Web Scheduler Quick Reference

Web address: http://scheduler.carleton.ca/

Event: These are general categories, such as “Course Related” or “Meetings”

Standardized Naming Convention:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Event Convention</th>
<th>Department: Event Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example</td>
<td>CDNS: Meetings</td>
<td></td>
</tr>
</tbody>
</table>

Activity: Activities are time-limited containers for reservations based on academic terms.

An activity is based on the academic term only (eg: 201530), or based on the academic term and a subcategory (eg: 201530: Student Meetings) to organize reservations.

There are a minimum of 3 activities per year, based on term: 201510, 201520, and 201530.

Standardized naming convention:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Simple activity convention - term only</th>
<th>Advanced activity convention - term: subcategories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example</td>
<td>Eg: 201530</td>
<td>Eg: 201530: Student meetings</td>
</tr>
</tbody>
</table>

Reservation: A reservation is a specific booking for a specific room at a specific time.

Standardized Naming Convention:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Event Convention</th>
<th>Department: Reservation Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example</td>
<td>CDNS: Project Meeting</td>
<td></td>
</tr>
</tbody>
</table>

Instructional Videos

Please note that each part of this document has an accompanying instructional video. These videos can be found on the SES website, http://carleton.ca/ses/
Example of a “Simple Event-Activity-Reservation” tree:

Example of an “Advanced Event-Activity-Reservation” tree (with activity subcategories):
Guide to Web Scheduler 2015

This document is intended to be a reference guide for staff who are delegated to a scheduling role, and who will receive and process student / faculty / staff room requests.

The following table clarifies the different scheduling interfaces currently in use.

<table>
<thead>
<tr>
<th>Portal 2015: Interface for Requesting Space</th>
<th>Web Scheduler 2015: Tool for Managing Space</th>
<th>Enterprise Desktop Client 2015: Deprecated tool for managing space that is being phased out</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Any student or staff can request space</td>
<td>• Departmental staff will manage space</td>
<td>• Only SES, Conference Services, and Student Affairs will use this tool</td>
</tr>
<tr>
<td>• Compatible with many browsers, computers, tablets, and mobile devices</td>
<td>• Compatible with many browsers, computers, tablets, and mobile devices</td>
<td>• Only works on Windows Desktop computers on the CUNET Domain</td>
</tr>
<tr>
<td>• <a href="https://booking.carleton.ca/Portal/">https://booking.carleton.ca/Portal/</a></td>
<td>• <a href="http://scheduler.carleton.ca/">http://scheduler.carleton.ca/</a></td>
<td></td>
</tr>
</tbody>
</table>

Logging into Web Scheduler

2. Enter your MyCarletonOne credentials, then click on Log in.
Creating a New Event

Creating a New Event must be done once per event category

*** Events created in Enterprise 2012 have already been migrated to Web Scheduler – so they do not have to be re-created again in Web Scheduler

1. Under the Events subheading, click or tap on New Event. The New Event Page should open

![New Event Page](image)

   a. For Event Type: Choose Ad Hoc Booking – Ad Hoc Booking, or advanced users may select another type.
   b. For ID: Use the convention Department: Event Category – E.g. CDNS: Meetings
   c. Description: Optional

2. Click on Create Event. Your New Event is now created. The next step is to create an activity for this New Event.
Creating a New Activity

1. Under the Activities heading, click or tap on New Activity. The Create Activity page will open:

- **Scheduling Data Set:** Choose and make sure your departmental code appears
- **Event:** Choose Event that you created [i.e. CDNS: Meetings]
- **Activity Type:** Choose Ad-Hoc – Ad-Hoc. Advanced users can choose another type.
- **ID:** Define the term for the activity e.g. 201530
  1. *Simple Activity Convention:*
     - Eg. “201530”
  2. *Advanced Activity Convention*
     - Eg: “201530 Student Meetings”
- **Start Date / End Date:** Choose the academic start and end dates
  1. **201530:** Sept 1 – Dec 31
  2. **201610:** Jan 1 – Apr 30
  3. **201620:** May 1 – Aug 31

- **Description:** Optional

2. Click on Create Activity. The activity has been created for the Event.
   - Please note: To create new activities, simply follow the above steps
Creating a New Reservation

1. Under Reservations, click or tap on **New Reservation**. The reservation page should open.

2. a) **Scheduling Data Set**: Make sure that your department appears [e.g. Ad hoc CDNS – Ad hoc CDNS]
   b) **Event**: Choose the event [e.g. CDNS: Meetings]
   c) **Activity**: Choose the activity [e.g. 201530]
   d) **Status**: You have 3 choices:
      a. To approve the request, select **Approved**
      b. To refuse the request, select **Refused**
      c. To cancel the request, select **Cancelled**
   e) **Reservation Type**: Select **Ad-hoc – Ad-hoc**. Advanced users may select another category.
   f) **Description**: Enter the description of the reservation [e.g. Faculty Meeting]
   g) **Requestor Contact**: Click on the ☁, then search for the requestor **Firstname.Lastname**.
      - Note: “Address Book – Academic” generally contains all students, and “Address Book – Ancillary” generally contains all the staff.
3. Under **Time and Room Information** as shown in the figure above, click on “Find a time and room” or “Pick a time in a specific room”

![Image of the Find a time and room interface]

- a) You see only space you administer by default. If you wish to request space in another department’s room, put a checkmark in “Include rooms that would require approval”.
- b) Click on **Verify Availability** to find rooms.
- c) Click on your selected room and click on **Select**

4. The selected room details will automatically be added to the reservation. Click or tap **Create Reservation** and the reservation is confirmed.
**Approving Portal Requests**

1. On the left side menu, Under Portal Bookings, click or tap **Portal Requests**

2. The Portal Requests page will appear.
   a) To find a specific **Portal Request** enter the reference number in the search box, then press Enter or in the list of requests, you can look for a specific request.
   b) Click on the request and the Portal Request screen will open.

3. Click on **Accept**. Note, this is NOT approving the request, but accepting the request to view or configure details.
4. Confirm the reservation details.

5. Click on Create Reservation, and the reservation is confirmed.

   • A Comment box will now display, where you can type any message for the requestor to see
**Creating Reservation by Room/Location/Capacity**

1. On the left side menu, click or tap “Specific Room Availability”

**SPECIFIC ROOM AVAILABILITY**

<table>
<thead>
<tr>
<th>Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location: DT - Dunton Tower</td>
</tr>
<tr>
<td><strong>Room</strong></td>
</tr>
<tr>
<td><strong>Include rooms that would require approval</strong></td>
</tr>
</tbody>
</table>

**Click on a row to select a room**

<table>
<thead>
<tr>
<th>Campus - ID</th>
<th>Building - ID</th>
<th>Short Display</th>
<th>Room Type - ID</th>
<th>Capacity</th>
<th>Configuration</th>
<th>Room - Room Admin</th>
<th>Calendar</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>DT</td>
<td>1212</td>
<td>DEPT</td>
<td>12</td>
<td></td>
<td>CDNS</td>
<td></td>
</tr>
<tr>
<td>M</td>
<td>DT</td>
<td>1216</td>
<td>DEPT</td>
<td>29</td>
<td></td>
<td>CDNS</td>
<td></td>
</tr>
</tbody>
</table>

2. The “**Specific Room Availability**” page will display.
   a. Click on the room that meets your needs.
   b. The space can be requested by:
      i. specific date and time by clicking **Verify Availability**,  
      ii. finding a date and time by clicking **Verify Calendar**,  
      iii. searching for recurring dates by clicking **Set Recurrence Options**.
3. Once you select a date/time, click **Create Reservation**, and the New Reservation page will open.
4. Follow the steps outlined in the **Creating a New Reservation** section of this document.
Using the Reservation Calendar

1. On the left side menu, click or tap “Reservation Calendar”

2. The Reservation Calendar page will display.

3. Click or tap directly on the calendar in the location that corresponds to the start time of the reservation, then click “Create Reservation”.
   a. Note click-and-drag is not supported.

4. The New Reservation page will display. Note that the date and start time will appear automatically, and you must only add the end time and duration.

5. Follow the steps outlined in the Creating a New Reservation section of this document