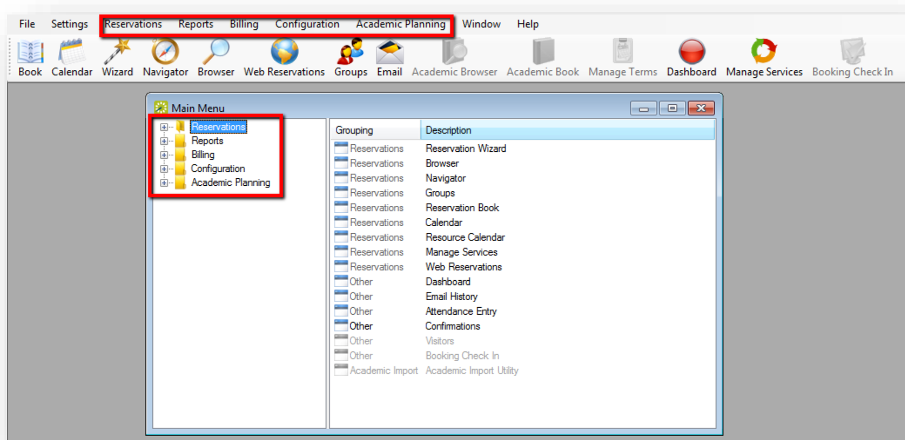
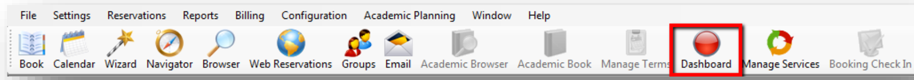
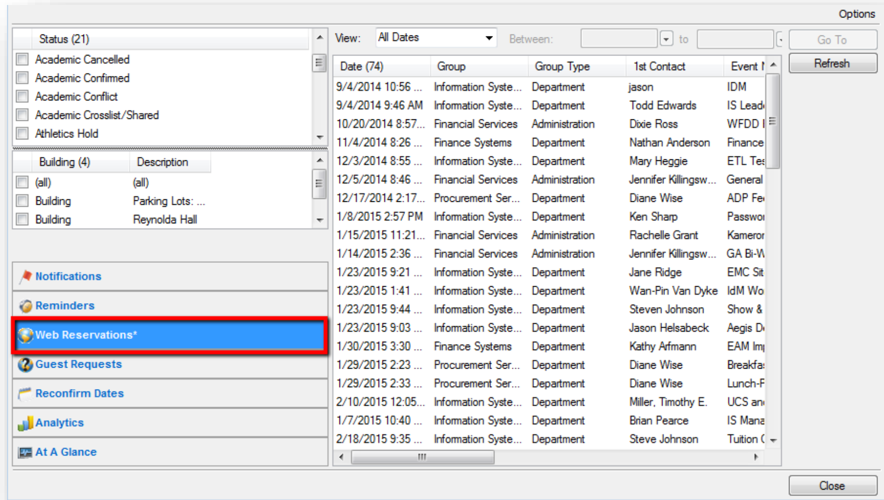
Managing DeaconSpace Requests Using Desktop Client

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.	
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.	

Upon login, a solid or flashing red dot to the left of the Dashboard menu indicates new information to review. Click the ‘Dashboard’ light to review pending requests.



Information available to view on the dashboard screen is selected using the tabs in the bottom left corner of the window. Any of the tabs that offer new information will display an asterisk. New requests from DeaconSpace users can be viewed using either the Web Reservations or Notifications tabs.

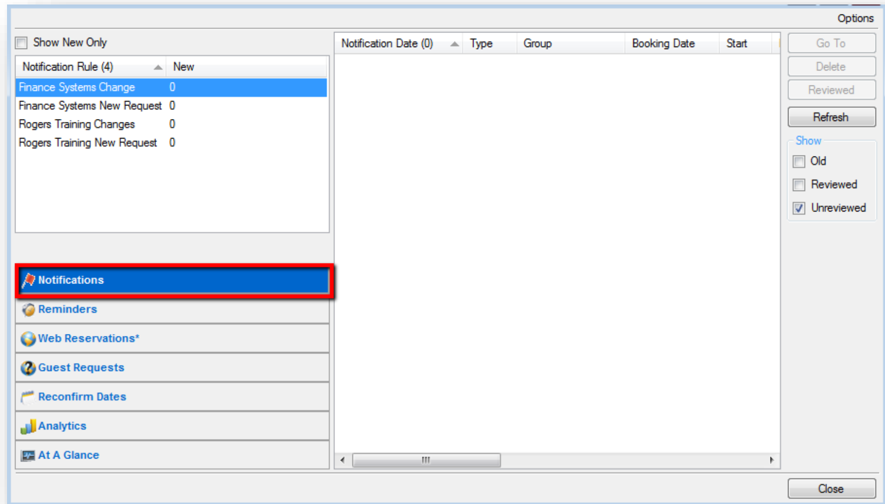


Web Reservations Tab:
To view DeaconSpace Requests for the spaces you manage, no matter the status, utilize the Web Reservations tab. You can then [select the status(es)] that you want to review. Viewing requests using this status is helpful so that you don’t miss reviewing a request that doesn’t necessarily meet the criteria of one of your notification rules. Common statuses to review include:

- **Web Request** – Requests made using DeaconSpace
- **Academic Bumped –** Requests for a space now reserved for an academic class
- **Conference Request –** Requests from Conference Services

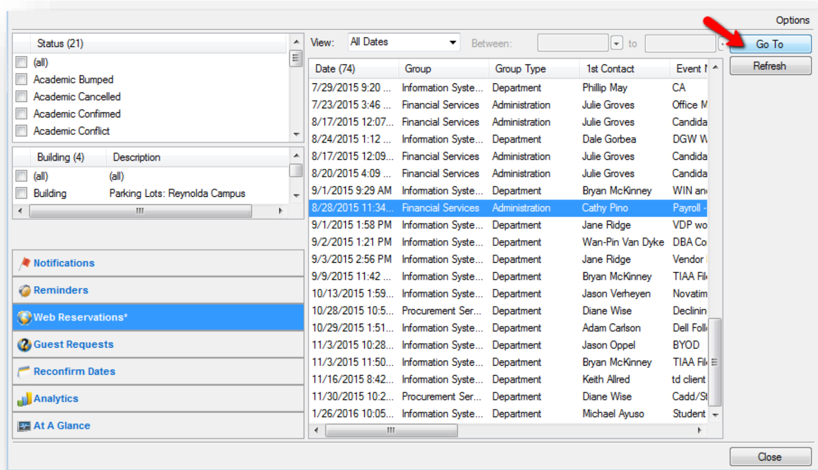
Once you select the status(es) you want to view, basic information for requests that meet those status criteria will display on the right side of the screen.

Notifications Tab:
This view provides information on new user requests that match the notification rules set up for you by your [stakeholder](). The number & types of notification rules differs per space manager, based on the number of spaces you manage and the notification rule types you need. Any DeaconSpace requests that meet the criteria for your notification rules will generate an email to you so that you will know to log in to EMS and take action. Click once on the notifications tab to display the rules at the top left of the screen. Any rule title with a number beside it other than 0 indicates new information that requires review. Click once on the rule title to display the related information on the right side of the screen.



To review a request, click once on the information row on the right side of the screen to highlight the request and then click "Go To".

Note: Any requests for a space that do not display under the status of 'Academic Bumped' or 'Web Conflict' are available to be confirmed for the space requested.



The Navigator window opens to allow for review of the request.

The left pane of the window displays the event structure: The top level folder includes the Reservation information:

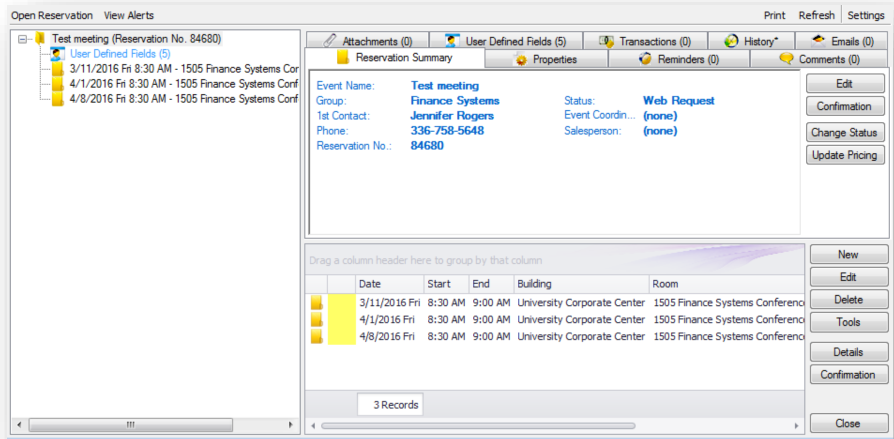
- ***Who*** is reserving the space (contact and group)
- For ***what*** event the space is being reserved.

A subfolder will display for each booking:

- ***Where*** the event is being held
- ***When*** the event is being held (date & time).

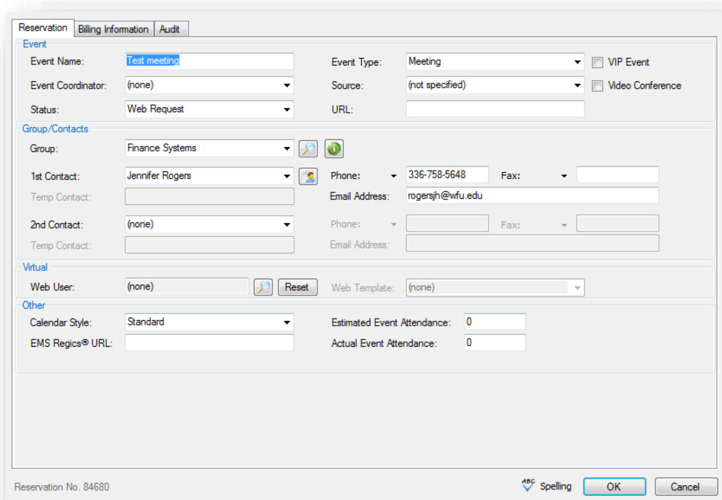
The information displayed on the right side depends on whether the reservation (top level folder) or booking (subfolder) is highlighted.

The recommended view is the reservation level so that you can see details about the reservation (top right pane) and the booking details (bottom right pane) on the same screen.



To edit information related to the reservation details (where/when), click ‘Edit’ in the top pane. The screen you see to the right will display, and each field regarding who is reserving the space and for what purpose will be editable.

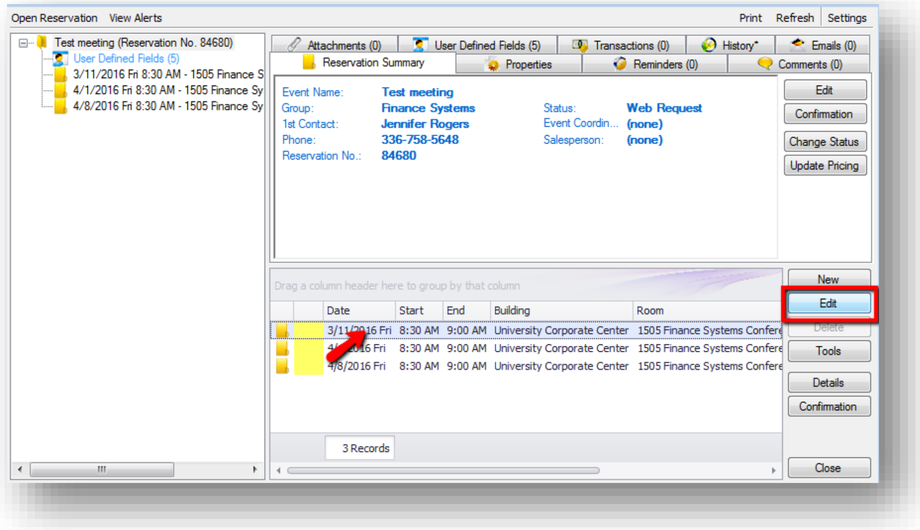
NOTE: Editing information at the reservation level affects <u>all</u> bookings associated with the event. This includes any bookings that take place in spaces managed by other space managers.



The ***preferred method*** for managing space requests is to review / confirm them at the booking level.

Why? There are times that an end user in DeaconSpace will need to reserve multiple spaces for a recurring event. Each space manager will only see the requests for the spaces that they manage – not all space requests related to a reservation.

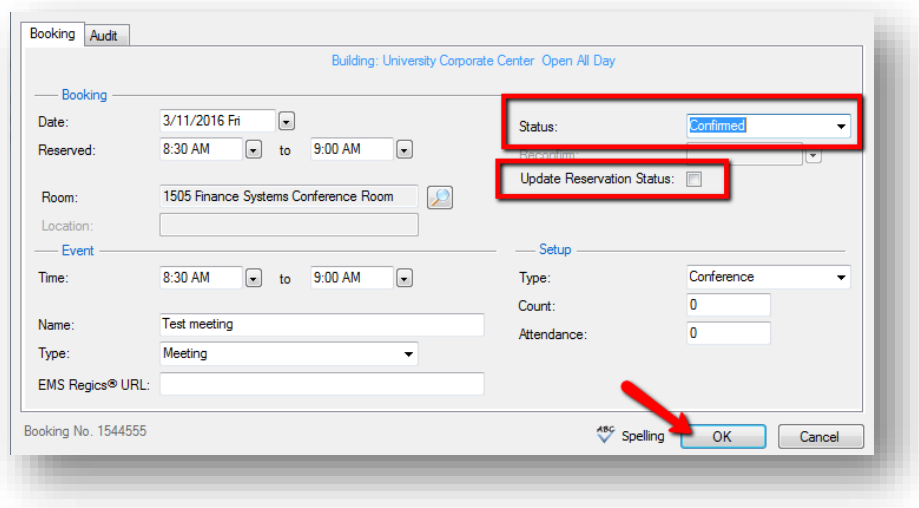
To edit information related to an individual booking (date/time), click once on the booking row in the lower pane to highlight the booking and then click ‘Edit’ in the bottom pane.

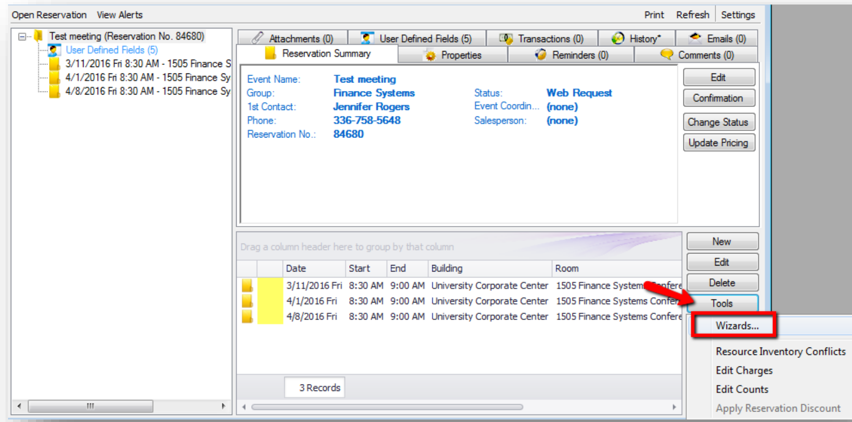
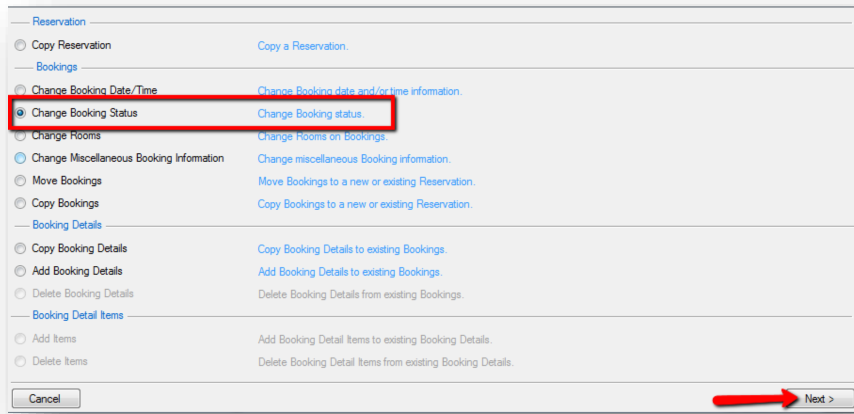
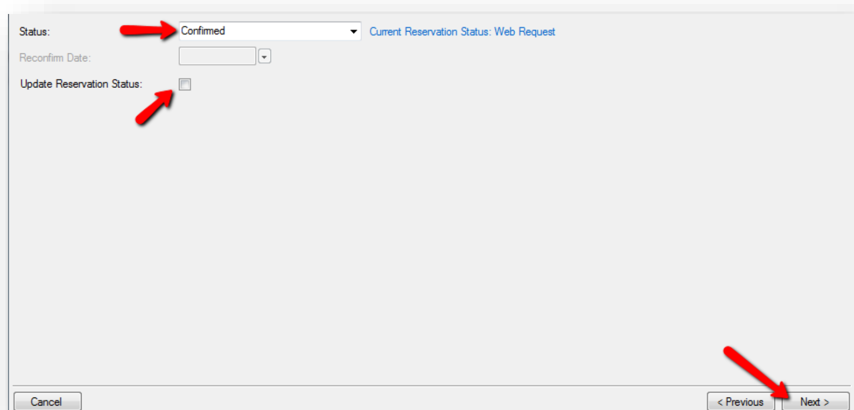


Each field related to booking details (date & time) is editable. Once all booking details have been reviewed & any necessary edits made, update the booking to reflect the appropriate status by clicking the status drop-down field and selecting the correct status from the list.

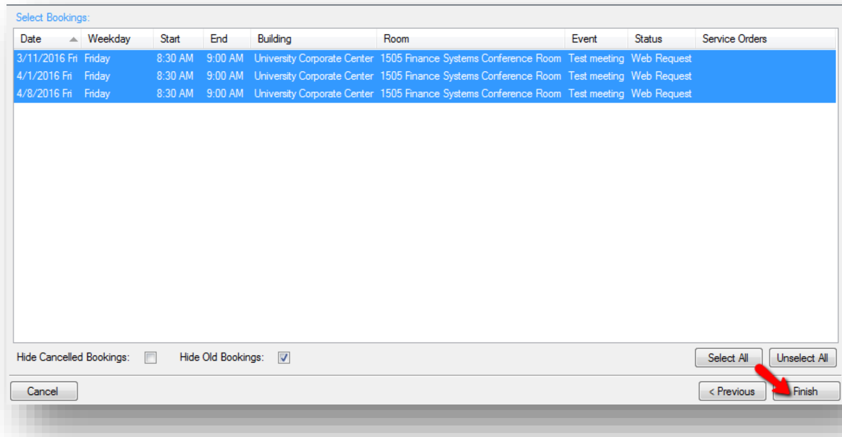
Once your status is selected, be sure to leave “Update Reservation Status” **unchecked** in the event that there are other bookings that belong to another space manager. Click OK to return to the main Navigator window.

For information regarding adding new bookings, please see the quick guide entitled, “[Creating New Reservations in EMS Desktop Client]”.

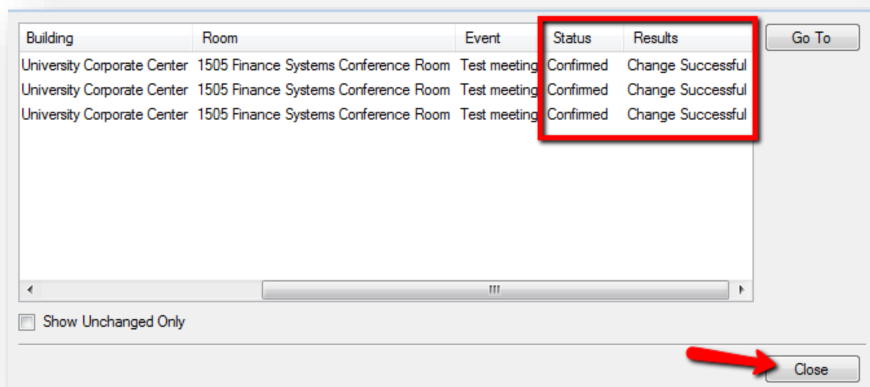


To update the status on multiple bookings at once, use the Change Status Wizard. This wizard is found by clicking the tools button in the lower pane and selecting “Wizards”.	
When the “Pick a Wizard” dialog box displays, Select ‘Change Booking Status Wizard’ found in the Bookings section.	
In the Status drop-down, select the appropriate status for the bookings you want to update. The current **reservation** status is displayed in blue to the right. Again, be sure that ‘Update Reservation Status’ is left **unchecked**. Click ‘Next’ to select the bookings that you wish to apply this status.	

By default, all bookings for the space that you manage will be highlighted. If you want to apply the selected status to all bookings listed, simply click ‘Finish’. If you do not wish to apply the status to all bookings, click ‘Unselect All’ hold the control button down and click the bookings to which the selected status should be applied. Click ‘Finish’ to apply the status change.

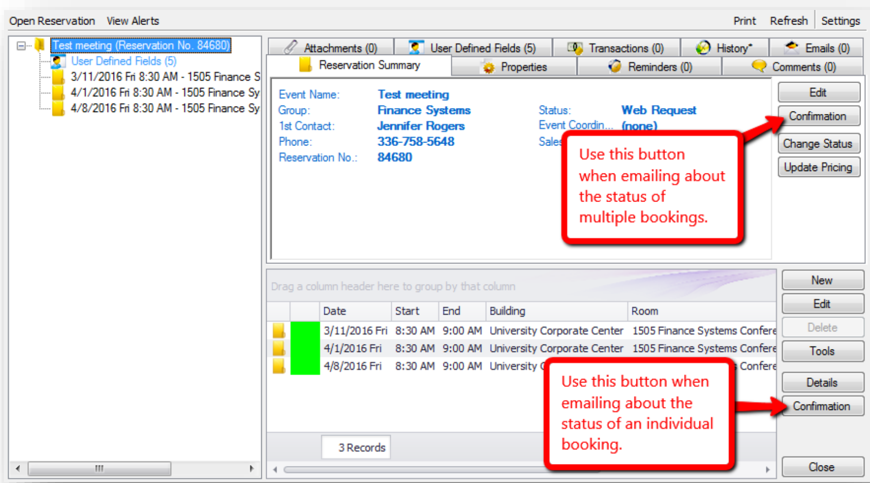


The final screen in the wizard process confirms whether or not the change was successful, and for which bookings. Simply click ‘Close’ to return to the main Navigator screen.

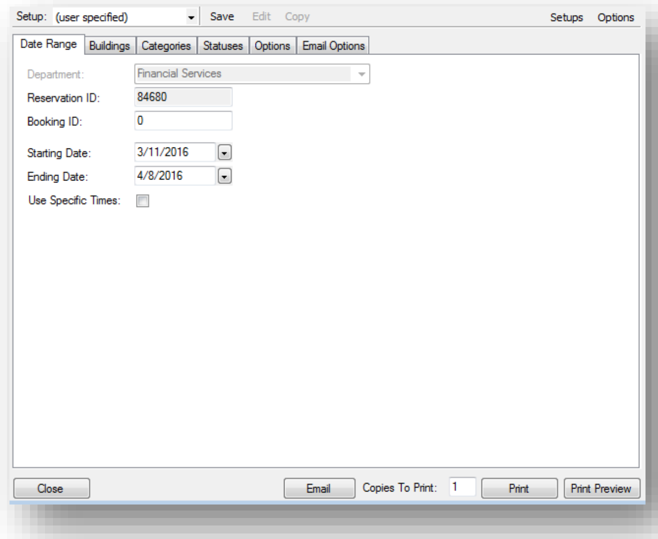
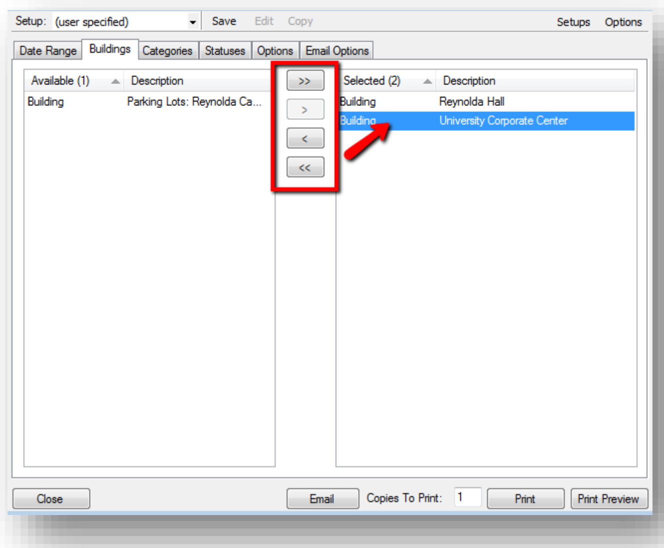


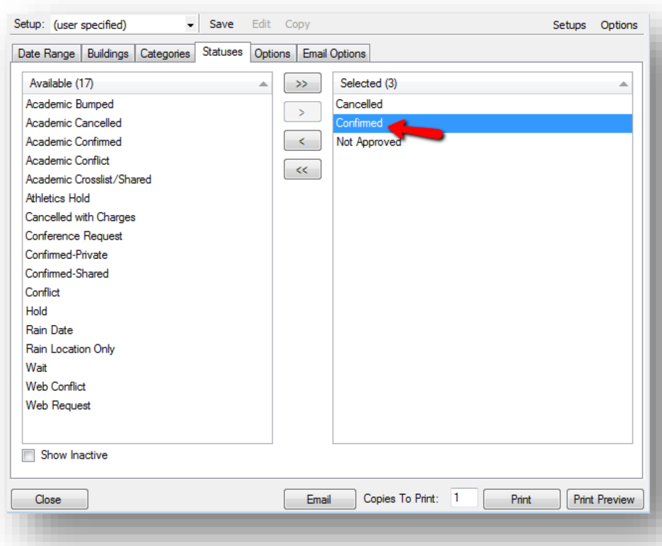
Now that you have updated the booking status, you will need to communicate that status to the end user. To do this, you will click the ‘Confirmation’ button.

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.



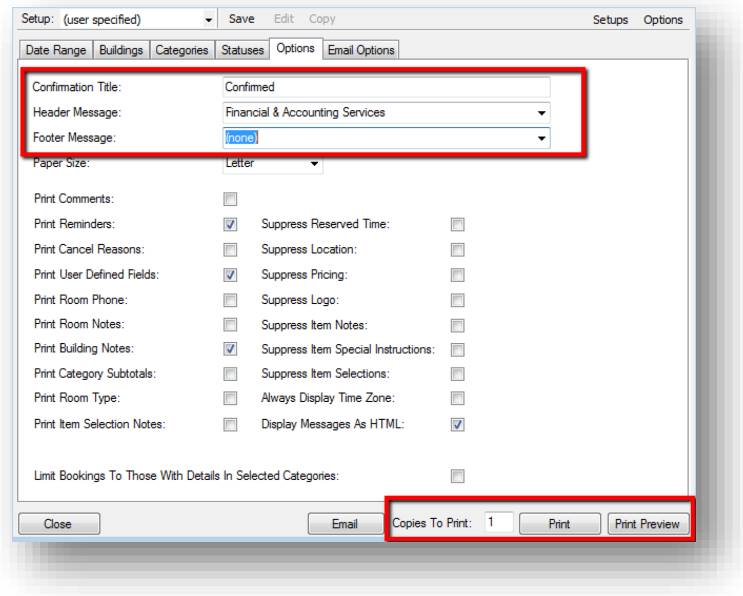
<table>
<tr>
<td>No matter which confirmation button you click, the wizard looks the same. The following steps walk you through each tab. For information on how to save some of this information for use over and over, see the quick guide, “<u>Specifying Confirmation Settings and Memorizing Confirmation Reports</u>”.

The Date Range tab will display the date range for the bookings associated with the event in your spaces.</td>
<td>
</td>
</tr>
<tr>
<td>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.</td>
<td>
</td>
</tr>
<tr>
<td>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.</td>
<td>
</td>
</tr>
</table>

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.

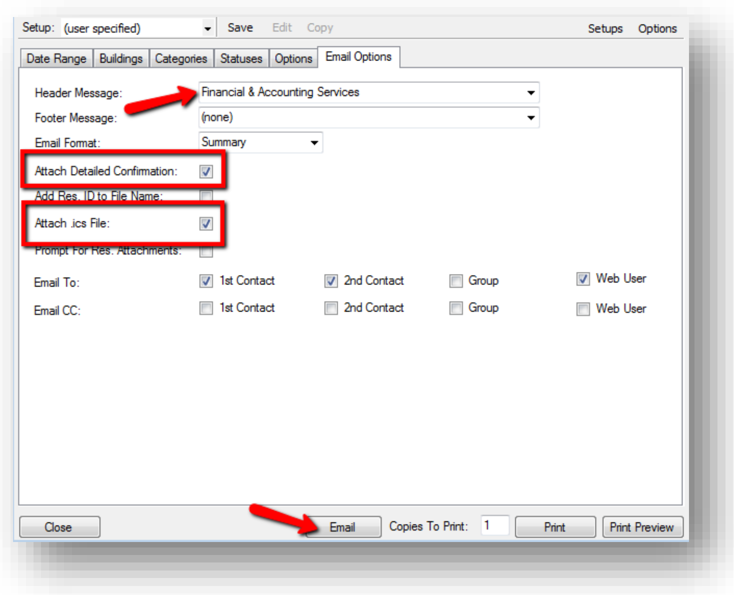
Use the Print Preview and/or Print buttons in the bottom right corner to preview what the document will look like or print a copy for your records if necessary. Use the Copies to Print field to the right of the print button to print the correct number.



The Email Options tab is where you select the information that will display in the body of the email you are sending. You will also want to select your header and/or footer message on this tab as well, so that it prints in the body of your email.

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.