

# 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.

<u>.</u>	Dashboard	- • ×
Status (15) Override - Academic  Request Building (33) Description Building Adams Building Building Aken Center Building Aken Center Building Alen House Compare Building	New:         Al Dates         Between:         to           Date (6)         Group         Group Type         1st Contact         Event Name         Event Type           5/21/2013 3:26 PM         Anime Society of Brooklyn         ASA Student Group Salor Moon         Weekly Anime Club Meeting         Meeting           5/20/2013 6:08 PM         Dean Evans and Associates, Inc.         Department         Scott         Club Meeting         Meeting           5/20/2013 1:142 AM         Dean Evans and Associates, Inc.         Department         Mindy         Department Meeting         Meeting           5/20/2013 1:142 AM         Dean Evans and Associates, Inc.         Department         Mindy         EMS Planning         Meeting           7/31/2013 3:58 PM         Dean Evans and Associates, Inc.         Department         Scott         Staff Meeting         Meeting           10/3/2013 3:58 PM         Dean Evans and Associates, Inc.         Department         Brandi         practice         Lunch	Options Go To Refresh
Notifications* Course Updates Cours		

• 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.

Show New Only	Notification Date (10)	🔺 Туре	Booking Date	Start	End	Building	Room	Go To
Notification Rule (5) A New	w 7/30/2008 3:27 PM	Change	8/19/2008 Tue	8:00 AM	12:00 PM	UK-CW	10.Enzo - All	Delete
Catering Change Order 0	8/19/2008 11:37 AM	Change	8/28/2008 Thu	6:00 AM	7:30 AM	UK-CW	10.Enzo - South	Reviewed
New AV Request and/or Change Request 0	8/19/2008 11:37 AM	Change	8/28/2008 Thu	7:00 AM	9:30 AM	UK-CW	10.Enzo - South	
New Catering Order 0	10/15/2008 1:57 PM	Change	10/29/2008 Wed	9:00 AM	10:00 AM	UK-CW	10.Enzo - North	Refresh
New Web Request 0	12/10/2008 10:40 AM	Cancelled	12/18/2008 Thu	3:00 PM	5:00 PM	UK-CW	10.Enzo - South	Show
New/Changed Video-conference 0	12/11/2008 1:48 PM	Change	12/18/2008 Thu	8:30 AM	11:30 AM	UK-CW	CQ02-Conferen	Old
	1/14/2009 9:27 AM	Change	1/16/2009 Fri	8:00 AM	10:00 AM	UK-CW	CQ02-Conferen	Reviewed
	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 - Conferer	Unreviewed
	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.

Organizational Meeting (Reservation No. 734)	Attachments (0) 了 User Defined Fields (1) 💷 Transactions (0) 🥺 History	🔶 Emails (C							
🗄 🚽 8/24/2012 Fri 1:00 PM - 02.110	Reservation Summary 😓 Properties 🥝 Reminders (1)	Comments (1)							
	Event Name: Organizational Meeting	Edit							
	Employee:         Johnston, Dean         Status:         Confirmed           1st Contact:         Johnson, Dean         Event Coor (none)         Phone:         Salesperson: (none)								
	Reservation No.: 734	Update Pricin							
	Bookings (1)	opuate r num							
		New							
		New							
	Date Start End Time Zone Building Room Event	New							
	Date Start End Time Zone Building Room Event	ation Edit							
	Date Start End Time Zone Building Room Event	ation Edit							

#### 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.

(Reservation No. 734) - Change I	Booking Status		
Status:	Confirmed	Current Reservation Status: Confirmed	
Reconfirm Date:	<b>v</b>		
Update Reservation Status:			
Send Confirmation If Successful:	<b>V</b>		
Cancel			Next >



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

elect bo	oking	S:							
Date	-	Weekday	Start	End	Building	Room	Event	Status	Service Orders
/24/20	12 Fri	Friday	1:00 PM	2:00 PM	DEN	02.110	Organizational Meeting	Confirmed	Yes
lide Can	celled	Bookings:	Hide	Old Bookin	ngs: 🔽			Select	All Unselect All

#### 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.

Reserved: Event: Setup Type: Booking No.:	Conference 339528	2:00 PM 11:30 AM	Location: Event Type: Status: Setup Count:	Confirmed			Edit Confirmation Outlook
Event: Setup Type: Booking No.:	10:00 AM - Conference 339528	11:30 AM	Event Type: Status: Setup Count:	Meeting Confirmed	1		Outlook
Booking No.:	339528 reader here to		Setup Count:				
							New
							140.14
Category	Drag a column header here to group by that column						Edit
	Service	Start	End	Reviewed	d State	-	Delete
						-	Tools
							Tools
							Items
							Print



- 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.

😤 Confirmation	÷	
Setup: (user specified)	Memorize Edit Copy	Setups Options
Date Range Buildings	Categories Statuses Options Email Options	
Department:	Dean Evans & Associates, Inc. 👻	
Reservation ID:	734	
Booking ID:	0	
Starting Date:	8/24/2012	
Ending Date:	8/24/2012 .	
Use Specific Times:		
Close	Email Copies To Print: 1	Print Print Preview

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

<b>*</b>	Confirmation - Internal Confirmation	- • •
Setup: Internal Confirm	nation - Memorize Edit Copy Word Merge	Setups Options
Date Range Buildings	Categories Statuses Options Email Options	
Department:	Conference Services V	
Reservation ID:	24101	
Booking ID:	0	
Starting Date:	11/13/2013 •	
Ending Date:	11/13/2013 •	
Use Specific Times:		
Close	Email Copies To Print: 1 Print	Print Preview
0030	Copies to think.	r in a r leview



#### 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.

<b>a</b>		Dashboa	rd				Options
Show New Only Notification Rule (2)	Notification Date (7) 8/1/2013 9:59 AM 9/30/2013 1:29 PM	Reservation ID 26102 26103	Organization Athletics Athletics	Organization Type University Deptartment University Deptartment		Event Name Athletics Infor this is s at	Go To Delete
AV Change Order 17 New Student Room Request 3	10/2/2013 8:26 AM 10/2/2013 8:35 AM 10/2/2013 8:35 AM 10/2/2013 8:38 AM 10/2/2013 8:45 AM 10/25/2013 11:46 AM	26104 26105 26106 26107 26111	Athletics Athletics Athletics Athletics Athletics AAA Colorado	University Deptartment University Deptartment University Deptartment University Deptartment External for Profit	Skip Hunter Skip Hunter Skip Hunter	Staff Meeting staff meeting another test	Refresh Show Old Reviewed
Rotifications*	<     New Bookings Chance	es Notified Users				>	✓ Unreviewed
Reminders     Web Reservations	Date 8/9/20	Start 013 Fri 9:00 AM	End Time Zone 10:00 AM MT		m Even Classroom Athleti	-	
Web Requests*							
Reconfirm Dates     Building Hours Exceptions*							
Analytics	<					>	
							Close



# **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.

Book

Building: Coolidge Build	ling	- Vie	ew:	Daily	-	Print						Ti	me Zo	one:	Eastern	n Time		- Refi	resh Options
Date: 1/20/2014 Mon	- Today	Day	4	•	Week	4	•	Mon	th 🖣		1	Year	•	•					
Filter			day.		ary 20,		-			ng H			4						
Rooms (8)	Capacity	7		8		9	10	0	11		12p		1		2	3	4	5	6
Coolidge Building															Martin L	uther Kin	g Holiday	/ 2014	
101	40																		
102	40														Test E	Billing Eve	nt		
103	40																		
104	40																		
110 Lab	20																		
111 Lab	20																		
112 Lab	20																		
200 (Auditorium)	200																		

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

izard Templa	. (no	mej			•				C	Option
alendar Se	lected Da	tes (1)					Location Feat	tures		
<< <	Januar	y		20	14 >	>>	Search Method:	○ Standard ○ Best Fit ● Specific Room		
S	м	т	W	т	F	S				
29	30	31	1	2	3	4	Building:	Coolidge Building	Y	
5	6	7	8	2	10	11	Room:	104		P
12	<u>13</u>	14	15	16	17	18	Location: — Room Spec	dications:		
19	19 20 21		20 21 22 23 24				Type:	(all)	~	
26	27	28	29	30	<u>31</u>	1	Floor:	(all)	~	
2	3	4	5	5 6 7 8			Setup Type:	(all)	v	
Date Pa	Date Pattern Clear Month Clear All		-	Setup Count:	0					
— Time —							- Status			
itart:	10:00 A	M	End:	1:00 PN	•	]	Status:	Confirmed   Reconfirm:		*
ime Zone:	Eastern	Time				~				
_ Setup/Tea										
Jse Default:	✓ Mir	nutes v	Setup:	0 .	Teardown	: 0				



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

lizard Template:	none) 👻						Option
- Event							
Event Name:	Advisee Meeting		VIP Event:				
Event Type:	Meeting V		Source:	Phone		~	
- Group/Contacts							
Group:	Chemical Engineering			v 🔎			
Ist Contact:	Carolyn Bertozzi 🗸	12	Phone: -	123.444.5555	Fax:	-	
Femp Contact:		Landard	Email Address:	carolyn@mit.edux			
Business Manager:	(none)		Phone: •		Fax:	÷ .	
Temp Contact:			Email Address				
Room Setup Billing		_					
Setup Type:	Classroom Style	·					
Setup Count:	10						

#### Add Services or Other Resources

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

Savigator - Organizational Meeting (Reservation No. 734) (B		
Open Reservation Organizational Meeting (Reservation No. 734)	Print           Print           Properties           Booking Summary           Properties           Properties	Refresh Settings
	Date:         8/24/2012 Fri         Event Name:         Organizational Meeting           Reserved:         1:00 PM - 2:00 PM         Location:         DEN - 02.110           Event:         1:00 PM - 2:00 PM         Event Type:         Meeting - Internal           Setup Type:         Workspace         Status:         Confirmed           Booking No.:         3318         Setup Count:         0	Edit Confirmation Outlook
	Booking Details (1) Category Service Start End	New
	Room Charge (none)	Edit
		Delete
		Tools
		Items
		Print
		Close

• 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.

Grouping:	(8)			
Quantity:	1.00			
Filter:				
Resource (6)		Price	Serves	
Data Projector		\$0.00		
Flip Chart		\$0.00		
Mobile LCD TV		\$0.00		
Mobile Video Conference Unit		\$0.00		
Speakerphone		\$0.00		
Whitebeard		\$0.00		
	_	Selec	t Cancel	

#### 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