Enterprise Training
March 2013
Agenda

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Training
- Portal Demo
- Booking your space
- Booking your space through the calendar
What is Enterprise?

- Central space booking system that manages all activities on campus: courses, exams, events, green space, and even parking.
- SES has been using Enterprise since March 2012. In September 2012, the system was launched in Conference Services and Student Affairs.
- The Portal is a web-based access point that will allow the university community to search, request, and book space.
- The Portal has been piloted with our fellow service providers: IMS, FMP, and Safety.
System Objectives

- Providing a one-stop shop for the management of space
- Enhanced room selection for space requestors
- Ability to view the status of booking requests
- Digital workflow of requests to the appropriate booking agent
- Central repository for institution-wide information about space utilization
- Potential to inform event planners of their responsibilities in a proactive manner
System Objectives

- Single contact for process support and issues
- Reduced risk to the institution by providing current information to Safety about events
- Transparency of space
- Easy access to key scheduling information
- Analyze space usage for government reporting, funding, and to estimate future requirements
Workflow

- Enterprise will only be installed for academic units that own departmental classrooms. All other clients will use the portal component.

- Departments will use Enterprise to:
  - View what’s taking place on campus
  - Request pool classrooms from SES
  - Manage their departmental classrooms
  - Receive requests for their departmental classrooms
  - Respond to clients within a 48 hour timeframe
  - Migrate 2013 bookings into Enterprise
Project Dates

- **Late January 2013**
  - University-wide launch

- **Spring, Early Summer 2013**
  - Phase 2 of the project, the ability to request space through the Portal will be available

- **Additional Training Dates:**
  - Throughout January and February
  - One-on-one training available upon request
Portal Demo

- The Portal can be accessed at:
  
  http://booking.carleton.ca/portal
Enterprise Terminology

- Events, Activities, and Reservations are all categories relevant to the creation of a booking.
- An Event 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.
- A Reservation is the actual booking. The reservation will contain time, room, and booking information.
Enterprise Terminology

Event

PHYS: Review Sessions

Activity

201310

201320

Reservation

Room: UC 182
2013/02/28
17:30 – 19:30

Room: TB 340
2013/03/20
08:30 – 11:30

Room: SA 303
2013/06/05
11:30 – 14:30
Enterprise Training

How to start a new booking for your departmental room
1. Log into Enterprise using the provided username and password on your slip of paper.

2. Click on *My Events* on the left hand menu.
3. Inside the *My Events* window, right click and select *Add*.

4. In the *Event* window, type in the name of the event found on your slip of paper.

Note that Event names should follow a naming convention:

**PHYS: Thesis Proposal**

- Abbreviation of your department's name.
- Colon.
- One Space.
- Name of the event.
5. Click on the “…” button beside Type. In the resulting window, select *Internal* and click on the “Attach…” button.

6. Click on the Save button at the top of the program.

7. In the *Event* window, click on the *Activities* tab.
8. Inside the Activities tab, right click on the space below and select Add.

9. In the Activity window, type in the name of the activity found on your slip of paper.

10. Click on the Save button at the top of the program.
11. Inside the *Reservations* tab, right click on the space below and select *Add*.

12. In the *Reservation* window, change the *Start Time* and *End Time* to the times on your slip of paper.

13. Change the *Start Date* to the date on your slip of paper.
14. Using the building and room on your slip of paper, type them into the corresponding boxes below.

15. Click on the *Add* button.

16. *Click on the down arrow* beside the *Finalize* button. Next, click on *Approve*.
17. Click on the Yes button.

18. Type in a comment if you wish. Click on the OK button.
Complete

As shown by the green checkmark icon beside the Status area, the reservation is now approved!

Please see the manual to learn more about using Enterprise.
Enterprise Training

How to do a booking from the room calendar
1. Click on *Space* on the bottom left hand menu.

2. Underneath Bookable Space, click on *Rooms* on the left hand menu.
3. In the Bookable Rooms window, right click on a room, and click **View Calendar**.

4. Click on a day from the calendar on the left side.
5. Highlight your desired time block by clicking and dragging over a specified time range.

6. Right click and click on New Reservation.
7. Choose the Event for your booking. To choose an existing event, click on the “...” button.

... and attach your existing event.

8. Check, that the Activity is correct, then click on the OK button.
9. The Reservation window will open up. Enter in a description if you wish.

10. *Click on the down arrow* beside the Finalize button. Next, click on Approve.

11. Click on the Yes button.

12. Type in a comment if you wish. Click on the OK button.
Complete

As shown by the green checkmark icon beside the Status area, the reservation is now approved!

Please see the manual to learn more about using Enterprise.
Support

- User guides are also available on our website. On the left hand menu, click on Information for Faculty & Staff, then select Enterprise:
  - [http://www2.carleton.ca/ses](http://www2.carleton.ca/ses)

- We welcome your feedback and questions:
  - Email, scheduling@carleton.ca
  - Phone, ext. 3610
  - Marlyn James, ext. 3389
  - Jamie Carmichael, ext. 3588
  - Eric Tran, ext. 3005
Installation

- For additional users who may require the Enterprise software on their computer, please e-mail scheduling@carleton.ca the following details:
  - First name
  - Last name
  - Department

- Installations will be performed remotely by CCS.