UNH Event Services

Managing Space

Simple Reservations and Confirmations

About EMS

EMS is software that manages the tracking of class/meeting/event reservations in all campus space* and also tracks requests for parking on campus.

SUPPORT

Do not contact EMS Software Support Services.

If you need more information or support, please submit a service request here.

SPACE ADMINISTRATORS / OWNERS

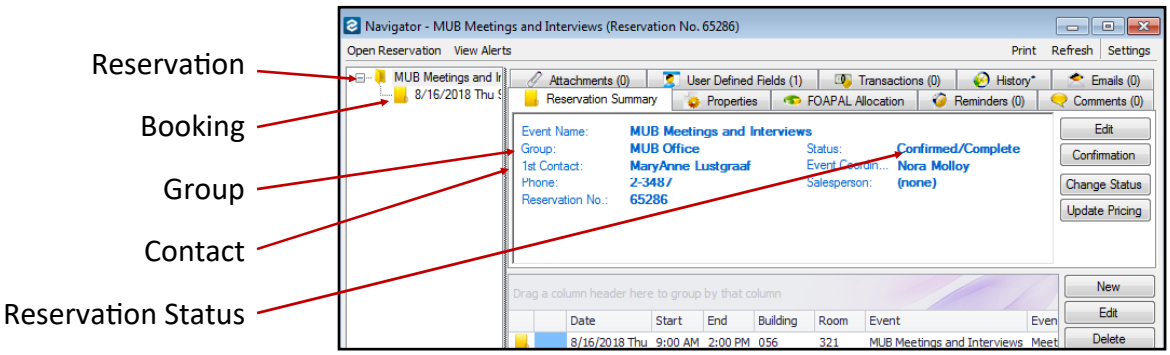
A space administrator / owner is the person responsible for managing a space, and subsequently responsible for managing the reservations for that space. Some space administrators are also "service providers," may also manage resources both with or without service orders.

ONLINE REQUEST TYPES

- Student Collaboration Space and Lactation Room requests submitted through the website are automatically approved and staff does not need to interact with the reservation. The staff can look at the reservation to see who has the space reserved if necessary.
- Most other spaces in the system, once requested online, need to be confirmed by a staff member.
- This document covers
    - Basic EMS Reservation "anatomy" language/vocabulary
    - Basic EMS Desktop Client language/vocabulary to work within basic reservations
    - Creating a new reservation from the "book"
    - Viewing and confirming a reservation submitted online (web request)
    - Sending Confirmations for a reservation.

Vocabulary for Working Within Reservations

- **Reservation:** A reservation is the "parent" of any event in the system and may contain one or more bookings. Each reservation is assigned a unique number.
- **Booking:** A booking is a subset of a reservation. If there are multiple rooms related to an event, or if the event has multiple dates, then each different room/date will be a different "booking" under the parent "reservation". Each booking is assigned a unique number.
- **Group:** A group is the department or organization responsible for the event—the customer.
- **Contact:** A contact is the individual person connected to the group that is responsible for the event.
- **Web User:** A web user is someone who submits the online request for space or services. The web user may or may not be the same as a contact on a reservation.

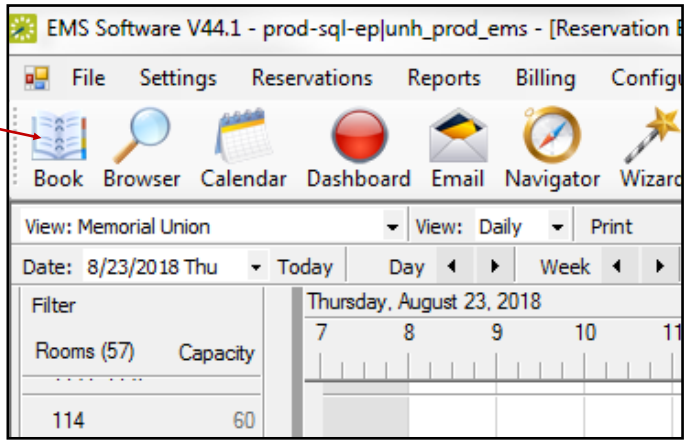


Vocabulary for Reservation Workflow

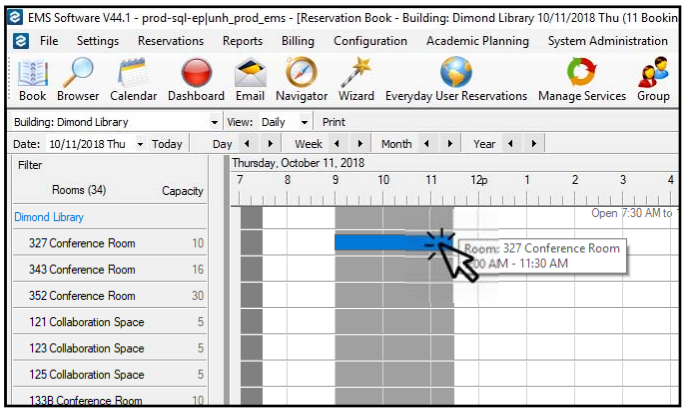
- **Book:** The book is the view that gives a space administrator an overall view of what is happening in their space on a given day.
- **Dashboard:** The dashboard, and specifically the "everyday user reservations" within the dashboard window, is where a space administrator will see any new requests that have been submitted and need to be reviewed for approval.
- **Navigator:** This is the view of a reservation with all of the bookings, dates, spaces, times, categories and resources visible. This is where you can get the "big picture".
- **Status:** Status is applied to an entire reservation as well as to individual bookings. In reality, the status field indicates where in the workflow that actual room reservations are. The status of the reservation or booking is controlled by the space owner. Bookings and reservations usually have the same status, but they can be different.
- **Event Time:** Is applied to a booking and is the actual advertised event start time.
- **Reservation Time:** Is applied to a booking and includes any set up and breakdown time before and after the event time.

Create a Reservation from the Book

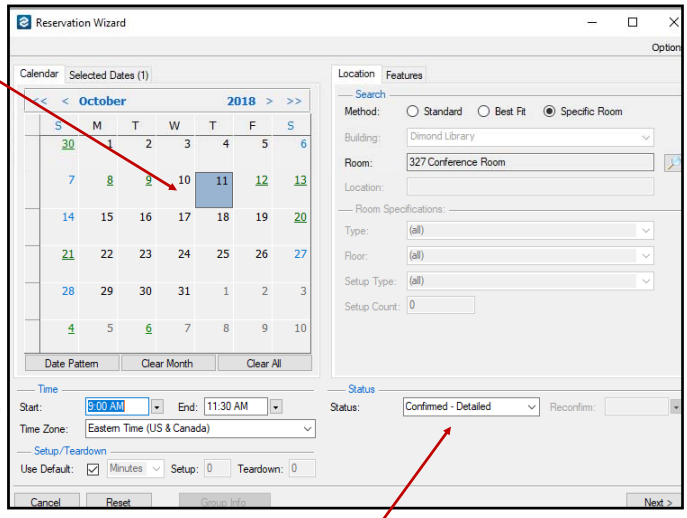
- Access the Book from the icon in the top toolbar.
- Check to see what building or view you are looking at.
- Use the dates, or use the arrows next to the dates to navigate back and forth between days/weeks.



- Locate the room and available time.
- Click and drag and release and the window to enter details will pop up.

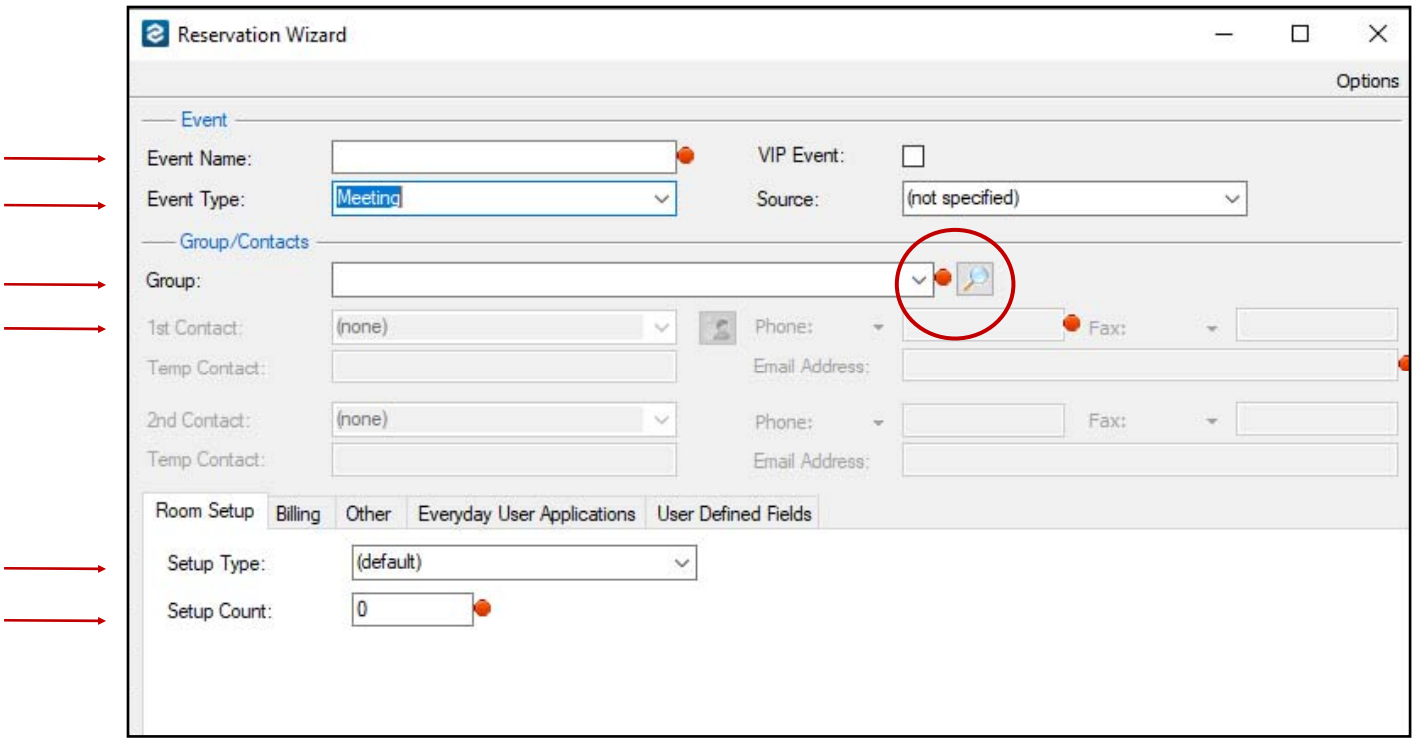


- Your date will already be selected based on your click and drag. If this is a recurring meeting, use the calendar, hold down the "shift" button to select the multiple dates.
- The event time matches what you set with the "click and drag." Use the Setup/Teardown in the bottom left corner to adjust the reservation time to be longer than the event time if there is a set up or breakdown necessary or a gap required between events.
  The start and end time should always be the actual time of the event. This is used in reporting for Campus Safety.
- Status should be "Confirmed/Complete" unless the space hold is for maintenance or an event that does not yet have all the details.
- Click next in the bottom right corner.



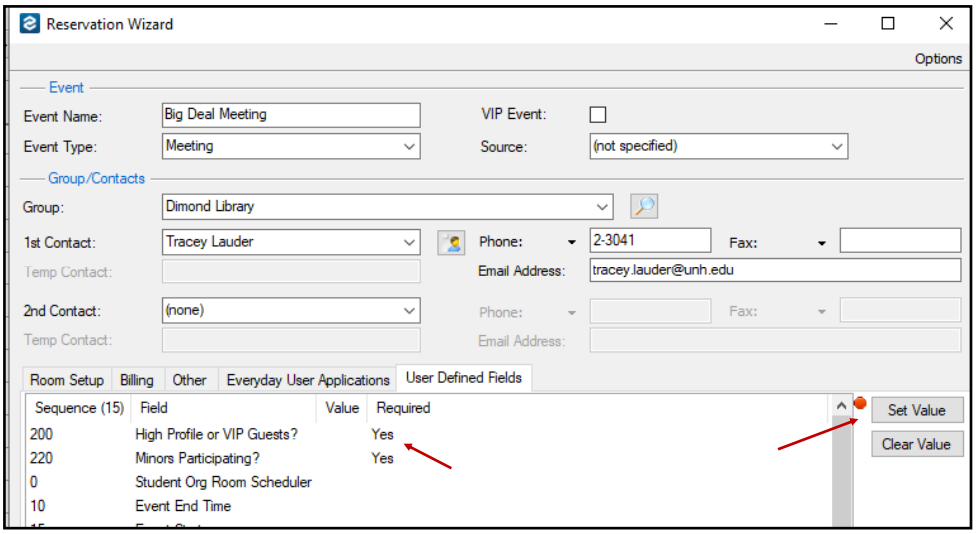
Create a Reservation from the Book
(continued)

- **EVENT NAME:** Enter a name and event type for the event. Use spelling and capitalization as this can show up in public places.
- **EVENT TYPE:** Enter the event type. Choose what is close to the type of event that is taking place. If is it a concern to have a particular event show up on the public calendar, use the "not on public calendar" event type. The event information will not be visible, but the room will show as booked.
- **GROUP:** Use the magnifying glass to search for a group. Enter at least 3 letters of a key word. Try different options if you can't find the group. You can always go "up a tier" if necessary. For example, if you can't find the "Accounting Department," you can use "Paul College" and put Accounting Department in the event title. (i.e. Accounting Department Meeting)
    - All recognized student orgs have accounts. So if you don't see them, they are not approved as a student organization and should not be reserving space.
- **CONTACT:** After the Group is populated, you will have the ability to select a contact if it is pre-programed or manually enter contact under "temporary".
- **SET UP TYPE:** Unless you are doing a custom room set up, leave the setup type as "Default." The default set up type for most rooms is "As Is" which means the client uses the existing set up.
- **SET UP COUNT:** Set up count is the number of people that are expected. Real estimates are necessary. Do not just put in "1" to get through quickly.
- Click finish in the bottom right corner you will be prompted to answer "User Defined Fields (UDFs.)"



Create a Reservation from the Book (continued)

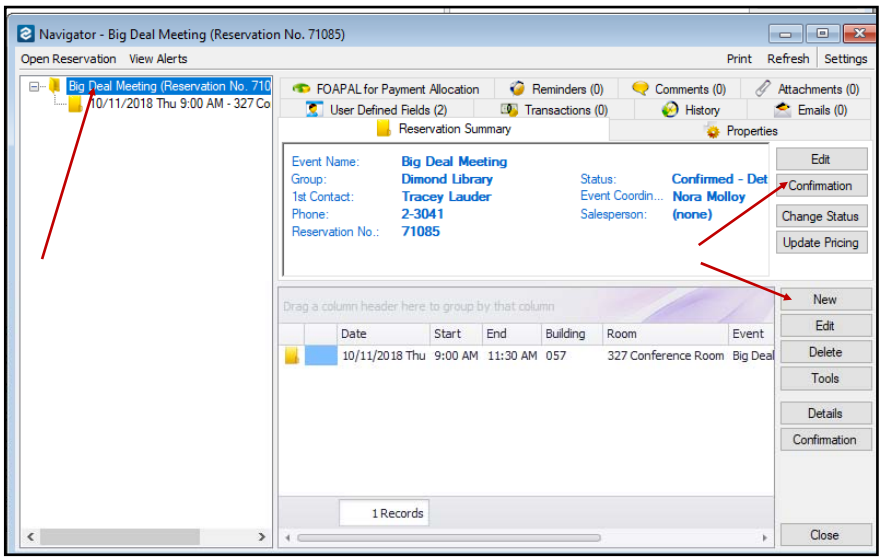
- **USER DEFINED FIELDS:** Only the first two UDFs are required. These two questions about High Profile guests and Minors are campus risk management mechanisms. if you are creating a reservation for a group you must ask them these questions before completing the reservation.



- **HIGH PROFILE GUESTS**: High profile and VIP guests include any state or federal official or candidate for political office, any prominent alum or donor to the University, or any speaker or guest that may attract attention to the event for their prominence or the subject matter they are speaking about. Multiple names can be entered. Please submit information for guests and speakers even if their participation is not yet confirmed. If unsure if a person qualifies to be "high profile or VIP," please include them. The comments section should include appropriate information such as guest's organization, title, speaking topic or indicate if they are a non-speaking guest/participant.

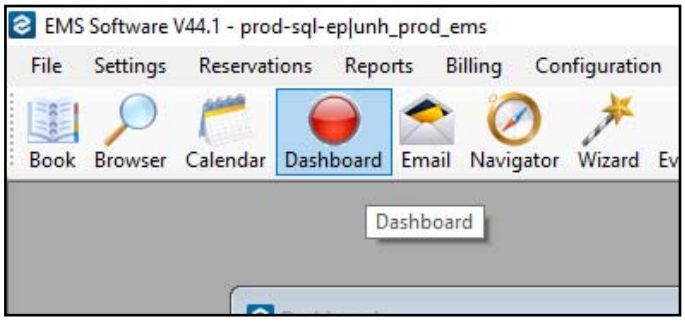
- **MINORS:** Minors include any participants, other than UNH students, who are under the age of 18. If you click yes, you will be given dropdown selections to define how minors are participating.

- Click finish in the bottom right corner. Your reservation is complete and you can close the window, send a confirmation, or, optionally, you can highlight the reservation in the top left, then click new in the bottom left box and initiate another booking attached to the same reservation.



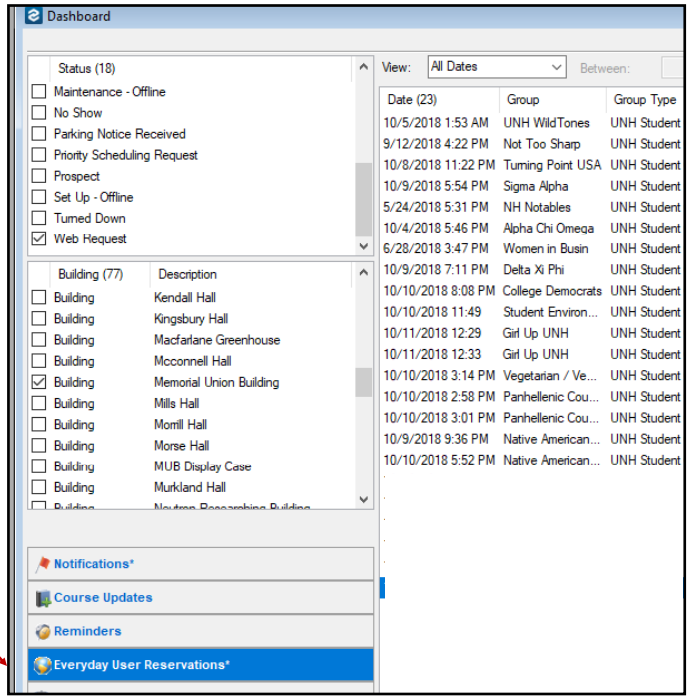
Completing a Web Request from the Dashboard

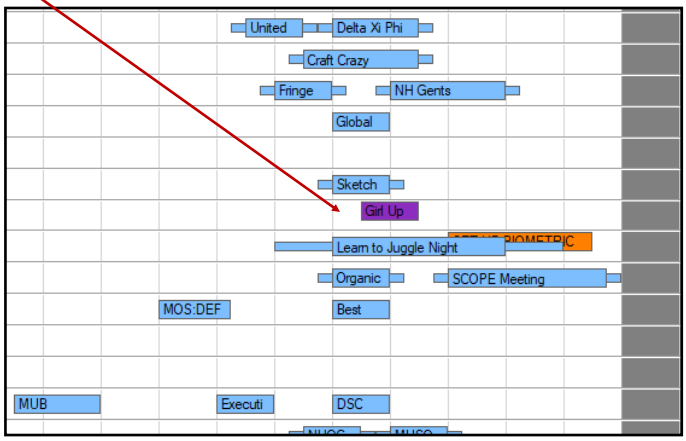
Use the Dashboard Icon at the top of the page to view if there are web requests for space reservations waiting to be approved.



OPENING THE DASHBOARD

- It is critically important that you are looking at the correct filters to review your web requests.
- **STATUS:** select "web request."
- **BUILDING:** select your building or view.
- Select "Everyday User Reservations." Everyday user is a term for a web user, a person submitting a request online.
- The requests waiting to be processed will show up in the screen on the right.
- Events in "web request" status will also appear in the Book view in a purple color.
- Note that while an event in "web request" status can be seen in the dashboard and the book, it is not actually blocking/holding space until you process it.
- It is possible for two different requests to be submitted for a space, be in "web request" status and overlap in time. Unless a policy dictates that one request take precedence over another, you would reference the time that the request was submitted and determine the priority based on first-come-first-served. Look for a different room and/or otherwise communicate as appropriate with both clients.

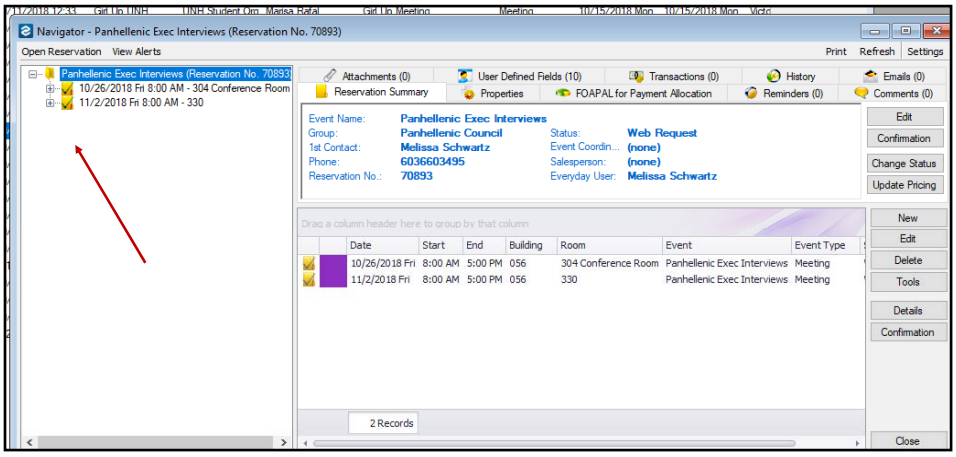




Completing a Web Request from the Dashboard (continued)

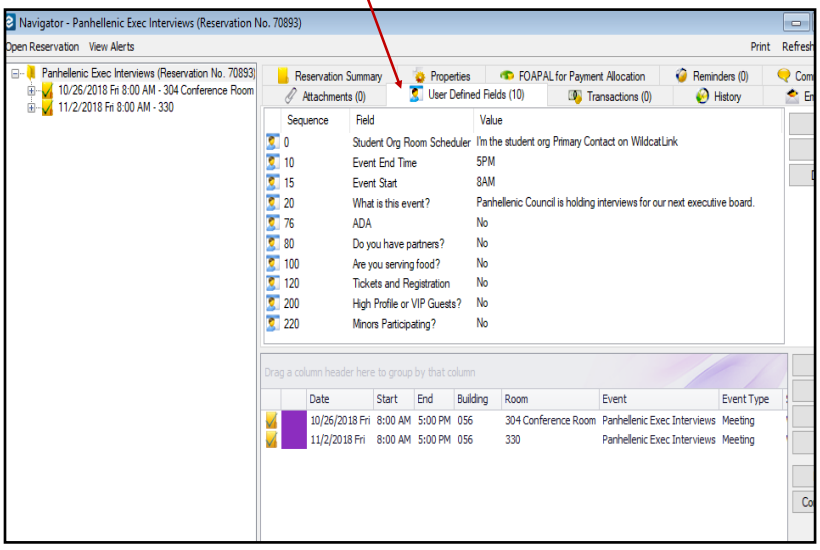
To process a web request, double click on the request from the book or the dashboard and it will open the request in the Navigator view.

- On the left you can see if the Reservation request contains one booking, or multiple bookings. When you process this request, you will have the option to approve one or all of these bookings.



- When in the Navigator view, be aware if you have selected, on the left, to look at the Reservation, or one of the Bookings. What you have selected on the left will change what you are able to see and do on the right side of the screen.

- With the Reservation selected, click on the tab "User Defined Fields." These are the supplement questions asked of the Web User to explain more about their event.



  - Most important you can verify the time they are requesting is the same as the actual event time.

  - Read the explanation they give for the event. That can often explain what an event title doesn't convey.

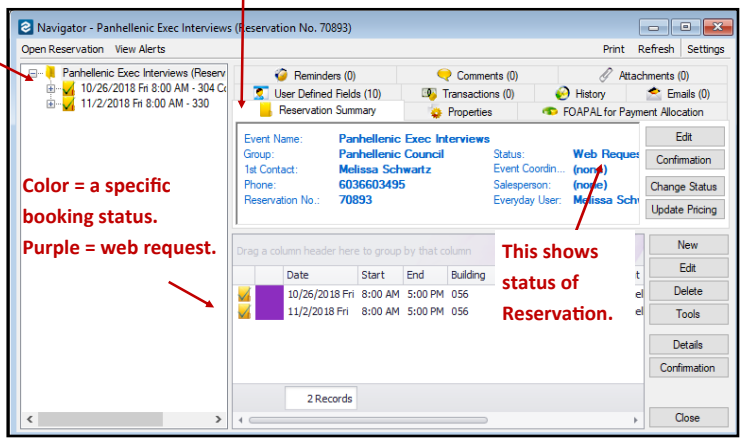
  - The High Profile Guest and Minor questions trigger notifications to the Campus Scheduling Administrator if they have been answered "yes". If you see someone has answered "yes" to the High Profile guest, hold off approving the request until you hear from the Campus Scheduling Administrator who can determine if the presence of this guest requires an special actions. You do not need to do anything if you see a "yes" to minors.

  - Other questions that appear or not are determined based on the parameters set in the specific request form that was set up to request this particular space.

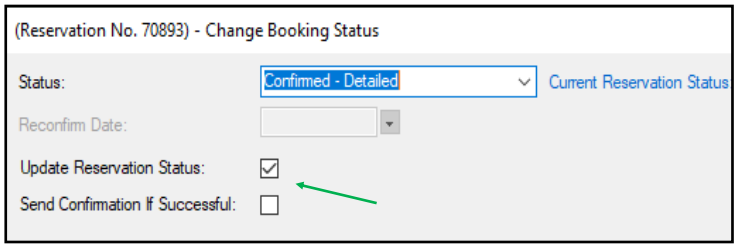
Changing the Status on a Web Request (or any reservation)

Assuming that you are ready to approve a Web Request, you need to change the status and send a confirmation.

- With the Reservation selected on the left, and the Reservation Summary tab selected on the right, click “Change Status” button.



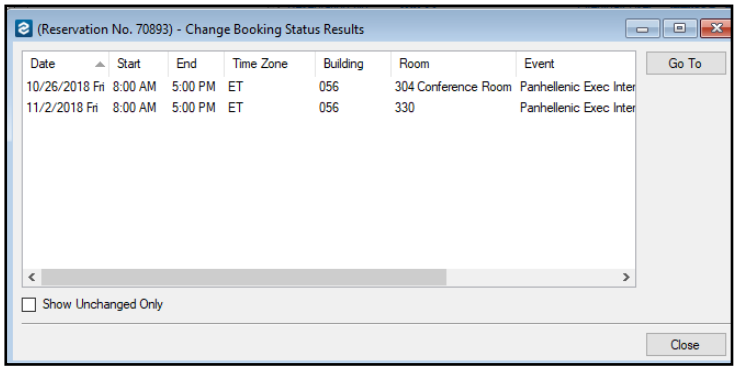
- Select “Confirmed—Detailed” if you have all of the information about the event completed and there are no outstanding questions.
  Update Reservation Status—check yes
  Send Confirmation if Successful—check no
  Click “Next”



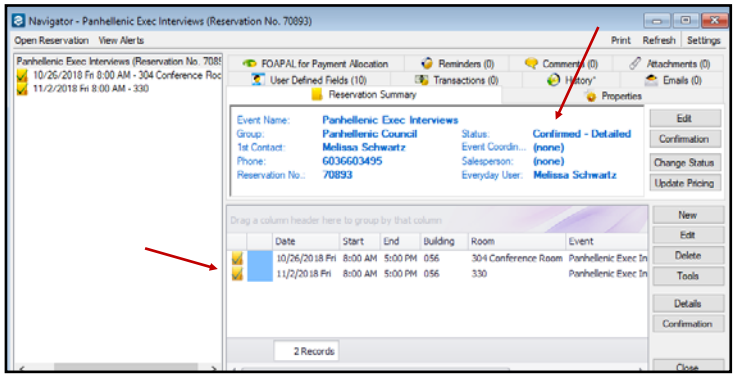
- On the next page, all of the bookings related to the reservation appear. You have the ability to choose one or all of the bookings to change the status on. Make your selection and click “Finish”

- You can follow this same process to change a Status to “cancelled” if you are not approving the request, or if a client requests to cancel a previously approved booking/reservation.

- A screen showing the bookings you just changed pops up and you can review if needed and close the screen.



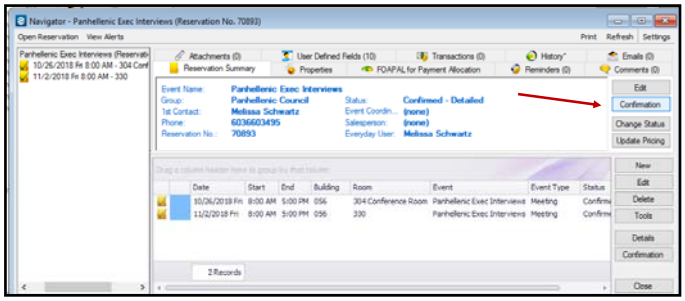
- You will be returned to the Navigator view and see the statuses have been updated. The name of the Status in the upper right confirms the status of the Reservation is changed. The change in color (blue) on the Bookings in the bottom screen shows which bookings have the new status.



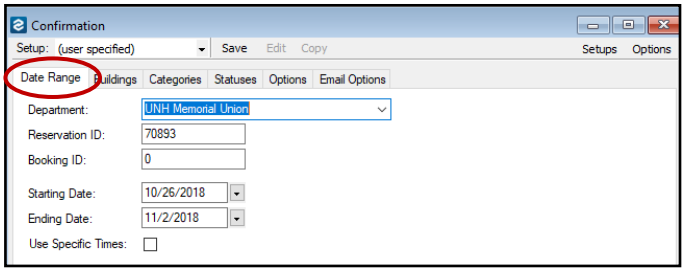
Sending Confirmation of an Approved Web Request

When ready to approve a Web Request, you need to change the status and send a confirmation to the client.

From the Navigator view, and with the Reservation selected in the left panel, click “Confirmation” on the right of the screen.

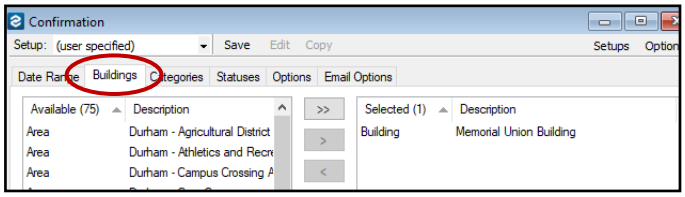


The first time you send a confirmation, you have to make a number of choices to decide how you want the confirmation to look and what information you want it to include. This is done by navigating through the tabs at the top of the Confirmation screen.



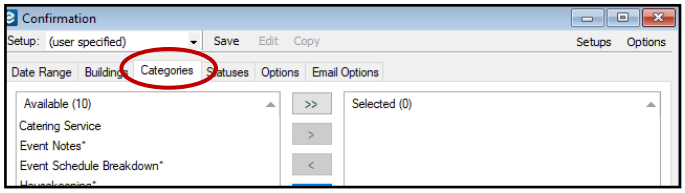
Date Range Tab

- Make sure your department is selected.
- Reservations and dates will be preset. Only in special circumstances would you need to change these to narrow down which bookings you want to confirm.



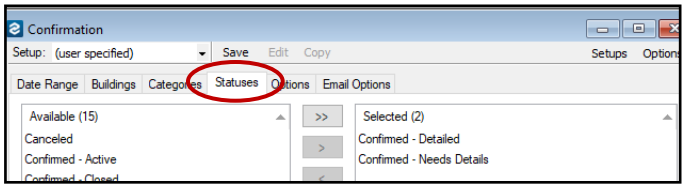
Buildings Tab

- Make sure only your building is chosen and appears in the right side panel.



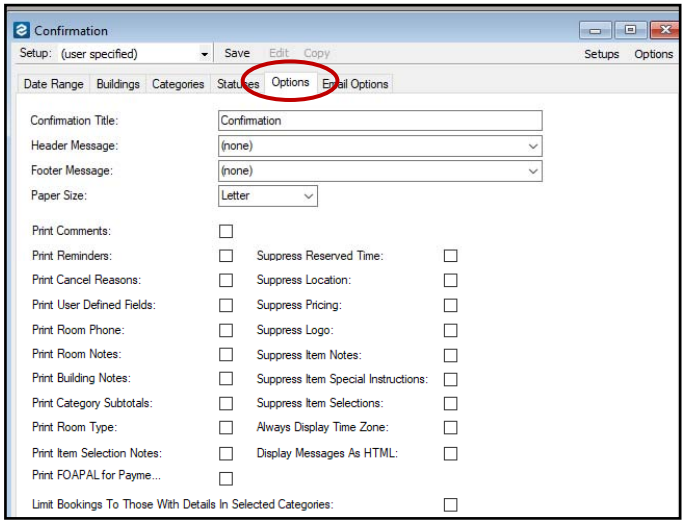
Statuses Tab

- Select the statuses you want to include. Usually this is “Confirmed/Detailed”, but confirmations are often sent with “Confirmed-Needs Details” status so that a client knows the space is held for them but still requires follow up.



Categories Tab

- Unless you are approving complex reservations and regularly use these categories, do not include any of them on the right hand panel.

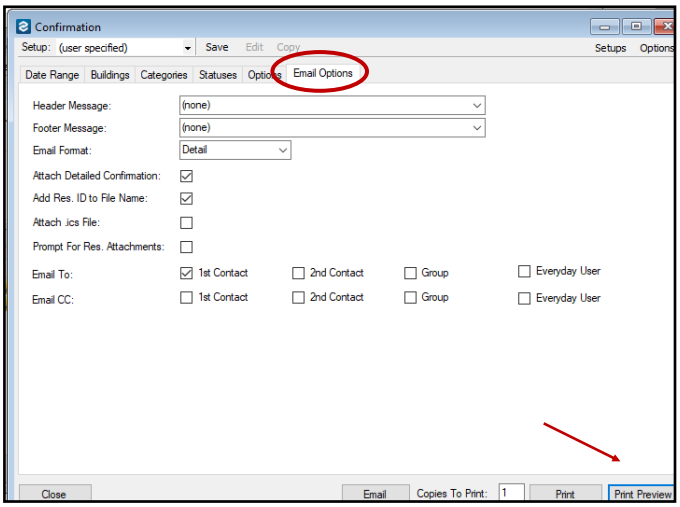


Options Tab

- The Confirmation Title is a title that will appear at the top of the document. Typically just the word “Confirmation” is used. Unless you are approving a complex reservation, leave all other boxes unchecked.

Sending Confirmation of an Approved Web Request
(continued)

Email Options Tab

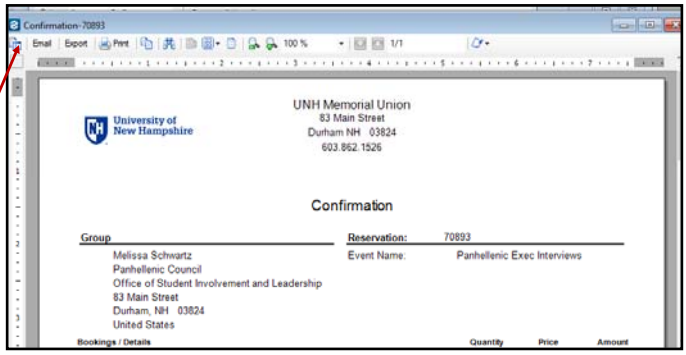


- **HEADERS and FOOTERS:** Select "none" unless you have them pre-configured custom to your space/building.
- **EMAIL FORMAT:** "Detail" is the recommended format
- **ATTACH DETAILED CONFIRMATION:** Check yes
- **ADD RES ID to FILE NAME:** Check yes
- **EMAIL TO:** Check "1st contact"

- Leave all other selections unchecked.

- These choices will put the confirmation information into a PDF and the body of the email and pre-fill the recipient email and the subject line.

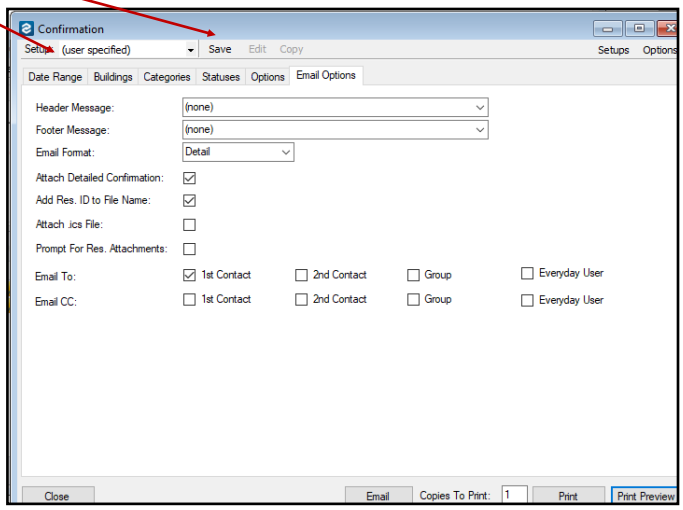
- Click "Print Preview" to see that the Confirmation looks the way you would like.



- If you want to make changes, simply close the preview and navigate to the tabs in the confirmation window to make changes.

- If you are on a networked computer, click "email" in the upper left corner. it will launch your outlook and open an email with the confirmation in the body and in an attached PDF. All you have to do is hit send.

- Before you close the confirmation screen, return one more time to the upper left corner. You can save the set up selection you just made on all of the tabs. Next time you send a confirmation, you can select your saved choices and not have to go through all of the tabs.



- You can save multiple versions of confirmation form formats if you have different configurations for different rooms or different event types.