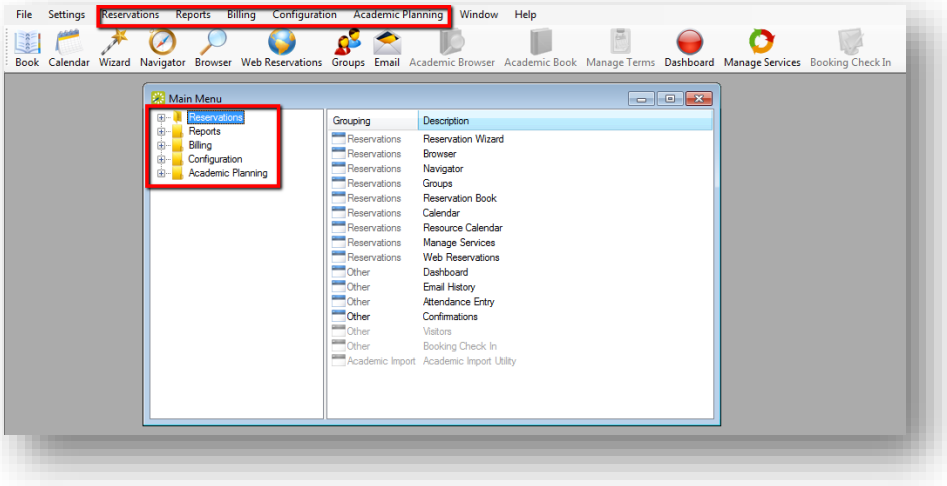
WAKE FOREST
UNIVERSITY

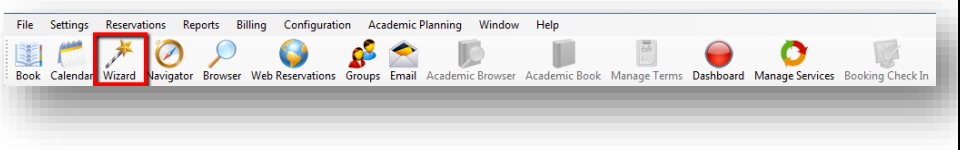
Utilizing Desktop Client to Create New Reservations

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.	
Once logged in, you may see a dialog box entitled “Main Menu”. This is just a different view of the drop-down menus at the top of the screen. You may ignore this or close it out if it is distracting.	

Creating a New Reservation Using Reservation Wizard

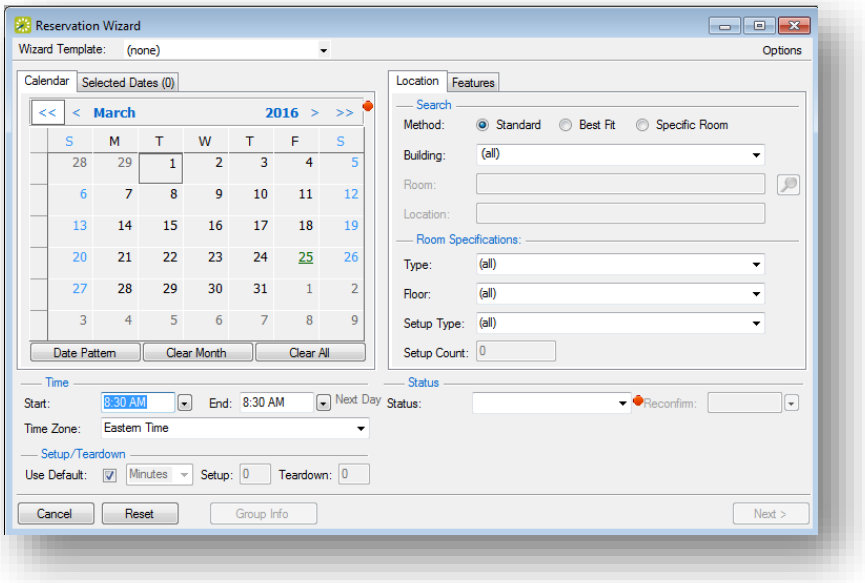
In the quick links menu, click “Wizard”.

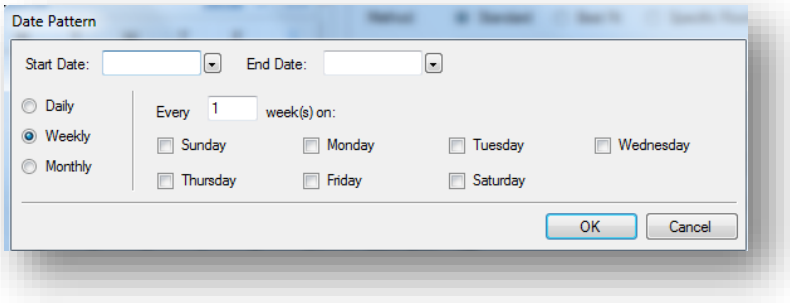
The following screens that display walk you through the process of creating a new reservation, step-by-step.



The first screen offers options for selecting the date(s), time, and room criteria – the booking level details (where/when).

1. **Date Selection:**
   a. Select one or more dates simply by clicking on them individually.
   b. For recurring events, click ‘Date Pattern’ below the calendar.
      i. The Date Pattern dialog box will display for you to input your start & end date, the frequency & day(s) of the week. Once entered, click “OK”.

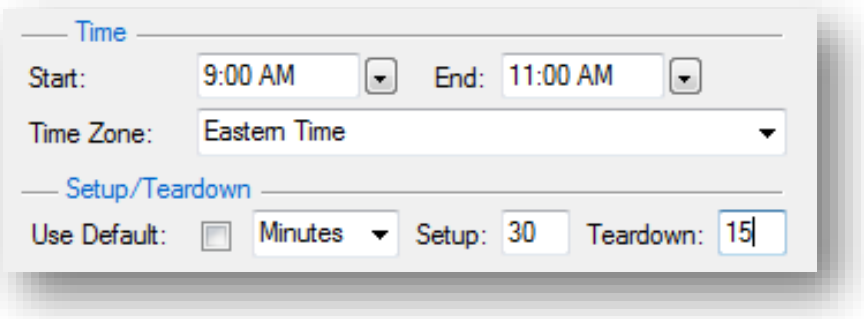




2. Time

a. Located below the calendar, enter your start & end time either by typing in the time in the field or clicking the drop-down arrow to the right of each field to select the time.

b. If additional Setup/Teardown time is needed, uncheck the 'Use Default' box & select either minutes or hours from the dropdown and the number of each in the fields to the right.



3. Location/Room

Standard: displays a list of all available rooms that meet all the requested dates.

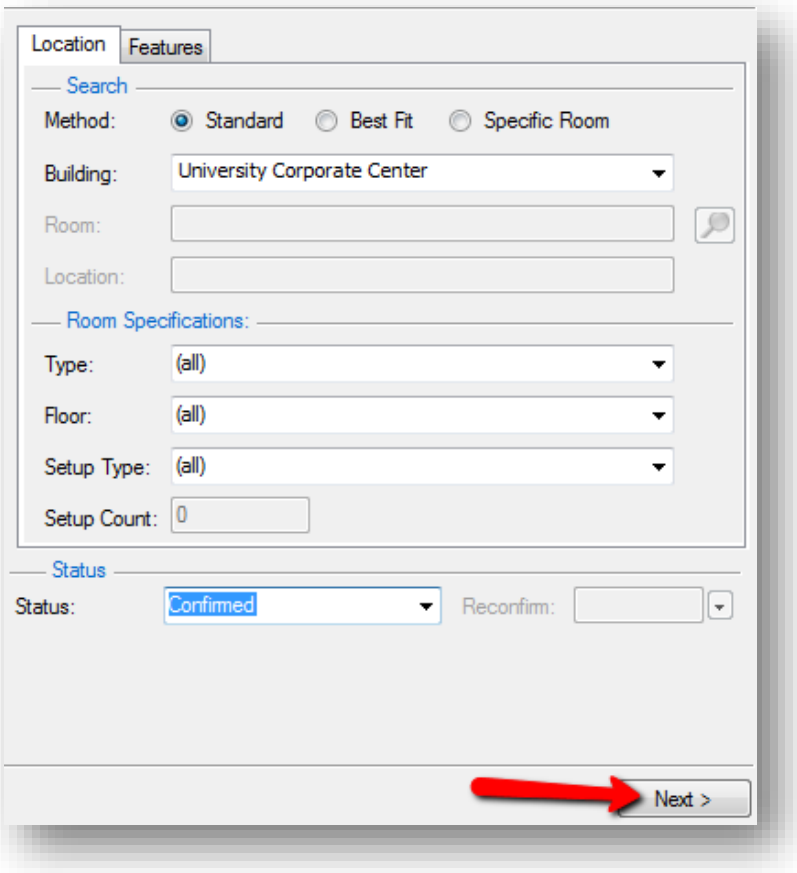
Best Fit: Use this option if no one room meets all the requested dates. The rooms displayed will list the number of requested dates that can be accommodated.

Specific Room: Use this option if you know the room you want to reserve.

Be sure the correct building selected.

Use the drop-down menus in the Room Specifications section to provide additional criteria to narrow your search if necessary.

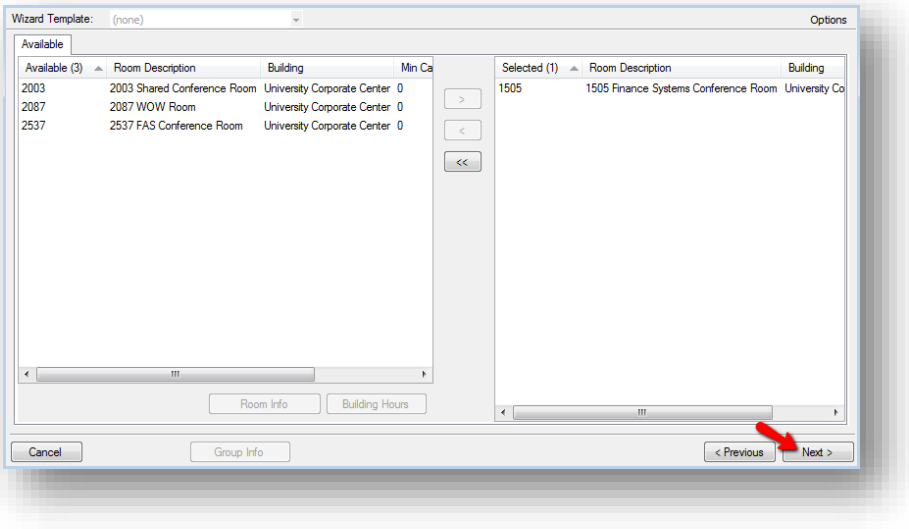
Be sure your status is set to 'Confirmed' and click 'Next'.



Standard Search Results:

The search results screen displays which rooms are available on the available tab & any conflicts on the conflicts tab. To view the conflicting date(s), click the 'Conflict' tab to see the details of the current bookings in the room.

To select an available room, click once on the room listing to highlight it and use the > in the middle of the window to move it to the selected list on the right. Click 'Next' at the bottom right of the screen.

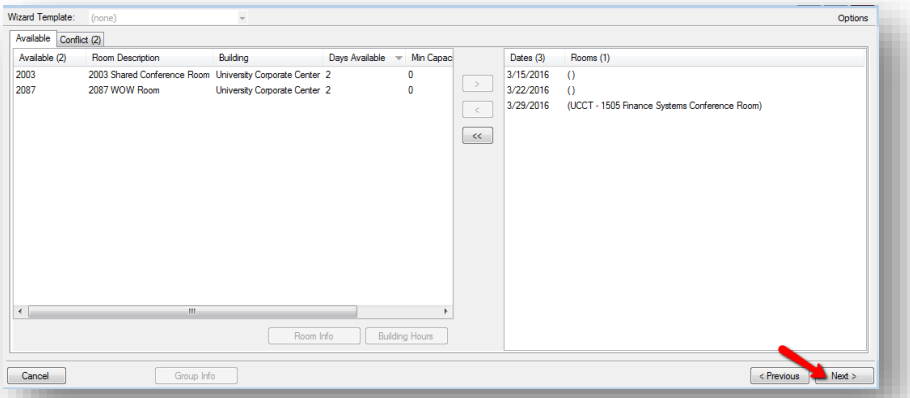


Best Fit Results:

These results are similar to the Standard search results, but display the rooms that are available along with a column for the number of days of those selected that they are available. On the right side of the screen, the selected dates will display. As with the standard search, any conflicts can be viewed on the conflicts tab.

Select an available room by clicking once on the room listing to highlight it and use the > to move it to the selected list on the right. If the room is only available for some of the selected dates, the web client will add that room to the dates it is available. Use the other rooms to complete the space reservation for any outstanding dates.

After adding rooms to all selected dates, click 'Next' to continue.

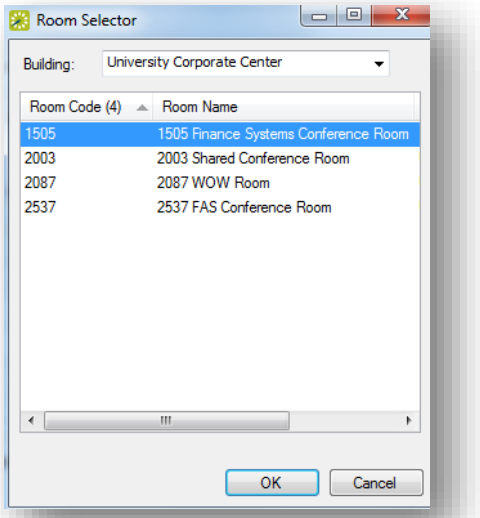


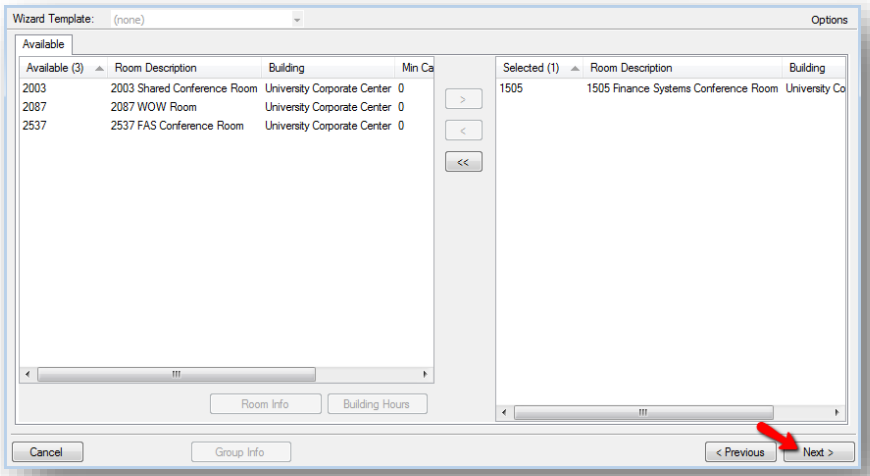
Specific Room Results:

Upon selecting the Specific Room search method, the Room Selector dialog box displays. Be sure the appropriate building is displayed on the Building drop-down, and then Click once on the desired room number or name to select it. Click OK to continue.

If there are any conflicts, a dialog box will indicate that one or more dates are not available. Click OK to continue.

The results will now look similar to the Standard & Best fit results, with the available date for the room displaying on the right side of the screen & conflicts on the conflict tab. Select the available date(s) and click 'Next' to continue.

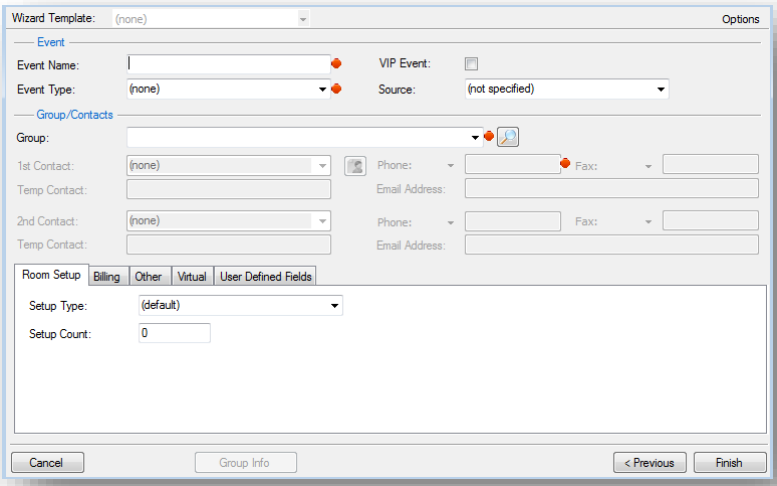


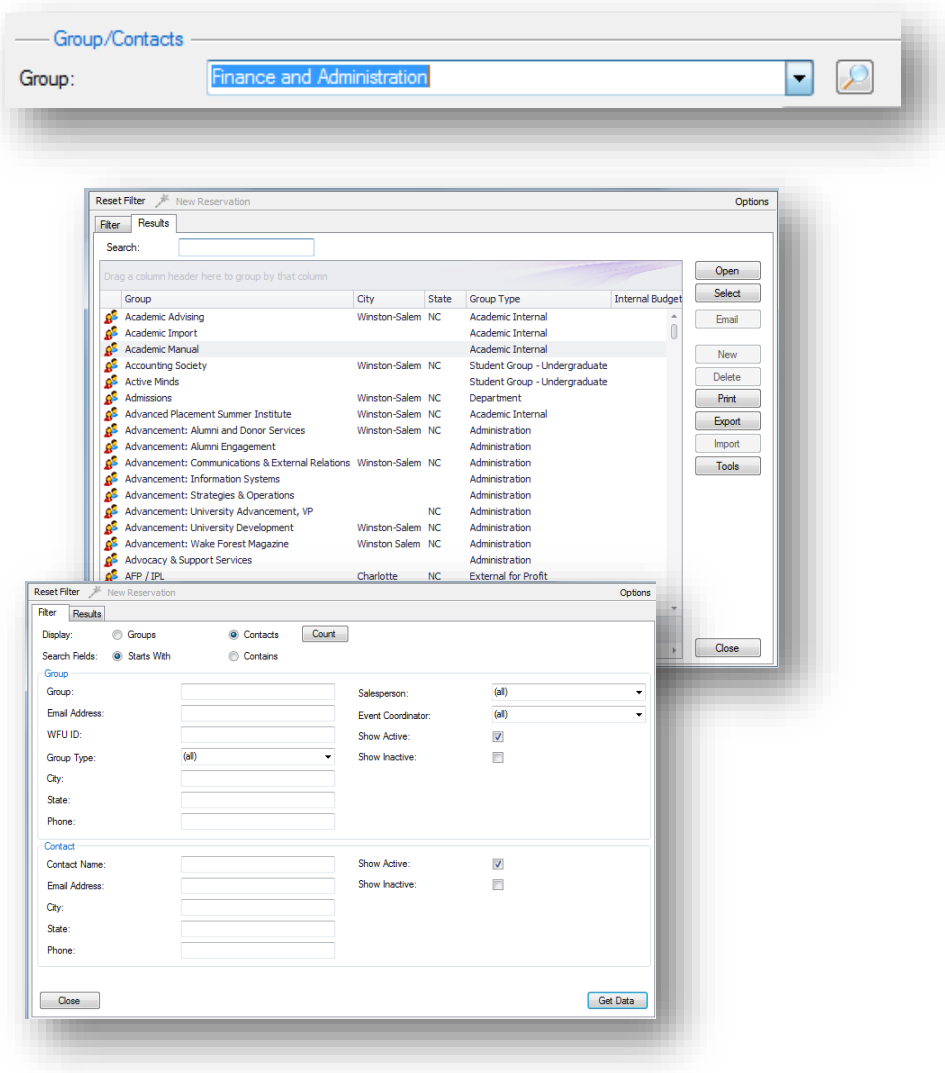
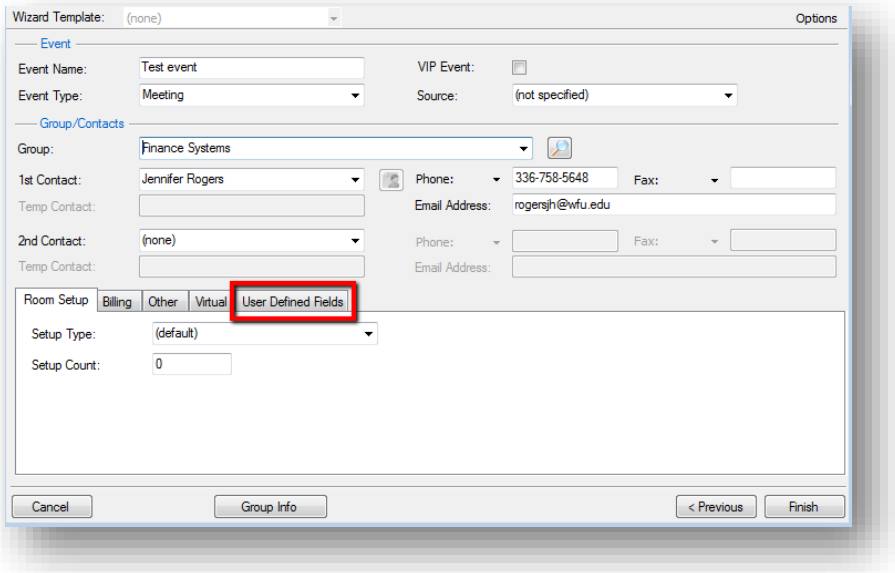


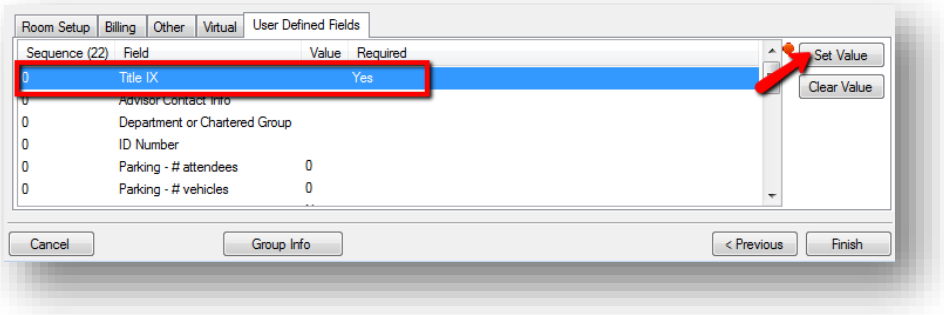
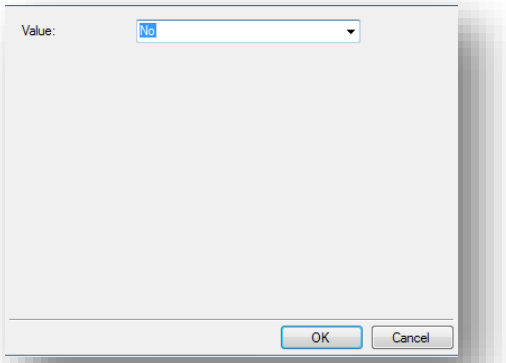
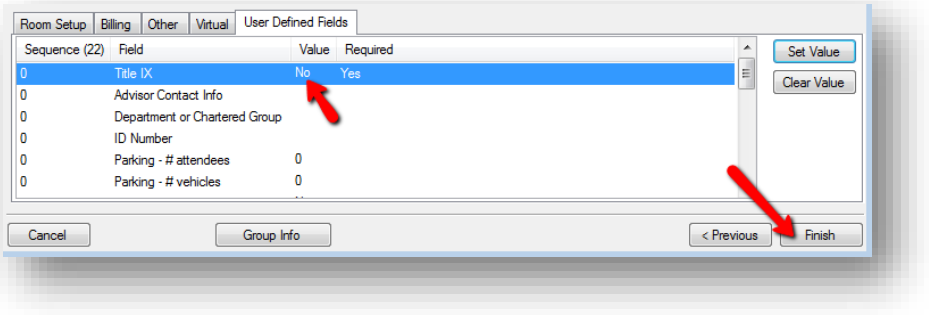
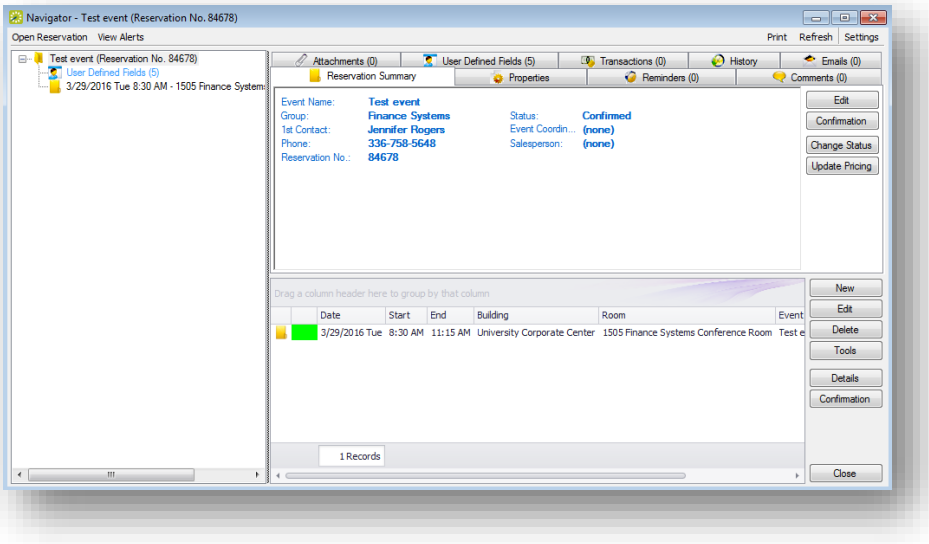
4. Event / Group Information

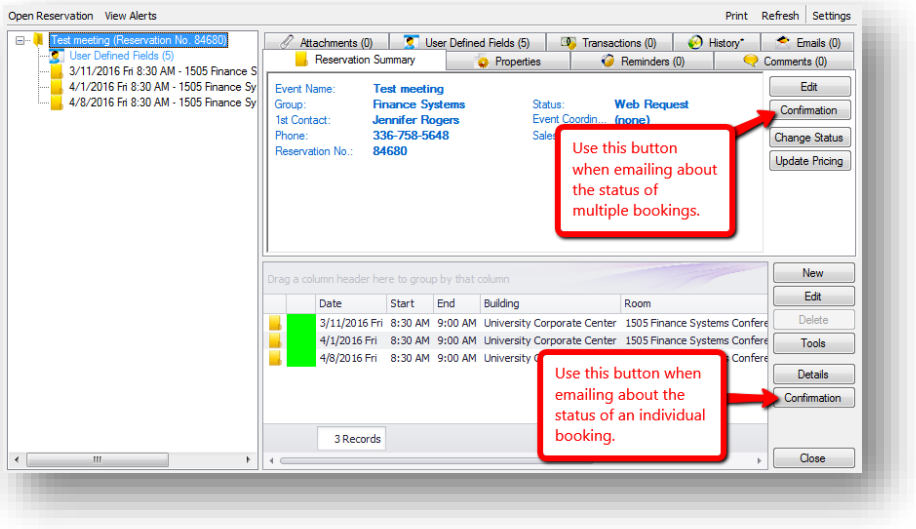
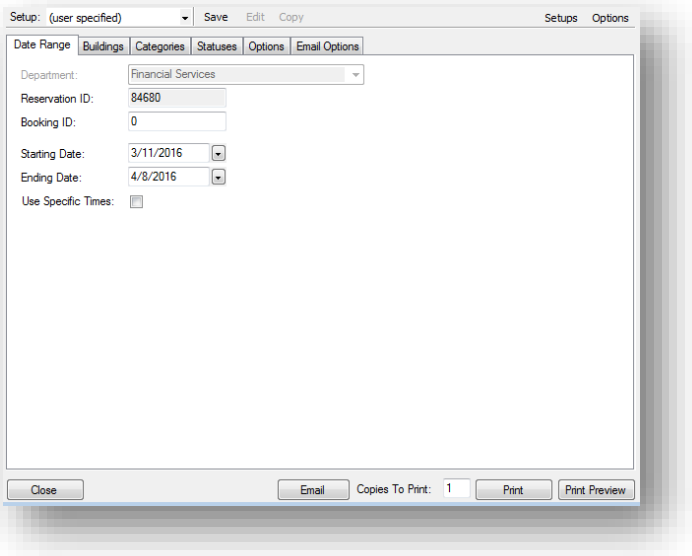
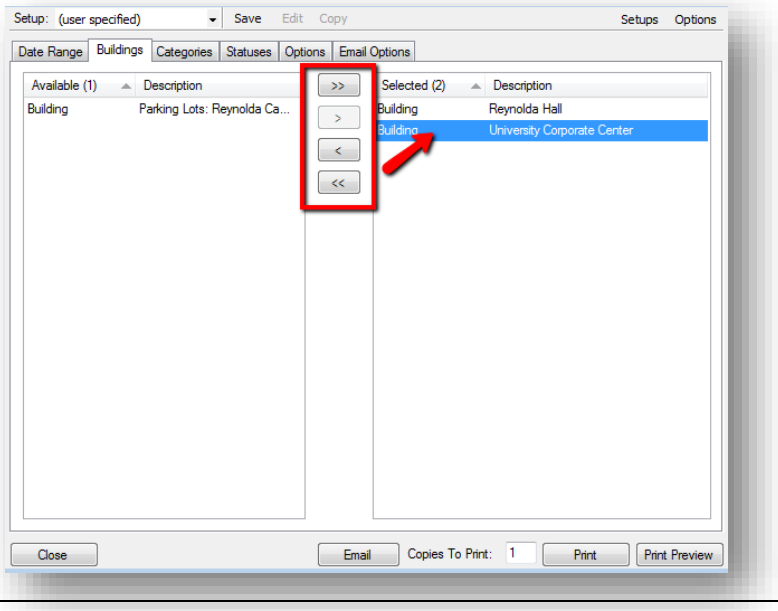
This screen is where the reservation level details are entered (who/what).

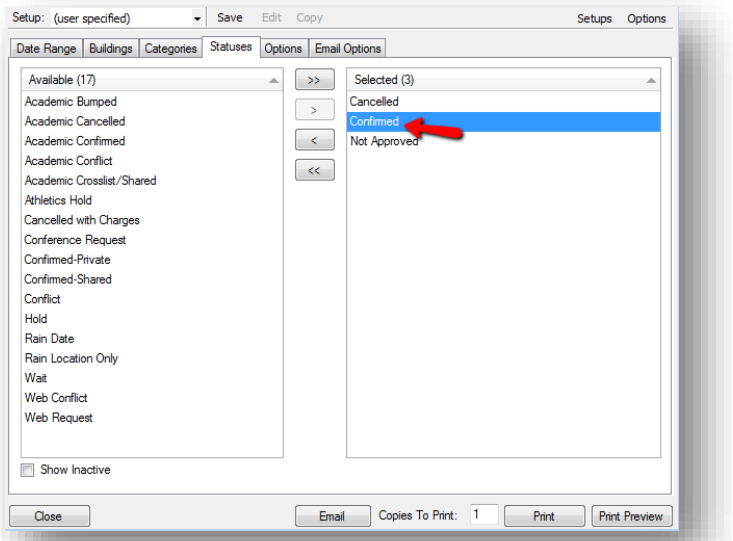
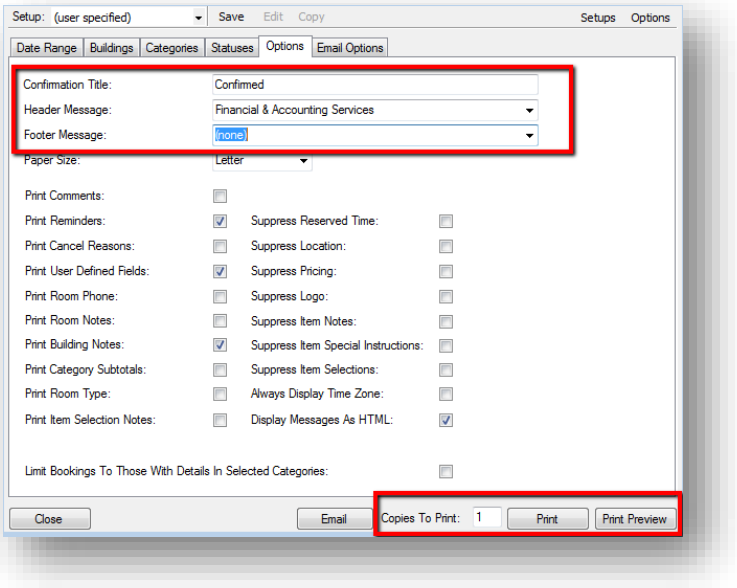
Begin by entering the event name & selecting the event type. Each field with a red dot beside it is required.

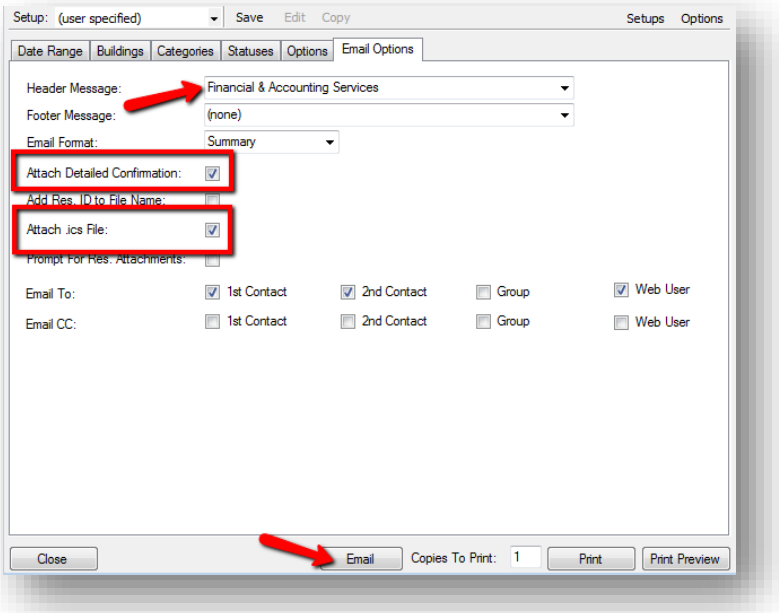
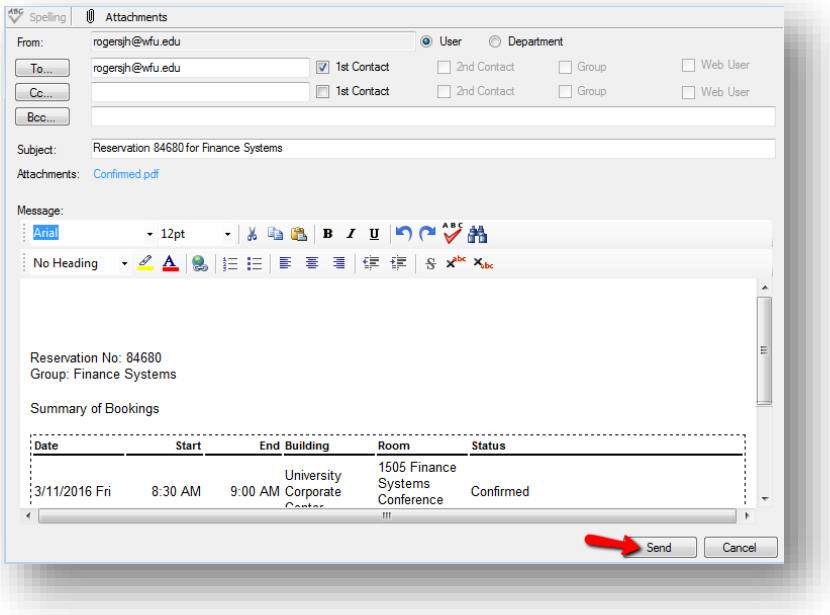
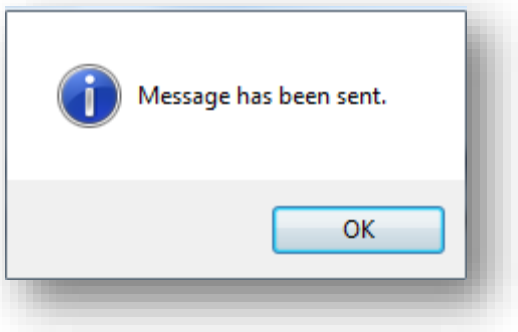


In the Group/Contacts section, select the group name by clicking the drop down arrow and picking it from the list. To look up a group or contact name, click the magnifying glass icon. A dialog box will display. On the Results tab, type the name or a portion of the desired group in the search field and the list will be filtered based on your results. Double click on the desired group name to add it to the reservation details. To learn more about a particular group, click once to highlight the group name and click “Open” to view group details. Use the filter tab to search by groups or contacts, as well as search by a WFU ID number or email address. Once you’ve added your search criteria, click ‘Get Data’ in the bottom right corner to return your results.	
The group and contact now display on the Event/Group screen. Use the tabs at the bottom to add any additional information. Click the User Defined Field (UDF) tab to provide the required response to the question, “Will persons 17 years old and younger (that are not Wake Forest Students) attend this event?” This is the same question that is required for end users as they use DeaconSpace to request space for an event. You will need to select ‘Yes’, ‘No’, or ‘Maybe’.	

The Title IX UDF displays first in the list. Click once to highlight that UDF and click 'Set Value'.	
A pop-up box will display with a drop-down to select the appropriate response – Yes, No, or Maybe. Select the appropriate value from the drop-down and click 'OK'.	
Your selected value will now display in the Title IX row on the User Defined Fields tab. Once all other fields are complete on this screen, click the finish button to complete your reservation.	
The Navigator window displays the event details as well as to send the email to the requestor regarding their event status. The left side pane displays the event folder structure. The top folder is the reservation information and the subfolders are each associated booking. With the top level folder highlighted, the upper right pane displays a reservation summary. The lower pane offers information on each booking.	

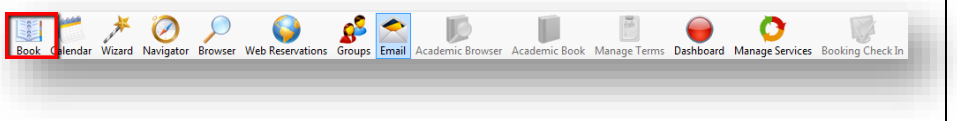
To communicate the booking status to the end user, you'll use the 'Confirmation' button. If you are communicating regarding one individual booking, click once to highlight that booking and click 'Confirmation' in the lower pane to the right of the bookings. To send an email regarding the status of multiple bookings, use the Confirmation button in the upper pane.	
The confirmation report window will now display for you to create a communication email to send to the requestor.	
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 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 confirmation report that is attached to the email you send. Make sure the Confirmation Title matches the status of the bookings you are emailing about. In the header and footer message drop-down fields, select the appropriate header and/or footer message for your area. Use the Print Preview and/or Print buttons in the bottom right corner to preview what the document will look like or print a copy for your records if necessary. Use the Copies to Print field to the right of the print button to print the correct number.	

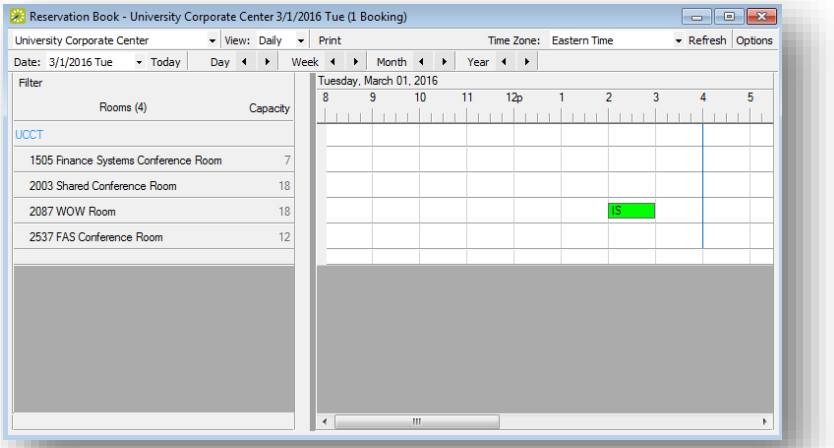
The Email Options tab is where you select the information that will display in the body of the email you are sending. Be sure that 'Attach Detailed Confirmation' and 'Attach .ics File' boxes are checked so that the requestor can add the confirmed bookings to his/her calendar. Once all information has been populated, click 'Email' at the bottom of the screen to generate the email preview.	
The email preview will display. You can add additional recipients to what is displayed on this screen, as well as type additional information into the body of the email. Once you're ready, Click 'Send' to send the confirmation to the requestor. A pop-up box will display to confirm that the email was sent. Click 'OK' to close the window.	 

Viewing Your Reservation Book

In the quick links menu, click “Book”.



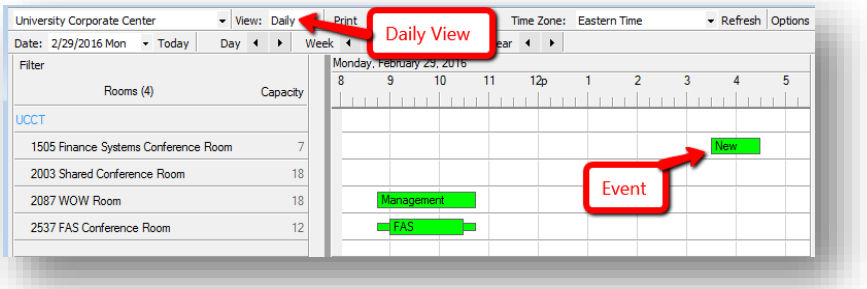
The screen will display an appointment “book” view of the rooms that you manage.

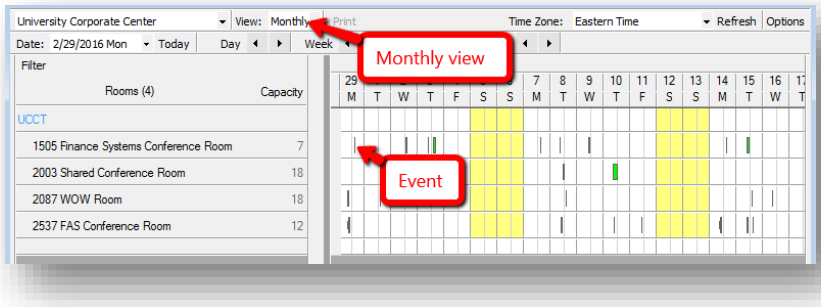


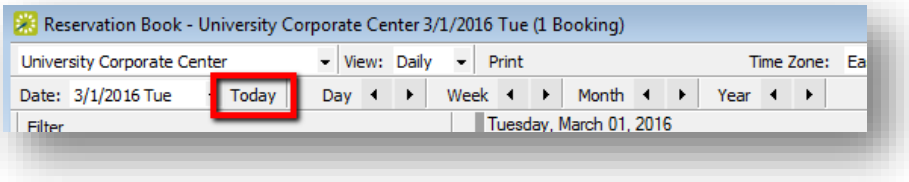
You can change the settings above the “book” to view by day, week, or month.

The view display begins on the date selected in the Date field, found under building.

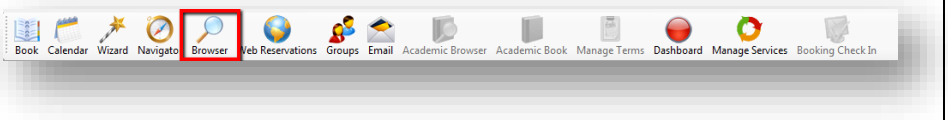
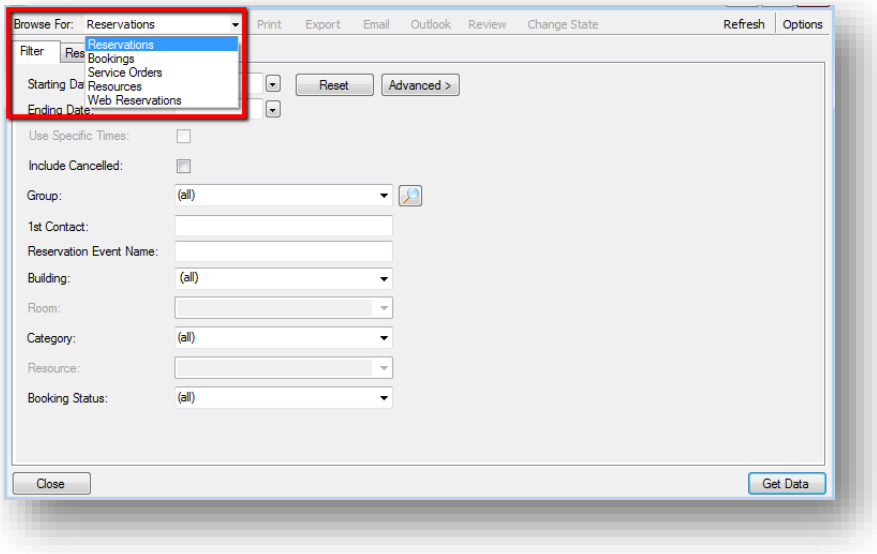
Double-clicking on any booking will open the Navigator window for that event for editing purposes.





Click the 'Today' button to display events for today's date within the view you've selected. Use the forward and back arrows beside to the right of the 'Today' button to navigate through the book either by day, week, month, or year within the view you've selected.	

Using Bowser to Search for Events

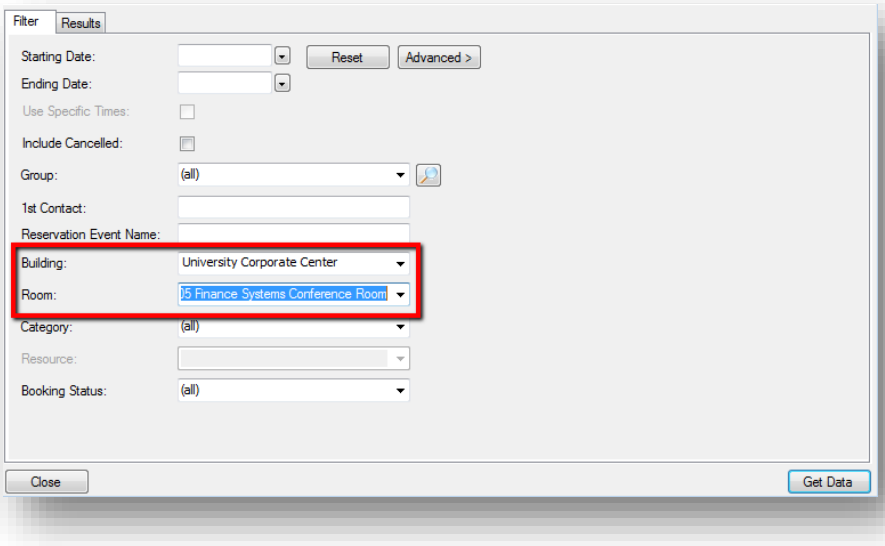
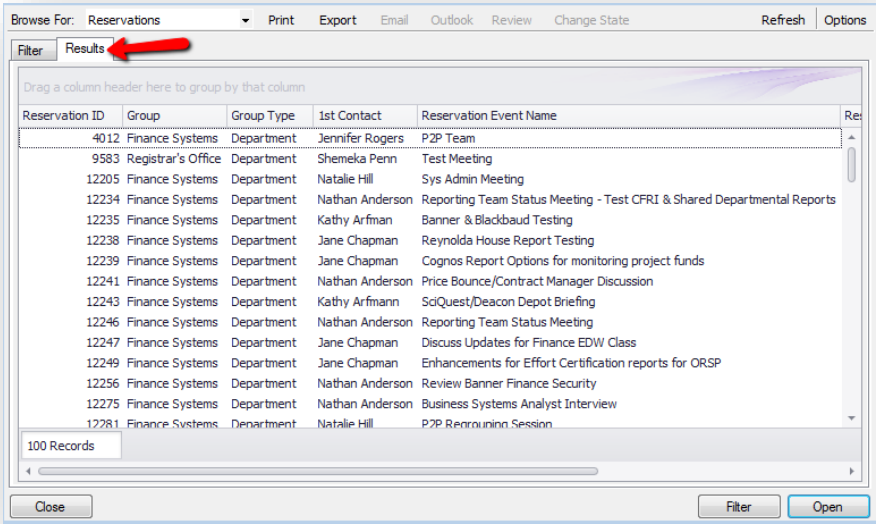
To begin your search, click 'Browser' in the quick links menu.	
On the search screen that displays, choose the type of information you want to search from the 'Browse For' drop-down.	

On the ‘Filter’ tab, enter any information that you will help you narrow down your search. Any of the drop-down menus can be used to filter your search.

For this example, we are filtering for reservations by room. To do this, the building must be selected first; then the Room can be selected.

After entering filters, click ‘Get Data’ in the lower left portion of the screen to return results.

Your results will display on the results tab. Results returned will depend on the information type you are browsing for, as well as the criteria you entered.

After locating the reservation you need, simply click once in the row to highlight it and then click ‘Open’ in the lower right corner of the screen.

This will open the Navigator window for you to be able to review and edit information about your selected reservation.