

# PATRICK HENRY COLLEGE

## User Guide

Using the PHC Campus Calendar System

and

Using the Campus Request System

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# Using the PHC Campus Calendar System

## View Events

When you access the PHC Campus Calendar system, the first page you see is the Calendar Selection page, which displays the groupings that have been defined to your system and a list of calendars within them. (**Note:** Guests will see all public calendars; users see all public calendars plus the private calendars to which they have access.) From there, you can select a single calendar or multiple calendars and view their events.

## Single Calendar

To view a particular calendar, check the box next to it and click the View Selected button, which can be found both above and below the groupings. (**Note:** An entry that has an arrow beside it is a link to another web page or other source of information. Simply click the link to follow it.) You can also view a calendar by clicking on the calendar name.

Calendar My Options Search Submit Event

### Calendar Selection

Check all the calendars below that you would like to view; then click on the "View Selected" button.

View Selected View All Clear

#### General Interest

- Vounteer Opportunities
- Live Music
- Theater
- Seminars & Lectures
- City Maps website

Check All General Interest

#### Courses

- First Aid Courses
- Labs and Fieldwork
- Academic Deadlines

Check All Courses

When you click View Selected or the calendar name, the system displays the calendar in its default format (Day, Week, Month or Year) and default view (list or calendar). To change the format, click the appropriate tab. To change the view, click List View or Grid View. When events are viewed as a list, clicking any column heading causes the list to be resorted based on that column. Use the arrows beside the date in the upper left of the calendar to see later or earlier dates. Or, choose a new date from the Select Date field. To see only events with a particular event type or in a particular location, make a selection from the appropriate list box. (**Note:** An event type only appears in the list if one or more events on the calendar have that event type.) To search for an event, type a keyword and click Go, or click Search. (See Search for Events for more information.) Initially, all of the events on a calendar are displayed. To see a "tool tip" with basic information on a specific event, position your cursor over it. (**Note:** The display of tool tips is an option in Default Settings.) For more detailed information, including information on related events, click the event name.

**Update Event**

**Title:** JTC Fundraiser  
**Event Type:** Meeting  
**Location:** City Center, Rm 100  
**Date:** Thursday, May 03, 2007  
**Time:** 6:00 PM to 9:00 PM  
**Calendar:** Community Events

**Contact Information**

**Name:** Monica Giles  
**Email:** monicag@dea.com  
**Phone:** 303-555-8595

**Highlights:** Silent auction, art display, live music.

**Related Events**

<u>Date</u>	<u>Time</u>	<u>Ti</u>
5/17/2007	6:00 PM to 9:00 PM	JT
5/31/2007	6:00 PM to 9:00 PM	JT
6/7/2007	6:00 PM to 9:00 PM	JT

On the Event Details window are options for printing the event details, having the system email you a reminder, having the system email your friend, or adding the event to a personal calendar (if this option has been activated in Default Settings). Click Print to produce a hard copy of the event.

To receive an email reminding you of the event, click Remind Me. At the Event Reminder window, enter your email address and indicate how much in advance of the event you want to be notified. Check the box if you want to be reminded of each occurrence of the event. Click Set Reminder.

To have the event information emailed to a friend, click Email a Friend. The system starts your email program and opens an email with the event information and a link to the calendar page. You select the recipient(s) and send the email as you normally would. To put an entry for the event into your personal calendar, click Add to Personal Calendar. At the File Download window, click Open. Review the displayed information, edit it as needed (add a reminder, etc.), and click Save and Close.

Back at the calendar display window, view a different calendar or grouping of calendars by selecting it from the Calendars list. The display is automatically updated after you make your selection.

Notice that when you are viewing a calendar, there are two options below the calendar. Click the Calendar Managers link to see the name and email address for the manager of each calendar. Click RSS Feeds to see a list of the available RSS feeds to which you can point your news reader.

**Calendar Managers List**

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Calendars and Calendar Managers are listed below by Grouping. Any notes about a calendar are shown as well.

**Academic Classes**

Academic Deadlines  
Jennifer Hollis, [jhollis2153@vsrl.com](mailto:jhollis2153@vsrl.com)  
Academic Deadlines

First Aid Courses  
Tim Hunter, [timhunter@litecoursemgr.com](mailto:timhunter@litecoursemgr.com)  
First Aid and Safety Training classes

Lab and Fieldwork

At the upper right of the calendar is a Print icon. Click it to produce a hard copy of the display. There are also options for exporting data, subscribing to the calendar, and submitting an event. (See sections below for information on these functions.)

### Multiple Calendars

To view the events from multiple calendars combined onto one calendar, check the boxes beside the calendars you are interested in. Calendars from multiple groupings can be included in the combined view. Notice that within each grouping there is a box that you can check if you want to see all of the calendars in that grouping.

After checking boxes, click View Selected. The system displays a calendar with all the events from the calendars you chose. The term “Combined Calendars” is used on this page, rather than a specific calendar name, which is what you see when viewing one individually. For reference purposes, the printed version of a combined calendar includes the names of the specific calendars it covers.

You can also view multiple calendars by clicking View All. Navigating, searching, setting reminders, etc. work the same way for combined calendars and single calendars. To clear the check boxes for all calendars you have selected, click Clear.

### Subscribe to a Calendar

“Subscribing” to a calendar means that you are asking to receive a system-generated email when events are added to the calendar or when events are changed/cancelled. Subscription emails are sent to subscribers once a day, as determined in Default Settings. Subscriptions can be cancelled at any time.

To subscribe to a calendar, click Subscribe on the calendar display window (you do not need to be viewing the calendar to which you want to subscribe). At the Calendar Subscription window, move the calendars to which you want to subscribe into the Selected Calendars box. Type your email address and check the appropriate box(es) to indicate what type of notifications you would like to receive. Click Subscribe.

The system displays a message telling you that a confirmation email has been sent to you. Click Done. When you receive the email, click the appropriate link to activate or edit your subscription. (**Note:** You will not receive event-related emails until you activate the subscription.)

To cancel a calendar subscription, follow the process above but click Unsubscribe. Again, you must click the link in the resulting email to cancel the subscription.

## Export Events

To export data when viewing a calendar or list of events, click the Export button. The Export Events function can also be found by clicking My Options on the menu bar. If exporting while viewing a calendar or list, indicate whether you want to open or save the file. Exported data is formatted for use by Microsoft Excel®.

If the Export Event function is selected from under Options, on the Export Events window, move the calendars from which events are to be exported from left to right by highlighting them and clicking the right arrow button or by double-clicking them. Indicate whether events from all dates should be exported or just a specified date range. Limit the export to a certain event type by selecting it from the list if appropriate. Indicate the file type for the export file and then click Export.

Indicate whether you want to open the file or save it. If saving, indicate the desired location and click Save.

## Search for Events

To perform a search, click Search on the menu bar (or in the Search Options area when viewing a calendar or list). Enter a date or date range, or leave the date fields blank to find all events. Enter a keyword or location if you want to narrow the results by those entries. Indicate whether you are looking for events or special dates (also referred to as “holidays”). Highlight the calendar or calendars you wish to search, using Ctrl-Click or Click-Shift-Click to select multiple entries if appropriate. Select one or more event types if appropriate and click Search.

The screenshot shows a search interface with the following elements:

- Search** header
- Text prompt: "Tell me what you're looking for..."
- Start Date:** 1/1/2007 Mon
- End Date:** 6/1/2007 Fri
- \*Available Calendars:** (all), Academic Deadlines, Alpha Club, Athletics, Board Meetings
- Event:** (all), Baset, Conc, Footb, Hock
- Keyword:** (empty field)
- Location:** City Center
- Radio buttons:  General events,  Special dates
- Search** button
- Search results table:

Event Date	Event Title	Location
5/3/2007	JTC Fundraiser	City Center, Rm 100
5/17/2007	JTC Fundraiser	City Center, Rm 100

The system displays the event date, title, location and calendar for all the events that meet your criteria. To sort the list of events, click a column heading. To find out more about a particular event, click its event name. You then have the same options as you find when clicking on an event on a calendar (Print, Remind Me, etc.).

## **My Notifications**

“Notification” is a term used here to refer to the two types of PHC Campus Calendar system generated emails that you can arrange to receive:

Subscriptions – Emails about new, modified or cancelled events on a particular calendar. Subscriptions are set up by clicking the Subscribe icon when viewing a calendar or list.

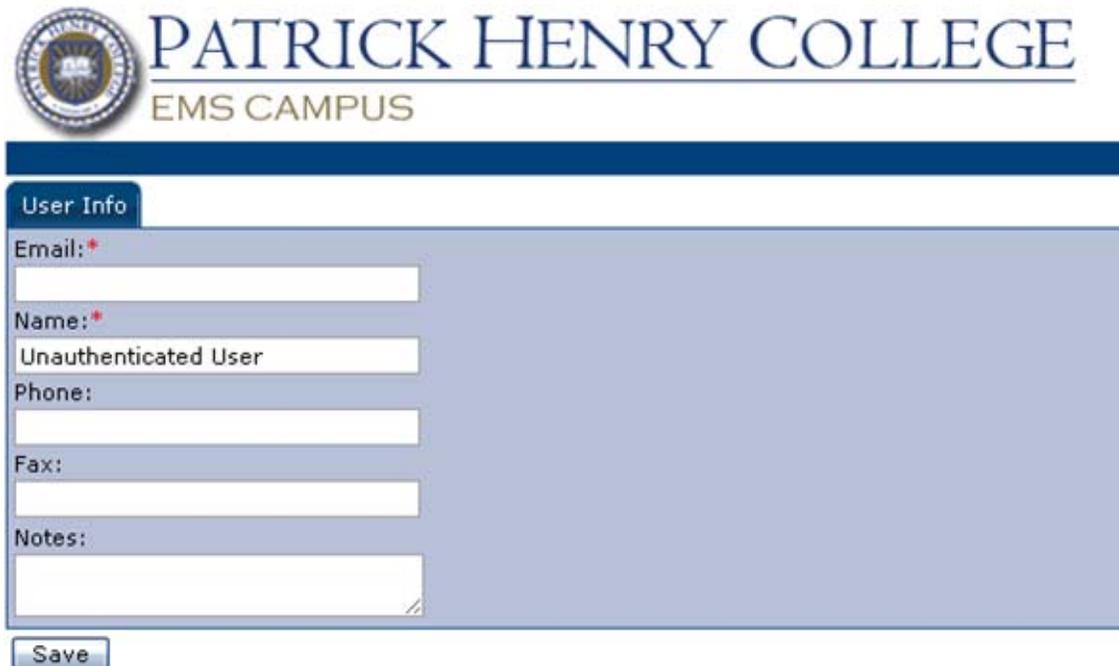
Reminders – Emails to alert you to the start of, or changes to, *specific events*. Reminders are set up by clicking the Remind Me icon when viewing the detail of an event.

Headings for Subscriptions and Reminders are only shown if you have set up one or more of that type of notification. To delete a subscription, click the X in the Actions column. To delete a reminder, click the check box and then click Delete. To view the details for an event, click the Event Title.

# Using the Campus Request System

## User Accounts

If you do not have an account created, the system automatically creates one for you based on your portal login credentials. You will be taken to a page where you will be prompted to enter your email address and name.



The screenshot shows the Patrick Henry College EMS Campus logo at the top. Below it is a blue header bar. Underneath the header is a form titled "User Info" with a tabbed interface. The form contains several input fields: "Email:" with a red asterisk, "Name:" with a red asterisk (containing the text "Unauthenticated User"), "Phone:", "Fax:", and "Notes:". A "Save" button is located at the bottom left of the form.

Enter your PHC email address, your name eg David Jones and phone number and click Save. The next time you click on the link to the calendar or the reservation request, you will be logged in automatically based on your network credentials without being prompted for a user name and password.

## Toolbar Dropdown Menus

When you first open the Campus Request System, you'll see three dropdown menus - **Browse**, **Reservations**, and **My Account**.

### Browse

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

### Browse Events

The *Browse Events* window displays events by day, week, or month.

To open the *Browse Events* page:

- Open the Campus Request System 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. 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**.

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

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

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.

<b>Reservation Id</b>	3921
<b>Booking Id</b>	7747
<b>Event Name</b>	New Employee Orientation
<b>Event Type</b>	Training
<b>Date</b>	Friday, April 04, 2008
<b>Location</b>	TX - Riggs Conference Room
<b>Reserved Time</b>	3:00 PM - 4:00 PM CT
<b>Event Time</b>	3:00 PM - 4:00 PM CT
<b>Setup Type</b>	(none) (12)
<b>Status</b>	Web Request
<b>Group</b>	Stacey Whala
<b>Contact Name</b>	(none)
<b>Phone</b>	303-555-1212
<b>Fax</b>	
<b>Contact Email</b>	stacey.whala@dea.com
<b>Event Coordinator</b>	(none)
<b>Salesperson</b>	(none)
<b>First Booking</b>	Friday, April 04, 2008
<b>Last Booking</b>	Friday, April 04, 2008
<b>Total No. Bookings</b>	1

### **Locate Group**

Select **Locate Group** to find the events that are taking place today for a specific group.

To open the *Locate Group* window:

1. Click **Browse - Locate Group**.
2. In the **Group Name** field, enter the name of the group or a portion of a group's name.
3. Click **Locate**.

The list's columns are:

- *Time*,
- *Title*,
- *Location*,
- *View On Map*.

The Campus Request System shows the events currently scheduled, otherwise, a message indicating there are no events displays.

If a partial name is used as the search criterion and more than one group has those characters in its name, the system displays a list of the groups.

**Note:** You must click on the group name to complete the event search.

## Reservations

Depending on what functionality has been enabled at your facility, reservations can be submitted in one of three modes - Self Serve, Service Only, and Request Form.

### Requesting Space - Self Serve

Self Serve mode provides you real-time room and service availability information. Your bookings may be immediately confirmed or require approval, depending on your facility's policies.

Your facility may have multiple Room Request links, each with its own set of features and permission levels. For example, one Room Request version can be assigned to scheduling a conference room and another version assigned for booking a group workspace in a hoteling environment.

**Note:** Some options may or may not appear, based on your system configuration. These items are identified with \*\*.

### Requesting A Room

1. Click on **Reservations – Room Request**. The *Room Request* window displays.

**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.

The screenshot shows a web application interface for making a room reservation. At the top, there is a navigation bar with links for 'Browse', 'Reservations', 'My Account', and 'Admin', and a user greeting 'Welcome Stacey Whala'. The main content area is divided into two sections: 'When and Where' on the left and 'Selected Locations' on the right. The 'When and Where' section contains several input fields: 'Date:\*' with a calendar icon and a 'Recurrence' button; 'Start Time:\*' and 'End Time:\*' with time pickers; 'Time Zone:\*' with a dropdown menu; and 'Facilities:' with a dropdown menu. Below these is the 'Setup Information' section with 'Attendance:\*' and 'Setup Type:' dropdowns, and a 'Find Space' button. The 'Selected Locations' section shows 'No rooms currently selected' and a 'Submit Reservation' button. At the bottom, there is a 'Powered by' logo for 'ems' and an 'Availability Filters' dropdown.

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*.

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. Select the event's **Time Zone\*\***.

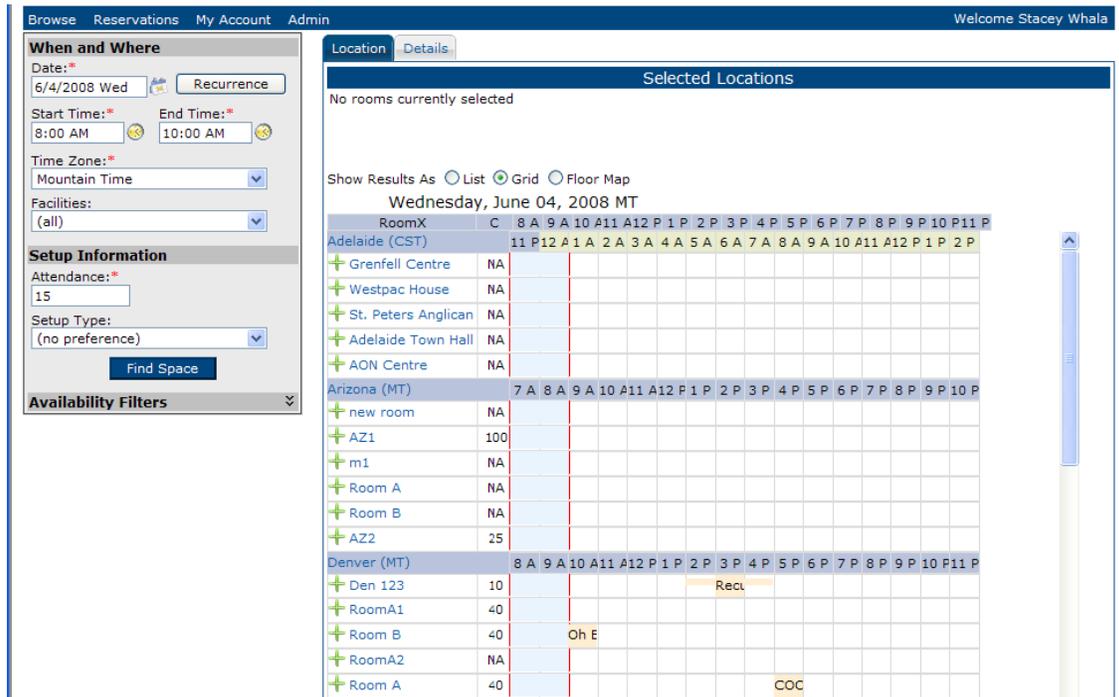
11. Choose the building, view, or area from the **Facilities** dropdown list where the event will take place.

**Note:** If you do not specify this field, all facilities will be searched for available rooms.

12. 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.

13. From the dropdown list, select a **Setup Type\*\***, if applicable.

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



## Availability Filters

Note that Availability Filters may or may not display, depending on your system's configuration.

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**,
2. **Grid**,
3. **Floor Map\*\***.

The *Availability* section lists available space that you can **Reserve** or **Request**, depending on your access within the Campus Request System. The *Availability* window displays *Select*, *Available*, *Location*, *Time Zone\*\**, *Capacity*, and *Price\*\**.

In the *List* or *Grid* view, click on a room in the *Location* to view **Building Details, Room Details, Setup Types, and Features, and Floor Map.**

Choose a location or locations by clicking on the corresponding plus sign icon under the *Select* column, OR select the **Floor Map** view and choose available space directly on the floor plan displayed.

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.*

**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.

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. Your system administrator configures the event type choices.

4. Select the **Group** that holds the reservation. If enabled, you can search for your name or department by clicking the magnifying glass icon. The *Group Lookup* dialog box displays.

**Note:** This column is originally configured as *Group Name*, but can be labeled as *Department/Employee*, depending on your organizations' needs and requirements. As an example, "And" has been entered in the **Group name contains:** field.

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 **2<sup>nd</sup> Contact** name, **Phone**, **Fax**, and **Email** address, if enabled.

12. If required, enter the **Billing Reference** and/or P.O. Number. These fields may be labeled differently in your environment. If enabled, you may be able to look up valid values using the magnifying glass icon.

## Reservation Summary

The *Reservation Summary* window opens, displaying the **Reservation 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**, **Event Type**, and **Billing Reference** and/or **P.O. Number**, if applicable.

The *Group Details* section contains information regarding your event, such as **Group**, **Contact Name**, **Phone**, **2<sup>nd</sup> 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.

Depending on your organization's business rules, a variety of icons display in the *Services* column, such as:

- A plus sign icon to add or edit services,
- An envelope icon to display a services summary,
- A red X to cancel a booking,
- A clock icon to edit a booking.

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 sign in the *Services* column next to the event to which you want to add a service or services. 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. In this example, "Denver Catering" has been selected as the service to add to the booking.

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**.

In this example, “Continental Breakfast” was the service added to the event.

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.

## **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.

Please follow the procedure for “Adding or Editing Services To A Current Booking,” starting on page 15.

### **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:



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

### **Cancelling a Service**

To cancel a service:

1. Click the red X next to the service you want to cancel.
2. Click **OK** on the displayed prompt.



The *Existing Services* section reflects the service cancellation.

## **Cancelling A Booking**

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

## **Editing A Booking**

To edit an existing booking:

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

## **Reservation 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*, starting on page 10.

### *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*

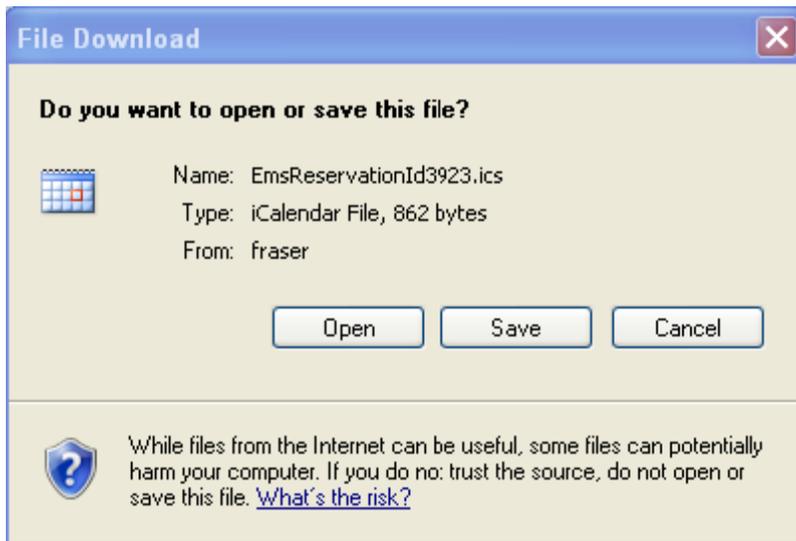
Service Availability displays all the conditions that apply to your event. Depending on your facility's business processes, the ability to request services may be restricted. Use the *Service Availability* window to view your organization's rules for adding or editing services.

#### *View Reservation Summary*

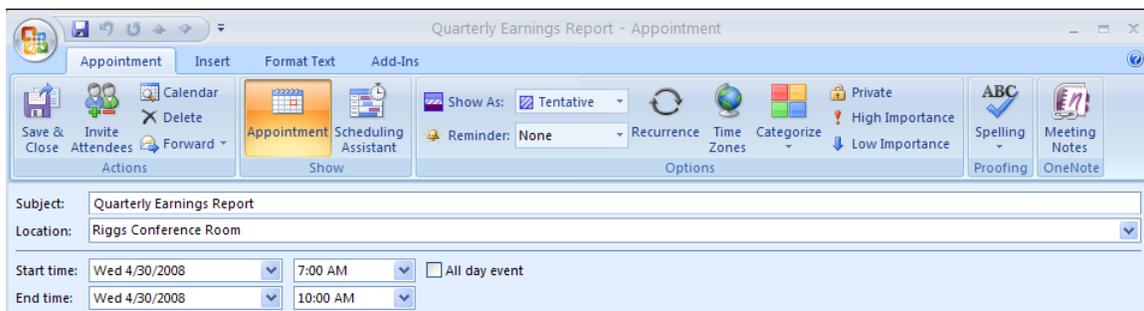
This link allows you to view and/or email an HTML-based summary of your reservation. The summary includes room, service, and pricing information, if applicable. Click this link to display your booking's information, either in detail or summary format.

#### *Add to Personal Calendar*

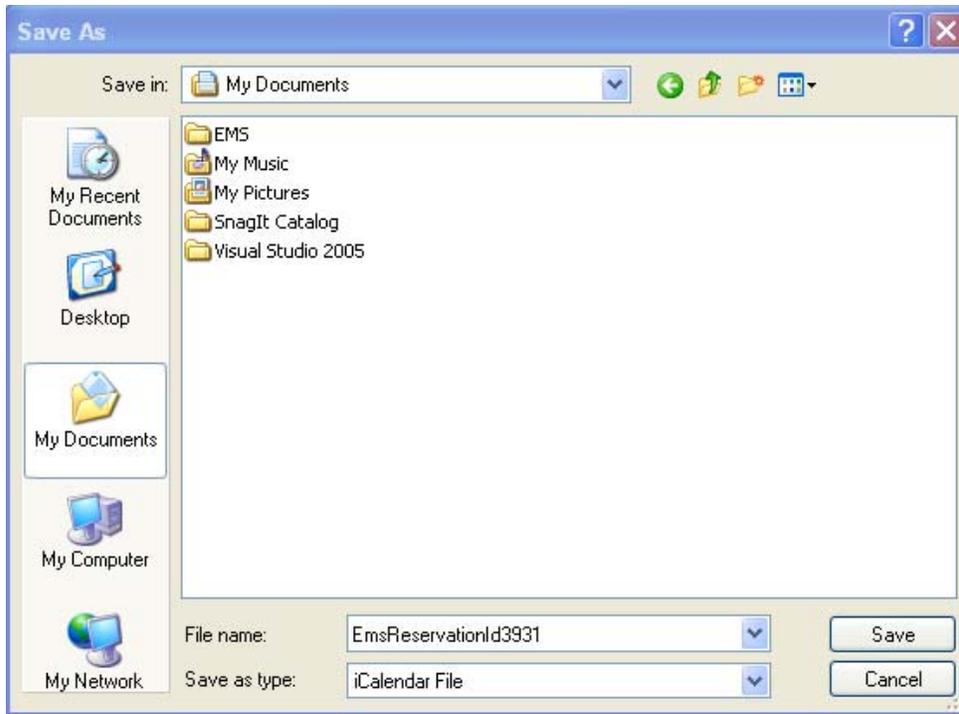
To add the selected event to your calendar, click **Add to Personal Calendar**. A dialog box displays allowing you to **Open**, **Save**, or **Cancel** adding the event to your calendar.



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 the Campus Request System: Click on **Reservations - View My Requests**.

Reservations							
Id	Name	Group	First Booking	Last Booking	Status	Location	Has Services
3907	test demo	Stacey Whala	3/31/2008 Mon	6/23/2008 Mon	Web Request	Houston Satellite Offices - Riggs Conference Room	Yes
3981	Quarterly Earnings Report	Stacey Whala	5/9/2008 Fri	5/9/2008 Fri	Web Request	Denver Administration Building - Training Room A	Yes

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**.

Browse Reservations My Account Admin						Welcome Stacey Whala	
Current		Historical		Reservation Id: <input type="text"/>	Event Name: sw demo	<input type="button" value="Quick Search"/>	<input type="checkbox"/> Show Cancelled
Reservations							
Id	Name	Group	First Booking	Last Booking	Status	Location	Has Services
3930	SW Demo - Training	Stacey Whala	4/14/2008 Mon	4/14/2008 Mon	Web Request	Houston Satellite Offices - Barton VC Room	No

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

## Service Only

Service Only Requests allow you to request services for locations not managed in the Campus Request System. For example, AV or Catering can be requested for a client meeting held in an employee's office.

To schedule a Service Only Request:

1. Click **Reservations - Service Only Request**.
2. In the *When* section, specify the **Date**, **Start/End Time**, and **Setup Information**, if required.

The **Service Availability** tab lists all the available services you can add to your event.

3. Click **Get Services**.

The **Details** tab displays.

4. Enter your **Event Name** and **Event Type** (Please refer to the *Requesting A Room* section).
5. Click **Submit Reservation**.

The process for adding services to a Service Only Request is the same as for any other booking. Like other bookings, Service Only Requests can be edited or cancelled.

## Request Form

When you select **Reservations -Request Form**, a simple one-page Reservation Request Form displays. All requests must be processed and approved by an administrator. The request can include resources and services needed for the event, as well as notes pertaining to the booking(s).