EMS - Room Reservation User Instructions

**How to Submit a Reservation Request**

1. Log in with the email address you used to set up your account (either [NetID@wisc.edu](mailto:NetID@wisc.edu), or a Standard Account [name@uwhealth.org](mailto:name@uwhealth.org) or [name@dept.wisc.edu](mailto:name@dept.wisc.edu)). If you have a standard account and cannot remember your password, email [reservations@hslc.wisc.edu](mailto:reservations@hslc.wisc.edu) to have it reset.
   a. *There is sometimes a delay on loading after login.*

2. Click on the “Create a Reservation” tab on left side
   a. You can now also find the list of reservation templates right on your “My Home” page under ‘My Reservation Templates’

3. Click on the “book now” button next to the reservation template you are interested in
   a. You can also click on the “about” button to see the information about that template such as when access will open, policies, building hours, restrictions, instructions, who to contact or who manages those rooms, etc.

4. Select the date, time, and location (building) that you would like to search for space

   ![Date & Time](date_time.png)

   a.

5. Click on “Search”

6. A grid of “Rooms You Can Reserve” will come up
   a. The dark gray areas are what is already reserved and currently unavailable

7. The circle + sign allows you to select whichever room as the one you wish to request
   a. Click on the Room Number to see information about that space including a list of features (conferring capabilities, resources, phone line, etc), images if we have them, etc.
   b. Each room’s capacity is also listed in the “Cap” column next to room number

8. Select the Number of Attendees

9. Click on “Add Room”
You can edit your “Attendance & Setup Type” by clicking “Reservation Details” which is the second step in submitting a request, or click on “Next Step”.

Fill in the Event Name, Event Type, Select the appropriate Group/Department, and Select YOUR NAME from the 1st Contact list (this should then auto fill phone & email)

If the room also have the option, you will also select if your event is an Audio/Video/Web Conference

When finished, click on “Create Reservation”.

All requests are manually processed, and it may take some time to receive a confirmation email. You should receive either a confirmation email or other message within 1 business day.

After you submit your request a couple options will come up. If you would like to add to your calendar click that, and if you want to double check what you submitted or need to change something click “Edit this reservation.”

**How to Submit a Recurring Meeting Reservation Request**

1. Log in & start setting up a request
2. Select the “Recurrence” button

3. Choose (daily, weekly, monthly, or RANDOM), choose day of week, choose end date, and time
   a. Use the “Random” option for those series/recurring events that do not fit the standard recurrence. Select whatever dates you need:
4. Click “Apply Recurrence”

5. The Recurrence will set, but you must select “Search” to move onto the next step

6. A list of rooms that are available for all or some of the dates you requested come up
b. The 6/6 is saying that this room is available 6 of the 6 dates you’re searching for.

c. There is also a column listing the capacity of each room – be sure you do not select a room that is too small for your needs.

d. Click on the Room # to see expanded information about the space (items in the room, tech available, phone line, etc), and images if we have them.

e. Scroll through and click on the + to add a particular room.
   i. You can also mix and match if you can’t find a room for all of the dates you need.

f. If you accidentally add something you didn’t mean to, you can subtract it with -

7. **If you cannot find a consistent room for all of the dates you’re searching you can select your best option from the list that comes up.
   a. Once you select an option that covers some of the dates you’re searching the list will refresh with your options for the remaining dates you need. (see screenshot)
b. Select the best option for your remaining date(s)

8. Click “Next Step”
9. Fill in the Event Name, Event Type, Select the appropriate Group/Department, and Select YOUR NAME from the 1st Contact list (this should then auto fill phone & email)
10. If the room also have the option, you will also select if your event is an Audio/Video/Web Conference
11. When finished, click on “Create Reservation”
12. All requests are manually processed, and it may take some time to receive a confirmation email. You should receive either a confirmation email or other message within 1 business day.

How to View Requests that you have Submitted
1. There are a couple different ways to view requests you have submitted.
2. Click on “MY EVENTS” found on the left side column
3. A list of all active reservations that have been made within your account will be listed.
You can also click on “PAST” to see those that have passed

b. To view any cancellations you can click on the “BOOKINGS” tab at the top
   a. You can click on the date to select a particular event date you’re looking for
   b. You can also type in the name, or part of the name, and click “Search Bookings”

5. Another option is on the bottom of the Home page you can see ‘My Bookings’
   a. Select day, month, or specific date to view

My Bookings

If the date has this symbol you have reserved at least 1 event on that date
   a. Click on symbol to view the reservations for that date
**How to Edit or Cancel a Request (tentative or confirmed)**

1. Click on “MY EVENTS”

2. A list of all current reservations will come up. Click on the name of the event you wish to edit or cancel.
   - You can also view if a request has been confirmed, or if still tentative
     - *You can edit, cancel, or add to any of these if tentative or confirmed.

3. To change the name or contact info for this event click on “Edit Reservation Details”
   - Be sure to click

4. To cancel the entire reservation click on “Cancel Reservation”

5. If the event is a series/recurring reservation and you only want to cancel certain dates click on the
   - next to the reservations you don’t need
6. If you need to edit the time, date, name, or room location click on the **Update Booking** button next to the specific date to edit.
   
   a. Be sure to click **Update Booking** when done to save changes.

7. Click on “New Booking” **New Booking** to add to a series/recurring reservation, or this is another way to develop a series or group of reservations.
   
   a. This should also be used for 1 day events that have multiple rooms.

---

### How to Search for Space or Events without making a Reservation

1. If you are searching for the availability of a certain room/building on a certain date click “LOCATION” to search via location:
   
   a. Click on “Add/Remove Locations” to select only the building you want to look at.
   
   b. If you need to, click on “Add Filter” to select a specific room, capacity, floor, feature, etc.

2. Whatever is grayed out in the grid is already reserved by a group.

3. To search via events click on “EVENTS” **EVENTS**.
a. To search a specific room, building, event name, etc click on “Add Filter”

b. Select to view either Daily, Weekly, or Monthly