



Enterprise ver. 2012

Documentation Manual

July 4, 2013

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I.0 HOW TO LOG IN

You can launch the program by double clicking on the shortcut icon on your desktop. See below.



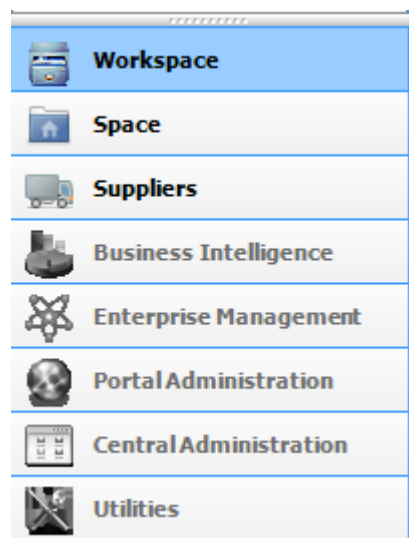
Login using your MyCarletonOne ID and password then click on the **Login** button or hit the Enter key. This is the same login that you use to log into your computer.



I.1 NAVIGATION

On the left hand side there are 3 modules available to users: Workspace, Space, and Suppliers.

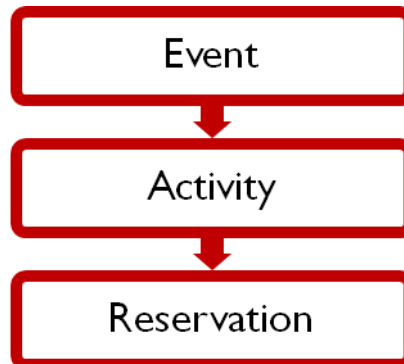
- The **Workspace** module allows users to access booking information and to perform bookings for their department.
- The **Space** module allows users to see a list of spaces on campus.
- The **Suppliers** module will not be relevant for users.



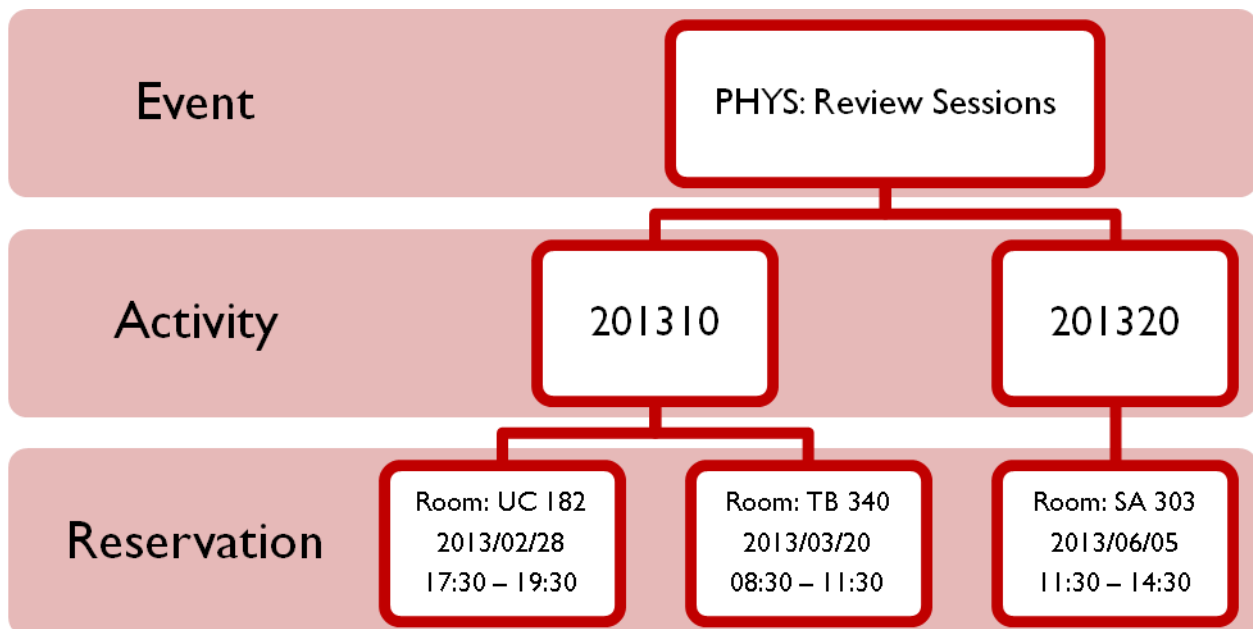
I.2 UNDERSTANDING EVENTS, ACTIVITIES, RESERVATIONS

Events, Activities, and Reservations are all categories relevant to the creation of a booking.

- An **Event** describes the actual event that is being booked; it is a general category of bookings. It is the foundation upon which activities and reservations are created. Each event can contain a number of activities. Each activity will house many reservations.
- An **Activity** is used to categorize the general time frame of the reservation. For example, an activity can be named “201310” or “201320”.
- A **Reservation** is the actual booking. The reservation will contain time, room, and booking information.



Events are the parents of Activities. Activities are the parents of Reservations. Each reservation must belong to an Activity and each Activity must belong to an Event.



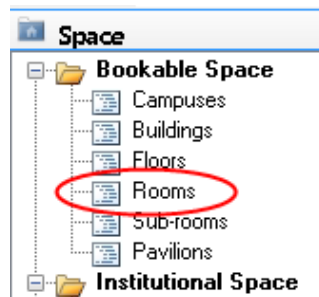
2.0 HOW TO CREATE A RESERVATION

2.1 HOW TO CREATE A RESERVATION USING THE CALENDAR

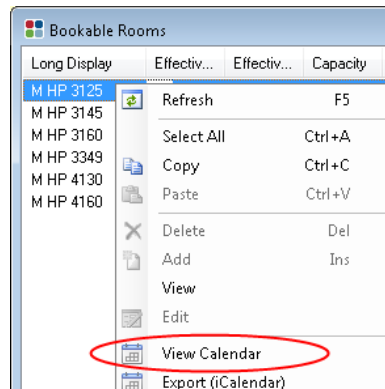
Click on **Space** on the bottom left hand menu.



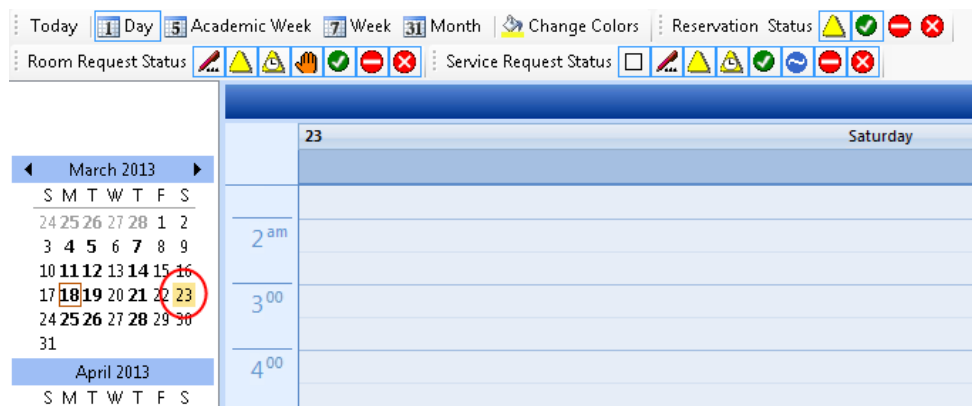
Underneath Bookable Space, click on **Rooms** on the left hand menu.



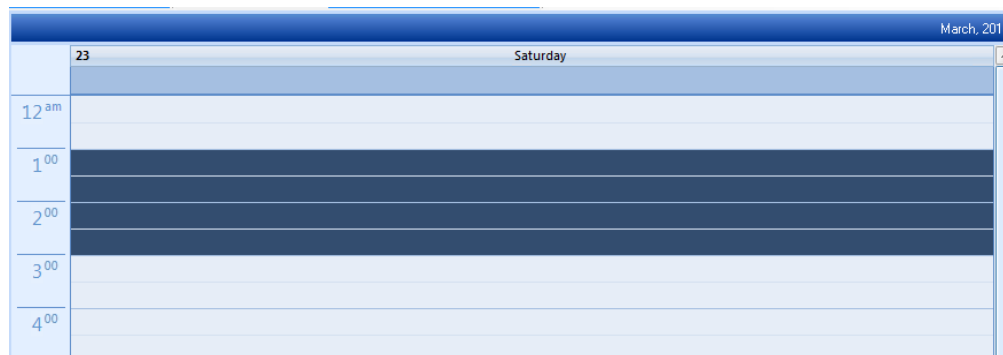
In the Bookable Rooms window, right click on a room, and click **View Calendar**.



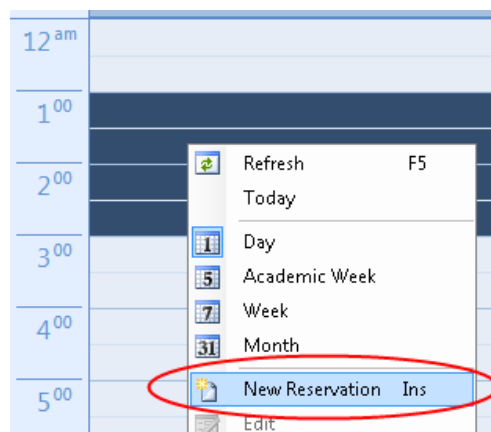
Click on a day from the calendar on the left side.



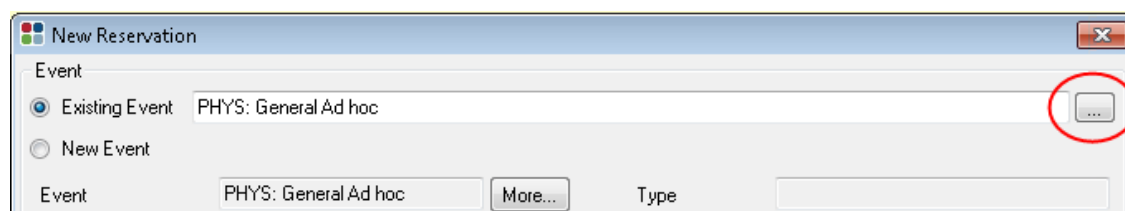
Highlight your desired time block by clicking and dragging over a specified time range.



Right click and click on **New Reservation**.



Choose the Event for your booking. To choose an existing event, click on the “...” button.



... and attach your existing event.

Check, that the Activity is correct, then click on the **OK** button.

Activity

☒ Existing Activity 201310

☐ New Activity

Activity ID: 201310 Activity Type:

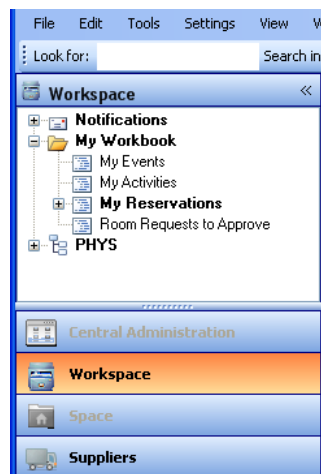
Description:

Start Date: ☐ Infinity End Date: ☐ Infinity Managed By: Captain Kirk

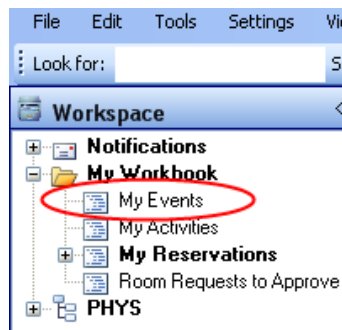
OK Cancel

The **Reservation** window will open up. Notice that the time, date, and room details are already filled in. Now you can attach a requestor, if you wish, then finalize the reservation.

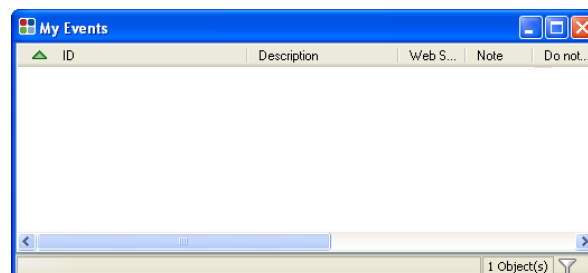
On the left hand side of the program, make sure that the **Workspace** module is selected. You can click on the Workspace button to select it. It should be selected by default.



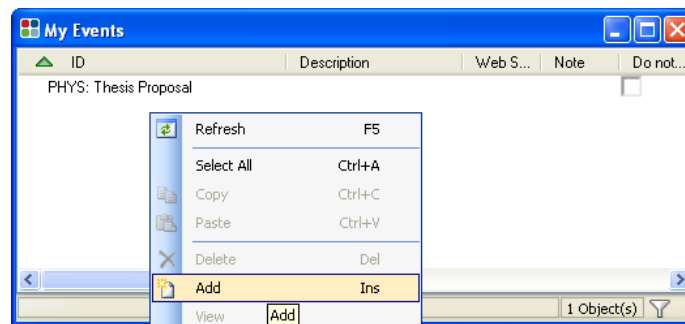
Next, click on **My Events**.



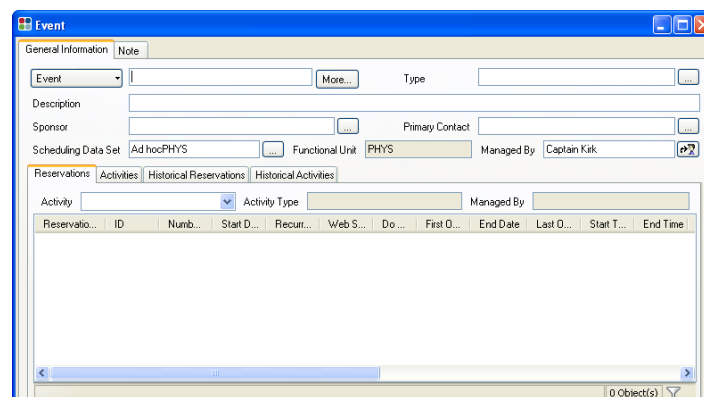
The **My Events** window will open. It contains a list of all events you have created.



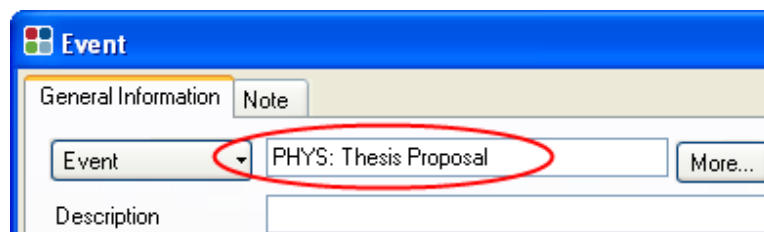
Before we can create our reservation, we need to create an event to house the activities and reservations. To create your event, right click anywhere inside the My Events window and click on **Add** to add a new event.



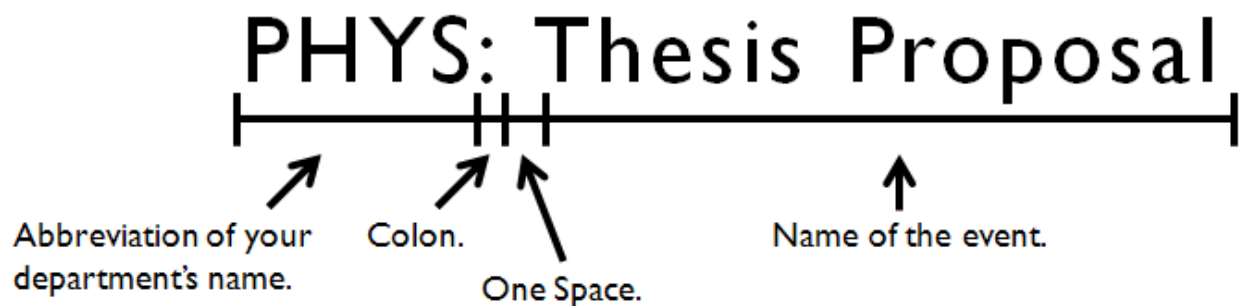
The **Event** window will open.



We need to name the event. Enter in the name of the event in the **Event** text box, following the proper naming convention.

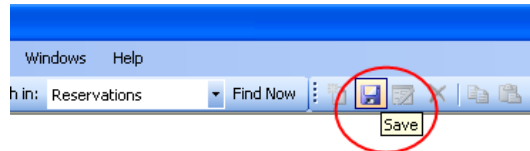


The proper naming convention is as follows:

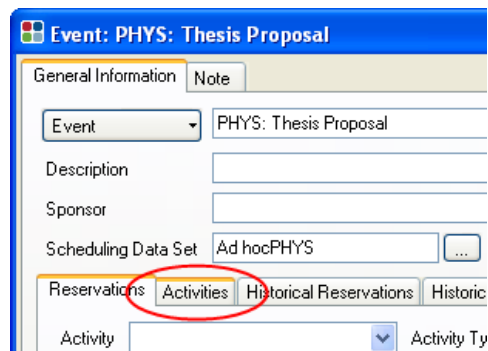


The event name must be unique. Adding in the abbreviation of your department's name will ensure that your event names are unique and easily organized.

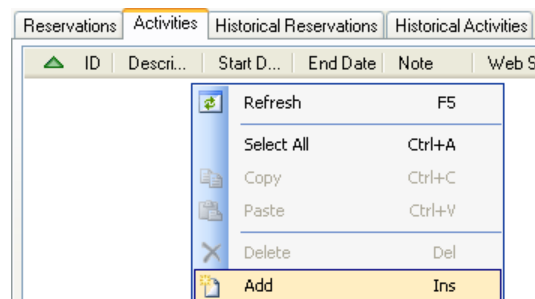
Save your changes by clicking on the **Save** button at the top of the window.



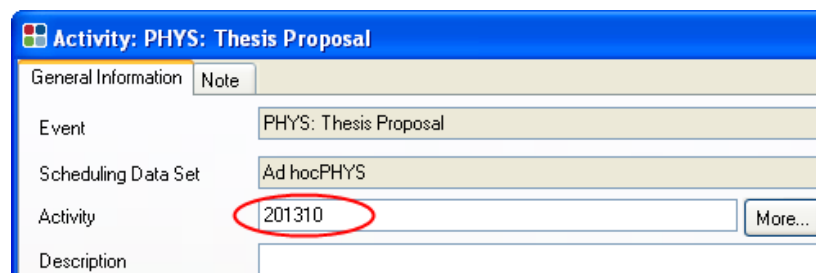
An activity is required if we want to continue with the booking process. Click on the **Activities** tab.



Next, right click on the empty white space below and click on **Add**.



The **Activity** window opens up. Begin by entering in the name of the activity in the **Activity** text box, following the proper naming convention.

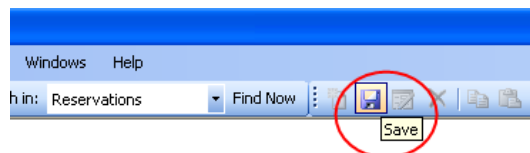


The activity is just a timeframe for the booking. The activity name is the academic term for when your booking occurs. As a refresher, the first 4 digits should be the year. The last 2 digits are either “10”, “20”, or “30”. These 2 digits correspond to the winter, summer, and fall terms respectively. In the example above, “201310” was used because the event will occur in the year 2013 during the winter term.

Activity Name	Academic Term	Date Range
201310	Winter	January 1 st to April 30 th
201320	Summer	May 1 st to August 31 st
201330	Fall	September 1 st to December 31 st

Once you have entered in your activity name, you can change the **Start Date** and **End Date** of the activity to reflect the date range of the activity. Refer to the table above.

Save your changes by clicking on the **Save** button at the top of the window.



Now let's create a reservation, right click on the empty white space below and click on **Add**.

The **Reservation** window will now appear. If you would like to add a description to the reservation, please type it out in the **Description** box. Descriptions can be used to add keywords that are relevant to the booking to ease locating the reservation. The description will **not** appear on the Portal. The description is optional.

Now we can fill out the time details in the area below. Enter in the **Start Time** first. Then, you may enter in the **End Time** or **Duration**.

- If you enter in the End Time first then the Duration will automatically fill in based on the Start and End Time. Likewise, if you enter in the Duration first, the End Time will automatically fill in based on the Start Time and Duration.

Now a date must be chosen. Click on the down arrow beside the **Start Date** box to bring up the calendar. Navigate through and click on your desired day.

Save your progress by clicking on the **Save** button.

We can now proceed with adding a room for the reservation.

- If you don't know what room you want and would like to view availabilities, please see the section entitled **How to Use the Resource Scheduler**.
- If you know what room you want please follow the method below.

Your room details can be entered in the **Add Room Request** section of the Reservation Window.

Start Time: 10:00 AM, End Time: 11:00 AM
Start Date: 2012-12-03, End Date: 2012-12-03
Add Room Request...
Campus: [] ..., Building: [] ..., Floor: [] ...
Room: [] ..., Configuration: [] ... Add →
Sub-room: [] ..., Sub-room Configuration: [] ...

Only the **Building** and **Room** details need to be filled in. You can begin by typing in the building code and the room number.

Add Room Request...
Campus: M ..., Building: HP ..., Floor: [] ...
Room: 3349 ..., Configuration: [] ... Add →
Sub-room: [] ..., Sub-room Configuration: [] ...

If you are ever unsure of a building code or room number, you can always click on the “...” button beside the related text boxes to bring up a window containing all building codes or room numbers.

Now that a room is selected, click on the **Add** button.

Add Room Request...
Campus: M ..., Building: HP ..., Floor: [] ...
Room: 3349 ..., Configuration: [] ... Add →
Sub-room: [] ..., Sub-room Configuration: [] ...

Your selected room and time details should now show up on the list to the right. If you don't see the room number, you can move columns around for a better view.

Add Room Request...
Campus: [] ..., Building: [] ..., Floor: [] ...
Room: [] ..., Configuration: [] ... Add →
Sub-room: [] ..., Sub-room Configuration: [] ...

Status	B...	Room ...	Reservati...	Reser...	Reser...	Reser...	Reser...	Reservatio...
Draft	HP	3349	2012-12-03	M	01	10:00 AM	11:00 AM	Pending

The circled statuses are reservation statuses. It is the status for the entire reservation. The yellow triangle means that the reservation status is currently pending and it has not been approved or denied.

The other status is the room status. It is the status of the room you are trying to book. In this case, the room status is “draft”, which means that it has neither been approved nor denied.

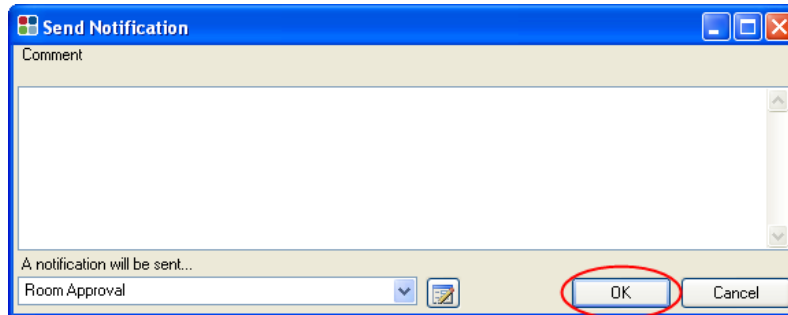
Now click on the line as seen below. It should now be highlighted in blue.

Notice that the buttons below now light up.

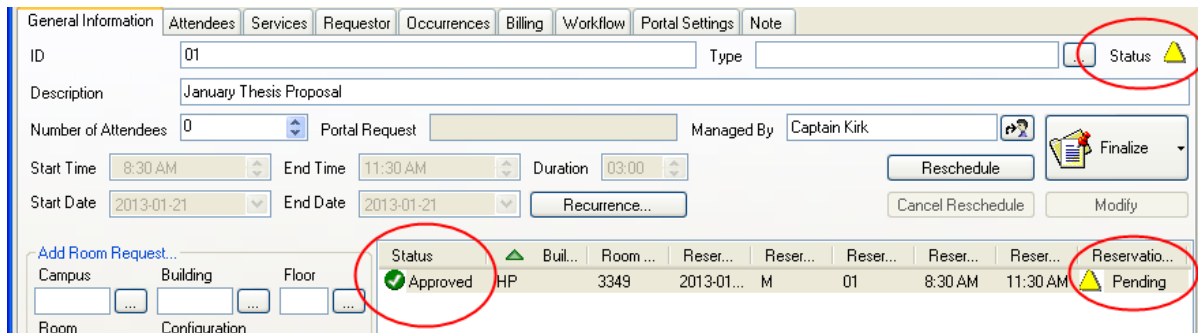
Click on the **Schedule** button to schedule the room.

- If the Schedule button is un-clickable, this means that you cannot book this room. You will need to request the room. Click on the **Request** button instead.

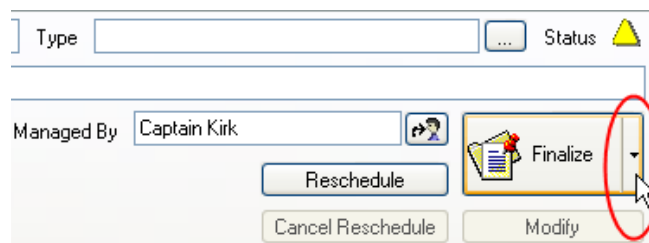
A **Send Notification** window will appear. This window can be used to type in comments for people requesting your space. If this is not relevant, leave the comment box empty. Click on the **OK** button.



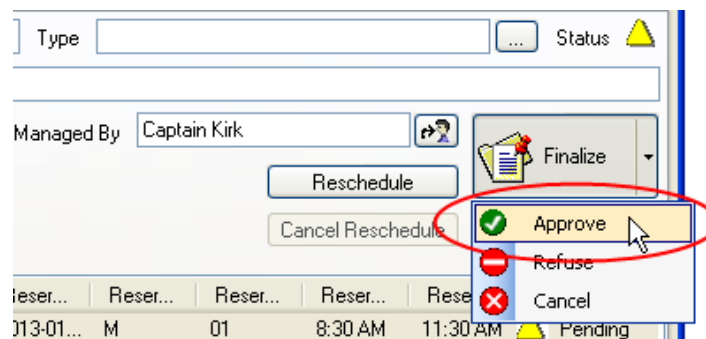
The room is now approved. This is shown by the green check mark icon shown below. Notice that the reservation itself is still pending, as shown by the yellow triangle icon.



To finalize the reservation, click on the down arrow beside the **Finalize** button. Please note that you cannot click on the button directly, you need to click on the down arrow to access the options.



In the appearing options, click on **Approve**.



Congratulations, the reservation has been created and approved.

The screenshot shows a reservation system interface with tabs: General Information, Attendees, Services, Requestor, Occurrences, Billing, Workflow, Portal Settings, and Note. The 'General Information' tab is active, showing details for a reservation with ID '01' and Description 'January Thesis Proposal'. The status is 'Approved' (indicated by a green checkmark). The reservation is managed by 'Captain Kirk' and has a duration of 03:00. The start time is 8:30 AM and the end time is 11:30 AM. The start date is 2013-01-21 and the end date is 2013-01-21. A 'Recurrence...' button is visible. Below the main form, there is a table showing reservation details:

Status	Build...	Room ...	Reser...	Reser...	Reser...	Reser...	Reser...	Reser...
Approved	HP	3349	2013-01...	M	01	8:30 AM	11:30 AM	Approved

2.2 HOW TO CREATE RECURRING RESERVATIONS

To set up a recurring reservation, click on the **Recurrence** button.

This screenshot shows the reservation system interface with the 'Recurrence...' button highlighted by a red circle. The reservation details are: Description (empty), Number of Attendees: 0, Portal Request (empty), Managed By: Captain Kirk, Start Time: 8:30 AM, End Time: 9:30 AM, Duration: 01:00, Start Date: 2012-12-03, End Date: 2012-12-03. Buttons for 'Reschedule', 'Finalize', 'Cancel Reschedule', and 'Modify' are also visible.

The **Reservation Recurrence** window will open. Choose your recurrence pattern: Not recurring, Daily, Weekly, Monthly, or Yearly.

The 'Reservation Recurrence: PHYS: Thesis Proposal 201310 05' dialog box is shown. Under the 'Recurrence pattern' section, the 'Not recurring' option is selected (indicated by a green dot). Other options include Daily, Weekly, Monthly, and Yearly. The 'OK' and 'Cancel' buttons are at the bottom right.

If you selected a weekly recurrence, the following will appear.

The 'Reservation Recurrence: PHYS: Thesis Proposal 201310 05' dialog box is shown with the 'Weekly' option selected. The 'Recurrence pattern' section shows 'Recur every 1 week(s) on' with checkboxes for Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. The 'Range of recurrence' section shows 'End after 10 occurrences' selected. The 'OK' and 'Cancel' buttons are at the bottom right.

Choose whether or not the recurrence occurs every 1 week or not. In addition, choose the days you are booking for. In this case, Monday and Wednesday were chosen by clicking on the boxes beside the respective days.

Recur every week(s) on

☐ Sunday ☒ Monday ☐ Tuesday ☒ Wednesday

☐ Thursday ☐ Friday ☐ Saturday

Finally, select whether you want the recurrence to end after an “x” amount of occurrences or whether you want it to end by a certain date. In this case, we would like the recurrence to end after a certain date so we click on the circle beside the **End by** option.

Range of recurrence

☒ End after occurrences

☐ End by

Range of recurrence

☐ End after occurrences

☒ End by

You will then be able to use the drop down menu. Click on the “down” arrow beside the date to bring up a calendar. Select your end date off of the calendar.

Range of recurrence

☐ End after occurrences

☒ End by

2012-12-24

< December, 2012 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	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

Today: 2012-12-03

Click on the **OK** button when you are finished.

Reservation Recurrence: PHYS: Thesis Proposal 201310 05

Recurrence pattern

☐ Not recurring

☐ Daily

☒ Weekly

☐ Monthly

☐ Yearly

Recur every week(s) on

☐ Sunday ☒ Monday ☐ Tuesday ☒ Wednesday

☐ Thursday ☐ Friday ☐ Saturday

Range of recurrence

☐ End after occurrences

☒ End by

OK Cancel

You will be back in the **Reservation** window. Notice that there is an added description below your time detail. It describes your recurrence selection.

Number of Attendees Portal Request ☐

Start Time End Time

Start Date End Date

Occurs every week(s) on Monday, Wednesday

Add Room Request...

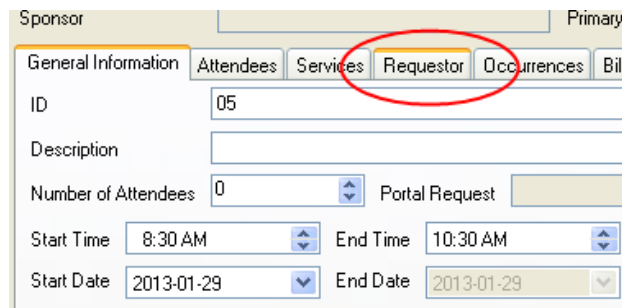
Campus Building Floor

Status

Finally, proceed with your reservation as normal.

2.3 HOW TO SEND A CONFIRMATION TO THE REQUESTOR

It is possible to send an e-mail confirmation to the person requesting your room if they have a Carleton e-mail account. Before approving the room, click on the **Requestor** tab in the Reservation window.



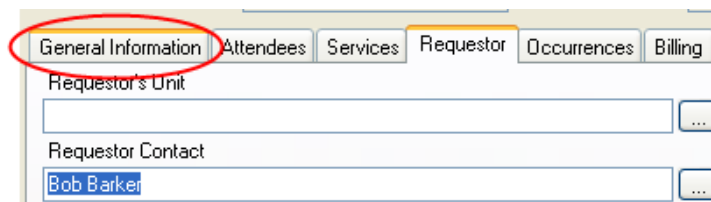
The screenshot shows the 'Requestor' tab selected in the Reservation window. The 'Requestor' tab is circled in red. The window displays fields for ID (05), Description, Number of Attendees (0), Start Time (8:30 AM), End Time (10:30 AM), Start Date (2013-01-29), and End Date (2013-01-29). The 'Requestor' tab is highlighted with a red circle.

In the text field below **Requestor Contact**, start typing in the name of the intended e-mail recipient. A list will start appearing below, signifying possible suggestions. Click on the desired name.



The screenshot shows the 'Requestor Contact' dropdown menu. The 'Requestor Contact' label is circled in red. The dropdown list shows 'Bob Barker' as the selected option, with other names like 'Bob_Baldwin', 'Bob_Desnoo', 'Bob_Heath', 'Bob_Hogg', 'Bob_Madore', and 'Bob_Rumscheidt' listed below. The 'Requestor' tab is also visible in the background.

You are done. Click on the **General Information** tab to proceed with your reservation as normal.



The screenshot shows the 'General Information' tab selected in the Reservation window. The 'General Information' tab is circled in red. The window displays fields for Requestor's Unit, Requestor Contact (Bob Barker), and other reservation details. The 'Requestor' tab is also visible in the background.

Once the reservation is approved, the recipient will automatically receive an e-mail with the booking confirmation.

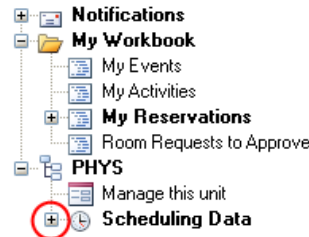
- The e-mail confirmation is sent out the moment you hit the approve button. Therefore, if you forget to add a requestor and the reservation is already approved, it is not possible to go back, add a requestor, and send an e-mail confirmation. You would have to modify the reservation, cancel the room, add a requestor, add the room, and re-approve the reservation.

2.4 HOW TO VIEW YOUR DEPARTMENT'S RESERVATIONS

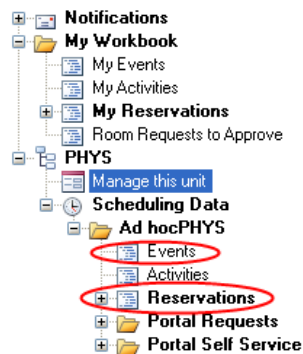
Alternatively, you may want to manage your department's reservations (reservations made by others in your department). To do so, click on the "+" sign beside your **department name** on the left hand menu.



Next, click on the “+” sign beside **Scheduling Data**.



Finally, select either **Events** or **Reservations** to access your department’s reservations. This will let you see events and reservations created by all members of your department.



3.0 HOW TO MODIFY A RESERVATION

3.1 HOW TO RESCHEDULE A RESERVATION

A reservation can be rescheduled should the event require a new date and time. To reschedule a reservation, first click on the **Modify** button.

Number of Attendees	Portal Request	Managed By	Finalize
0		Captain Kirk	

Start Time	End Time	Duration	Reschedule
2:00 PM	3:00 PM	01:00	

Start Date	End Date	Recurrence...	Cancel Reschedule	Modify
2012-12-01	2012-12-01			

Status	Buil..	Room ...	Reser...	Reser...	Reser...	Reser...	Reser...	Reservatio...	R
Approved	HP	3349	2012-12...	S	04	2:00 PM	3:00 PM	Approved	

Next, click on the **Reschedule** button.

Type	Status
	Approved

Managed By	Finalize
Captain Kirk	

Duration	Reschedule
01:00	

Recurrence...	Cancel Reschedule	Modify

The time and date details can be updated now. The status icon also changes from approved to pending, signified by the yellow triangle icon. Make your desired time and/or date changes.

Number of Attendees: 0 Portal Request: Managed By: Captain Kirk

Start Time: 2:00 PM End Time: 3:00 PM Duration: 01:00

Start Date: 2012-12-01 End Date: 2012-12-01 Recurrence...

Buttons: Apply, Finalize, Cancel Reschedule, Modify

Add Room Request...			Status	Buil...	Room ...	Reser...	Reser...	Reser...	Reser...	Reser...	R
Campus	Building	Floor	⚠ Pending (...)	HP	3349	2012-12...	S	04	2:00 PM	3:00 PM	⚠

Click on the **Apply** button when you are finished.

ID: 04 Type: Status: ⚠

Description:

Number of Attendees: 0 Portal Request: Managed By: Captain Kirk

Start Time: 4:00 PM End Time: 5:00 PM Duration: 01:00

Start Date: 2012-12-01 End Date: 2012-12-01 Recurrence...

Buttons: Apply, Finalize, Cancel Reschedule, Modify

A notification window will open. Key in an appropriate message or user initials and click on the **OK** button. Please note that you must enter in a comment in order to proceed.

Send Notification

Comment (required): Rescheduling.

A notification will be sent... Reservation Modification

Buttons: OK, Cancel

The area below is now greyed out, signifying that everything inside it is finalized and locked for modifying. The status icon also changes to a checkmark in a green circle signifying that the rescheduled reservation is approved.

General Information | Attendees | Services | Requestor | Occurrences | Billing | Workflow | Portal Settings | Note

ID: 04 Type: Status: ✓

Description:

Number of Attendees: 0 Portal Request: Managed By: Captain Kirk

Start Time: 4:00 PM End Time: 5:00 PM Duration: 01:00

Start Date: 2012-12-01 End Date: 2012-12-01 Recurrence...

Buttons: Reschedule, Finalize, Cancel Reschedule, Modify

Add Room Request...			Status	Buil...	Room ...	Reser...	Reser...	Reser...	Reser...	Reser...	R
Campus	Building	Floor	✓ Approved	HP	3349	2012-12...	S	04	4:00 PM	5:00 PM	✓

3.2 HOW TO CANCEL A RESERVATION

Please note that when you cancel a reservation, it is **NOT** possible to go back and change it. This has been mentioned to the developer, so please be careful.

To cancel a booking, first open the reservation. Next, click on the **Modify** button to change the reservation.

General Information | Attendees | Services | Requestor | Occurrences | Billing | Workflow | Portal Settings | Note

ID: 01 | Type: | Status:

Description: January Thesis Proposal

Number of Attendees: 0 | Portal Request: | Managed By: Captain Kirk

Start Time: 8:30 AM | End Time: 11:30 AM | Duration: 03:00

Start Date: 2013-01-21 | End Date: 2013-01-21 | Recurrence...

Buttons: Reschedule, Finalize, Cancel Reschedule, **Modify** (circled in red)

Status	Buil...	Room ...	Reser...	Reser...	Reser...	Reser...	Reser...	R
Approved	HP	3349	2013-01...	M	01	8:30 AM	11:30 AM	

The window containing the room details changes from grey to white. The window is no longer locked and can now be modified. Click on your desired room. It will highlight it in blue.

request: | Managed By: Captain Kirk

Start Time: 8:30 AM | Duration: 03:00 | Reschedule | Finalize

Start Date: 2013-01-21 | Recurrence... | Cancel Reschedule | **Modify**

Status	Buil...	Room ...	Reser...	Reser...	Reser...	Reser...	Reser...	R
Approved	HP	3349	2013-01...	M	01	8:30 AM	11:30 AM	

Notice that the **Cancel** button at the bottom now lights up. Click on the **Cancel** button.

Status	Buil...	Room ...	Reser...	Reser...	Reser...	Reser...	Reser...	R
Approved	HP	3349	2013-01...	M	01	8:30 AM	11:30 AM	

1 Object(s) selected

Buttons: Request, Schedule, Hold, Refuse, **Cancel** (circled in red)

A notification window opens. If you wish to enter in a comment, type it in the comment box. Finally, click the **OK** button.

Send Notification

Comment

A notification will be sent...

Room Cancellation

Buttons: OK (circled in red), Cancel

The status icon changes to an "X" in a red circle. Also notice that the reservation status icon below is a yellow triangle indicating that the reservation is still pending.

Status	Reser...	Reser...	Reser...	Reser...	Reservatio...	Reservatio...	Reser...	Reser...
Cancelled	2012-10...	U	01	8:00 PM	Pending		7:00 PM	2012-

The next step is to cancel the reservation. Click on the "down" arrow inside the **Finalize** button.

The screenshot shows a reservation management window. At the top, there are fields for 'Type' and 'Status'. Below these, there's a section for 'Request' with a dropdown menu, 'Managed By' (Captain Kirk), and a user icon. The reservation details include '1:30 AM' for start time, 'Duration 03:00', and '013-01-21' for the date. There are buttons for 'Reschedule', 'Recurrence...', 'Cancel Reschedule', and 'Modify'. A red circle highlights the 'Finalize' button, which has a document icon with a red pushpin. Below the buttons is a table with columns: Status, Build..., Room..., Reser..., Reser..., Reser..., Reser..., Reser..., and R. The first row shows 'Cancelled' status, 'HP' build, '3349' room, '2013-01...' reser, 'M' reser, '01' reser, '8:30 AM' reser, '11:30 AM' reser, and a yellow triangle status icon.

Next, click on the **Cancel** button.

This screenshot shows the same reservation management window after clicking 'Finalize'. The 'Finalize' button is now disabled. A new menu is visible, showing 'Approve' (with a green checkmark), 'Refuse' (with a red minus sign), and 'Cancel' (with a red 'X'). The 'Cancel' button is circled in red. The table below still shows the 'Cancelled' status and other reservation details.

The area below is now greyed out, signifying that everything inside it is finalized. The status icon also changes to an "X" in a red circle signifying that the entire reservation is cancelled.

This screenshot shows the reservation management window after clicking 'Cancel'. The 'Cancel' button is now disabled. The 'Status' field at the top right now shows a red 'X' in a circle. The table below shows the 'Cancelled' status and other reservation details. The 'Finalize' button is still visible but disabled.

The reservation is now cancelled and you can now close the reservation window.

HELP AND SUPPORT

For additional help and for Enterprise software installation, please contact Scheduling:

- E-mail: scheduling@carleton.ca
- Phone: ext. 3610

To access the Portal, please go to :

- <http://booking.carleton.ca/portal/>