



Canceling Reservations & Bookings in Desktop Client

Double-click the EMS Icon on your desktop, and log in by typing in your network user name and password and clicking the OK button.



From the main menu, click the Browser option to search for a reservation.



The browser window will display on the filter tab, allowing you the opportunity to enter search criteria to find the reservation you need. Note: There are many ways to search to find the reservation you need. In this guide, we will search by group name, which is one method. Keep in mind that search criteria can be entered in any of the fields on the filter tab to find the reservation you need.

In the 'Browse For' field at the top, select Reservations.

In the Group field, click the drop down to select the desired group. Once all search criteria has been entered, click 'Get Data' in the bottom right corner of the screen to view the results of your search.

On the Results tab, click once in the row for the reservation that you need to edit and click 'Open' at the bottom of the screen to open the Navigator window and make any necessary changes.

| Reservation ID | Group | Group Type | 1st Contact | Reservation Event Name | Description |
|----------------|--------------------|------------|-----------------|---|-------------|
| 4012 | Finance Systems | Department | Jennifer Rogers | P2P Team | |
| 9583 | Registrar's Office | Department | Shemeka Penn | Test Meeting | |
| 12205 | Finance Systems | Department | Natalie Hill | Sys Admin Meeting | |
| 12234 | Finance Systems | Department | Nathan Anderson | Reporting Team Status Meeting - Test CFRI & Shared Departmental Reports | |
| 12235 | Finance Systems | Department | Kathy Arfman | Banner & Blackbaud Testing | |
| 12236 | Finance Systems | Department | Jane Chapman | Reynolda House Report Testing | |
| 12239 | Finance Systems | Department | Jane Chapman | Cognos Report Options for monitoring project funds | |
| 12241 | Finance Systems | Department | Nathan Anderson | Price Bounce/Contract Manager Discussion | |
| 12243 | Finance Systems | Department | Kathy Arfman | SiQuest/Deacon Depot Briefing | |
| 12246 | Finance Systems | Department | Nathan Anderson | Reporting Team Status Meeting | |
| 12247 | Finance Systems | Department | Jane Chapman | Discuss Updates for Finance EDW Class | |
| 12249 | Finance Systems | Department | Jane Chapman | Enhancements for Effort/Certification reports for ORSP | |
| 12256 | Finance Systems | Department | Nathan Anderson | Review Banner Finance Security | |
| 12275 | Finance Systems | Department | Nathan Anderson | Business Systems Analyst Interview | |
| 12281 | Finance Systems | Department | Natalie Hill | P2P Renovating Session | |

When the Navigator window opens to allow for editing, make sure you are viewing the reservation summary tab so that you can view the reservation level information (who/what) as well as the associated bookings in the lower pane.

To cancel a single booking:

Begin by clicking once on the booking row in the lower pane of the navigator window and click 'Edit'.

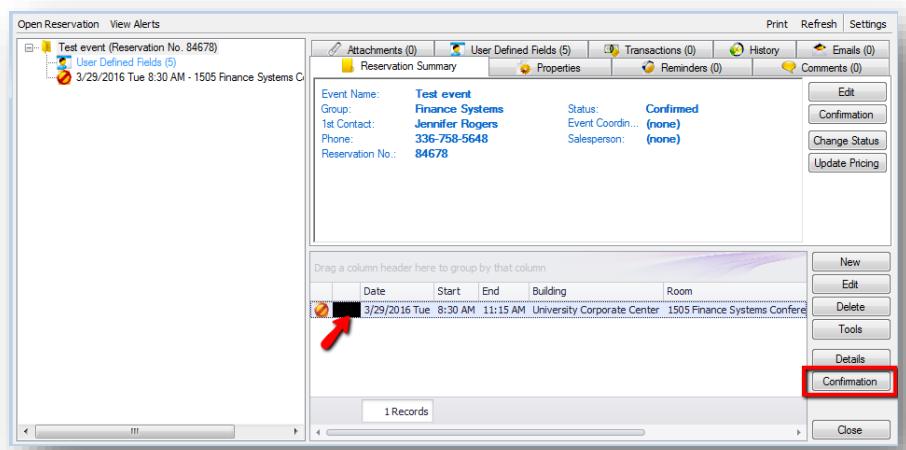
On the edit screen, click the Status drop-down and select 'Cancelled'.

A Cancel Status dialog box will display for you to indicate why the booking was cancelled and by whom (The 'Reason' and 'Who Cancelled' fields are required). Click 'OK' to be returned to the edit screen.

Click 'OK' at the bottom of the edit screen to continue the cancellation process.

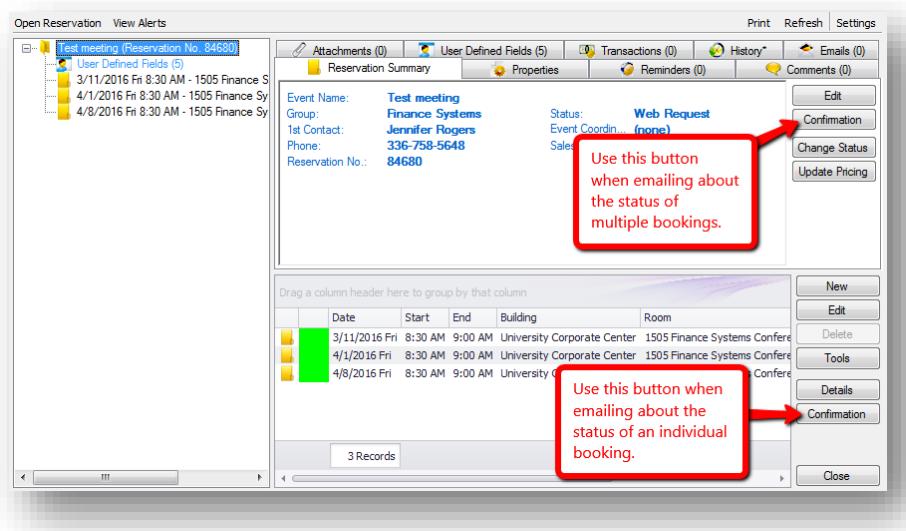
Another dialog box will display to be sure that you want to cancel. Click 'OK'.

The edit screen will close and the Navigator window will now display the updated booking information with a black box to indicate the cancelled booking. To send an email communication of this cancellation, click on the cancelled row once to highlight, and then click ‘Confirmation’ in the lower pane.



Now that you have updated the booking status, you will need to communicate that status to the end user. To do this, you will click the ‘Confirmation’ button.

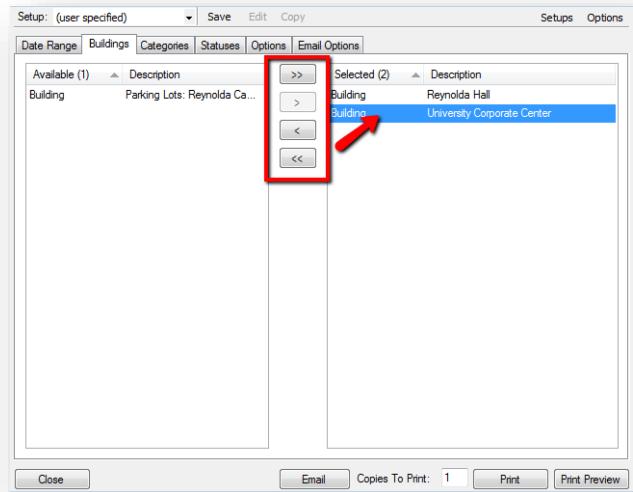
If you are communicating regarding one individual booking, click once to highlight that booking and click ‘Confirmation’ in the lower pane to the right of the bookings. To send an email regarding the status of multiple bookings, use the Confirmation button in the upper pane.



No matter which confirmation button you click, the wizard looks the same. The following steps walk you through each tab. For information on how to save some of this information for use over and over, see the quick guide, “[Specifying Confirmation Settings and Memorizing Confirmation Reports](#)”.

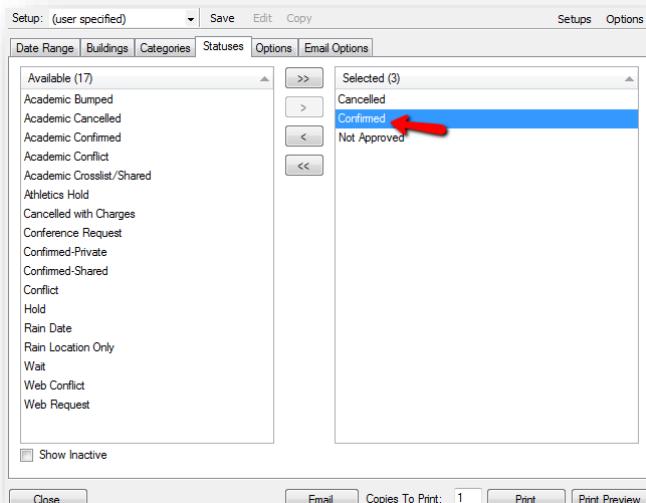
The Date Range tab will display the date range for the bookings associated with the event in your spaces.

On the buildings tab, make sure that the building for this reservation is listed on the right in the Selected Buildings box. If not, click once on the building name on the left in the Available Buildings column to highlight it. Then click the single arrow in the center to move it to the right.



On the Statuses tab, make sure that the 'Confirmed' status is listed on the right under 'Selected Statuses'.

NOTE: The Categories tab is not covered in this guide as only a small sub-section of Space Managers uses it.

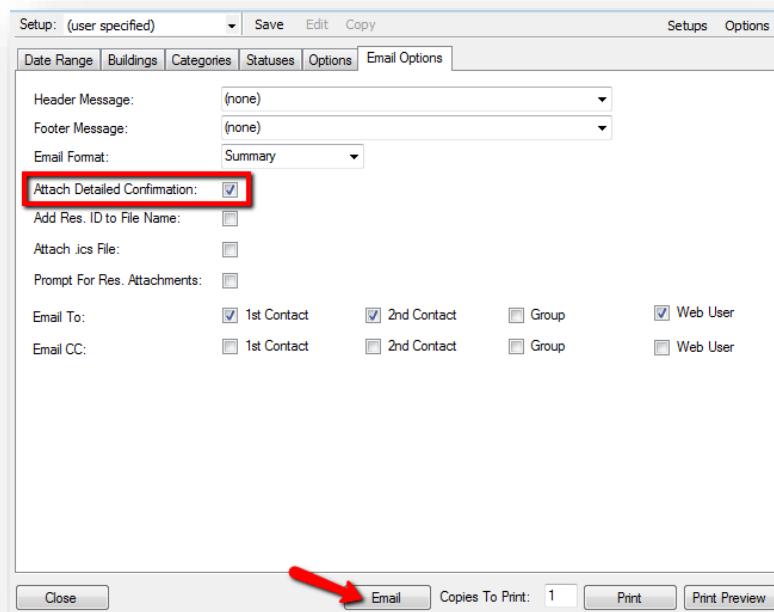
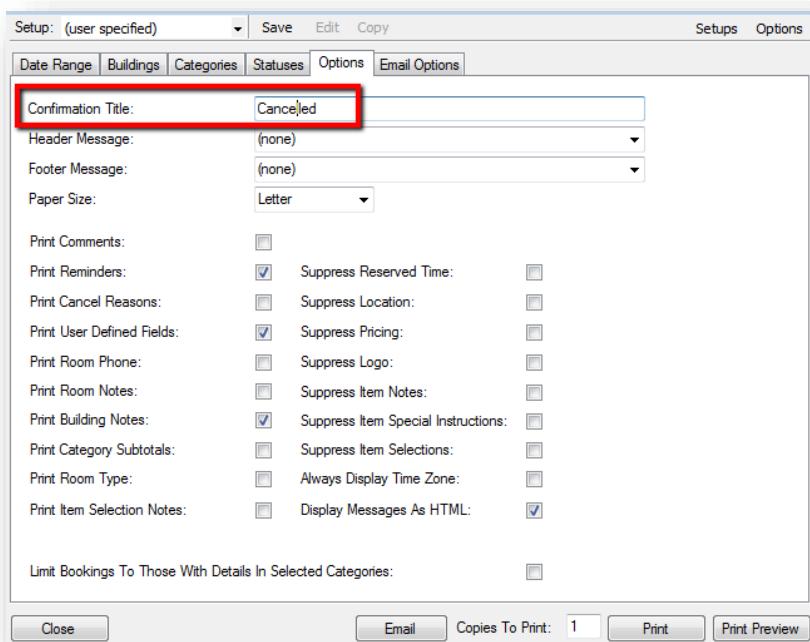


The Options tab is where you select any information you want displayed on the printable report that is attached to the email you send. Make sure the Confirmation Title matches the status of the booking you are emailing about – In this case, Cancelled. In the header and footer message drop-down fields, select the appropriate header and/or footer message for your area that matches the booking status. Select any of the checkboxes that provide information to be printed on the attached file.

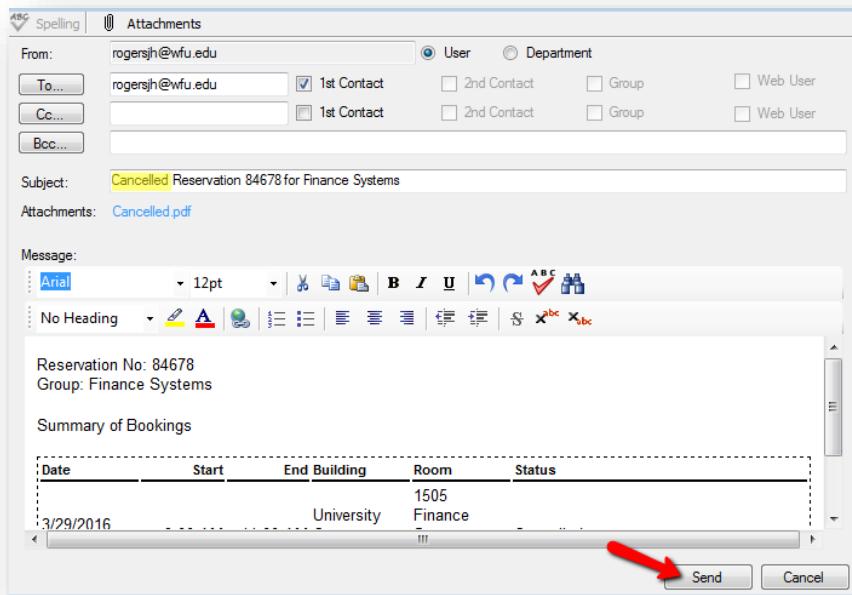
Click ‘Print Preview’ in the bottom right corner to see what the file will look like. Use the ‘Print’ button to print a copy for your files if necessary, and adjust the number of copies to print using the field to the left.

The Email Options tab is where you select the information that will display in the body of the email you send. Be sure that ‘Attach Detailed Confirmation’ is checked so that the requestor can print a copy for their records if desired.

Once all information has been populated, click ‘Email’ at the bottom of the screen to generate the email preview.

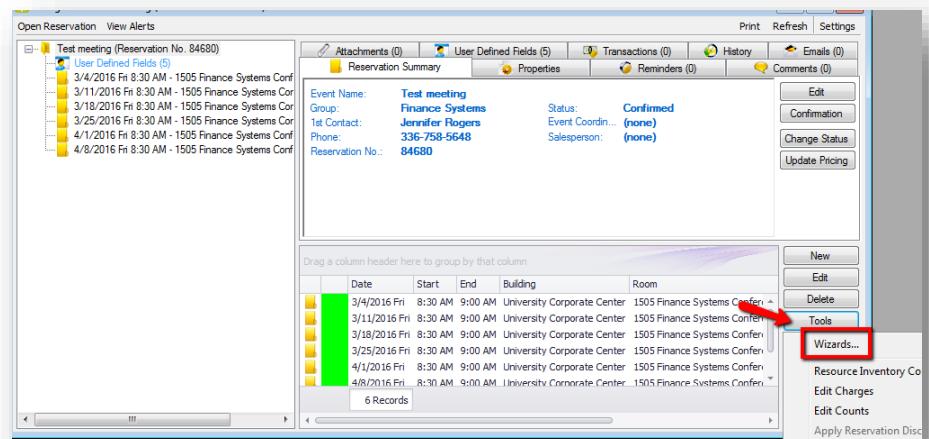


Use this screen to make a final review of the email, and edit as necessary. Make sure the subject line reflects 'Cancellation'. Click 'Send' in the bottom right corner to send the cancellation email.

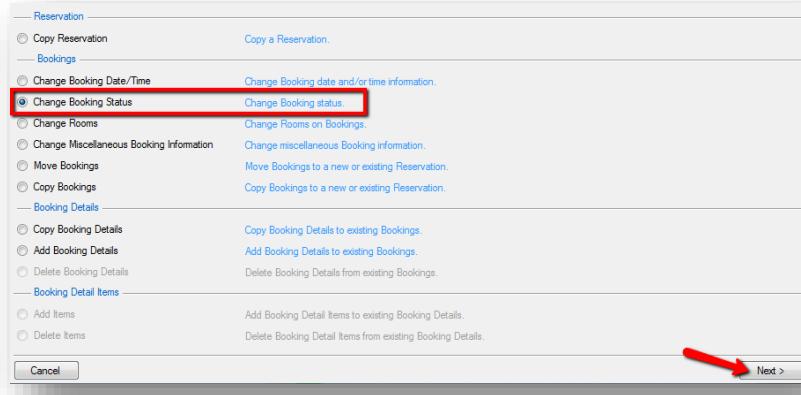


To cancel multiple bookings:

In the lower pane of the window, click 'Tools' and select 'Wizards'.



On the Wizards dialog box, select 'Change Booking Status' and click 'Next' in the bottom right corner.



From the Status drop down, select 'Cancelled'. Leave the 'Update Reservation Status' box **unchecked** as you are only cancelling individual bookings. This is in the event that a reservation has multiple bookings in multiple locations, so that you don't cancel the bookings in spaces you don't manage, as you can't see those.

Once status is selected, the Reason, Who Cancelled, & Notes fields display. Complete these fields & click 'Next' in the bottom right of the screen.

The next screen displays the list of bookings to which this change will apply. If you are applying this to all bookings listed, click 'Select All' and then 'Finish'. If you are only applying the change to a portion of bookings, hold the Ctrl key and click on each row to highlight. Then click 'Finish'. The change booking status wizard screen will display the updated status and the results of the change. Click 'Close' at the bottom right of this screen to return to the Navigator window.

Status: Cancelled

Reconfirm Date:

Update Reservation Status:

Reason: Cancelled by User

Who Cancelled: J Rogers

Notes:

< Previous Next >

Select Bookings:

| Date | Weekday | Start | End | Building | Room | Event | Status |
|-----------|---------|---------|---------|-----------------------------|--------------------------------------|--------------|-----------|
| 3/4/2016 | Fri | 8:30 AM | 9:00 AM | University Corporate Center | 1505 Finance Systems Conference Room | Test meeting | Confirmed |
| 3/11/2016 | Fri | 8:30 AM | 9:00 AM | University Corporate Center | 1505 Finance Systems Conference Room | Test meeting | Confirmed |
| 3/18/2016 | Fri | 8:30 AM | 9:00 AM | University Corporate Center | 1505 Finance Systems Conference Room | Test meeting | Confirmed |
| 3/25/2016 | Fri | 8:30 AM | 9:00 AM | University Corporate Center | 1505 Finance Systems Conference Room | Test meeting | Confirmed |
| 4/1/2016 | Fri | 8:30 AM | 9:00 AM | University Corporate Center | 1505 Finance Systems Conference Room | Test meeting | Confirmed |
| 4/8/2016 | Fri | 8:30 AM | 9:00 AM | University Corporate Center | 1505 Finance Systems Conference Room | Test meeting | Confirmed |

Hide Cancelled Bookings: Hide Old Bookings:

Select All Unselect All

< Previous Finish >

| Date | Start | End | Time Zone | Building | Room | Event | Status | Results |
|-----------|---------|---------|-----------|-----------------------------|--------------------------------------|--------------|-----------|-------------------|
| 3/4/2016 | 8:30 AM | 9:00 AM | ET | University Corporate Center | 1505 Finance Systems Conference Room | Test meeting | Cancelled | Change Successful |
| 3/11/2016 | 8:30 AM | 9:00 AM | ET | University Corporate Center | 1505 Finance Systems Conference Room | Test meeting | Cancelled | Change Successful |
| 3/25/2016 | 8:30 AM | 9:00 AM | ET | University Corporate Center | 1505 Finance Systems Conference Room | Test meeting | Cancelled | Change Successful |

Show Unchanged Only

Close

The bookings are now updated with the black boxes to reflect their cancelled status.

If you need to prepare a cancellation email, click 'Confirmation' in the upper pane and following the instructions on pages 4-6.

Reservation Summary

User Defined Fields (2) Transactions (0) History* Emails (0)

Event Name: Test - Stretch Break
Group: Finance Systems Status: Cancelled
1st Contact: Jennifer Rogers Event Coordinator: (none)
Phone: 336-758-5648 Salesperson: (none)
Reservation: 1451 Web User: Rogers, Jennifer H.

Date Time Booking Sta Time Booking End Time Zone Building Room

| | | | | | |
|---------------|---------|---------|----|-------------------|----------|
| 8/1/2014 Fri | 4:15 PM | 5:15 PM | ET | University Corpor | 1505 Fin |
| 8/8/2014 Fri | 4:15 PM | 5:15 PM | ET | University Corpor | 1505 Fin |
| 8/15/2014 Fri | 4:15 PM | 5:15 PM | ET | University Corpor | 1505 Fin |
| 8/22/2014 Fri | 4:15 PM | 5:15 PM | ET | University Corpor | 1505 Fin |
| 8/29/2014 Fri | 4:15 PM | 5:15 PM | ET | University Corpor | 1505 Fin |

New Edit Delete Tools Details Confirmation

To delete cancelled bookings, hold down the Ctrl button and click on each cancelled booking you want to delete. Note that bookings must be in a cancelled status before they can be deleted.

Once highlighted, click the Delete button to the right of the bookings list.

Open Reservation View Alerts

Test meeting (Reservation No. 84680)

User Defined Fields (5)

3/4/2016 Fri 8:30 AM - 1505 Finance Systems Conf
3/11/2016 Fri 8:30 AM - 1505 Finance Systems Conf
3/18/2016 Fri 8:30 AM - 1505 Finance Systems Conf
3/25/2016 Fri 8:30 AM - 1505 Finance Systems Conf
4/1/2016 Fri 8:30 AM - 1505 Finance Systems Conf
4/8/2016 Fri 8:30 AM - 1505 Finance Systems Conf

Event Name: Test meeting
Group: Finance Systems Status: Confirmed
1st Contact: Jennifer Rogers Event Coordinator: (none)
Phone: 336-758-5648 Salesperson: (none)
Reservation No.: 84680

Date Start End Building Room

| | | | | |
|---------------|---------|---------|-----------------------------|-----------------------------|
| 3/4/2016 Fri | 8:30 AM | 9:00 AM | University Corporate Center | 1505 Finance Systems Confer |
| 3/11/2016 Fri | 8:30 AM | 9:00 AM | University Corporate Center | 1505 Finance Systems Confer |
| 3/18/2016 Fri | 8:30 AM | 9:00 AM | University Corporate Center | 1505 Finance Systems Confer |
| 3/25/2016 Fri | 8:30 AM | 9:00 AM | University Corporate Center | 1505 Finance Systems Confer |
| 4/1/2016 Fri | 8:30 AM | 9:00 AM | University Corporate Center | 1505 Finance Systems Confer |
| 4/8/2016 Fri | 8:30 AM | 9:00 AM | University Corporate Center | 1505 Finance Systems Confer |

New Edit Delete Tools Details Confirmation Close

A pop-up box will ask to be sure you want to delete the selected bookings. Click OK.

You will be returned to the Navigator window, and the bookings you deleted will be gone. If you haven't already, send the cancellation email to requestor.

