

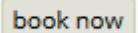
EMS - Room Reservation User Instructions

How to Submit a Reservation Request

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



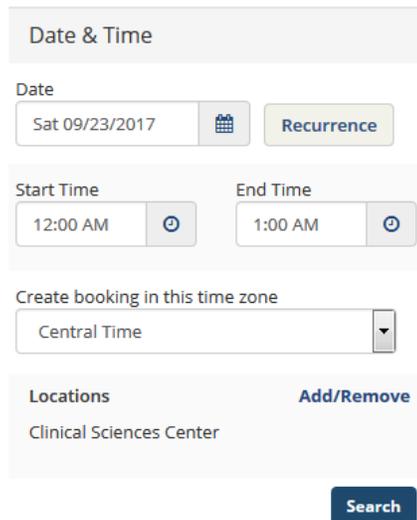
2. Click on the “Create a Reservation” tab on left side
 - a. You can now also find the list of reservation templates right on your “My Home” page under ‘My Reservation Templates’



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

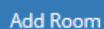


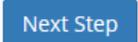
The form is titled "Date & Time" and contains several input fields and buttons. It includes a "Date" field with a calendar icon and a "Recurrence" button. Below that are "Start Time" and "End Time" fields, each with a clock icon. A dropdown menu for "Create booking in this time zone" is set to "Central Time". At the bottom, there is a "Locations" section with "Clinical Sciences Center" listed and an "Add/Remove" button. A "Search" button is located at the bottom right of the form.

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”



- a. You can edit your “Attendance & Setup Type” by clicking  Attendance & Setup Type
- 10. Click on “Reservation Details”  which is the second step in submitting a request, or click on “Next Step” 
- 11. 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)
 - a. If the room also have the option, you will also select if your event is an Audio/Video/Web Conference
- 12. When finished, click on “Create Reservation” 
- 13. 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.
- 14. 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

 CREATE A RESERVATION

Date & Time

Date



Recurrence

Start Time



End Time



Create booking in this time zone

Central Time ▼

Locations

[Add/Remove](#)

Clinical Sciences Center

Search

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:

Recurrence

Repeats:

August 2018

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Start Time:

End Time:

Create booking in this time zone:

b.

4. Click “Apply Recurrence”

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

Date & Time

Occurs every week on Saturday, effective Sat Sep 23, 2017 until Sat Oct 28, 2017 from 3:30 PM to 4:30 PM Central Time. (6 occurrences)

Locations **Add/Remove**

Clinical Sciences Center

6. A list of rooms that are available for all or some of the dates you requested come up

Room Request

STROUF, CALLIE

CSC Reservations

1 Rooms | 2 Reservation Details

New Booking for Sat Sep 23, 2017

Date & Time: Occurs every week on Saturday, effective Sat Sep 23, 2017 until Sat Oct 28, 2017 from 3:30 PM to 4:30 PM Central Time. (6 occurrences)

Selected Rooms: Your selected Rooms will appear here.

Room Search Results

Room	Available	Location	Floor	TZ	Cap	Price	Match
Room D5/607	6/6	Clinical Sciences Center	Sixth Floor	CT	10		
Room E5/422	6/6	Clinical Sciences Center	Fourth Floor	CT	10		
Room E5/492	6/6	Clinical Sciences Center	Fourth Floor	CT	40		
Room E5/642	6/6	Clinical Sciences Center	Sixth Floor	CT	8		
Room E5/668	6/6	Clinical Sciences Center	Sixth Floor	CT	8		
Room E5/682	6/6	Clinical Sciences Center	Sixth Floor	CT	24		
Room F4/417	6/6	Clinical Sciences Center	Fourth Floor	CT	16		

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

Selected Rooms Attendance & Setup Type

- Room G5/170 (1 of 6 occurrences with 5 conflicts) - Room G5/164 (6 of 6 occurrences)

Room Search Results

- 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)

Selected Rooms Attendance & Setup Type

Room G5/122 (5 of 6 occurrences with 1 conflicts)

Room Search Results

LIST

Favorit...

Room	Available	Location	Floor	TZ	Cap	Price	Match
6occurrence(s): 5 In Room G5/122 1 Remaining Skip 1							
Rooms You Can Reserve							
Room D5/607	1/1	Clinical Sciences Center	Sixth Floor	CT	10		<input type="checkbox"/>
Room E5/422	1/1	Clinical Sciences Center	Fourth Floor	CT	10		<input type="checkbox"/>
Room E5/492	1/1	Clinical Sciences Center	Fourth Floor	CT	40		<input type="checkbox"/>
Room E5/642	1/1	Clinical Sciences Center	Sixth Floor	CT	8		<input type="checkbox"/>
Room E5/668	1/1	Clinical Sciences Center	Sixth Floor	CT	8		<input type="checkbox"/>
Room E5/682	1/1	Clinical Sciences Center	Sixth Floor	CT	24		<input type="checkbox"/>

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

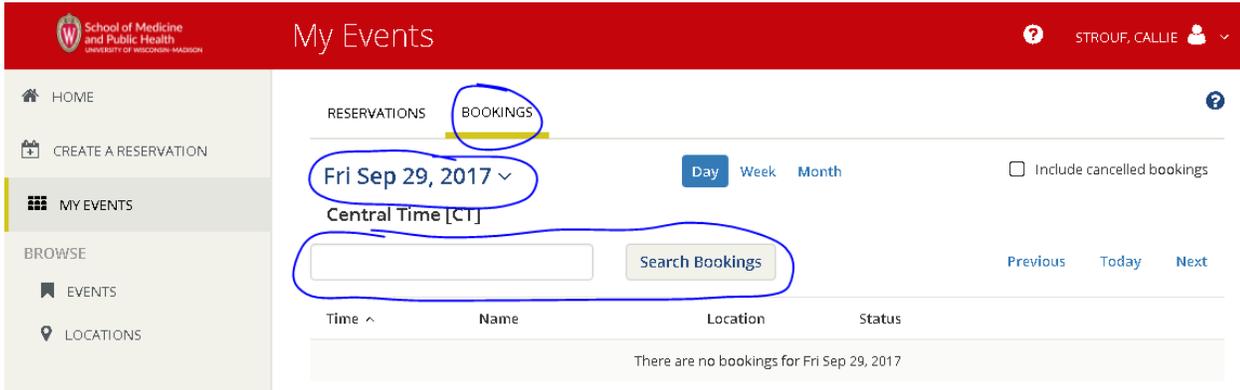
1. There are a couple different ways to view requests you have submitted.

2. Click on "MY EVENTS" found on the left side column

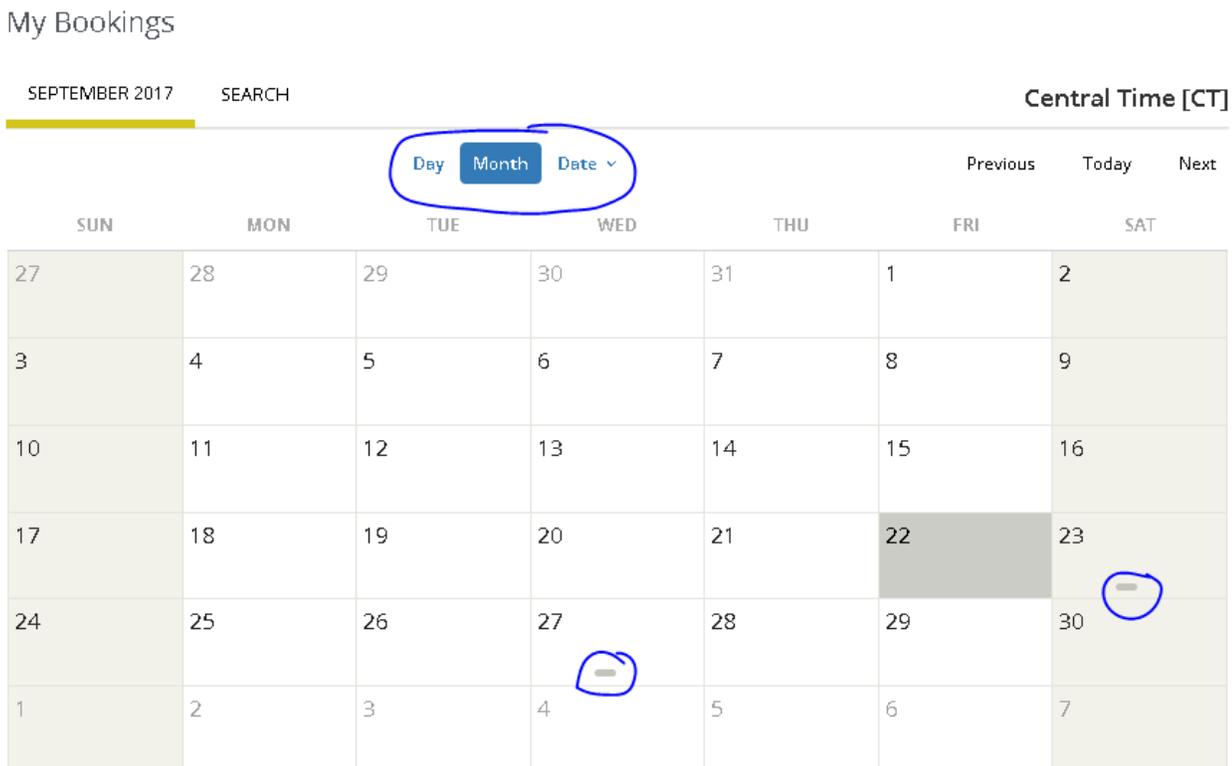


3. A list of all active reservations that have been made within your account will be listed.

- a. You can also click on “PAST” to see those that have passed
 - b. To view any cancellations you can click Include cancelled reservations
4. 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”



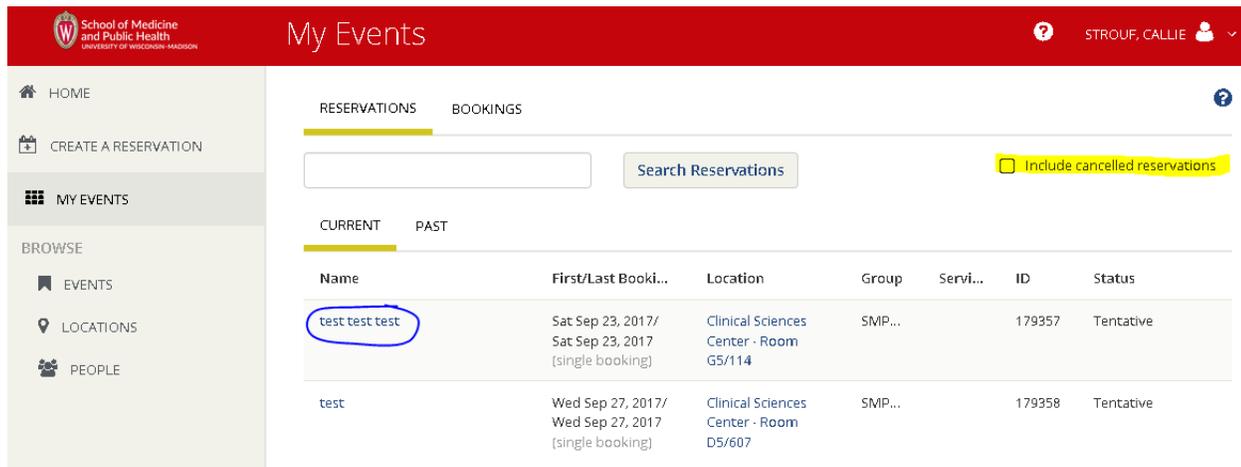
5. Another option is on the bottom of the Home page you can see ‘My Bookings’
- a. Select day, month, or specific date to view



6. 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.
 - a. You can also view if a request has been confirmed, or if still tentative
 - i. *You can edit, cancel, or add to any of these if tentative or confirmed.



The screenshot shows the 'My Events' interface. On the left is a navigation menu with options like HOME, CREATE A RESERVATION, MY EVENTS, and BROWSE. The main area has tabs for RESERVATIONS and BOOKINGS. A search bar is present with a search button and a checkbox for 'Include cancelled reservations'. Below are tabs for CURRENT and PAST reservations. A table lists reservations with columns: Name, First/Last Book..., Location, Group, Servi..., ID, and Status. The first row, 'test test test', is circled in blue.

Name	First/Last Book...	Location	Group	Servi...	ID	Status
test test test	Sat Sep 23, 2017/ Sat Sep 23, 2017 (single booking)	Clinical Sciences Center - Room G5/114	SMP...		179357	Tentative
test	Wed Sep 27, 2017/ Wed Sep 27, 2017 (single booking)	Clinical Sciences Center - Room D5/607	SMP...		179358	Tentative

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



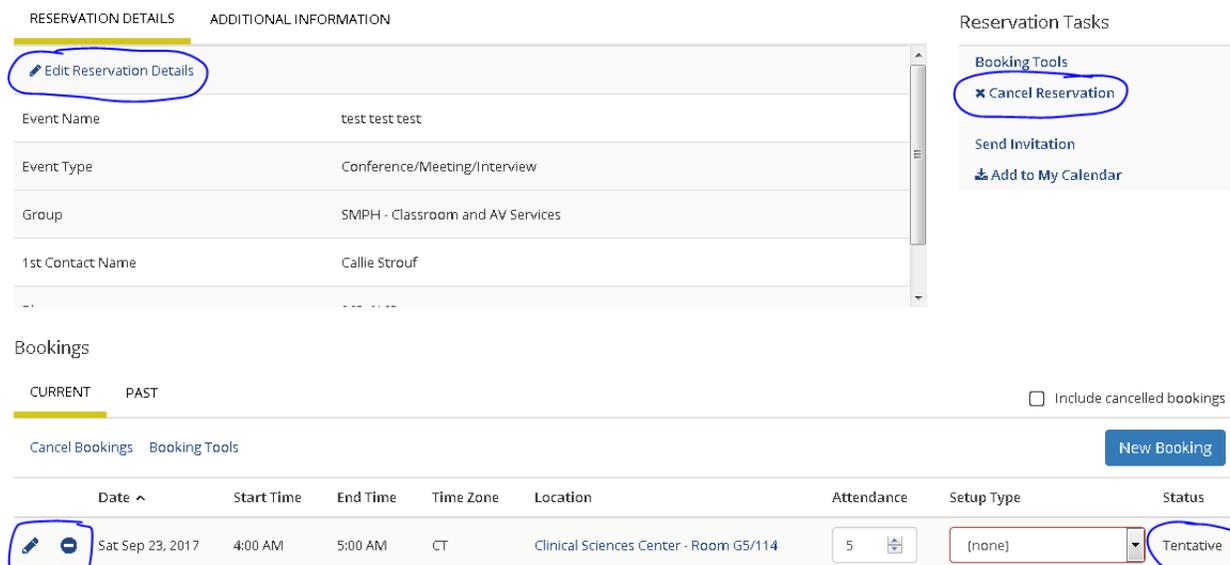
- a. Be sure to click



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



◀ My Events / test test test beginning Sep 23, 2017 (179357)



The screenshot shows the 'Reservation Details' page. It has two tabs: RESERVATION DETAILS and ADDITIONAL INFORMATION. The 'Edit Reservation Details' button is circled in blue. The main content area shows event details like Event Name, Event Type, Group, and 1st Contact Name. On the right, there's a 'Reservation Tasks' panel with 'Cancel Reservation' circled in blue. Below is a 'Bookings' section with tabs for CURRENT and PAST. A table lists bookings with columns: Date, Start Time, End Time, Time Zone, Location, Attendance, Setup Type, and Status. The first row, 'Sat Sep 23, 2017', has a minus sign icon circled in blue and a 'Tentative' status circled in blue.

Date	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Sat Sep 23, 2017	4:00 AM	5:00 AM	CT	Clinical Sciences Center - Room G5/114	5	(none)	Tentative

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

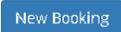
6. If you need to edit the time, date, name, or room location click on the  next to the specific date to edit

a. Be sure to click  when done to save changes

7. Click on “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.

CURRENT PAST Include cancelled bookings

Cancel Bookings Booking Tools 

Date ^	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
  Fri Sep 22, 2017	8:00 PM	9:00 PM	CT	Health Sciences Learning Center - Room 1202	5 	Conference Room 	Tentative
  Sat Sep 23, 2017	8:00 PM	9:00 PM	CT	Health Sciences Learning Center - Room 1202	5 	Conference Room 	Tentative
  Sun Sep 24, 2017	8:00 PM	9:00 PM	CT	Health Sciences Learning Center - Room 1202	5 	Conference Room 	Tentative
  Mon Sep 25, 2017	8:00 PM	9:00 PM	CT	Health Sciences Learning Center - Room 1202	5 	Conference Room 	Tentative

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: 

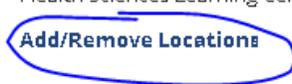
a. Click on “Add/Remove Locations” to select only the building you want to look at

b. If you need to, click on “Add Filter” to select a specific room, capacity, floor, feature, etc.

Filters

[Compact View](#)

Date: Fri 09/22/2017  Time Zone: Central Time 

Locations: Health Sciences Learning Center  

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

3. To search via events click on “EVENTS” 

a. To search a specific room, building, event name, etc click on “Add Filter”

Add Filter

Filters

Compact View Saved Filters

Date  **Add Filter**

Save Filters

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

DAILY LIST

WEEKLY LIST

MONTHLY LIST

