EVENT SCHEDULING QUICK REFERENCE GUIDE

University of Toronto

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Dashboard and Daily Activities

Open a Request (or Notification) 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.
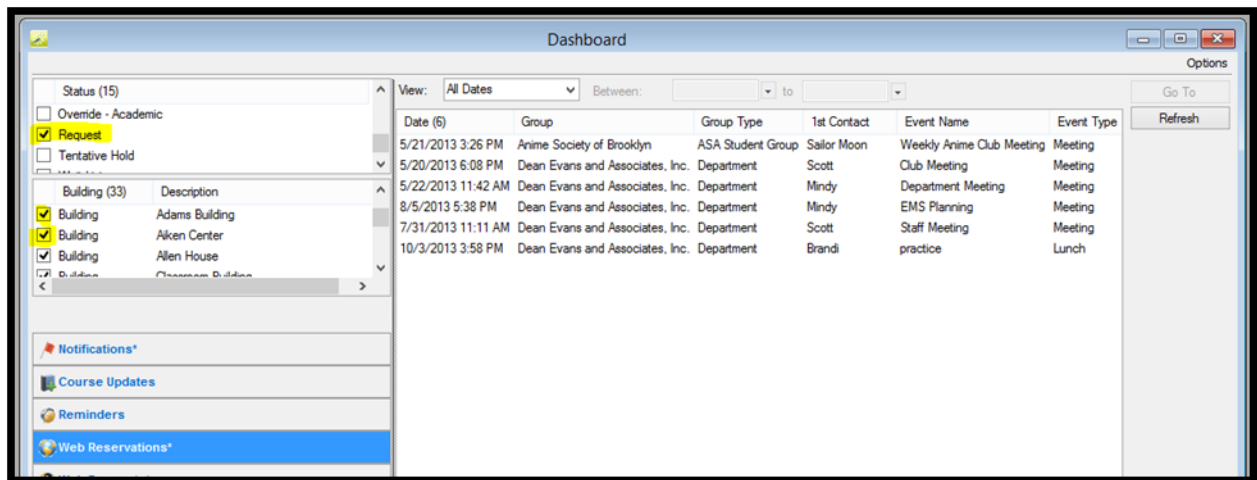
- Notifications: The left-hand window will display each notification rule and the number of new notifications that are applicable to each notification rule. Select a notification rule to see the new notifications. See sample screen shot below.
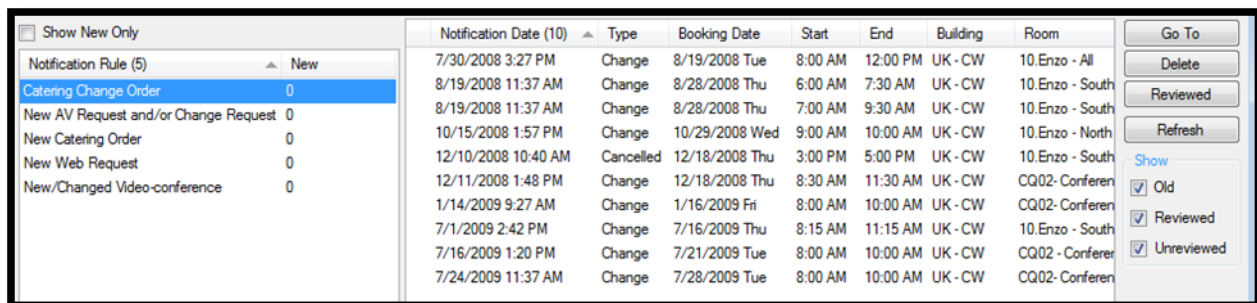
- Double-click on the room request in the right-hand window to open the reservation in the Navigator.
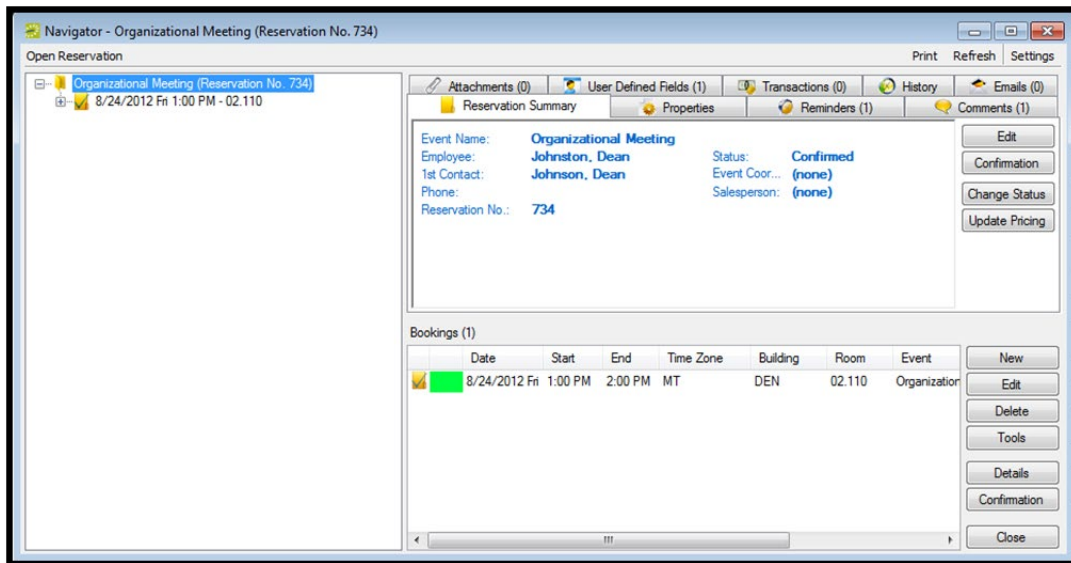
Approve, Deny, or Cancel a Request
- Review the service details added to the room request to determine if additional time is needed.
  - a. If yes, add setup and or breakdown time.
- Review the events scheduled in rooms around this request and determine if this request is suitable (highlight a booking, right click > Go To Book).
- 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.
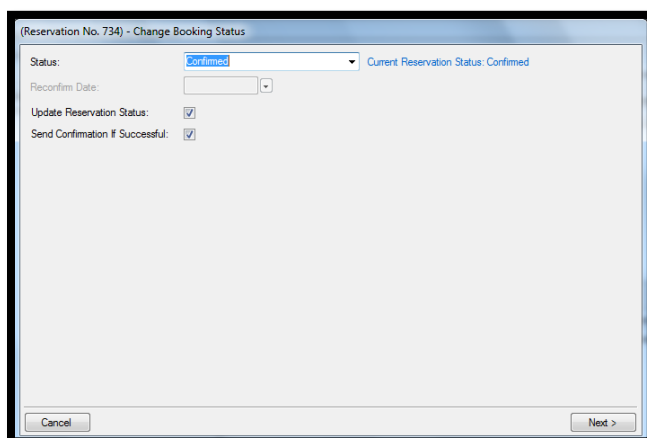
- Select the individual bookings that you would like to change (screen show below). Click Finish.
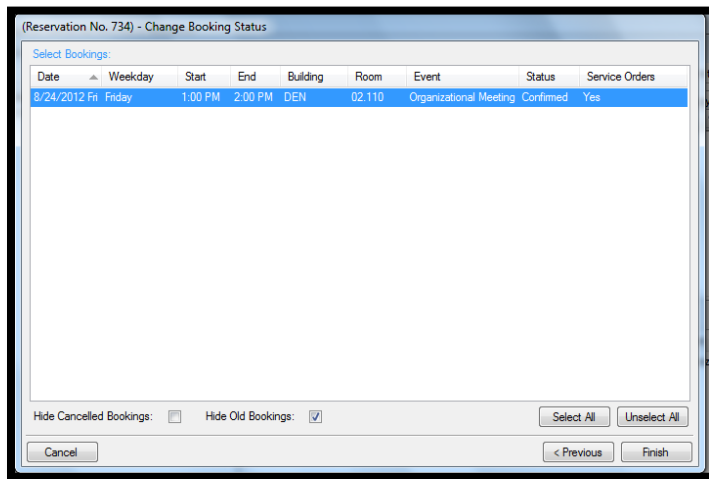
Send a Confirmation Email
- Select the Reservation level of the reservation. This is the top layer in the left-hand pane of the Navigator.
- Click the Confirmation button on the right side of the Navigator window.

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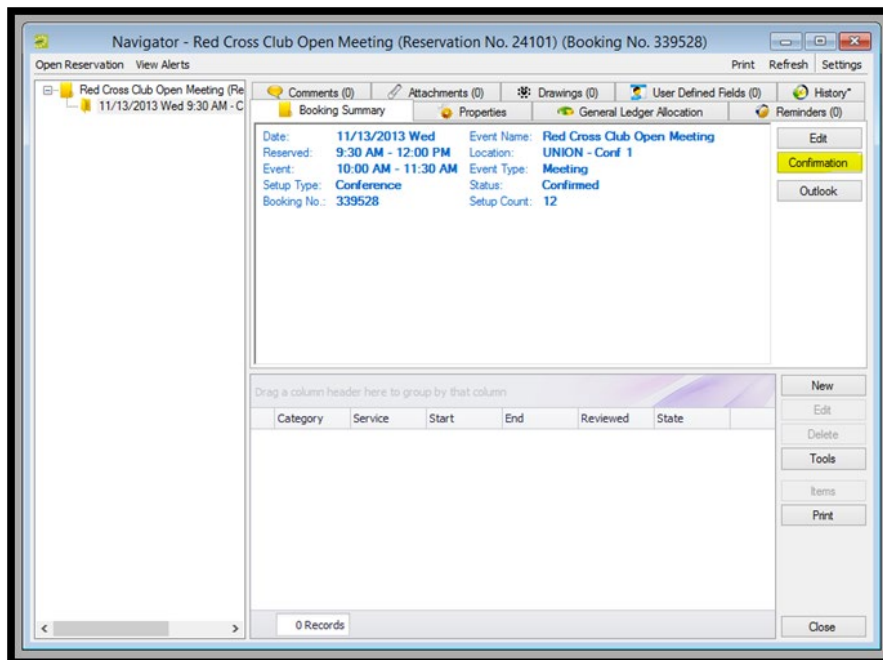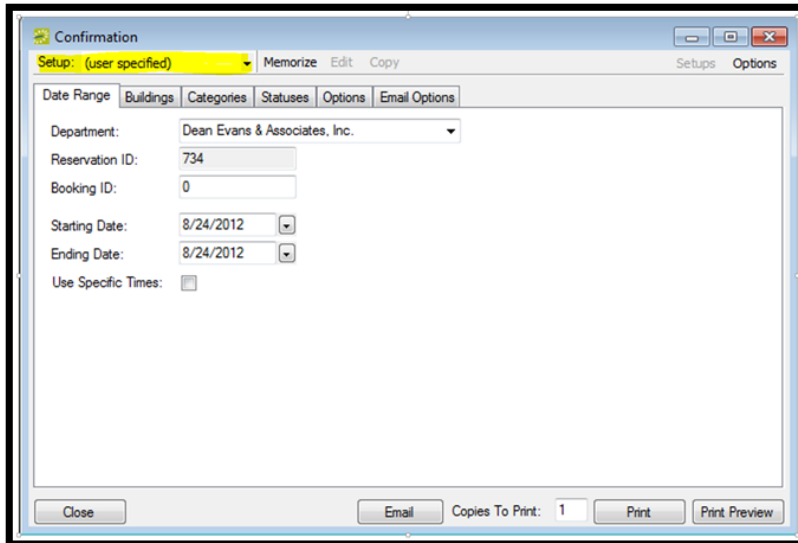 - a. Select a pre-configured ("memorized") confirmation from the Setup: dropdown menu in the top left corner of the window.
  - b. Visit each of the tabs (Date Range, Buildings, Categories, Statuses, Options, & Email Options) to select the appropriate information for this reservation. See screen shot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

- Click Print Preview to see the confirmation. Review the preview for accuracy.
- **Close the preview and click *Email* to send the Confirmation Email.**
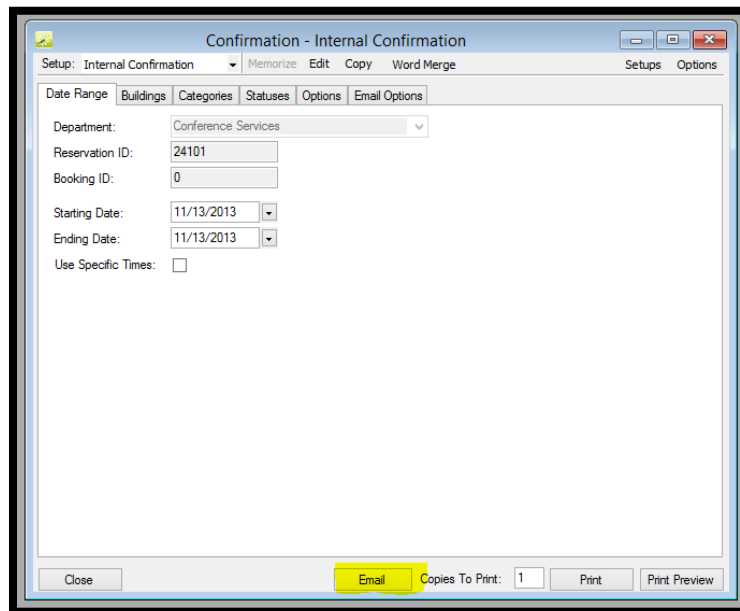
Mark Notification as Reviewed

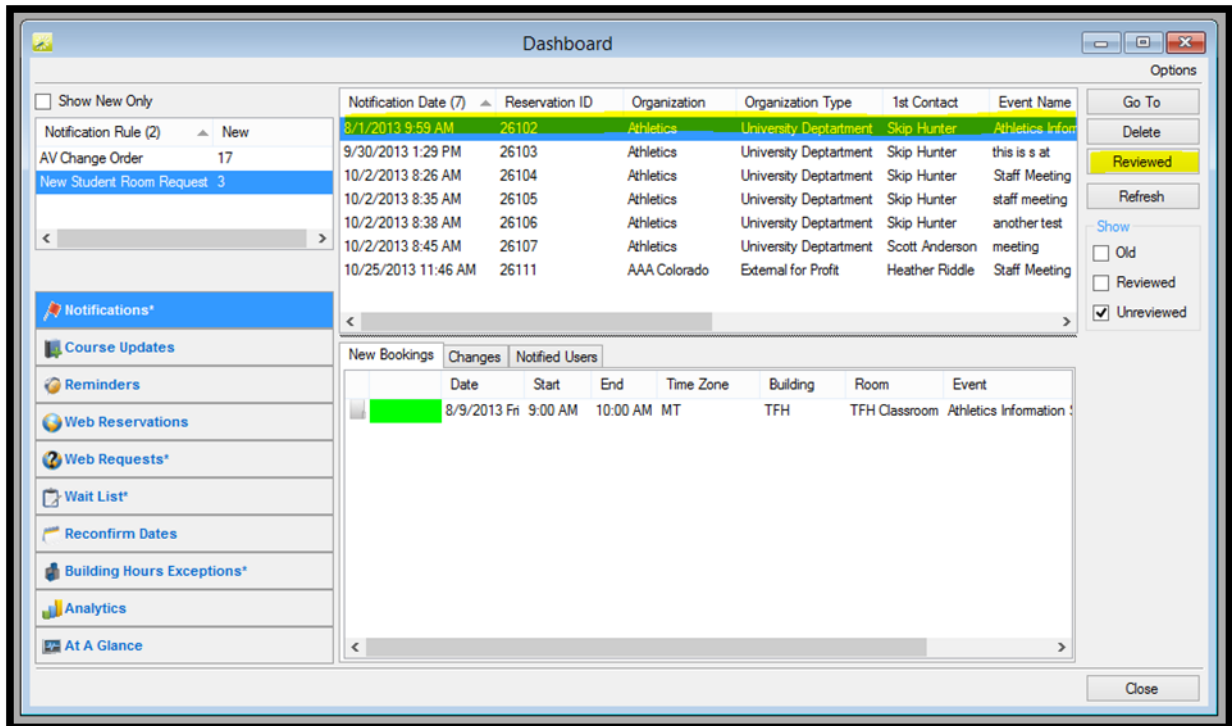- Now that you are finished working on the reservation, close the reservation Navigator to return to the Dashboard.
- If you were working in the "Web Reservations" area of the dashboard, click Refresh. Requests that were processed will disappear from the list.
- If you were working in the "Notifications" are of the dashboard, highlight the room request you just responded to and click Reviewed.

Creating Reservations

Create a Simple 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.
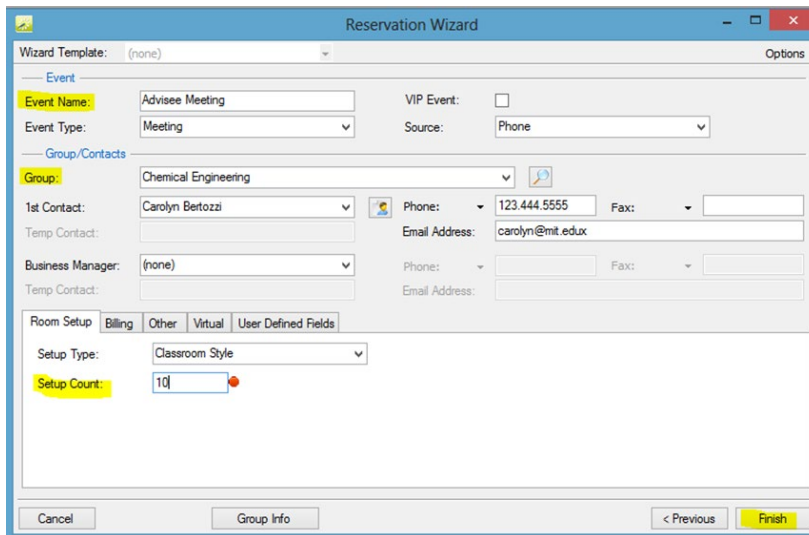
- Select the Book button from the toolbar.

- 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.
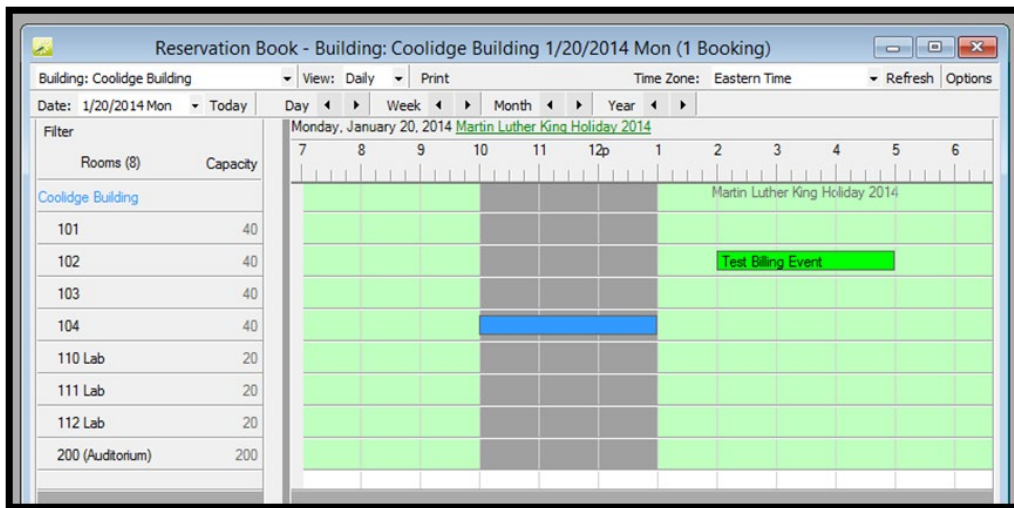
- The Reservation Wizard window will open. Choose a status and click next.
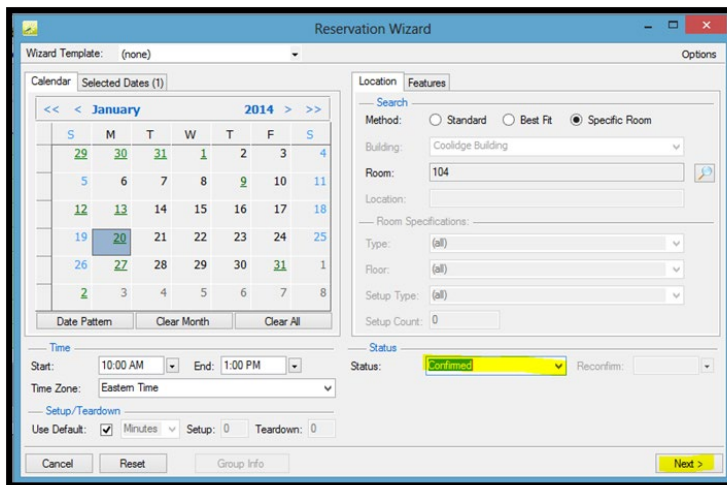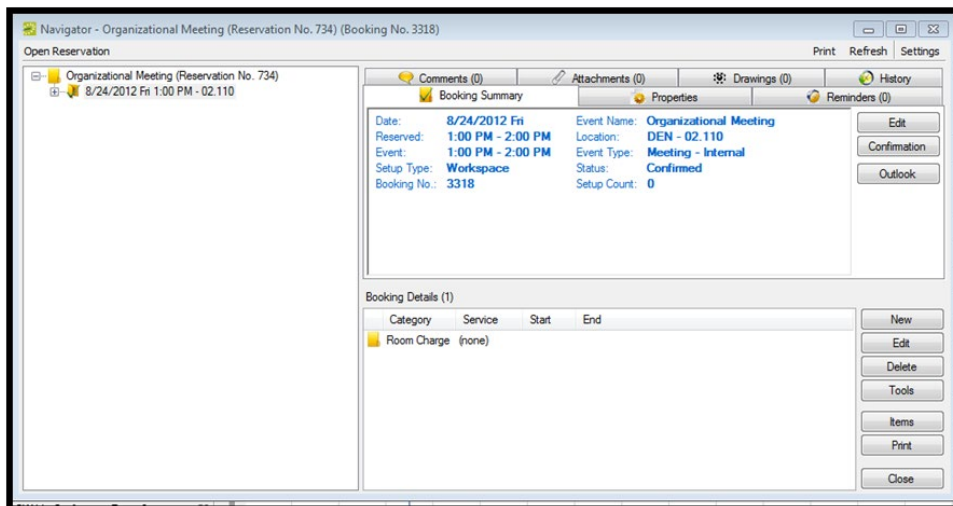
- Complete the reservation by indicating the event name, the group sponsoring the event, and other critical event information. Click Finish.

Add Services or Other Resources

- 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.

Create a Complex Reservation with Wizard
- Use *Wizard* to add a recurrence, a multi-room reservation or to search for specific availability by filter options:
    a. Standard Fit – EMS searches for room(s) that are available on ALL dates/times requested
    b. 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
    c. Specific Room – You choose a specific room
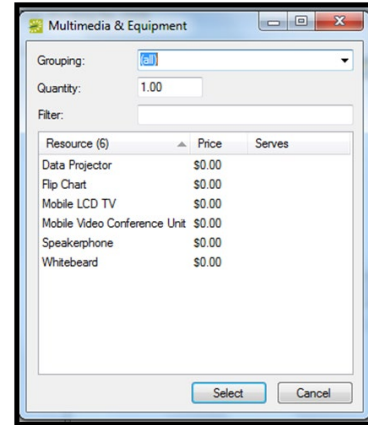- Use *Book* to add single day/single time reservations, if you find it easier than using the Wizard.

Additional Tips

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* to review reservations for a specific customer.
    a. Add comments to Groups to track important information of which all schedulers should be aware.
    b. Add attachments to Groups (e.g., insurance policies).

Using the Navigator (Reservation and Booking Edit Screen)
- 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.

Users Settings and Options

- In Navigator > Settings > Options
  a. At a Glance > Check the following:
      - Reservation Reminders, Attachments, User Defined Fields, Comments.
      - Booking Reminders, Attachments, User Defined Fields, Comments.
- In Book > Options
  a. Automatically Refresh: Every 2, 5 or 10 Minutes (default is Never)
  b. Show '(all)' in Building List
  c. 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