Enterprise ver. 2012

Documentation Manual

July 4, 2013

TABLE OF CONTENTS

1.0 HOW TO LOG IN

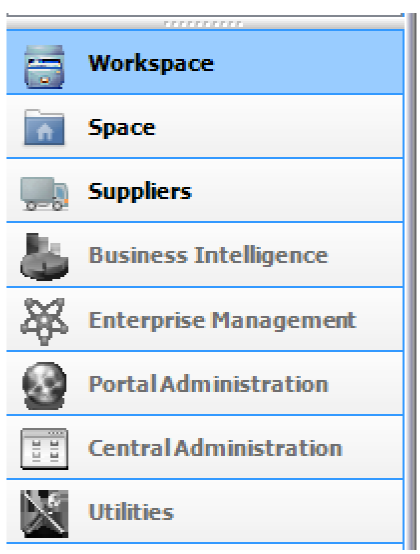
You can launch the program by double clicking on the shortcut icon on your desktop. See below.

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.

1.1 NAVIGATION

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

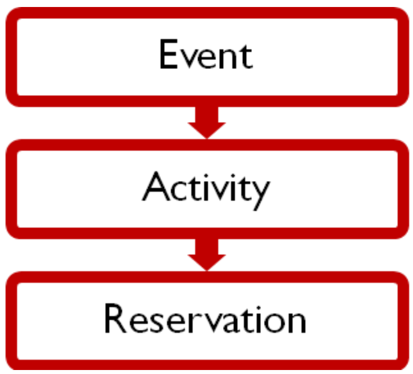
- The **Workspace** module allows users to access booking information and to perform bookings for their department.
- The **Space** module allows users to see a list of spaces on campus.
- The **Suppliers** module will not be relevant for users.



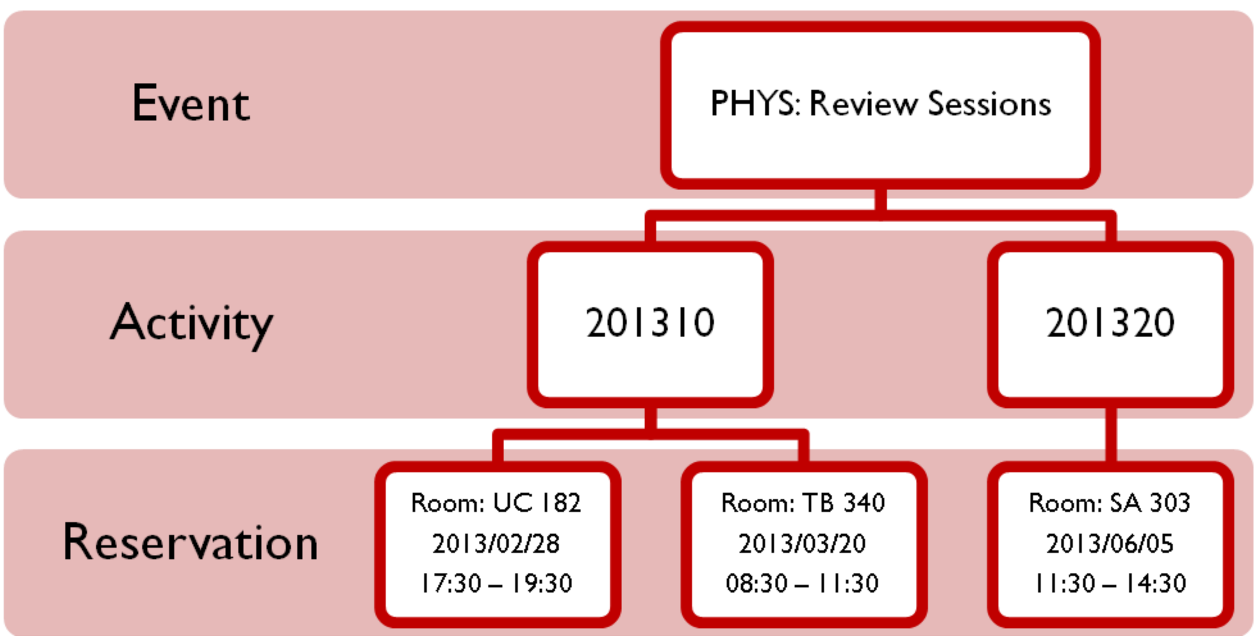
1.2 UNDERSTANDING EVENTS, ACTIVITIES, RESERVATIONS

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.



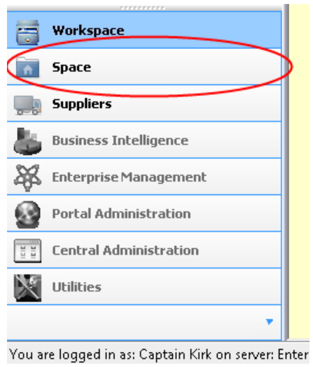
Events are the parents of Activities. Activities are the parents of Reservations. Each reservation must belong to an Activity and each Activity must belong to an Event.



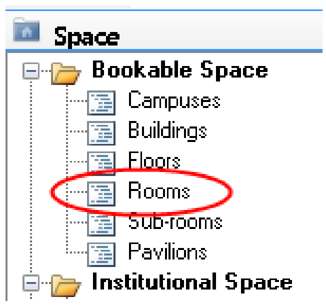
2.0 HOW TO CREATE A RESERVATION

2.1 HOW TO CREATE A RESERVATION USING THE CALENDAR

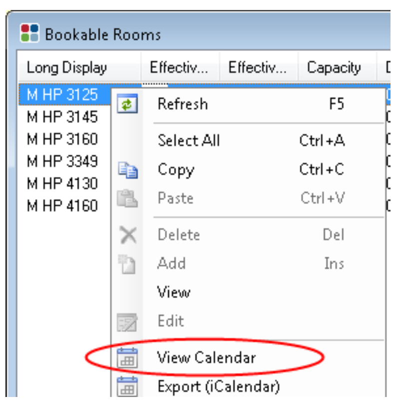
Click on **Space** on the bottom left hand menu.



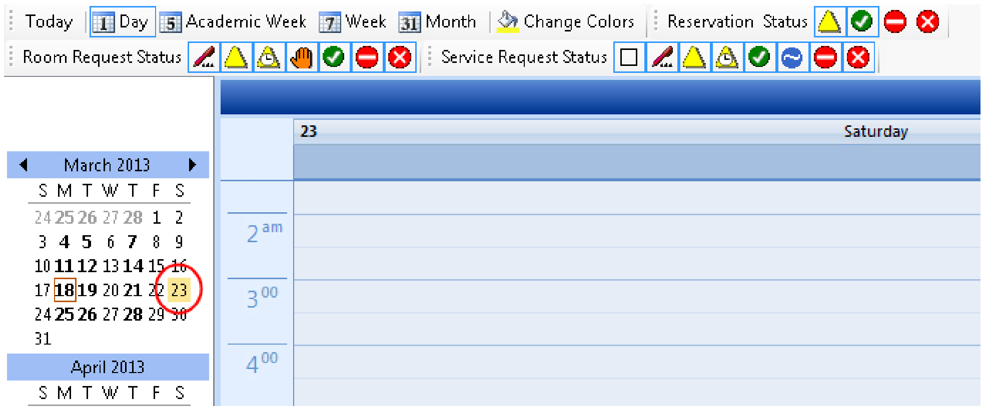
Underneath Bookable Space, click on **Rooms** on the left hand menu.



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

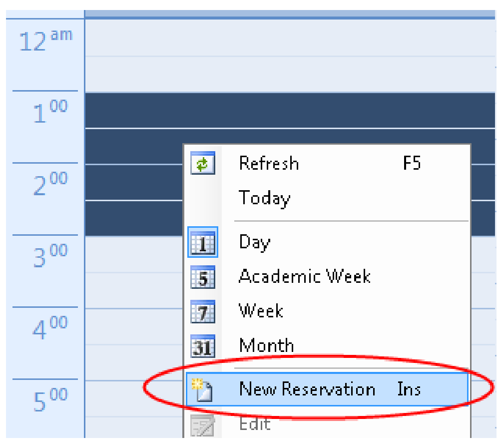


Click on a day from the calendar on the left side.

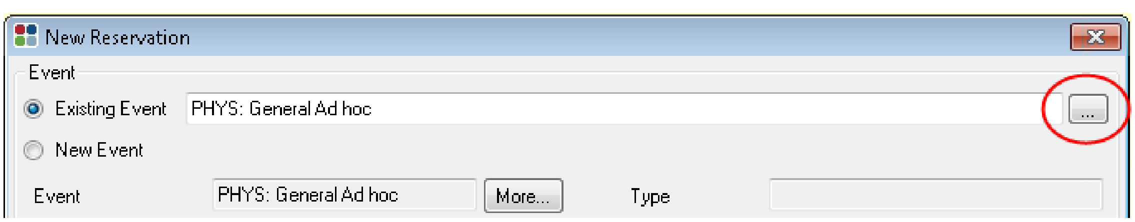


Highlight your desired time block by clicking and dragging over a specified time range.

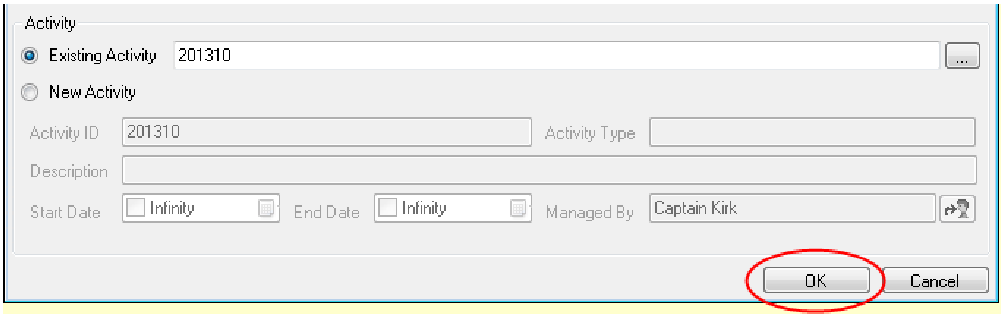
Right click and click on **New Reservation**.



Choose the Event for your booking. To choose an existing event, click on the **"…" button**.

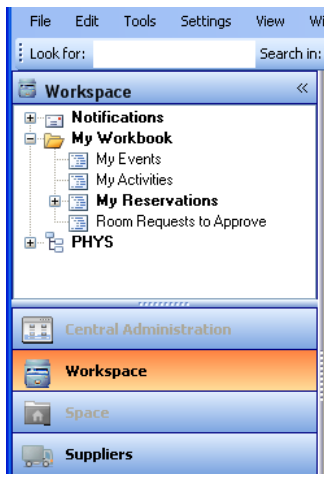


… and attach your existing event.
Check, that the Activity is correct, then click on the **OK** button.

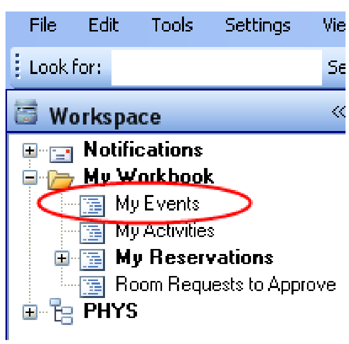


The **Reservation** window will open up. Notice that the time, date, and room details are already filled in. Now you can attach a requestor, if you wish, then finalize the reservation.

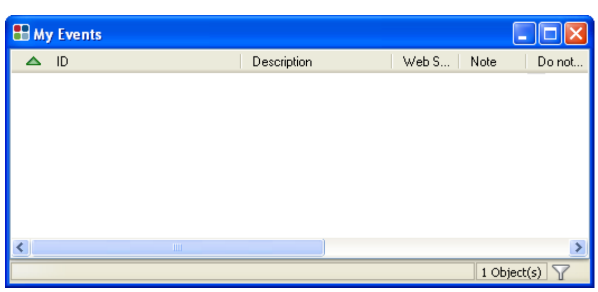
On the left hand side of the program, make sure that the **Workspace** module is selected. You can click on the Workspace button to select it. It should be selected by default.



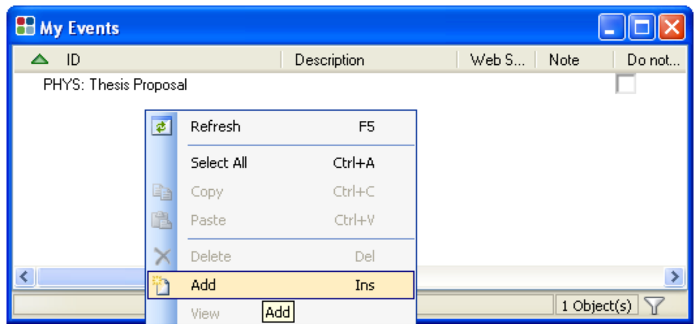
Next, click on **My Events**.



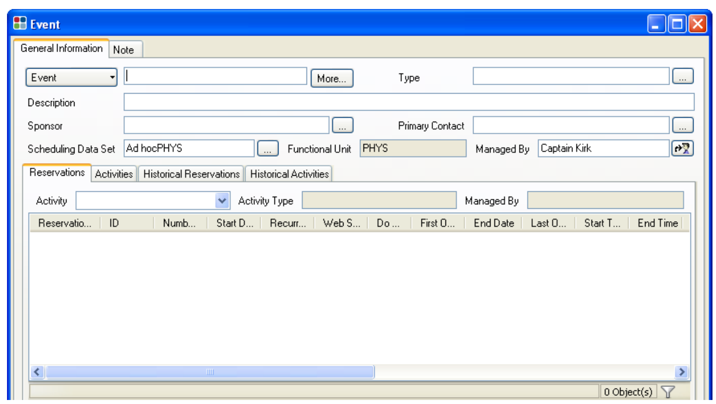
The **My Events** window will open. It contains a list of all events you have created.



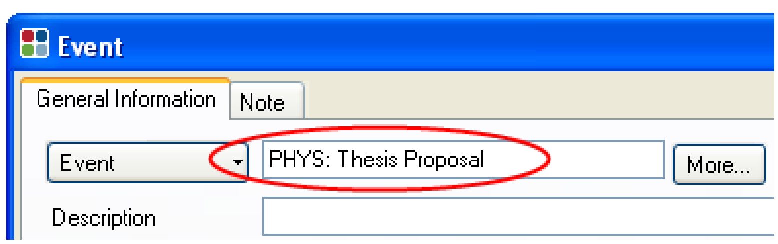
Before we can create our reservation, we need to create an event to house the activities and reservations. To create your event, right click anywhere inside the My Events window and click on **Add** to add a new event.



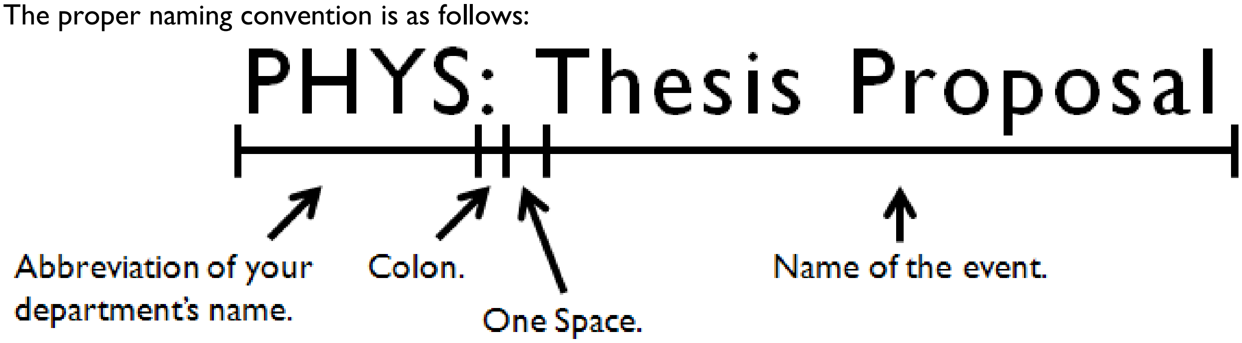
The **Event** window will open.



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

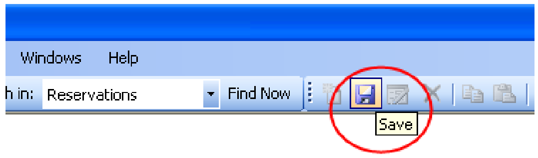


The proper naming convention is as follows:

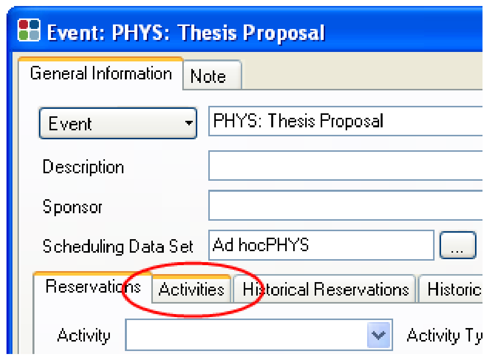


The event name must be unique. Adding in the abbreviation of your department's name will ensure that your event names are unique and easily organized.

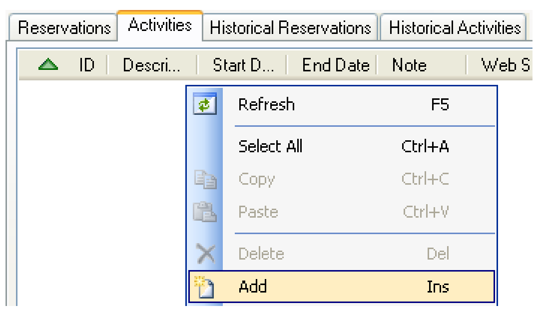
Save your changes by clicking on the **Save** button at the top of the window.



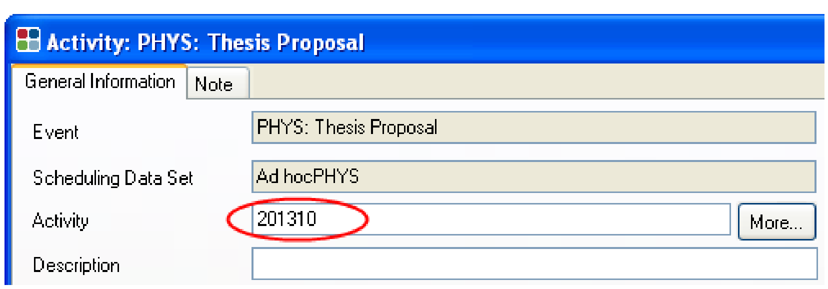
An activity is required if we want to continue with the booking process. Click on the **Activities** tab.



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



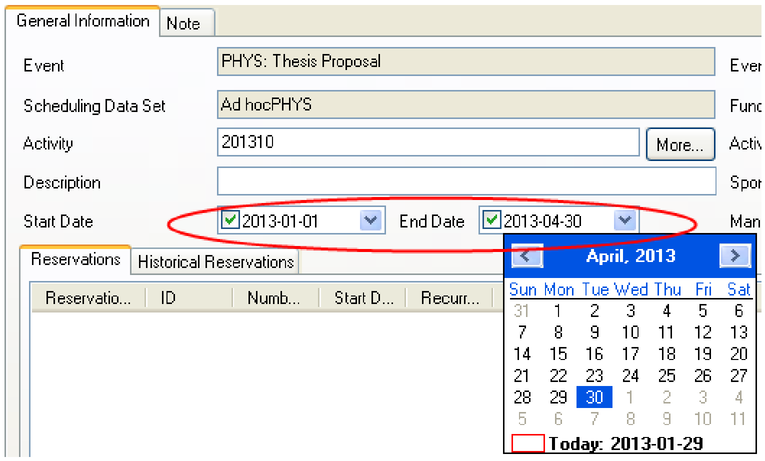
The **Activity** window opens up. Begin by entering in the name of the activity in the **Activity** text box, following the proper naming convention.



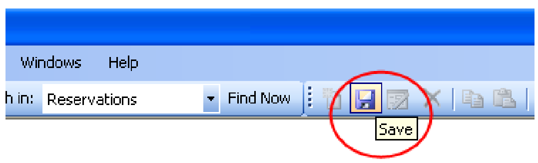
The activity is just a timeframe for the booking. The activity name is the academic term for when your booking occurs. As a refresher, the first 4 digits should be the year. The last 2 digits are either "10", "20", or "30". These 2 digits correspond to the winter, summer, and fall terms respectively. 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 1st to April 30th
201320	Summer	May 1st to August 31st
201330	Fall	September 1st to December 31st

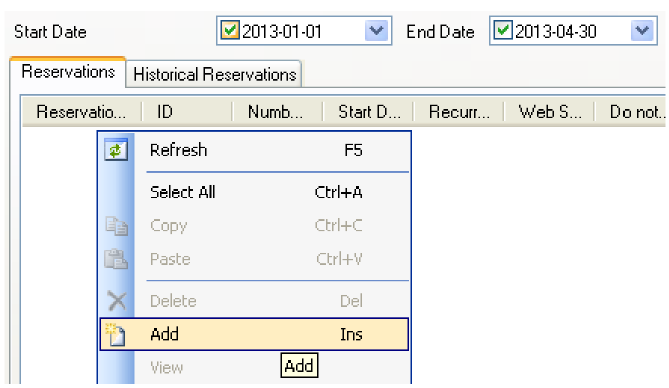
Once you have entered in your activity name, you can change the **Start Date** and **End Date** of the activity to reflect the date range of the activity. Refer to the table above.



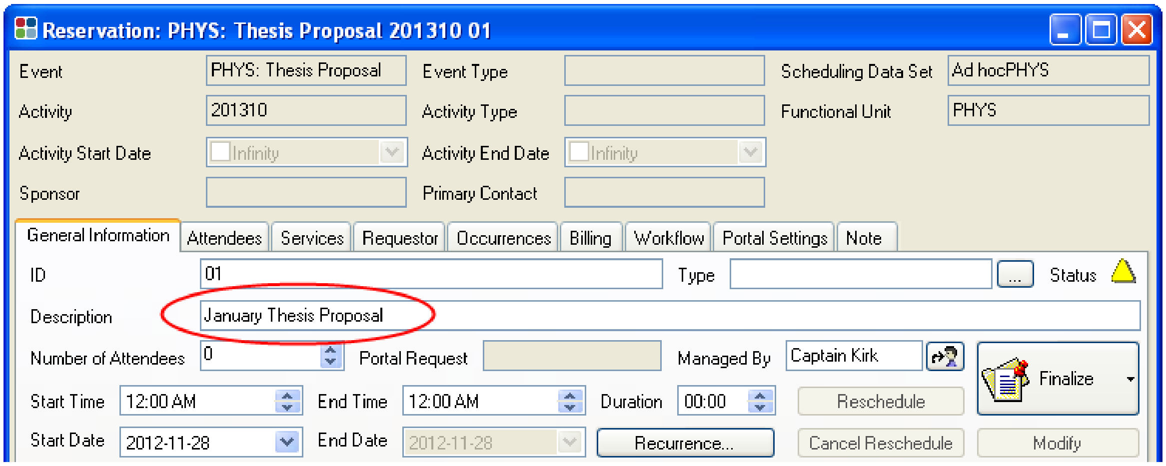
Save your changes by clicking on the **Save** button at the top of the window.



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

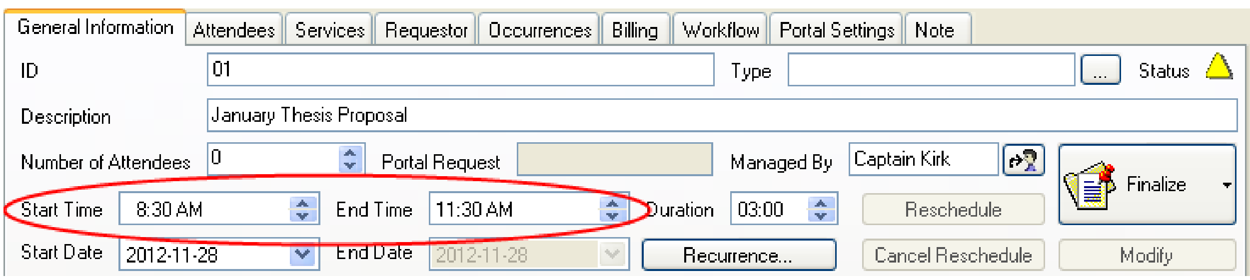


The **Reservation** window will now appear. If you would like to add a description to the reservation, please type it out in the **Description** box. Descriptions can be used to add keywords that are relevant to the booking to ease locating the reservation. The description will **not** appear on the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

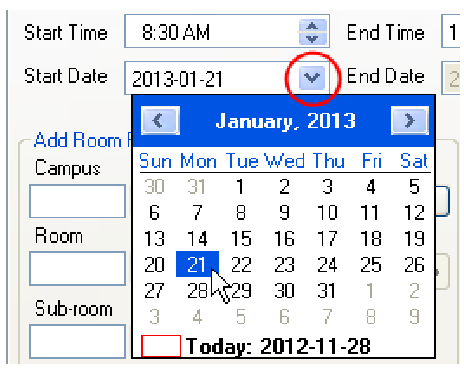


Now we can fill out the time details in the area below. Enter in the **Start Time** first. Then, you may enter in the **End Time** or **Duration**.

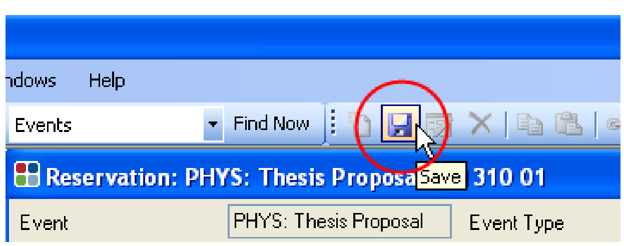
- If you enter in the End Time first then the Duration will automatically fill in based on the Start and End Time. Likewise, if you enter in the Duration first, the End Time will automatically fill in based on the Start Time and Duration.



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.



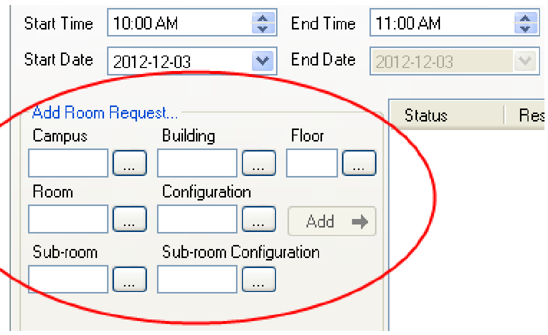
Save your progress by clicking on the **Save** button.



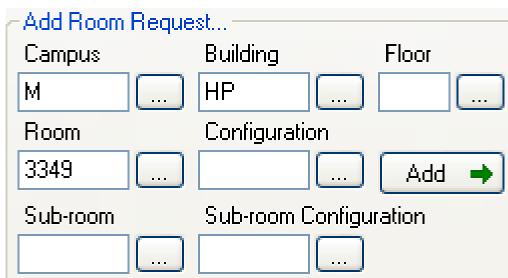
We can now proceed with adding a room for the reservation.

- 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.

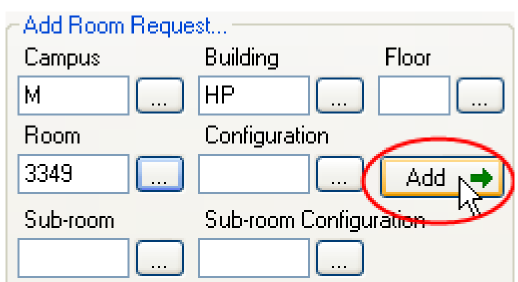


Only the **Building** and **Room** details need to be filled in. You can begin by typing in the building code and the room number.

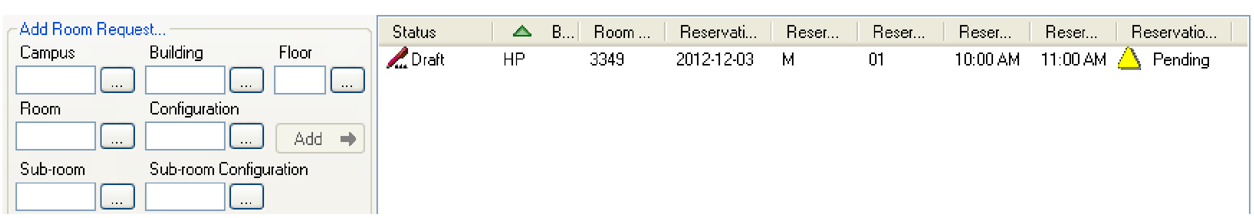


If you are ever unsure of a building code or room number, you can always click on the "…" button beside the related text boxes to bring up a window containing all building codes or room numbers.

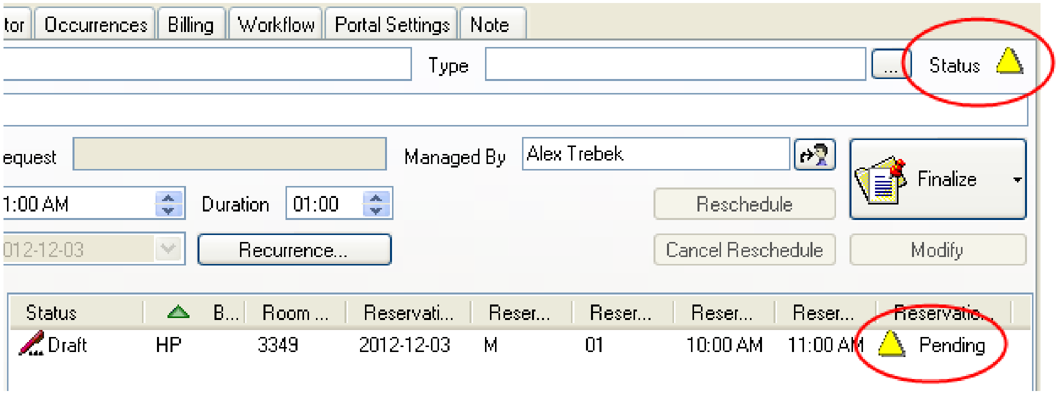
Now that a room is selected, click on the **Add** button.



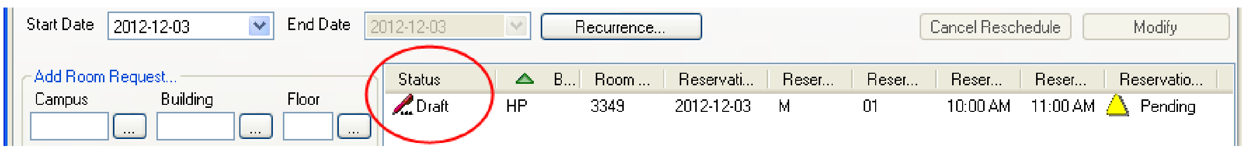
Your selected room and time details should now show up on the list to the right. If you don't see the room number, you can move columns around for a better view.



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.

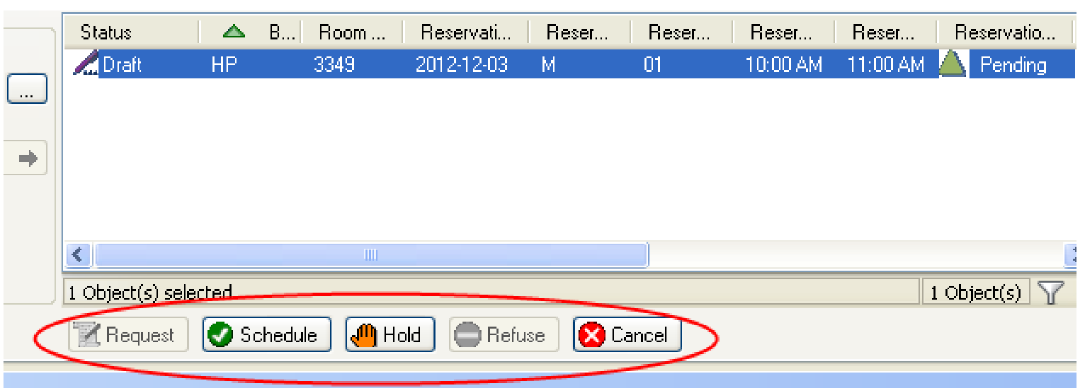


The other status is the room status. It is the status of the room you are trying to book. In this case, the room status is "draft", which means that is has neither been approved nor denied.



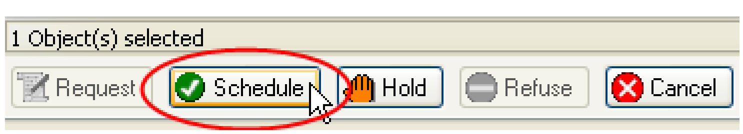
Now click on the line as seen below. It should now be highlighted in blue.

Notice that the buttons below now light up.

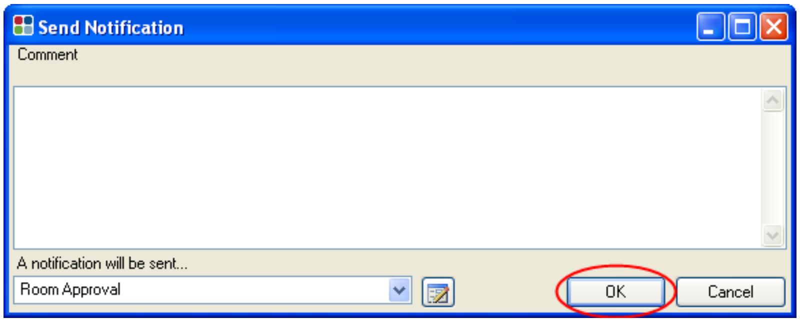


Click on the **Schedule** button to schedule the room.

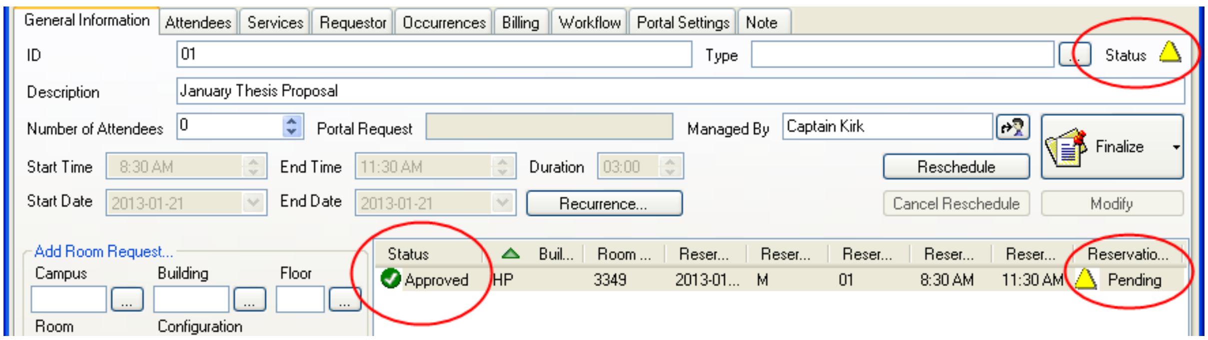
- If the Schedule button is un-clickable, this means that you cannot book this room. You will need to request the room. Click on the **Request** button instead.



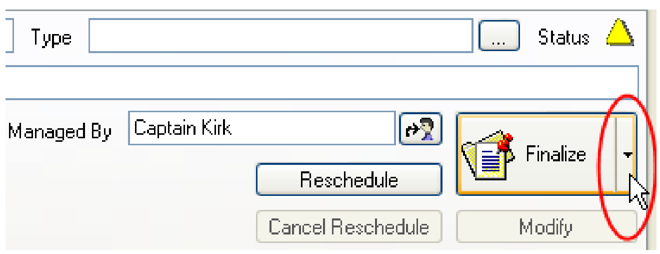
A **Send Notification** window will appear. This window can be used to type in comments for people requesting your space. If this is not relevant, leave the comment box empty. Click on the **OK** button.



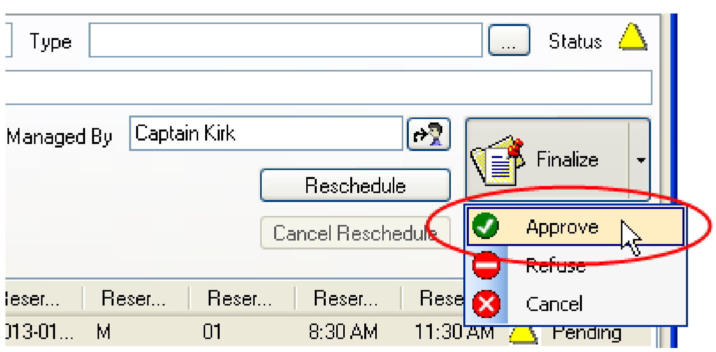
The room is now approved. This is shown by the green check mark icon shown below. Notice that the reservation itself is still pending, as shown by the yellow triangle icon.



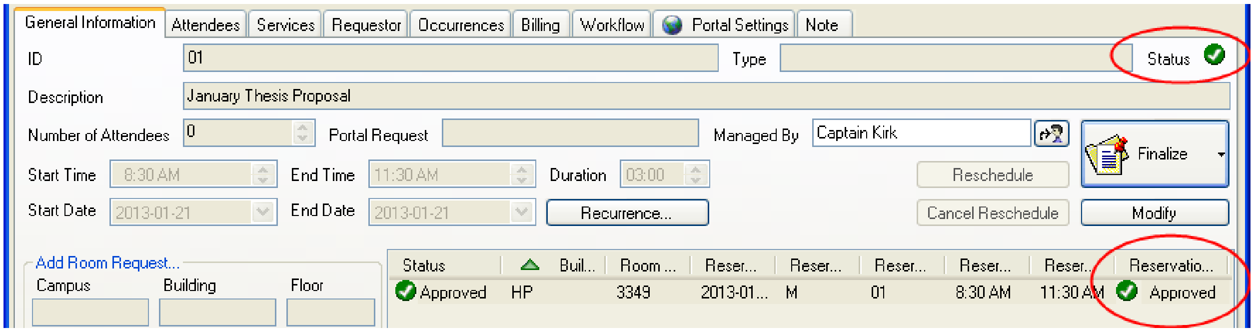
To finalize the reservation, click on the down arrow beside the **Finalize** button. Please note that you cannot click on the button directly, you need to click on the down arrow to access the options.



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

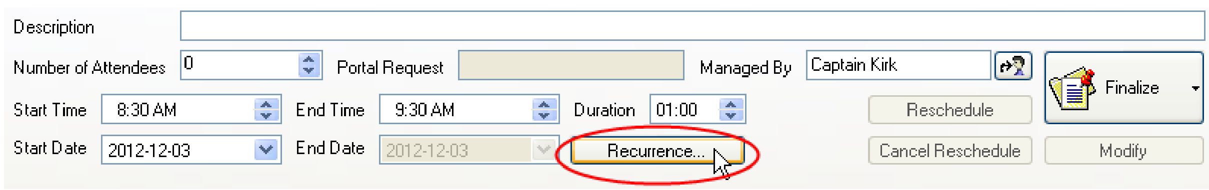


Congratulations, the reservation has been created and approved.

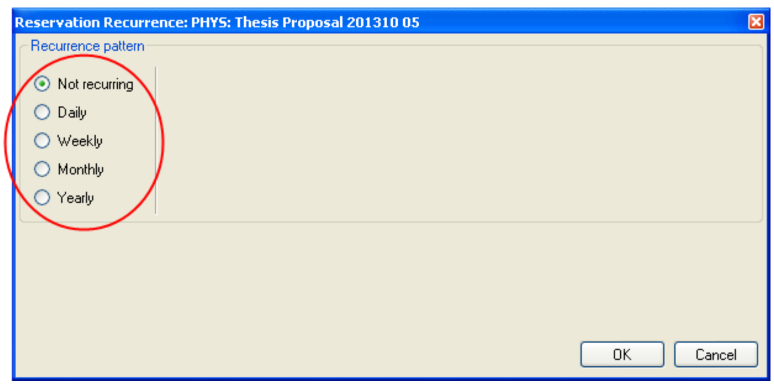


2.2 HOW TO CREATE RECURRING RESERVATIONS

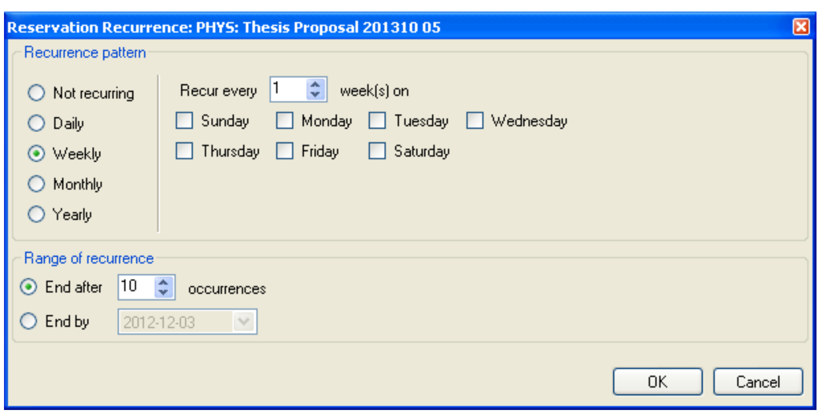
To set up a recurring reservation, click on the **Recurrence** button.



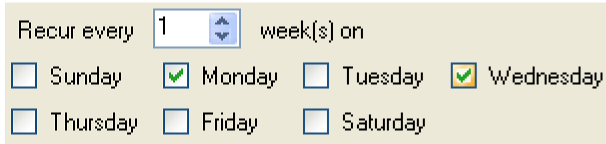
The **Reservation Recurrence** window will open. Choose your recurrence pattern: Not recurring, Daily, Weekly, Monthly, or Yearly.



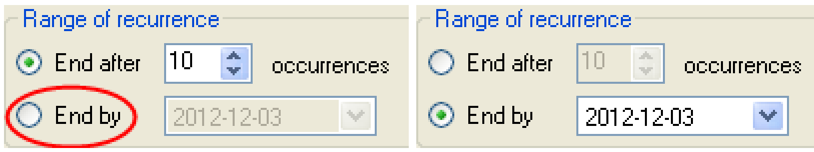
If you selected a weekly recurrence, the following will appear.



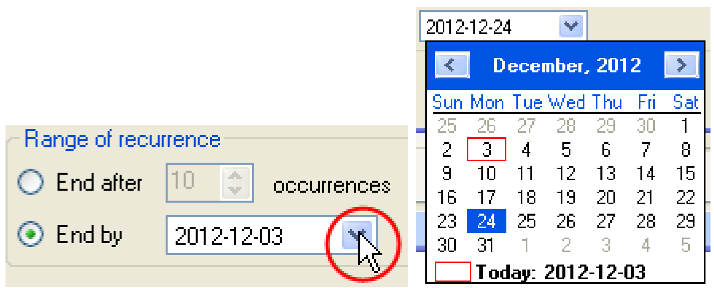
Choose whether or not the recurrence occurs every 1 week or not. In addition, choose the days you are booking for. In this case, Monday and Wednesday were chosen by clicking on the boxes beside the respective days.



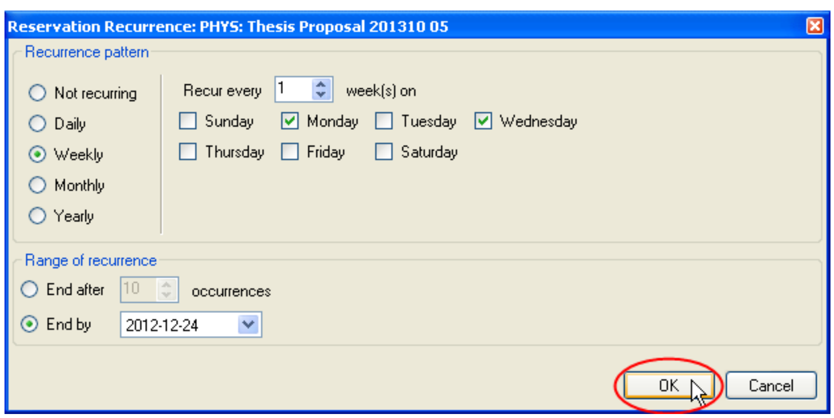
Finally, select whether you want the recurrence to end after an "x" amount of occurrences or whether you want it to end by a certain date. In this case, we would like the recurrence to end after a certain date so we click on the circle beside the **End by** option.



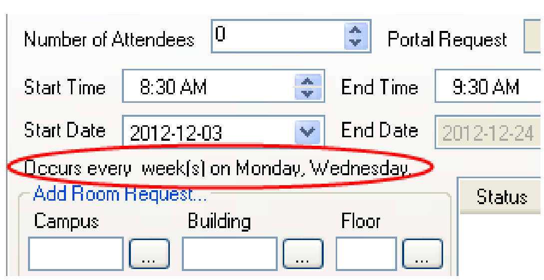
You will then be able to use the drop down menu. Click on the "down" arrow beside the date to bring up a calendar. Select your end date off of the calendar.



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



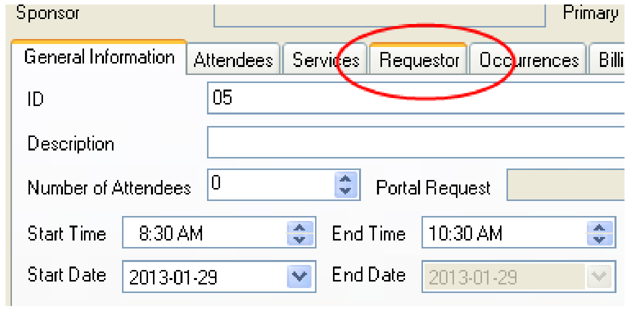
You will be back in the **Reservation** window. Notice that there is an added description below your time detail. It describes your recurrence selection.



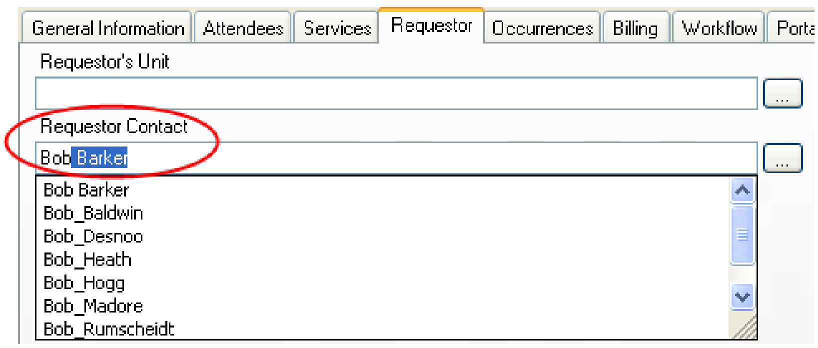
Finally, proceed with your reservation as normal.

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.



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.



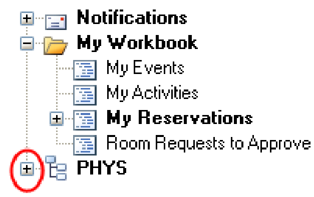
You are done. Click on the **General Information** tab to proceed with your reservation as normal.

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

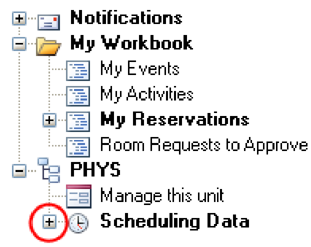
- The e-mail confirmation is sent out the moment you hit the approve button. Therefore, if you forget to add a requestor and the reservation is already approved, it is not possible to go back, add a requestor, and send an e-mail confirmation. You would have to modify the reservation, cancel the room,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

2.4 HOW TO VIEW YOUR DEPARTMENT'S RESERVATIONS

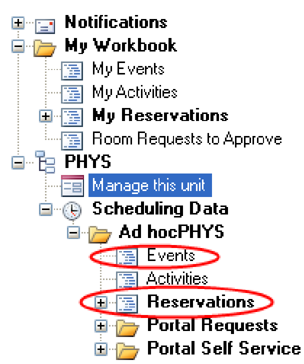
Alternatively, you may want to manage your department's reservations (reservations made by others in your department). To do so, click on the "+" sign beside your **department name** on the left hand menu.



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



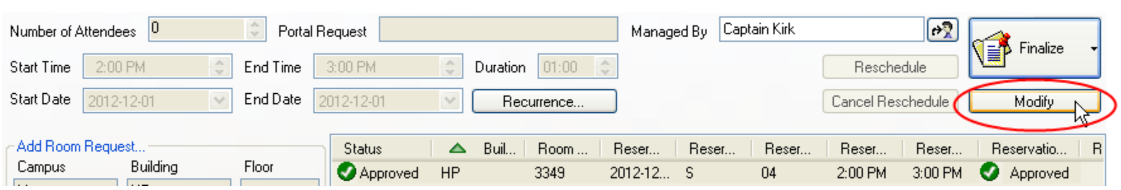
Finally, select either **Events** or **Reservations** to access your department's reservations. This will let you see events and reservations created by all members of your department.



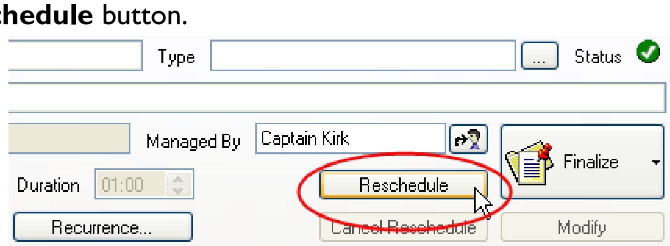
3.0 HOW TO MODIFY A RESERVATION

3.1 HOW TO RESCHEDULE A RESERVATION

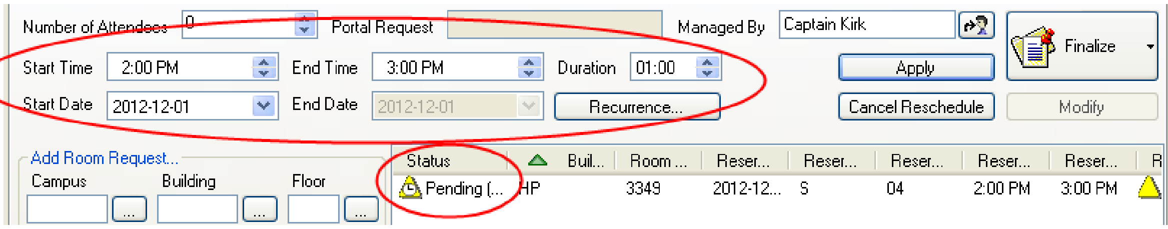
A reservation can be rescheduled should the event require a new date and time. To reschedule a reservation, first click on the **Modify** button.



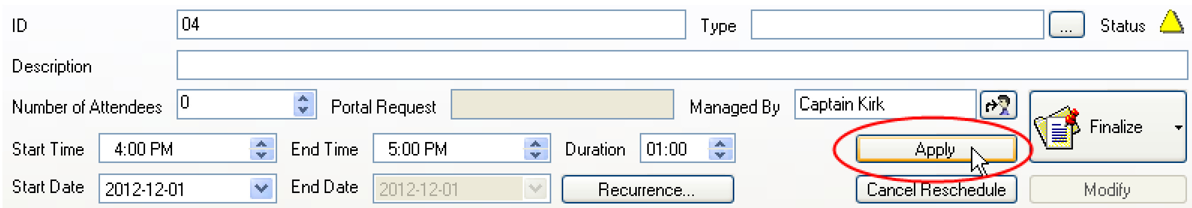
Next, click on the **Reschedule** button.



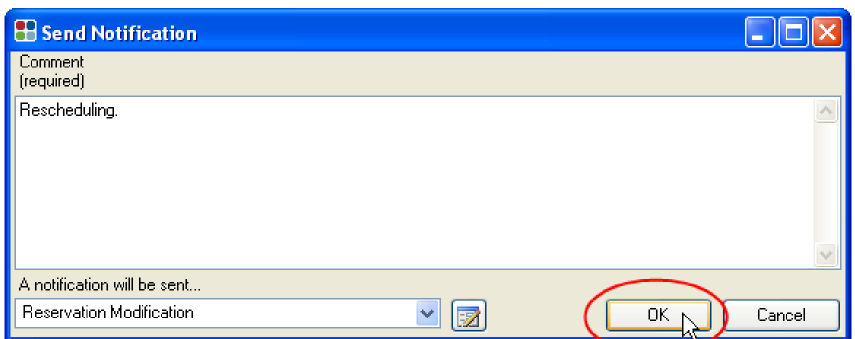
The time and date details can be updated now. The status icon also changes from approved to pending, signified by the yellow triangle icon. Make your desired time and/or date changes.



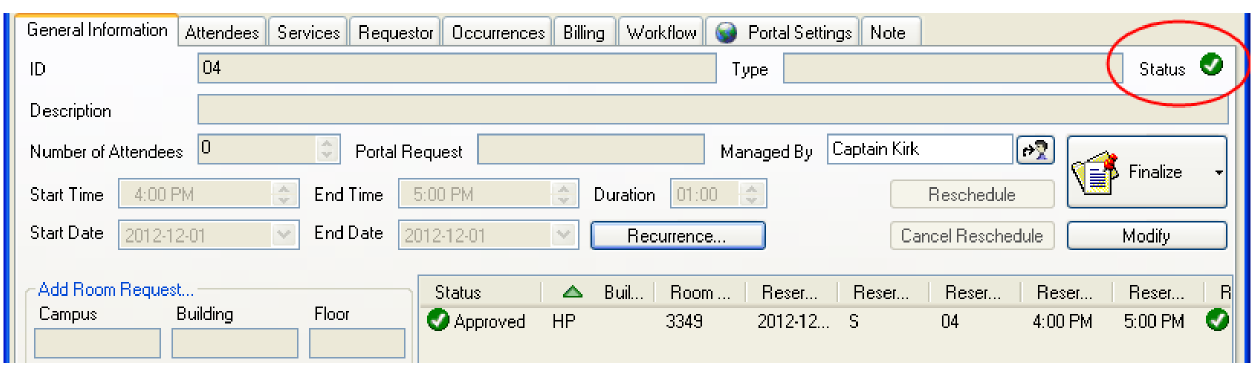
Click on the **Apply** button when you are finished.



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.



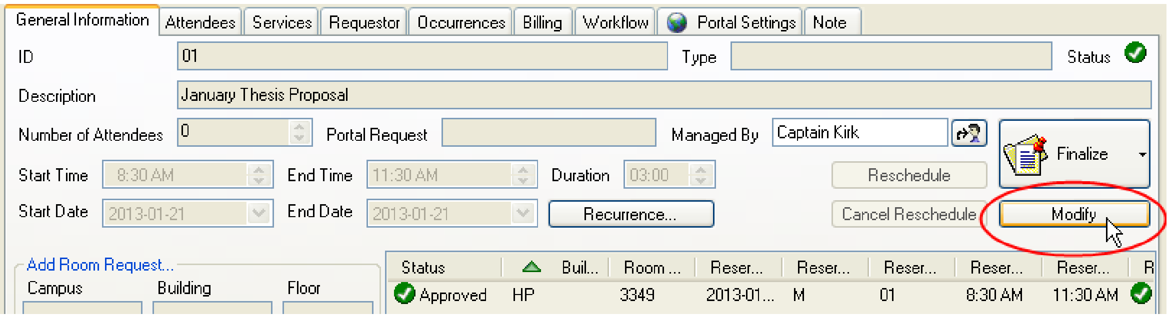
The area below is now greyed out, signifying that everything inside it is finalized and locked for modifying. The status icon also changes to a checkmark in a green circle signifying that the rescheduled reservation is approved.



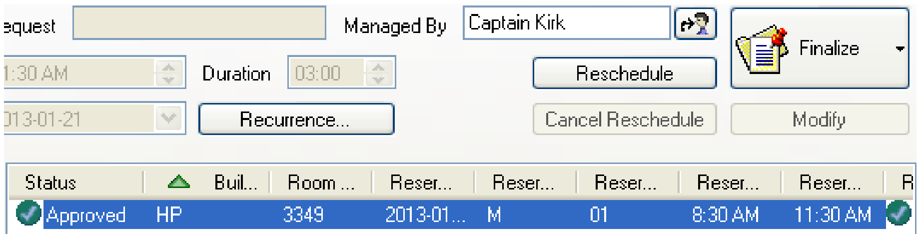
3.2 HOW TO CANCEL A RESERVATION

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.

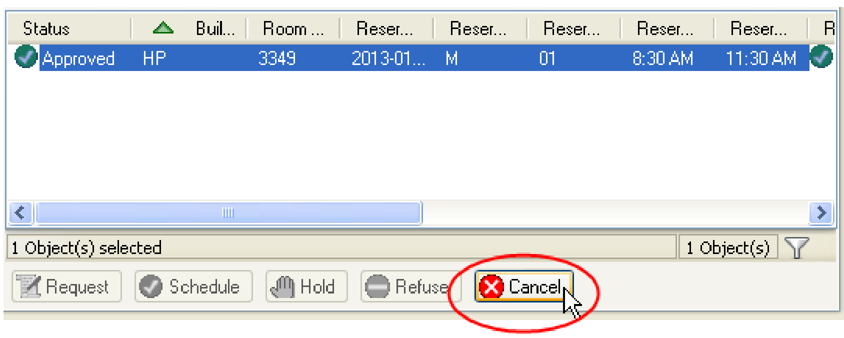
To cancel a booking, first open the reservation. Next, click on the **Modify** button to change the reservation.



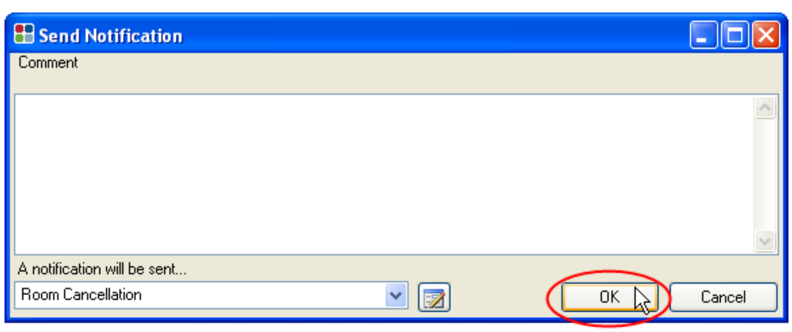
The window containing the room details changes from grey to white. The window is no longer locked and can now be modified. Click on your desired room. It will highlight it in blue.



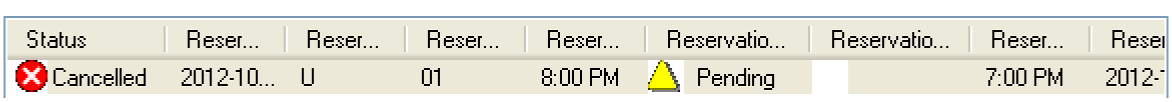
Notice that the **Cancel** button at the bottom now lights up. Click on the **Cancel** button.



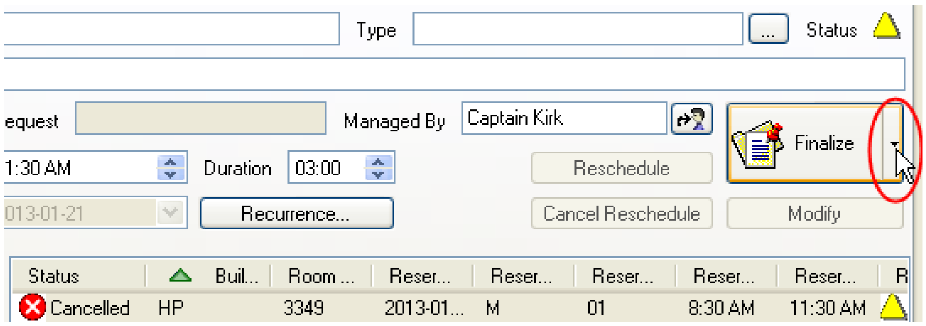
A notification window opens. If you wish to enter in a comment, type it in the comment box. Finally, click the **OK** button.



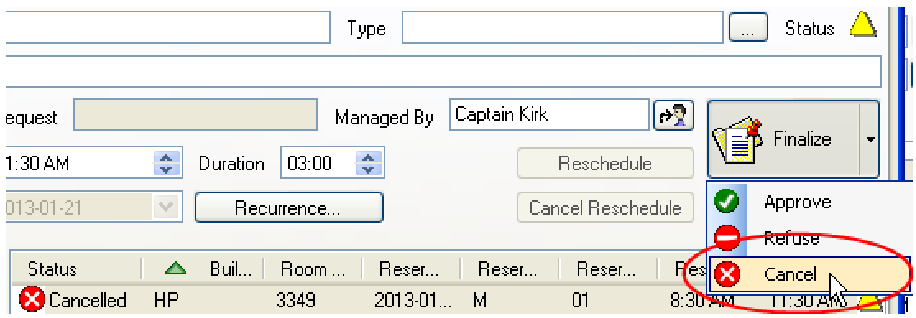
The status icon changes to an "X" in a red circle. Also notice that the reservation status icon below is a yellow triangle indicating that the reservation is still pending.



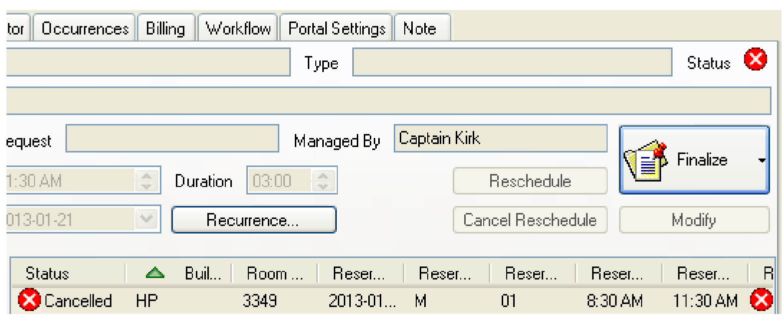
The next step is to cancel the reservation. Click on the "down" arrow inside the **Finalize** button.



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



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.



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/