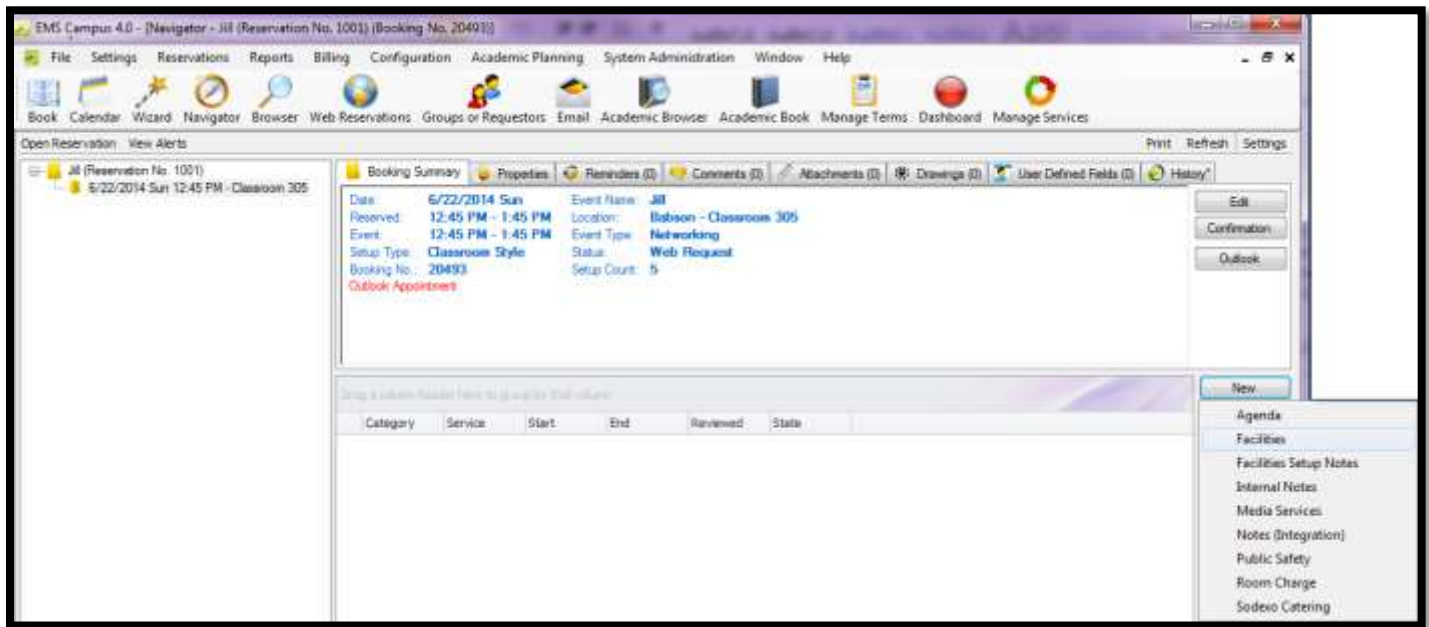
- Room Setup: Billing | Other | Virtual | User Defined Fields (Tabs)
- Setup Type: (default) (Dropdown)
- Setup Count: 0 (Text Field)

Navigation buttons at the bottom include 'Cancel', 'Group Info', '< Previous', and 'Finish'.

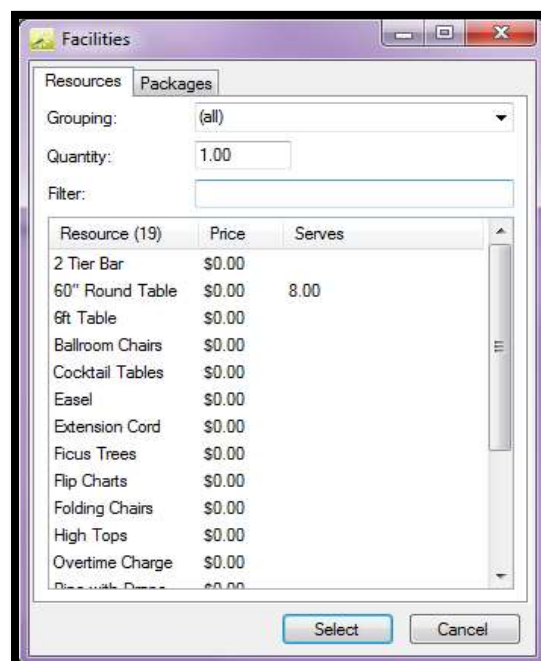
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### 3. Add Facilities or Other Resources to an Event

1. Select the folder for the appropriate date and location that you would like to add resources to. Making sure that you are on the booking and not the Reservation top level.

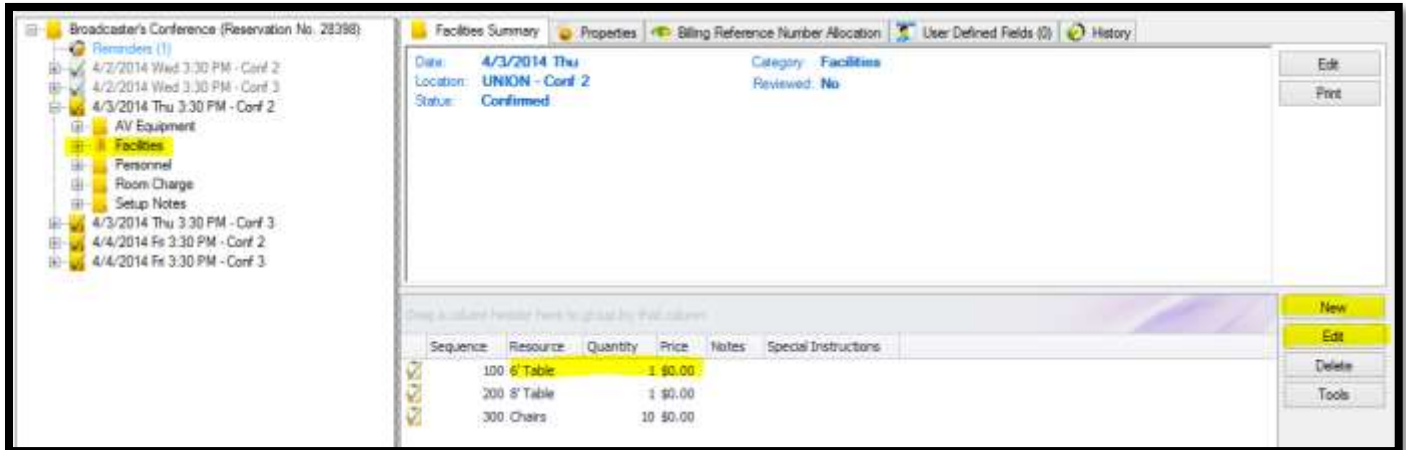


2. To add new resources, click the *New* button in the bottom right-hand portion of the window and select the category of resources that you would like to add for this event.
3. A pop up Resource Window will appear. In my example I selected Facilities.



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4. 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. Close the popup window when you've finished adding resources for that category.
5. If you need to add new items to an existing folder of resources, select that folder from within the room on the left side of the Navigator. This will allow you to either edit existing resources that have already been scheduled or add to items into the existing folder.

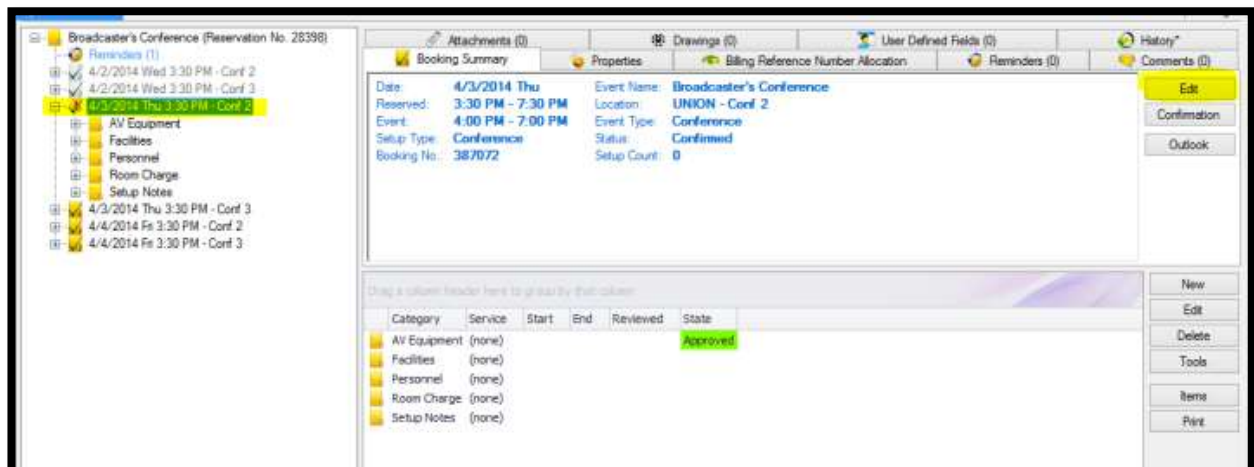


Sequence	Resource	Quantity	Price	Notes	Special Instructions
100	8' Table	1	\$0.00		
200	8' Table	1	\$0.00		
300	Chairs	10	\$0.00		

6. To add a note to a specific resource that will be included in the Work Order to Facilities, click on the item as highlighted above and enter the instructions in **the Special Instructions field** (example: please place 3 tables against the wall for check-in). The Notes field is public facing and will show on Virtual EMS online and will not go to Facilities within the Work Order, usually not used.

### 4. Approve, Deny, or Cancel a Request From the Navigator:

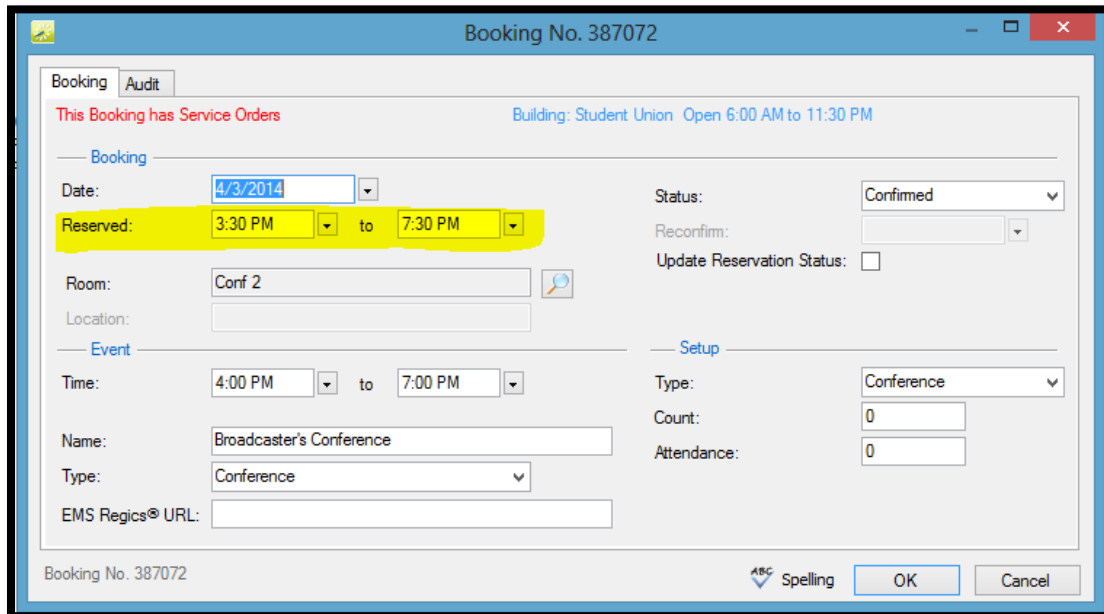
1. Review the service details added to each room to determine if additional time is needed.
  - a. If yes, add setup and or breakdown time by selecting the folder for that room and clicking *Edit*



Category	Service	Start	End	Reviewed	State
AV Equipment	(none)				
Facilities	(none)				Approved
Personnel	(none)				
Room Charge	(none)				
Setup Notes	(none)				



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Booking No. 387072

This Booking has Service Orders Building: Student Union Open 6:00 AM to 11:30 PM

**Booking**

Date: 4/3/2014  
 Reserved: 3:30 PM to 7:30 PM  
 Room: Conf 2  
 Location:

**Event**

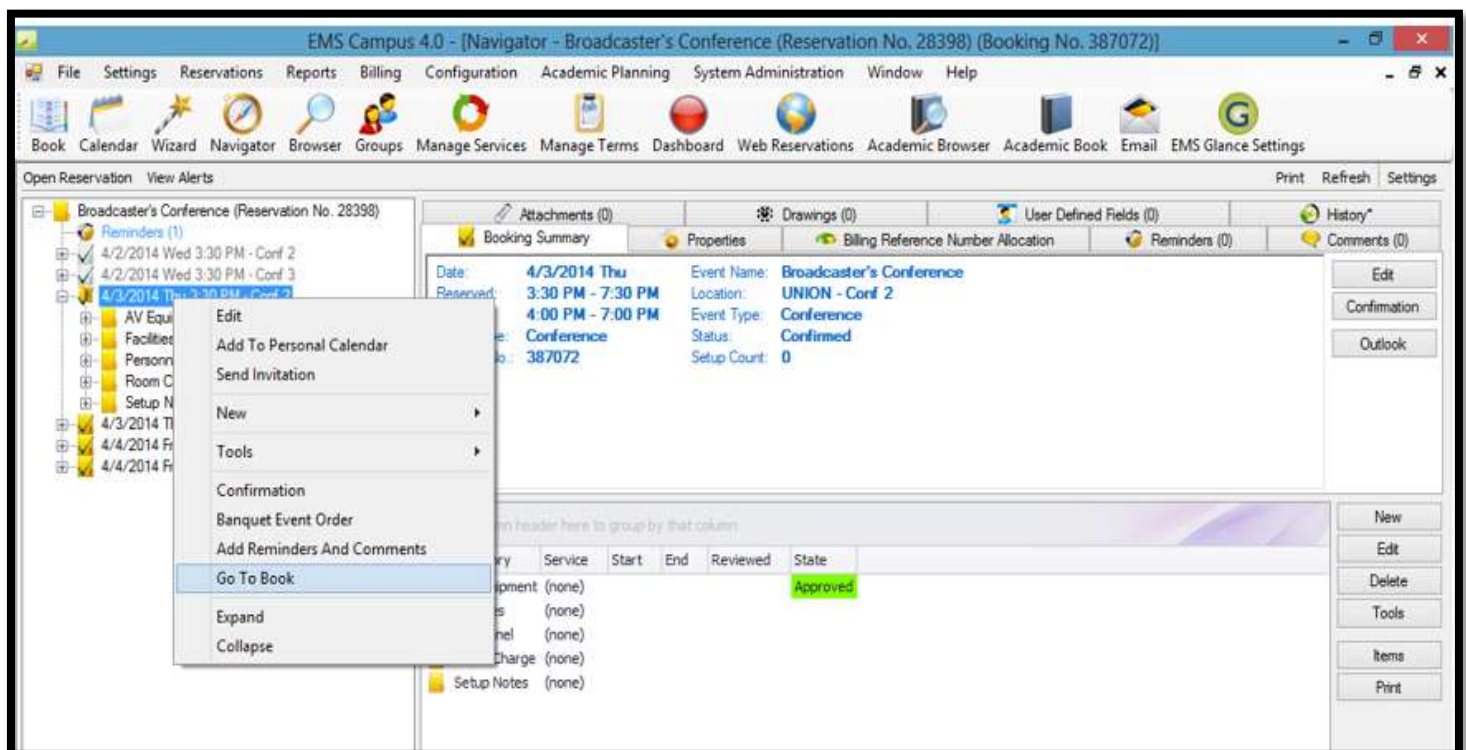
Time: 4:00 PM to 7:00 PM  
 Name: Broadcaster's Conference  
 Type: Conference  
 EMS Regics® URL:

**Setup**

Status: Confirmed  
 Reconfirm:  
 Update Reservation Status:  
 Type: Conference  
 Count: 0  
 Attendance: 0

Booking No. 387072 Spelling OK Cancel

2. Review the events scheduled in rooms around this request and determine if this request is suitable.
  - a. Right click on the folder for the specific room and select *Go To Book*
  - b. The booking will be highlighted with a red outline in the Reservation Book. Double click on the booking to return to the reservation in the Navigator window.



EMS Campus 4.0 - [Navigator - Broadcaster's Conference (Reservation No. 28398) (Booking No. 387072)]

File Settings Reservations Reports Billing Configuration Academic Planning System Administration Window Help

Book Calendar Wizard Navigator Browser Groups Manage Services Manage Terms Dashboard Web Reservations Academic Browser Academic Book Email EMS Glance Settings

Open Reservation View Alerts Print Refresh Settings

Broadcaster's Conference (Reservation No. 28398)

Reminders (1)

- 4/2/2014 Wed 3:30 PM - Conf 2
- 4/2/2014 Wed 3:30 PM - Conf 3
- 4/3/2014 Thu 3:30 PM - Conf 2
- 4/4/2014 Fri 3:30 PM - Conf 2
- 4/4/2014 Fri 3:30 PM - Conf 2

Context Menu:

- Edit
- Add To Personal Calendar
- Send Invitation
- New
- Tools
- Confirmation
- Banquet Event Order
- Add Reminders And Comments
- Go To Book**
- Expand
- Collapse

Booking Summary

Date: 4/3/2014 Thu  
 Reserved: 3:30 PM - 7:30 PM  
 Event Name: Broadcaster's Conference  
 Location: UNION - Conf 2  
 Event Type: Conference  
 Status: Confirmed  
 Setup Count: 0

Attachments (0) Properties Drawings (0) User Defined Fields (0) History\*

Billing Reference Number Allocation Reminders (0) Comments (0)

Edit Confirmation Outlook

Header here to group by that column

Item	Service	Start	End	Reviewed	State
Equipment	(none)				Approved
Personnel	(none)				
Facilities	(none)				
Charge	(none)				
Setup Notes	(none)				

New Edit Delete Tools Items Print



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Building: Student Union		View: Daily		Print		Time Zone: Mountain Time																																			
Date: 4/3/2014 Thu		Today		Day		Week		Month		Year																															
Filter		Thursday, April 3, 2014																																							
Rooms (14)		Capacity				7		8		9		10		11		12p		1		2		3		4		5		6		7		8		9		10		11			
Student Union																						Open 6:00 AM to 11:30 PM																			
Classroom 101		2 - 50																																							
Classroom 102		2 - 25																																							
Conference Room 1		5 - 40																																							
Conference Room 2		5 - 25																																							
Conference Room 3		2 - 40																																							
Conference Room 4		2 - 30																																							

3. Select the Reservation level of the reservation. Click the Change Status button located on the right side of the Navigator window.

Navigator - DEA Meeting (Reservation No. 36723)

Open Reservation View Alerts

DEA Meeting (Reservation No. 36723)

4/8/2014 Tue 2:30 PM - J-310

4/8/2014 Tue 2:30 PM - U-214

Comments (1) Attachments (0) User Defined Fields (1) Transactions (0) History\* Reminders (0)

Reservation Summary Properties Billing Reference Number Allocation

Event Name: DEA Meeting

Group: AAA Colorado

1st Contact: Heather Riddle

Phone: 303-456-1231

Reservation No.: 36723

Status: New Request

Event Coordin.: (none)

Salesperson: Nadine

Web User: Jason Shunk

Edit

Confirmation

Change Status

Update Pricing

Drag a column header here to group by that column

	Date	Start	End	Building	Room	Event	Event Type	Status
	4/8/2014 Tue	2:30 PM	6:30 PM	JEFF	J-310	DEA Meeting	Meeting	New Request
	4/8/2014 Tue	2:30 PM	6:30 PM	UNION	U-214	DEA Meeting	Meeting	New Request

2 Records

New

Edit

Delete

Tools

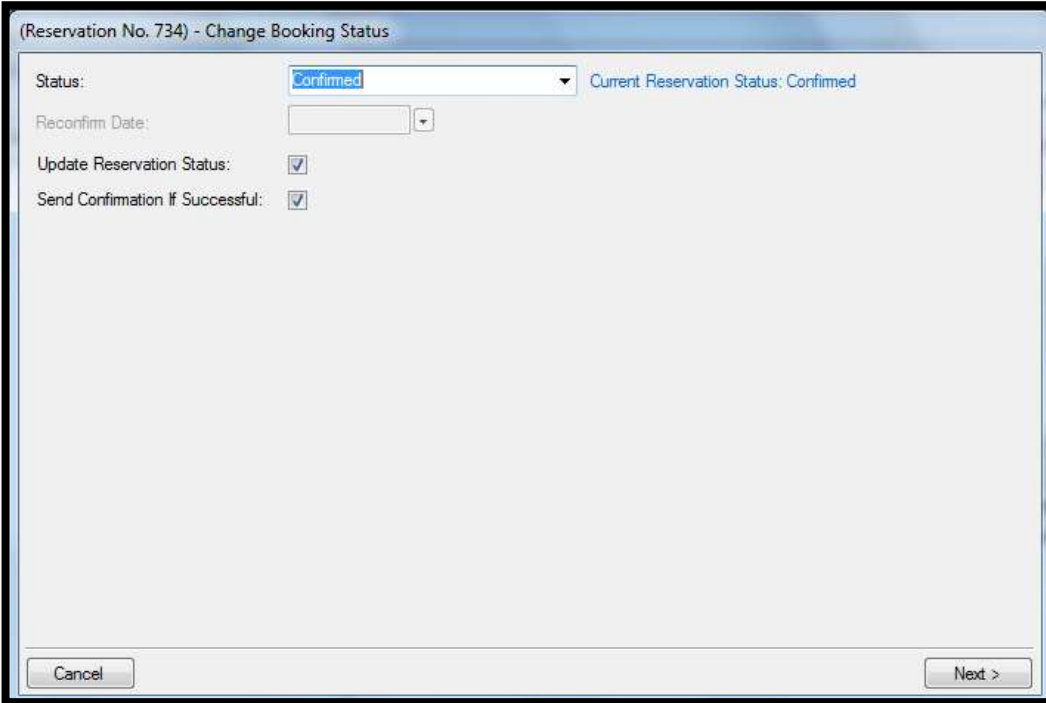
Details

Confirmation

Close

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- Choose the appropriate status for this request and mark the *Send Confirmation if Successful* checkbox.



(Reservation No. 734) - Change Booking Status

Status: Confirmed Current Reservation Status: Confirmed

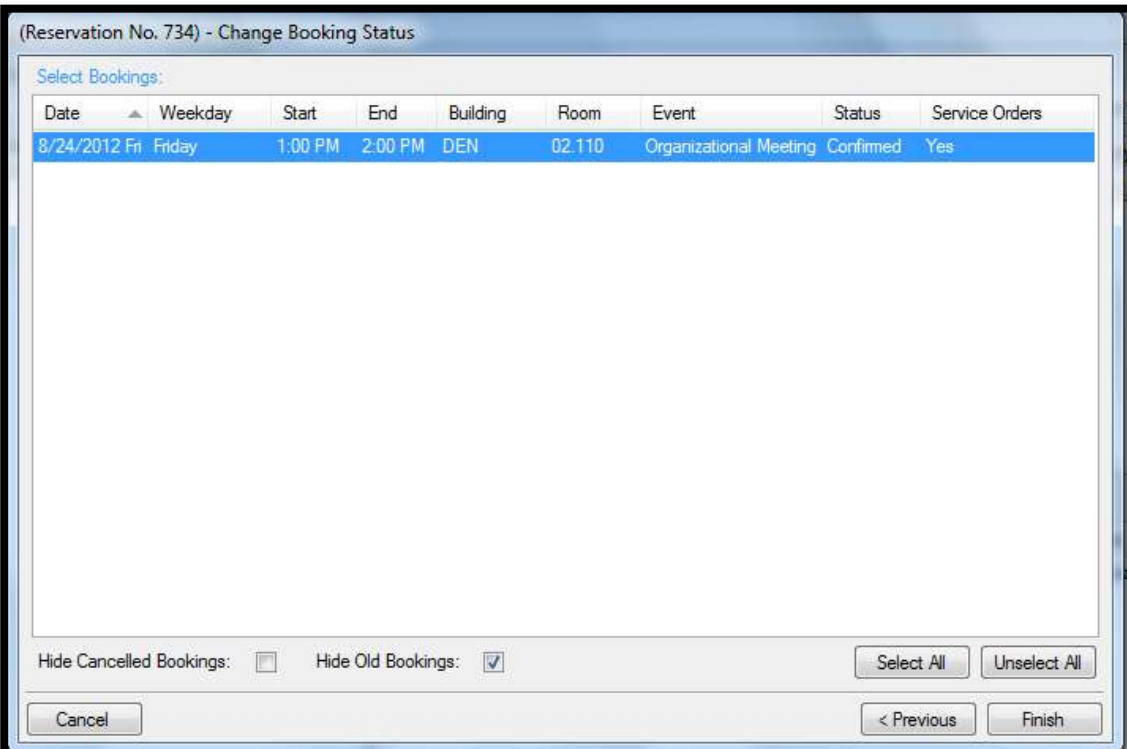
Reconfirm Date:

Update Reservation Status: ☒

Send Confirmation if Successful: ☒

Cancel Next >

- Select the individual bookings that you would like to change (screen show below). Click Finish to change the status and immediately transition to the Confirmation window.



(Reservation No. 734) - Change Booking Status

Select Bookings:

Date	Weekday	Start	End	Building	Room	Event	Status	Service Orders
8/24/2012 Fri	Friday	1:00 PM	2:00 PM	DEN	02.110	Organizational Meeting	Confirmed	Yes

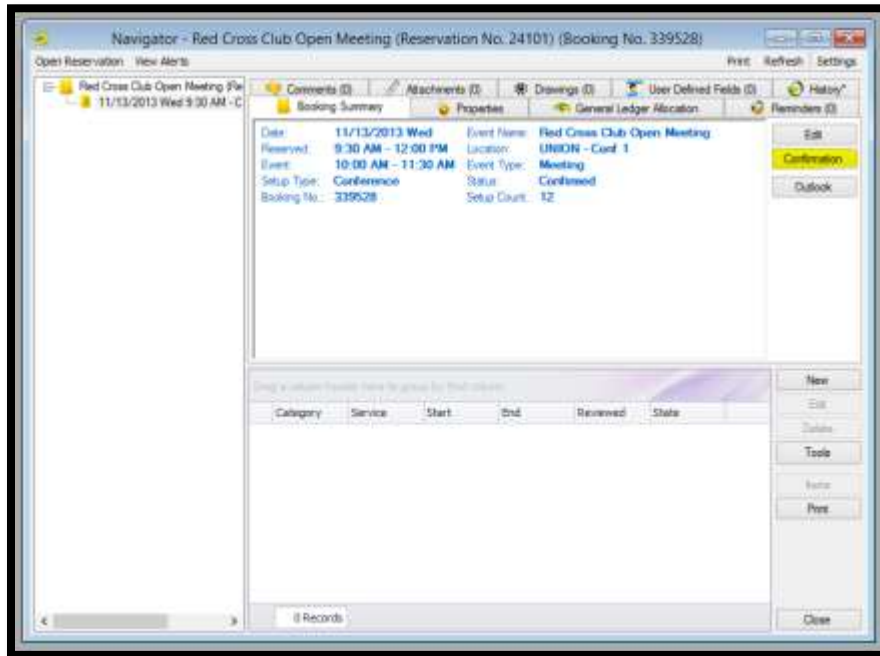
Hide Cancelled Bookings: ☐ Hide Old Bookings: ☒

Cancel Select All Unselect All < Previous Finish

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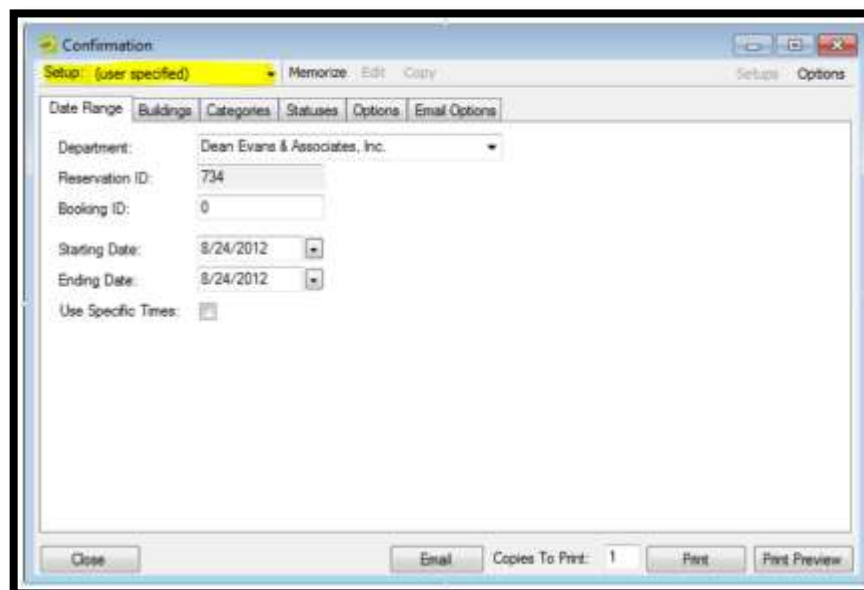
### 5. Send a Confirmation Email

1. Select the Reservation level of the reservation. This is the top layer in the left-hand pane of the Navigator.
2. Click the Confirmation button on the right side of the Navigator window.



### 3. Do one of these things:

- a. Select a pre-configured 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. Once individual tabs are set with your preferences you can *Memorize* (Save) the confirmation to use it again without having to set preferences on each tab.



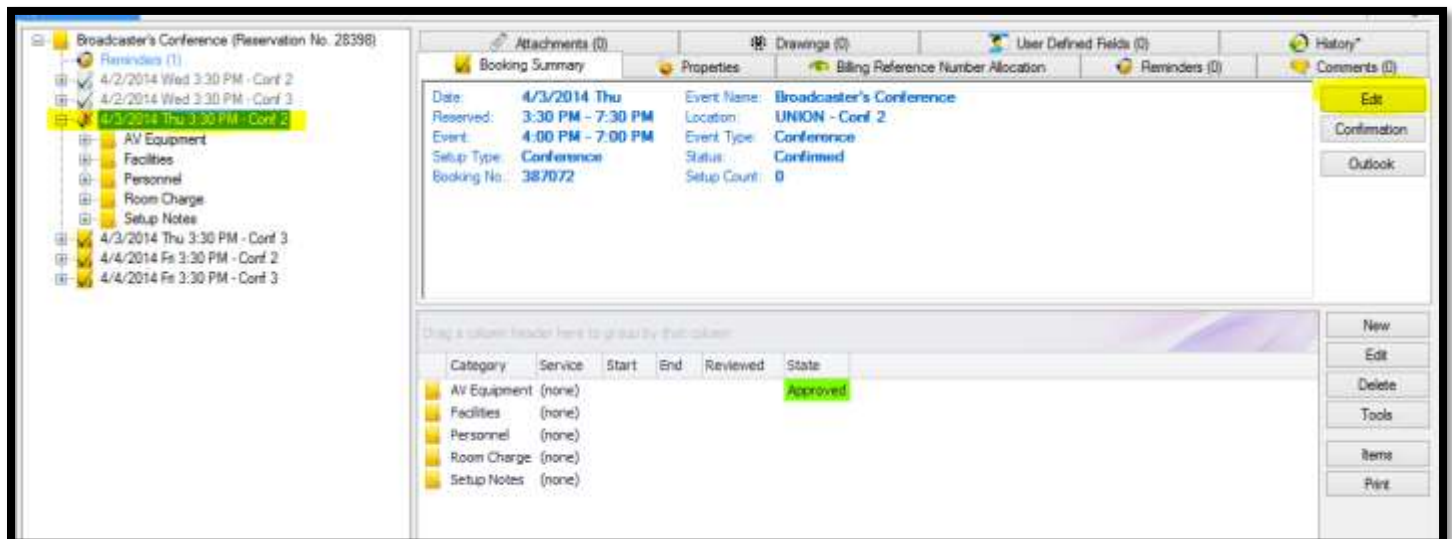
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4. Click Print Preview to see the confirmation. Review the preview for accuracy.
5. Close the preview and click *Email* to send the Confirmation Email.

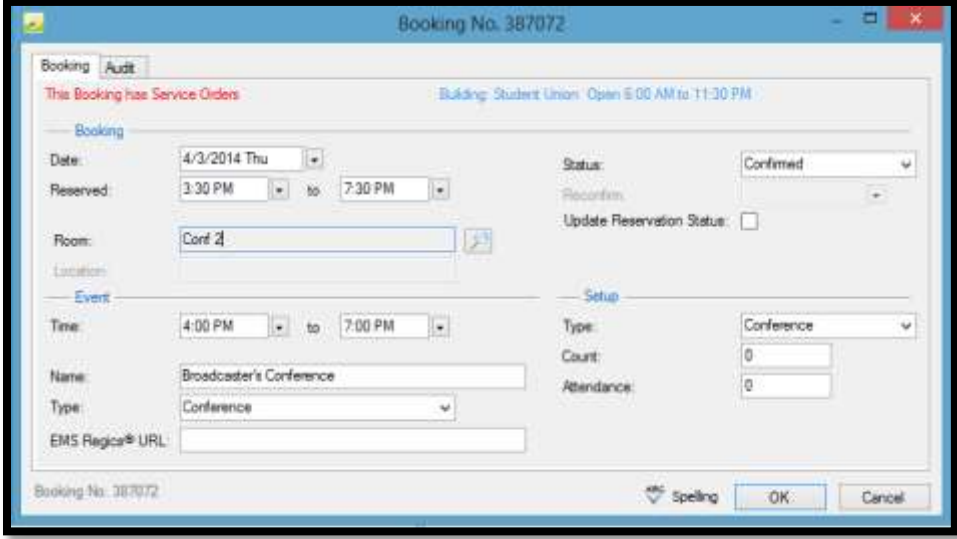
### 6. How to Edit a Single Room Booking in a Reservation (time, cancel, location, etc):

1. Select the specific room from the folder list along the left side of the reservation window.
2. Click *Edit* on the right.



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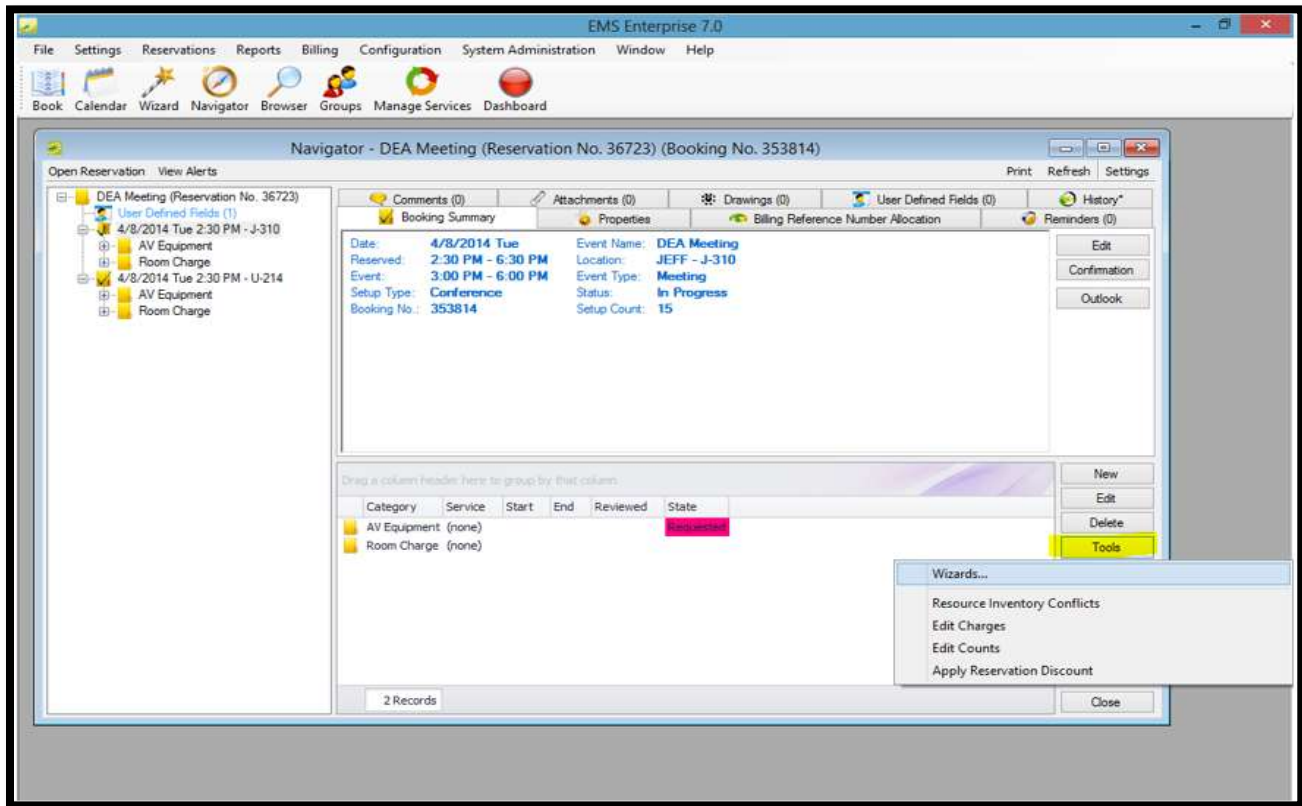
- Use the edit booking window to change the event time, edit the reservation time to include setup/teardown, change the status of the individual room, look for a new location for the individual meeting, etc



## 7. How to Edit Multiple Room Bookings Within One Reservation or Add Services to Multiple Room Bookings Simultaneously

- If you need to make changes or add details to multiple bookings within a single reservation then you can use the Wizards that are available within the Tools menu. Please see page 112 and page 148 of the EMS User Manual for definitions of each Wizard

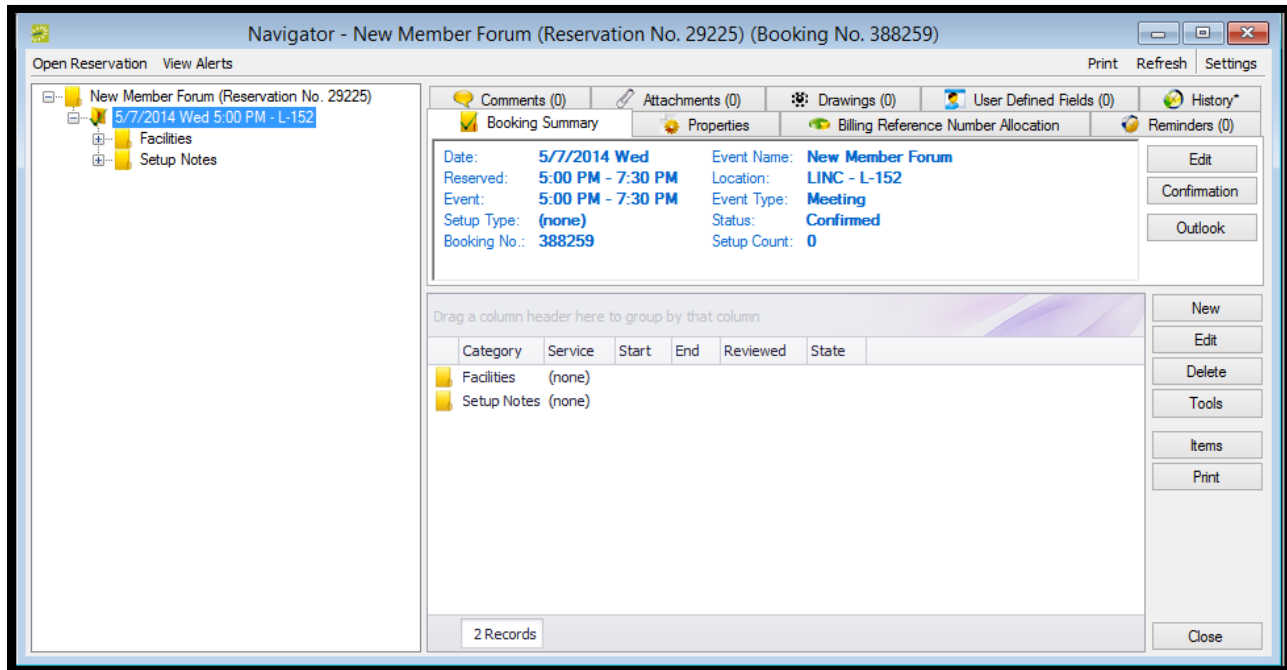
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### 8. Review the Facilities and Facilities Setup Note information

1. Select the folder for the appropriate date and location that you would like to review. Click the + beside the folder to see the Facilities and Setup Notes folders. If these folders don't exist then there isn't any Facilities or Setup Notes associated with that particular room.



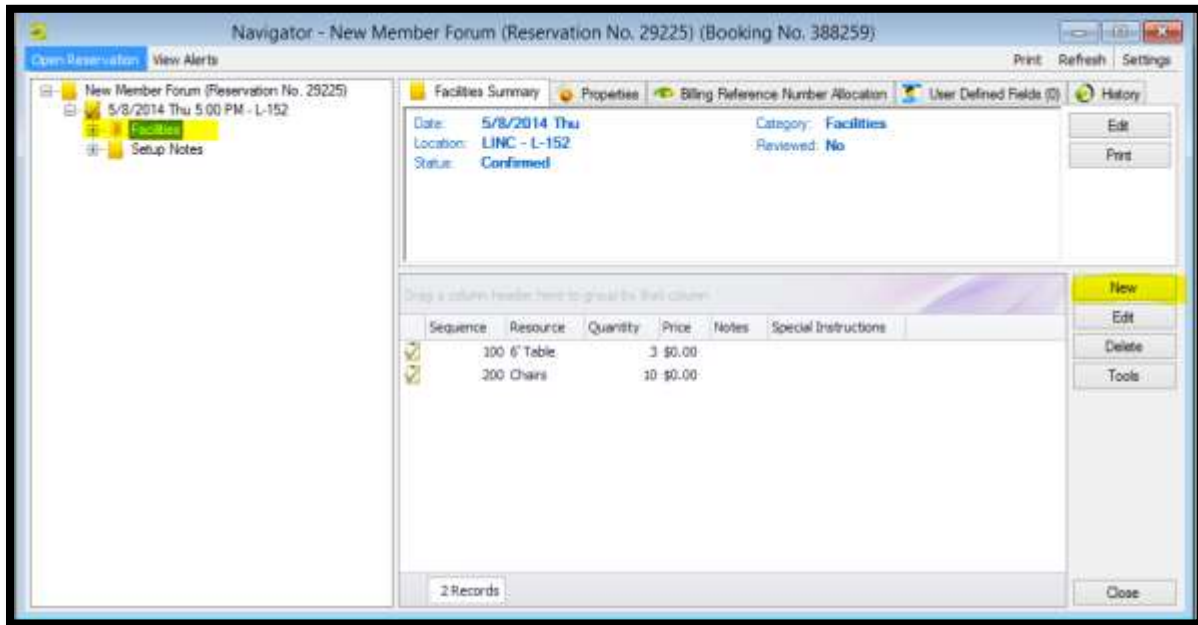
2. If the folder doesn't exist, select the Booking and Click **New** to choose the folder (Facilities or Facilities Setup Notes) that you want to add to the room.



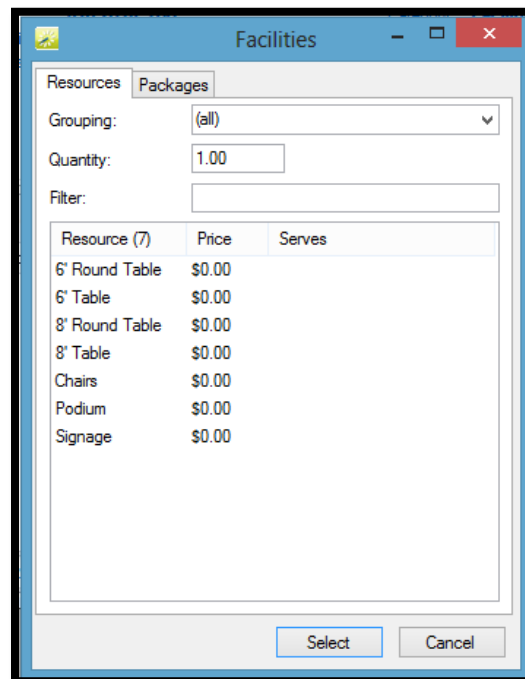


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- To add new resources to an existing folder, select the folder and click the *New* button in the bottom right-hand portion of the window and select the category of resources that you would like to add for this event.

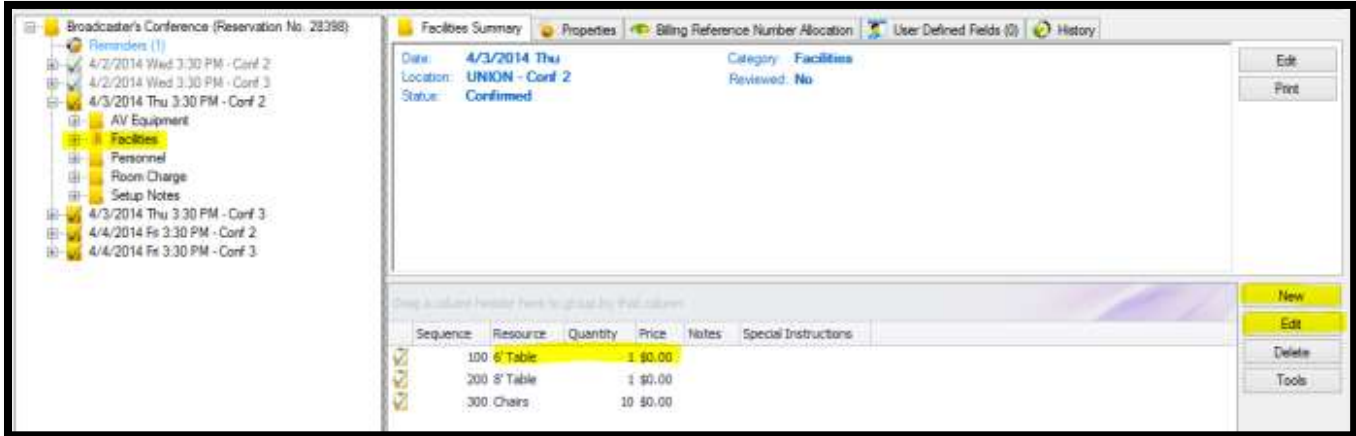


- A pop up Resource Window will appear. In my example I selected Facilities.



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5. 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. Close the popup window when you've finished adding resources for that category.
6. If you need to add edit items in an existing folder of resources, select that folder from within the room on the left side of the Navigator. This will allow you to edit existing resources that have already been scheduled.

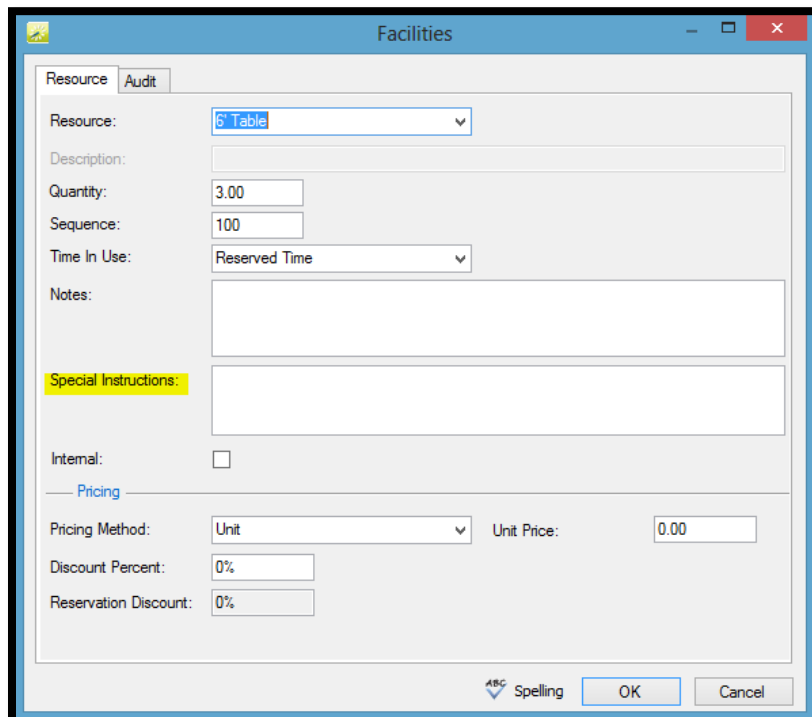


The screenshot shows the 'Facilities Summary' window for a reservation. The left sidebar lists various resource categories like Reminders, AV Equipment, Facilities, Personnel, Room Charge, and Setup Notes. The main area displays reservation details for '4/3/2014 Thu' at 'UNION - Conf 2'. Below this is a table of scheduled resources:

Sequence	Resource	Quantity	Price	Notes	Special Instructions
100	6' Table	1	\$0.00		
200	8' Table	1	\$0.00		
300	Chairs	10	\$0.00		

Buttons for 'Edit', 'Print', 'New', 'Edit', 'Delete', and 'Tools' are visible on the right side of the window.

7. If there are special instructions that should be included in the work order for a specific item, select that item from within the specific folder, click *Edit*, and add the special instructions to the Special Instructions text field.



The screenshot shows the 'Facilities' edit window. It has two tabs: 'Resource' and 'Audit'. The 'Resource' tab is active, showing the following fields:

- Resource:** A dropdown menu with '6' Table' selected.
- Description:** A text field.
- Quantity:** A text field with '3.00' entered.
- Sequence:** A text field with '100' entered.
- Time In Use:** A dropdown menu with 'Reserved Time' selected.
- Notes:** A large text area.
- Special Instructions:** A text field, highlighted with a yellow background.
- Internal:** A checkbox.
- Pricing:** A section with the following fields:
  - Pricing Method:** A dropdown menu with 'Unit' selected.
  - Unit Price:** A text field with '0.00' entered.
  - Discount Percent:** A text field with '0%' entered.
  - Reservation Discount:** A text field with '0%' entered.

At the bottom right, there are buttons for 'Spelling', 'OK', and 'Cancel'.

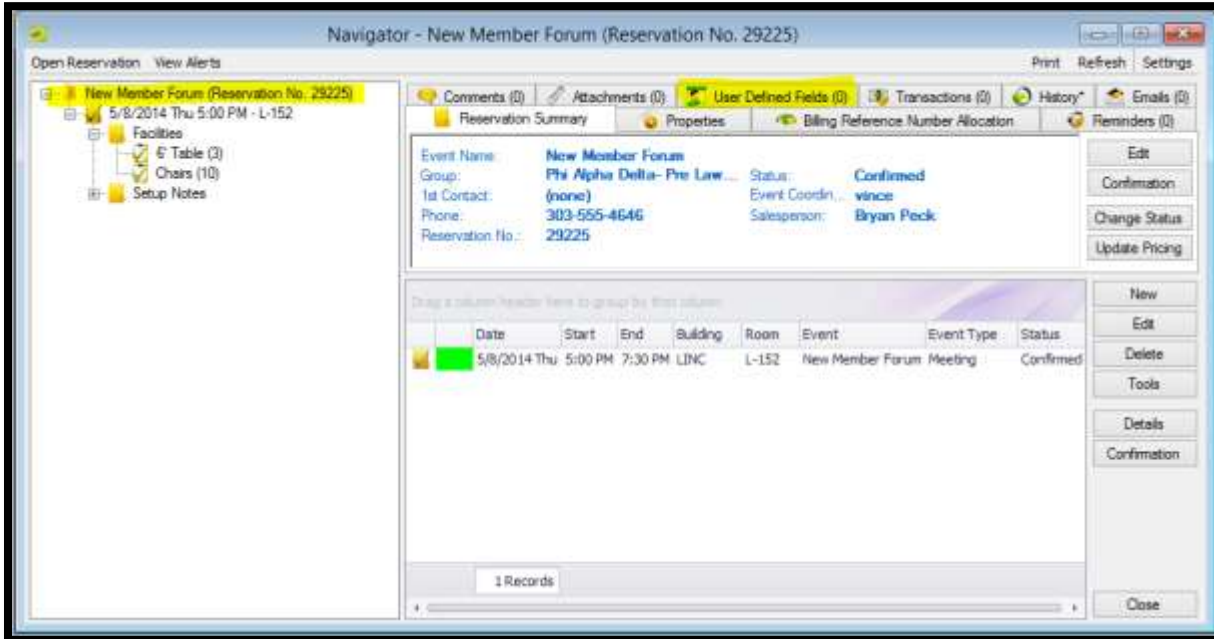
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8. If there are general notes about the event that should be included in the work order add a Facilities Setup Notes folder and enter the information into the text field.

### 9. Prepare the reservation for integration to TMA

After reviewing all event details and making sure that the reservation time, event time, Facilities, and Setup Notes are accurate. Take the following steps to prepare the reservation for integration with TMA:

1. Select the Reservation level of the record (top level) and visit the User Defined Fields tab.



Navigator - New Member Forum (Reservation No. 29225)

Open Reservation View Alerts

Print Refresh Settings

Comments (0) Attachments (0) **User Defined Fields (0)** Transactions (0) History\* Emails (0)

Reservation Summary Properties Billing Reference Number Allocation Reminders (0)

Event Name: New Member Forum  
 Group: Phi Alpha Delta- Pre Law... Status: Confirmed  
 1st Contact: (none) Event Coordi... vince  
 Phone: 303-555-4646 Salesperson: Bryan Peck  
 Reservation No.: 29225

5/8/2014 Thu 5:00 PM - L-152

Facilities

6 Table (3)

Chairs (10)

Setup Notes

Drag a column header here to group the first column

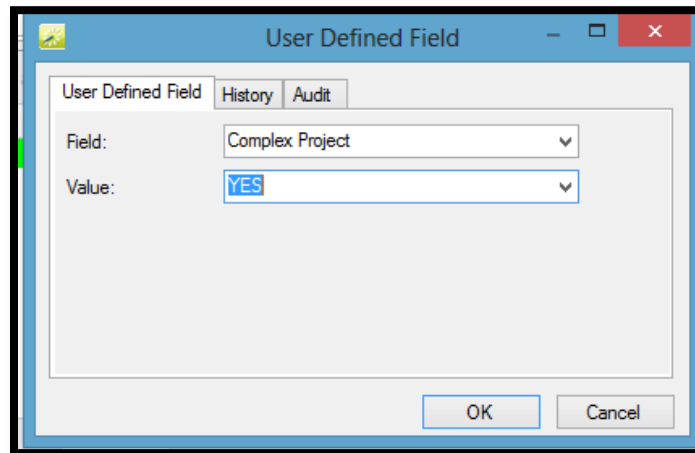
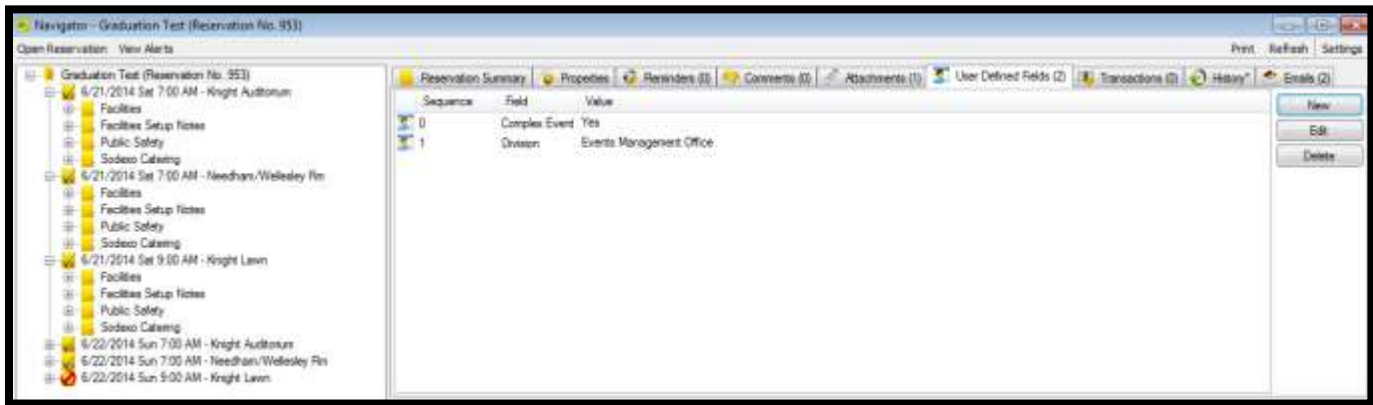
Date	Start	End	Building	Room	Event	Event Type	Status
5/8/2014 Thu	5:00 PM	7:30 PM	LINC	L-152	New Member Forum Meeting	Confirmed	Confirmed

1 Records

New Edit Delete Tools Details Confirmation Close

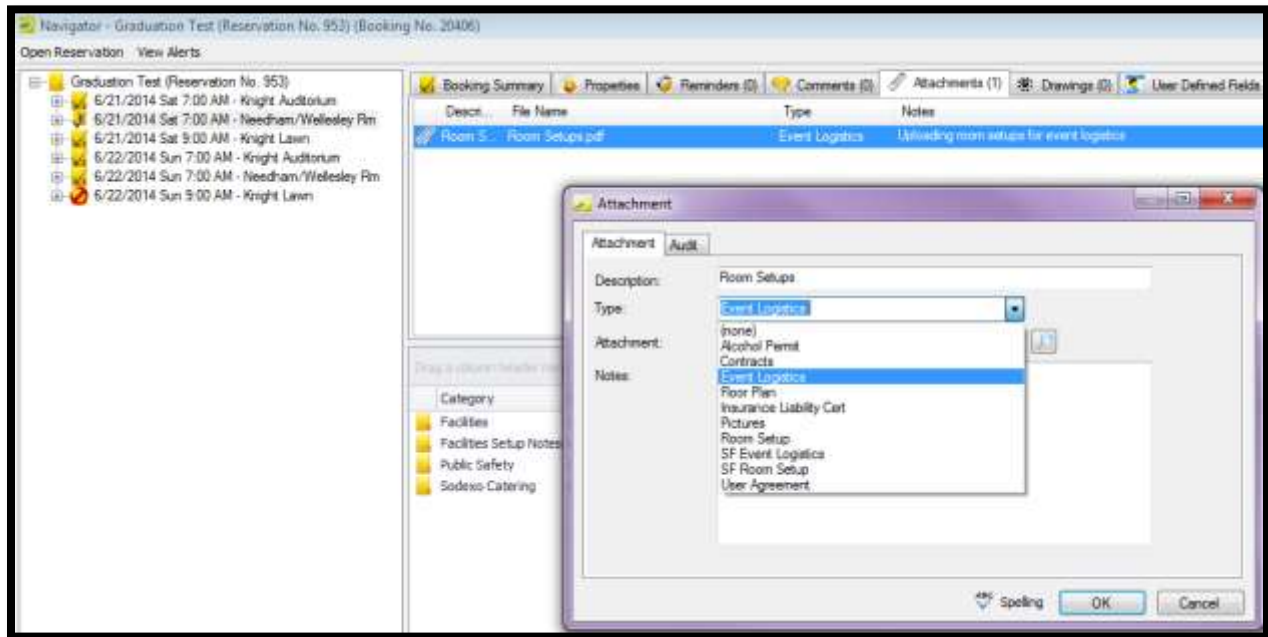
2. Click 'New' if the event is large, 2 or more rooms that require services from facilities, this determines that it will require its own project in TMA. Click the 'New' button and Select Complex Event from the Field dropdown menu. Select "yes" from the Value dropdown. This will group all spaces/rooms associated with this reservation and group them together for facilities so they know all the spaces are affiliated with one event.

## Space Scheduling Reference Guide

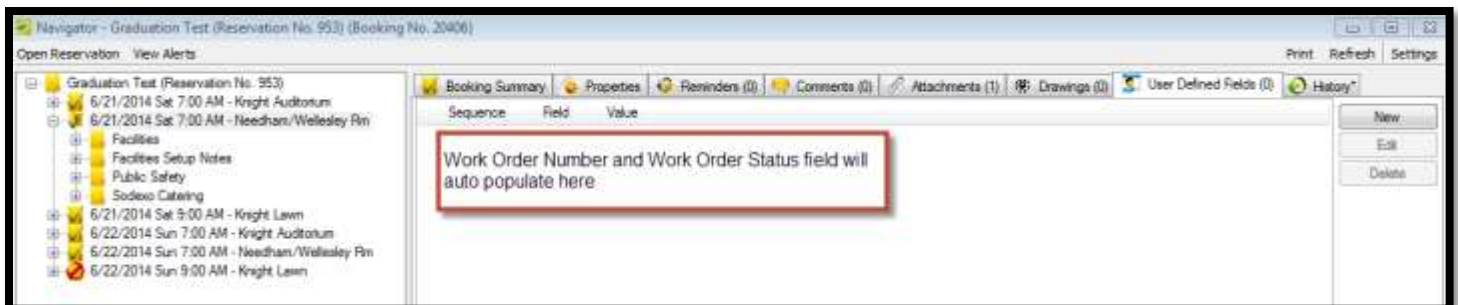


- Click the Attachments tab at the Reservation level and the individual booking levels to check for attachments. If there are attachments, review what they are. If the attachments are a Room Setup diagram or Event Logistics, then click the attachment and select 'Edit' to specify the type of attachment it is. All Room Setups and Event Logistics attachment types are sent to WebTMA and included in the work order for facilities, so you must specify the attachment type if facilities needs to be aware of this information.  
 \*\*\*Please note: as reservations get closer to their date, please check back to review facilities services requested, facilities setup notes, and attachments on the service order

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4. Once the Work Order is created in WebTMA, you can view the Work Order Number and Status assigned to each space. Click on a space/room in the left hand pane in the Navigator window and then click the User Defined Field tab, the Work Order # and Work Order Status fields will be auto-populated from WebTMA.



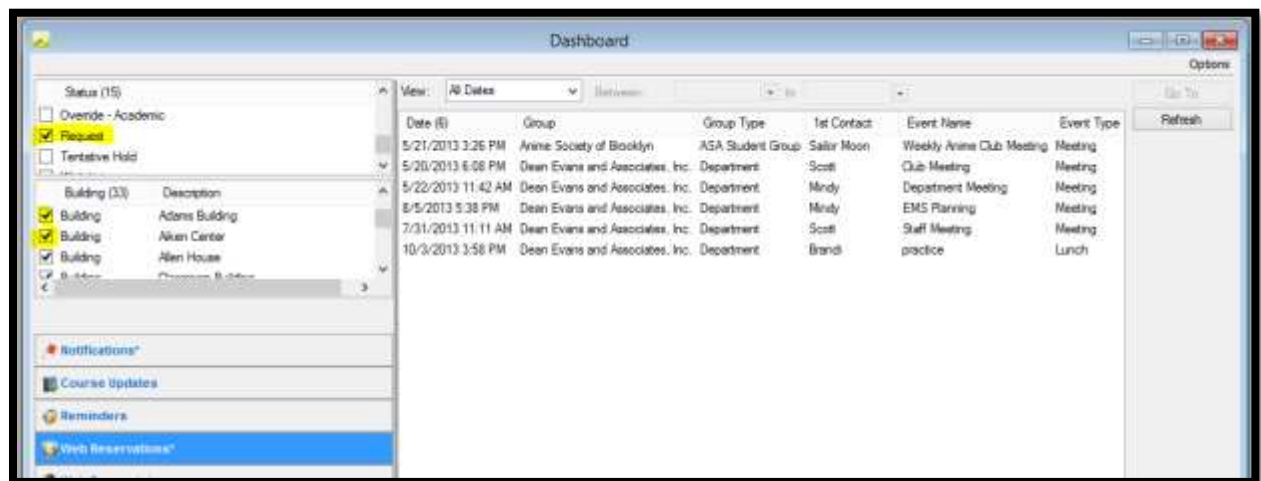
## Space Scheduling Reference Guide

### 10. Open a Request from the Dashboard:

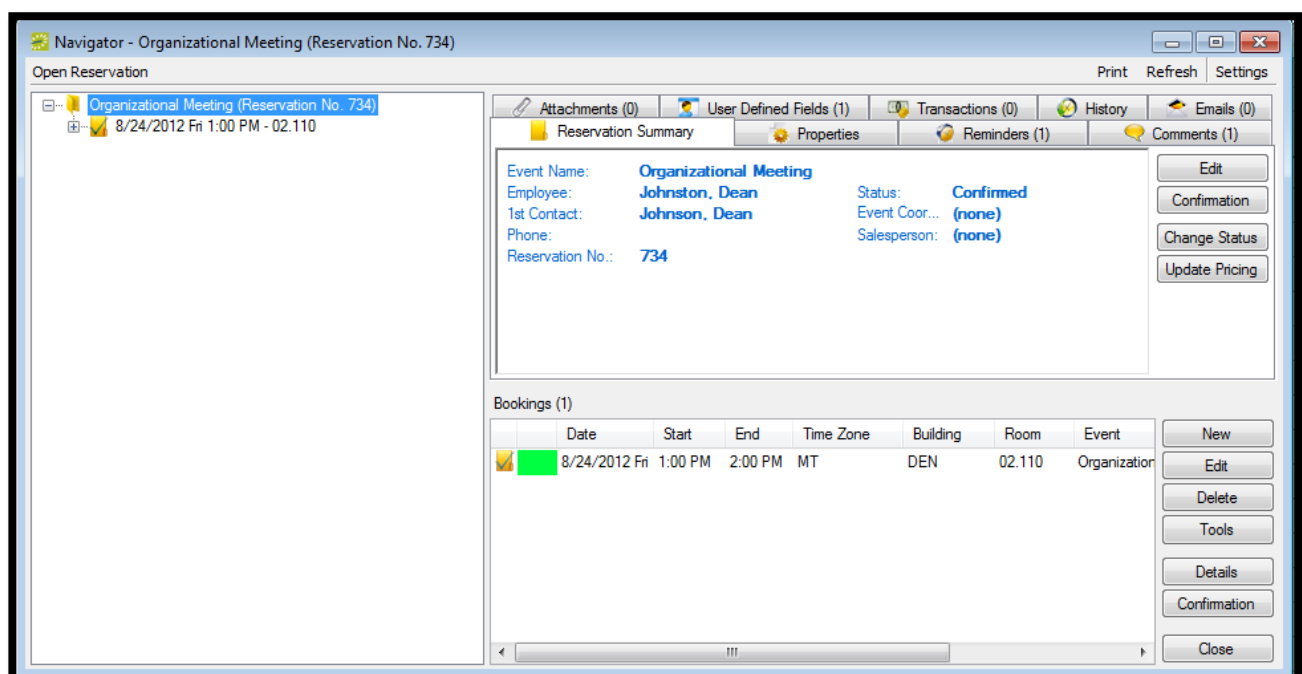
1. Open the Dashboard button to review all web reservations and notifications that are awaiting approval.



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



3. Double-click on the room request in the right-hand window to open the reservation in the Navigator and complete any of the actions described above.



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### 11. How to Create a View:

1. To create your own personal view of rooms to have easy access to, go to Settings → My Views. Create or edit a your view by entering a name of the view in the Description field and then click on the Rooms tab to search and add the specific rooms you prefer to see in your view. Move the rooms to the right hand pane to add them to your view.

