July 1, 2010

ASU Reservations User Guide



Special Events (325) 942-2021 Reservations@angelo.edu

Introduction

ASU Reservations (Virtual EMS) is a web-based application that provides efficient facilities and services management by allowing customers, event attendees, and the general public to use a standard Internet browser to view real-time calendars and event schedules. When authorized, ASU Reservations users can also submit online requests and book space.

To access the test site for ASU reservations logon to the RamPort and go to the Work Life Tab. Locate the Special Events Channel in the middle towards the bottom of the page. You will then click on ASU Reservations which will take you to the reservations page.



Figure 1 – ASU Reservations/Reservations Page

Login

If you have an ASU Reservations account, you'll see the *ASU Reservations* tool bar when you first log in. It displays for the duration of your session. When logging on thru RamPort you will not need to sign on to the reservations page. If you sign on outside of RamPort you will need to login as described below.

- 1. At the site, select **My Account-Log In**.
- 2. Enter your User ID and Password.
- 3. Click Login.

After you log in, you will see toolbar options such as Browse, Reservations, My Account, and Links.

Note: If you don't have an ASU Reservations account, you will need to request one and receive approval prior to making reservations.

Log Out

To log out of ASU Reservations, click the **Log Out** option. Click on **My Account - Log Out**.

Using ASU Reservations

Toolbar Dropdown Menus

When you first open ASU Reservations, you'll see four dropdown menus - Browse, Reservations, My Account, and Links.

Browse

The Browse dropdown menu contains **Browse Events**, **Browse Facilities**, **Browse for Space**, and **Locate Group**.

Browse Events

The *Browse Events* window displays ASU events by day, week, or month. To open the *Browse Events* page: Open ASU Reservations and go to **Browse - Browse Events**.

To view events in list format: Click the **Daily List**, **Weekly List**, or **Monthly List** tab.

To sort the list based on a particular column: Click that column's heading.

To reverse the sort order: Click the heading again.

To view events in calendar format: Click the **Weekly Calendar** or **Monthly Calendar** tab.

To change the dates shown: Use the arrows on either side of the date heading.

The *Browse Events* window displays a calendar that lists all the scheduled events in auxiliary locations. Hover over each event listed to see specific information regarding that event.

You can choose to display the information by clicking on the Daily List, Weekly List, Monthly List, Weekly Calendar, or Monthly Calendar tabs.

Move forward or backward among days, weeks, and months by clicking on the arrows to the left of the displayed day, week, or month.

Daily, Weekly, or Monthly List These views can be grouped by: **Date, Location, Group**.

Note: This column is originally configured as **Group Name**, but can be labeled as **Department/Employee**, depending on your organizations' needs and requirements. Sortable columns on this screen are *Start Time*, *End Time*, *Title*, *Location*, and *Group Name*.

Weekly Calendar

The Weekly Calendar simply displays all scheduled events during a specified seven-day span, from Sunday to Saturday.

Monthly Calendar

The **Monthly Calendar** displays all scheduled events for the selected month. The upper-right side of the *Reservations* window contains the following selections: **Filter**

1. Click **Filter** to specify the searchable items for an event(s).

When you click Filter, a dialog box opens where you can enter the Date, Facilities, Room, Event Type, Event Name, Group Name, and/or Group Type.

2. Complete the fields and click **Apply**.

Today

Click **Today** to display a list of all scheduled events for the current date by displaying the **Daily List** tab.

This Week

Clicking **This Week** simply displays all scheduled events for the current week by displaying the **Weekly Calendar** tab.

This Month

Clicking **This Month** displays the listed events for the currently selected month by displaying the **Monthly Calendar** tab.

Browse Facilities

The *Browse Facilities* window displays a list of rooms by building and by the setup types and capacities that are valid for the rooms. People interested in scheduling an event can use this information to determine which rooms could accommodate their gathering.

When you select **Browse Facilities**, the *Setup Types by Room* window displays. You can select that the displayed rooms be grouped by **Setup Type** or **Room**.

Group By Setup Type

Setup Type displays all rooms grouped by their respective setup types.

Selecting **Group By** – **Setup Type** displays *Setup types by Room* that lists all scheduled events, grouped by specific location. Sortable columns are *Location* and *Maximum Capacity*.

Hovering over each event displays that room's specific information.

Group By Room

Group By Room displays all setup types grouped by the room.

Clicking **Group By** – **Room** displays a *Setup types by Room* list with *Setup Type* and *Maximum Capacity* sortable columns.

Clicking on each listed item displays a separate window that contains **Building Details** and below, **Room Details**, **Setup Types**, and **Features** tabs.

Setup Types

Selecting the Setup Types tab displays the Setup Types and Capacities window with Setup Type, Min Capacity,

and Max Capacity columns.

Features

Selecting the **Features** tab simply displays the specific features available at the chosen facility. **Browse For Space**

Use the *Browse for Space* window to look for available space at a particular date and time. To open the *Browse for Space* window:

Click Browse – Browse for Space.

Note: The *Browse for Space* window is read-only; you can't make reservations from this page. The system displays a grid showing room availability. You can use the arrows to scroll forward or backward in time.

Event Details

To see details about an event: Hover over an event and a Tool Tip displays.



Figure 2 – Tool Tip

Reservations

Reservations can be submitted in one of ways – Academic Room Request, Facilities Request, and University Center Display Case.

Requesting Space – Academic Room Request

Academic Room Request provides you real-time academic room and service availability information. Your bookings will require approval, however you will know if the space is available at the time of the request.

Requesting Space – Facilities Request

Facilities Request provides you real-time auxiliary and service availability information. Your bookings will require approval, however you will know if the space is available at the time of the request.

Requesting Space – University Center Display Case

University Center Display Case provides you real-time display case availability information. Your bookings will require approval, however you will know if the space is available at the time of the request.

Requesting A Room

1. Click on Reservations – Academic Room Request/Facilities Request/University Center Display CaseThe *Room Request* window displays.



Figure 3 – Reservations/Room Request

Note: Fields marked with a red asterisk (*) are required.

2. In the *When and Where* section, enter or click on the calendar icon to select a **Date** or range of dates for the event.

To the right of the calendar icon is the **Recurrence** button. If your event occurs more than one time in the future:

3. Click **Recurrence** to display the *Appointment Recurrence* dialog box. The *Appointment Recurrence* dialog box contains three sections – *Time*, *Recurrence Pattern*, and *Range of Recurrence*.



Figure 4 – Reservations/Request/Appointment Recurrence

4. In the *Time* section, manually enter the **Start Time** and **End Time** in the blank fields or select the dates using the calendar icons to the right of the fields.

The next section is Recurrence Pattern.

5. Select Daily, Weekly, Monthly, or Random recurrence patterns.

The dialog box changes depending on which recurrence you select.6. In the *Range of Recurrence* section, enter or use the calendar icon to select a **Start Date**.

7. Specify the end date by clicking one of two radio buttons:

Choose to end the event after a specified occurrence or number of recurrences

OR

Enter the recurrence **End by** date or select it by clicking the calendar icon.

8. Click **Apply Recurrence** to add the information to your event and return to the *Room Request* window OR

Click **Remove Recurrence** to cancel the recurrence information and return to the *Room Request* window.

At the Room Request window, in the When section:

9. Enter or use the calendar icon to select the **Start Time** and **End Time** for the event.

10. Choose the building, view, or area from the Facilities dropdown list where the event will take place

Note: If you do not specify this field, all facilities will be searched for available rooms. 11. In the *Setup Information* section, enter your event's **Attendance**** number.

The attendance number you enter is applied as the setup count to your bookings.

- 12. From the dropdown list, select a Setup Type**, if applicable.
- 13. Click **Find Space** to display the **Location** and **Details** tab windows.

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Figure 5 – Room Request Results-List View

Availability Filters – To narrow down availability rooms

1. Click + **Availability Filters** to display a dialog box where you can select your event's **Room Type** and **Floor** from the respective dropdown lists.

2. From the Features list, click the checkboxes to search for built-in room features for your event.

Note: Features are used for searching only and won't be stored with your request.

3. Click **Find Space** to display the **Location** and **Details** tab windows.

Location Tab

When you click **Find Space** from the *Room Request* window, the **Location** tab displays the rooms in the *Availability* section.

You can click to show results as a:

1. List (What is available for the time you requested)

2. Grid (Shows you all rooms in a time format with the blue highlight areas being reserved the white areas are available and the yellow highlighted areas are the rooms that are available per your criteria search.



Figure 6 – Room Request Results-Grid View

The *Availability* section lists available space that you can **Reserve** or **Request**, depending on your access within ASU Reservations. The *Availability* window displays *Select*, *Available*, *Location*, and *Capacity*.

In the *List* or *Grid* view:

Click on a room in the Location to view Building Details, Room Details, Setup Types, and Features

Choose a location or locations by clicking on the corresponding green plus icon under the *Select*

column.

Your choice then displays in the *Selected Location* portion of the window. *Selected Locations* columns are *Click* to Remove, Date, Start Time, End Time, Location, Status, and Conflict.

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Figure 7 – Selected Location View

Note: *Conflict* only applies if there's a scheduling conflict with your event.

Details Tab

Use the fields in the **Details** tab to add specific information to your room request.

1. Click the **Details** tab and complete the necessary information.

Note: Required information is indicated by a red asterisk (*).

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Figure 8 – Details Tab View

2. In the Event Name field, give your event a descriptive name, such as Staff Meeting, Workspace, etc.

3. Select an **Event Type** from the dropdown list.

4. Select the **Group** that holds the reservation. You can search for your name or department by clicking the magnifying glass icon.

The Group Lookup dialog box displays.

5. Click the magnifying glass icon and any group names containing "And" display.

Note: If you wish to remove a group name, simply click the red X next to the appropriate group name.

6. Back on the **Details** tab, specify the name of a **Contact** person or click the magnifying glass icon to display the *Contact Lookup* dialog box, if enabled.

Note: If you select **Temporary Contact**, you will be required to enter a **Name**. Select a name displayed in the dropdown list.

7. For example, type "And" in the **Group name contains:** field and click the magnifying glass icon. These example results display.

8. Click the green plus sign next the contact name and the contact information is placed in the *Current Contact* area.

9. Click the person icon to make the current contact the default contact.

Click the red X in the upper right corner to close the *Contact Lookup* window and return to the **Details** tab: 10. Enter the **Phone** number, **Fax** number (if applicable), and **Email** address in order to complete the reservation, unless the group has been defined as not requiring contacts.

11. You can also enter a **2nd Contact** name, **Phone**, **Fax**, and **Email** address, if enabled.

Note: Fields marked with a red asterisk are required (*).

12. Click **Submit Reservation**. Your request has been submitted. Remember your event is still only in the request stage and has not been approved.

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Figure 9 – Reservations Summary

The *Reservations Summary* window opens, displaying the **Reservations Details** tab, which contains the *Reservation Details* and *Group Details* sections that list the event's information and the **All**, **Current**, and **Historical** tabs.

The *Reservation Details* section contains information regarding your event, including **Reservation ID**, **Event** Name, and Event Type.

The *Group Details* section contains information regarding your event, such as **Group**, **Contact Name**, **Phone**, **2nd Contact Name**, and **Phone**.

The **Current** tab displays events occurring today or in the future. It contains the *Actions*, *Services*, *Date*, *Time*, *Title*, *Location*, *Status*, and *Setup* columns.

Note: The *Date*, *Title*, *Location*, and *Status* columns are sortable. A variety of icons display in the *Services* column, such as:

A plus sign icon to add or edit services, +

A Red X to cancel a booking \times

A clock icon to edit a booking 🧭

A magnifying glass with a plus sign to view services \mathcal{P}

In addition, a warning icon may appear if you encounter a problem trying to reserve your room and/or service. To identify the issue, please check your booking status or requested services.

The Historical tab lists events that occurred in the past only.

Adding or Editing Services To A Current Booking

1. On the *Reservation Summary* window, click the green plus + in the *Services* column next to the event to which you want to add a service or services.

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Figure 10 – Booking Details

The **Booking Details** tab displays with *Booking Details*, *Additional Details*, *Available Services*, and *Existing Services* areas.

- 2. Select the *Available Services* to apply to your event and a new area displays.
- 3. Enter the Start and End Time of your service, if applicable.
- 4. Choose the **Service Type**, if applicable.
- 5. Click the plus sign icon (+) to see a list of individual items.

Note: Pause your mouse over a resource to view additional information about that resource. 6. To select an item, click the checkbox next to it and enter the desired quantity.

- 7. Enter any special instructions, if necessary.
- 8. You may be required to complete additional information regarding your service request.

Note: Fields marked with a red asterisk are required. 9. Click **Save**.

If you have multiple bookings, you can apply your service to some or all of your additional bookings.

If you have a single booking, you'll return to the previous screen.

Additional categories that may be available are **Setup Notes** and **Attendees**.

For Setup Notes categories:

1. From the *Reservation Summary*, click the plus sign icon + next to the desired booking.

The **Booking Details** tab displays.

2. In the *Available Services* section, select **Setup Notes**.

The **Booking Details** tab displays with a **Setup Notes** text entry section. 3. Enter your notes and click **Save**.

The **Setup Notes** are added to the existing service.

To add attendees to the booking: 1. From the *Reservation Summary*, click the plus sign icon + next to the desired booking.

The **Booking Details** tab displays.

2. In the Available Services section, select Attendees to display this window.

In the Attendees section, complete the necessary fields.

- 3. Click Add To Additional Bookings to add your attendee to other bookings.
- 4. Complete the fields and click **Save** or **Cancel** to return to the *Booking Details* window.

5. To return to the *Reservation Summary* window, click the Back To Reservation Summary link located in the top right hand corner of the page.

Editing A Service

To edit a booking's existing service:

1. On the *Booking Details* window, click the pencil icon 🖉 next to the service you want to edit.

2. Make your edits in the new screen that displays and click Save.

Adding A New Service

To add a new service to your booking:

From the *Reservation Summary*, click the plus sign icon + in the *Services* column and select the desired service.

Adding A New Item

To add a new item from the same service:

- 1. Click the plus sign icon + next to the desired booking in the *Existing Services* section.
- 2. Select the new item you want to add, enter the desired quantities, and click **Save**.

This pop-up displays.

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Figure 11 – New Service Item Prompt

2. Click **OK** to return to the *Booking Details* window, which displays the new items you just added.

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Figure 12 – Booking Detail Window

Cancelling a Service

To cancel a service:

- 1. Click the red \times next to the service you want to cancel.
- 2. 2. Click **OK** on the displayed prompt.
- 3. The *Existing Services* section reflects the service cancellation.

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Figure 13 – Cancel Items Prompt

Cancelling A Booking

To cancel a booking, click the red \times in the *Actions* column and a popup message prompts you.

Editing A Booking

To edit an existing booking:

- 1. Click the clock icon \bigcirc in the *Actions* column.
- 2. Make the necessary changes in the window that displays.
- 3. Click Update Booking.

Reservations Summary Window Actions

The following actions display on the right side of the *Reservation Summary* window:

- Edit Reservation
- Add Booking
- Cancel Services
- Service Availability
- View Reservation Summary
- Add to Personal Calendar

Edit Reservation

Edit Reservation allows you to edit information completed on the **Details** tab when you originally made your reservation.

- 1. Click Edit Reservation from the *Reservation Summary*.
- 2. Make the necessary changes in the window that displays.
- 3. Click **Save** and the following message displays.
- 4. Click **OK** to return to the *Reservation Summary*.

Add Booking

This function allows you to add additional bookings to your reservation.

1. From the *Reservation Summary*, click **Add Booking**.

2. Follow the same steps as in *Requesting A Room*.

Cancel Services

This function allows you to cancel a service that was requested for multiple bookings.

- 1. Select the event's service category that you want to cancel from the **Categories** dropdown list.
- 2. Select the bookings from which you want to remove the service.

3. Click Save.

Service Availability

Service Availability displays all the conditions that apply to your event. Depending on your facility's business processes, the ability to request services may be restricted.

• Use the *Service Availability* window to view your organization's rules for adding or editing services.

View Reservations Summary

This link allows you to view and/or email an HTML-based summary of your reservation. The summary includes room, service, and pricing information, if applicable.

• Click this link to display your booking's information, either in detail or summary format.

Add to Personal Calendar

• To add the selected event to your calendar, click Add to Personal Calendar.

A dialog box displays allowing you to **Open**, **Save**, or **Cancel** adding the event to your calendar.

- Clicking **Open** opens your calendar and saves the event to it.
- Clicking **Save** opens the *Save As* dialog box.

View My Requests

To see a list of the events you have created in Virtual EMS:

• Click on **Reservations - View My Requests**.



Figure 13 – Reservations/View My Requests/Current Tab

When viewing the list, you can choose options for seeing:

• **Current** reservations (reservations with one or more bookings on or after today's date)

OR

• Historical reservations (those with no bookings on or after today's date).

Current reservations can also be edited, provided the modification is made far enough in advance of the next booking date or cancelled.

If you know part or all of a **Reservation Id** or **Event Name**:

1. Enter the information in the appropriate fields.

2. Click Quick Search.

• To access a reservation, click the **Event Name** located in the *Name* column.

My Account

A Click Save

Edit My Account

Use the **Edit My Account** function to change your account information. 1. To open the *Edit My Account* window, go to **My Account - Edit My Account.**

2. The following fields can be edited - Email, Name, Phone, Fax, Time Zone, Password, Confirm Password, and Notes.

Note: To change your password, the **Password** and **Confirm Password** fields must be completed. 3. Select the **I do NOT want to receive automatic emails** checkbox to avoid receiving reminder notification and EMS reservation summary emails. You will still receive manually-sent confirmation emails.

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Figure 14 – Reservations/View My Requests/Current Tab

Glossary

Active Status

Active users can log into ASU Reservations; active users have full access to the system.

Area

Areas are groupings of buildings used for searching and reporting within ASU Reservations.

Booking Details

Booking details consist of resources, notes, services, etc. for a specific event or event.

Category

Categories are groupings of resources such as items or services that are needed for an event.

Current Reservation

A current reservation is a reservation with one or more bookings on or after the current date. Current reservations can be viewed, cancelled, and edited, provided the modification is made far enough in advance of the next booking date.

Custom Links

Custom links are character strings that users can copy into a web browser or click on as a hyperlink to be directed to the Virtual ASU Reservations calendar for a specific building.

Features

Features are attributes of rooms that can be used for searching in ASU Reservations.

Group Types

Group types categorize a user's list of groups that are available for searching within ASU Reservations. **Guest**

A guest is someone who accesses/opens a ASU Reservations page to view a list of events, but doesn't log into the system.

Historical Reservation

Historical reservations are those reservations with no bookings on or after the current date. Historical reservations can be viewed, but not edited.

Resource

Resources are the items or services needed for an event.

Services

Services refers to the resources, services, or notes needed for a booking, such as equipment, personnel, set up notes, or any type of item defined by a user.

Setup Count

The setup count is the anticipated attendance for a booking. Setup count is applied to all of the bookings created.

Setup Type

Setup type is the physical layout of a room for a booking and is applied to all bookings created.

View

Views are groupings of rooms for viewing or reporting within ASU Reservations.

Web Menus

Web menus are links that appear as menu options in ASU Reservations