

## **Table of Contents**

Login and Navigation	2
View Scheduled Events	3
View Scheduled Meetings	6
Schedule a New Event	7
Modify or Cancel a Scheduled Event	12
Check Availability of Rooms	14
Approval of Event Requests	16
Additional Help and Logout	18

# **Login and Navigation**

Log into the UniTime web site using your customary university username and password or the password provided by your system administrator. The URL of the login page should be provided by the organizational unit responsible for scheduling events to the locations of interest.



The left hand margin of the screen displays a menu of timetabling and scheduling applications available within UniTime. Applications displayed will vary depending on your user role within the system.

To access the Event Management functions, click on the button with a plus sign (+) to the left of "Event Management" in the menu.

□ Personal Schedule	
⊕ Event Management	
User Preferences	
Help	
Log Out	

This will open the menu to display pages available in the Event Management application as shown below.

	Personal Schedule						
⊡	Event Management						
	·	Events					
	·	Meetings					
	⊡	Add Event					
	·	Room Availability					
+	Us	er Preferences					
+	He	lp					
	Lo	g Out					

### **View Scheduled Events**

To view an event or set of events, click on "Events" in the sidebar menu.

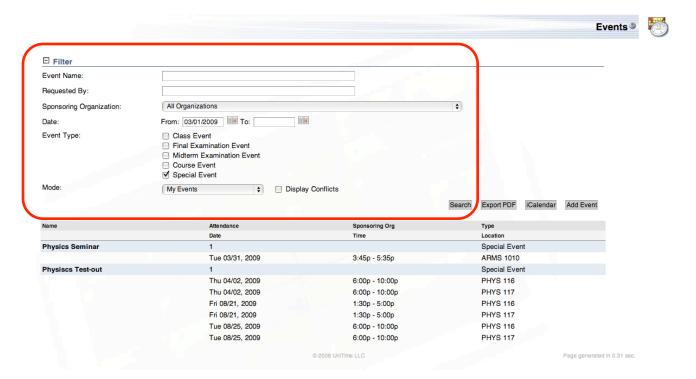


The **Events** page will look similar to the screen capture below:



This page displays a list of events (highlighted by blue bars) along with the times and locations of all meetings associated with each event. Events are sorted alphabetically and only the first 100 events meeting any search criteria are displayed. To **modify the search criteria**, click on the button with a plus sign (+) to the left of "Filter" in the upper left corner of the table (circled in red above).

This opens the filter dialog section (circled below in red) which allows the user to select events meeting a variety of criteria described below by entering them and clicking on the search button.



#### **Event Name**

Enter any substring of a name of the event

Requested By (available to event managers and administrators only)

Search for events requested by a particular person (enter any substring of the name)

#### **Sponsoring Organization** (applicable to special events only)

Select a sponsoring organization to search for events of this organization

#### **Date**

Limit the search to events that have at least one meeting between the From: and the To: date Either field can be left empty, which implies no limit in that direction

#### **Event Type**

Select the type(s) of events to search for

#### Mode

My Events

Display events which have the current user as Main Contact

All Events

Display all events, whether or not their meetings have been approved

All Approved Events

Display only events that have at least one approved meeting

All Events Awaiting Approval

Display only events that have at least one meeting awaiting approval

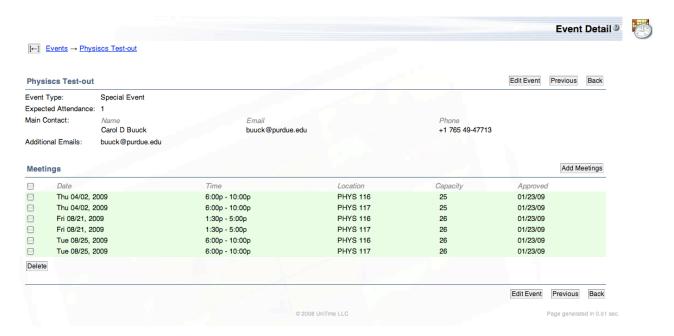
All Events Awaiting My Approval (applicable only to event managers)

Display only events that have at least one meeting awaiting approval

All Conflicting Events

Display events that have meetings overlapping with other meetings at the same locations **Display Conflicts** - if checked, conflicting meetings will be displayed

Clicking on any of the events highlighted by the blue bars in the results table will display the **Event Detail** page for this event.



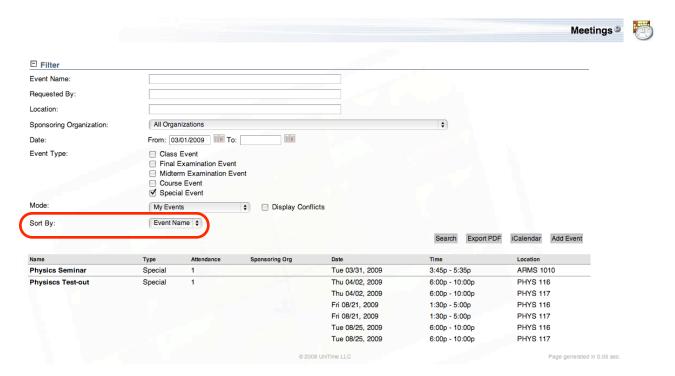
This page provides an overview of the event and its meetings. Meetings that have not yet been approved are highlighted in yellow, meetings that have been approved are displayed with a green background.

The main contact (usually the person who has requested the event) may **delete** all the meetings associated with an event from this page and thus the whole event. The main contact may also **add meetings** to the event or **edit** general information about the event. These functions are discussed in more detail under the Modify or Cancel a Scheduled Event section.

## **View Scheduled Meetings**

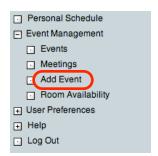
The individual meetings associated with an event may also be searched on via the **Meetings** page, which is accessed from the menu on the left hand side of the screen. The search results obtained from this page do not include all meetings of an event, only those meetings that meet the search criteria (as opposed to the **Events** page, where if one meeting associated with an event meets the search criteria, all meetings of that event are displayed).

The search criteria available in the filter dialog section on the Meetings page is the same as for Events page described in the previous section, with the exception that meetings may be searched for based on **location** and the displayed results may also be sorted by the event name, meeting location, or meeting time. The sort option pull-down box is highlighted in the screen capture below.



A list of meetings displayed on this page may also be exported as a PDF report or as an ICS format calendar file. PDF reports are restricted to 1,500 meetings rather than the 100 event limit used for screen displays.

#### Schedule a New Event

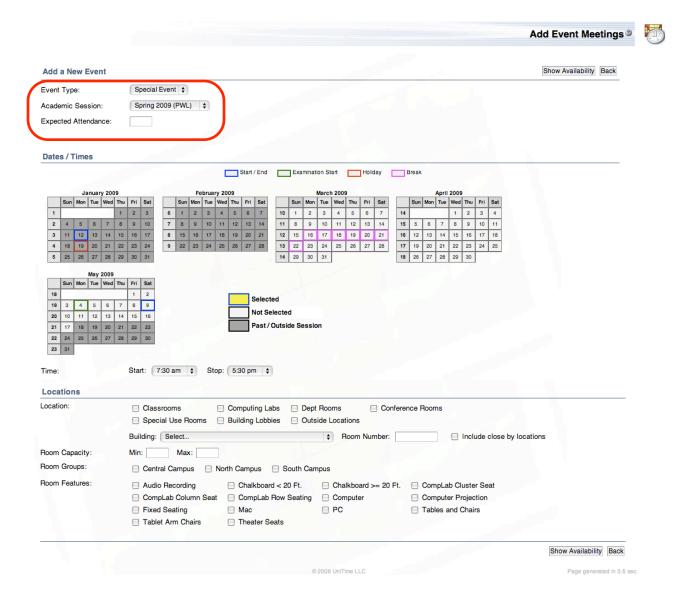


To schedule a new event, click on "Add Event" in the menu on the left hand side of the application screen.

This will take you to the **Add Event Meetings** page, which will look similar to the screen capture below. This is the first of three pages used to input information about an event and request locations at desired times.

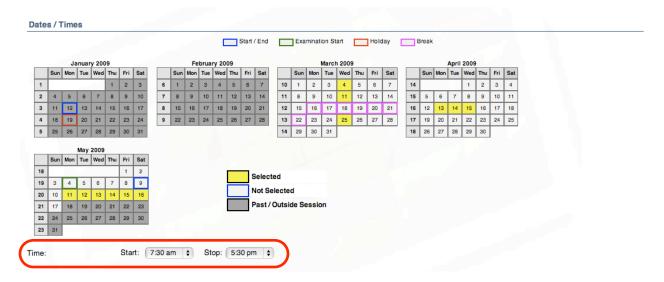
The first step is to select the Event Type, the Academic Session it is to be scheduled to, and to provide an estimate of the Expected Attendance for the event. These are input at the top of the page in

the area highlighted by the red circle below. In most cases "Special Event" should be chosen for the Event Type. The rooms that are available for scheduling, as well as the meeting dates that will be displayed and available to select from, are determined by the Academic Session.



Select the date(s) of the event using the calendars displayed in the **Dates/Times** section. Selected dates are highlighted in yellow. To schedule an event on multiple days at the same time, select all of the desired days. If more than one date/time combination is desired, select only those days that correspond with the same meeting time. Additional date/time combinations can be added after the first set is submitted.

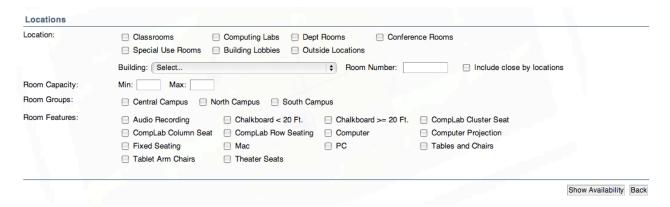
**Note:** To select an entire week, click on the week number in the left margin of the monthly calendar. To select the same day of every week in a month, click on that day in the top row of the calendar. To select the entire month, click on the blank square in the upper left hand corner. Dates can be deselected by clicking on the "Not Selected" box and then clicking on the dates not desired or by simply clicking a second time on an unwanted date. Dates shaded in dark gray are in the past and can not be selected. Important dates to keep in mind are outlined in colors defined by the key at the top of the section.



The desired starting and ending times for the event meeting(s) are set in the Time field (circled in red above). To choose the desired times, click on the time boxes and select from the drop down lists. When focus is on the time drop down, it is also possible to type in the desired time. For example, "10p" will select get "10:00 pm" or "73a" will select "7:30am". (This work for the first characters typed. If a mistake is made, it is necessary to hit Backspace to clear the numbers/letters entered previously.)

Note that the start and stop times apply to all dates selected. To make a reservation with diferent date/time combinations, it is necessary to add meetings to the event after the first set of dates/times is submitted. This is done on the Event Detail page as discussed further below.

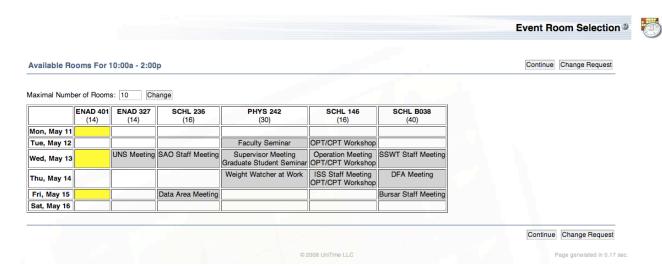
Constraints on the meeting location(s) are set in the Locations secton of the **Add Event Meetings** page illustrated below.



If the particular room or type of meeting space needed is known, this can be indicated by selecting the appropriate box for the desired room type or selecting the desired building and typing in a room number. Otherwise, desired room attributes such as room capacity, campus location, and room features can be selected to narrow the search for available meeting locations. Any selections made in the Locations section restrict the number of rooms that are returned by the system. It may be necessary to lessen the number of restrictions if a desired space is not available.

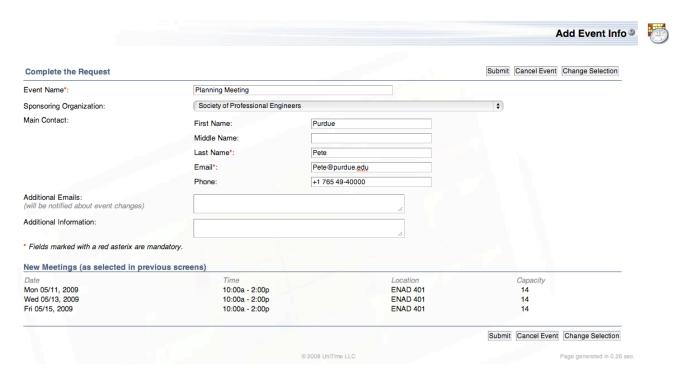
Once the date, time, and location criteria have been specified, the application can search for all locations matching these criteria. To do so, click on the "Show Availability" button.

The **Event Room Selection** Page will be displayed. This page provides the user with a table view indicating the availability of the times and locations selected on the Add Event Meetings page. Locations can be selected by clicking on any blank table field. Locations are listed in this table from left to right based on most to least availability on the requested dates and times.



Selected date/time/location combinations are displayed in yellow. Clicking on the "Continue" button will create meetings at these times and locations. If none of the options presented is suitable, it may be necessary to click on the "Change Request" button to return to the previous page and modify the selected dates, time, or room attributes.

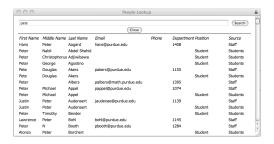
Selecting one or more date/location cells and clicking on the "Continue" button will take you to the **Add Event Info** page shown below.



The **Event Name**, along with the name and email address of the **Main Contact** for the event, are **required** fields. The contact information will be filled in based on information associated with your login account. The **Sponsoring Organization** drop down list is useful for tracking events by groups established in the application.

Event managers will also see a button labeled "Lookup" to the right of the First Name line. When a portion of the name is entered in the First Name or Last Name field(s). clicking on the "Lookup" button will search contact information stored either in the timetabling application or in other applications set up to provide user's data.



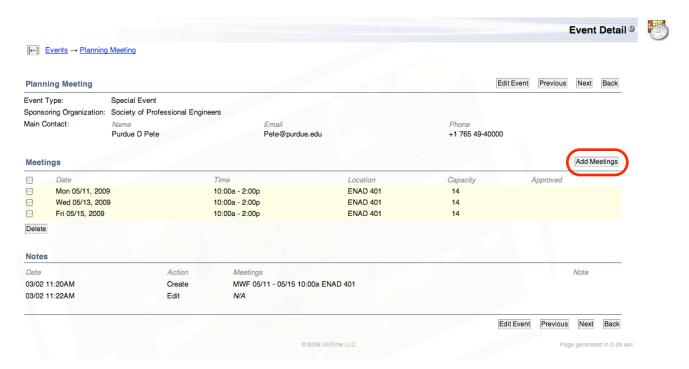


Event Managers can then select from a pop-up list, such as that displayed on the left, of names that partially match the strings entered. Clicking on a line with an appropriate match from this list will populate the contact information fields. There may be multiple lines for the same person from different sources. Any of them may be chosen.

The Additional Emails field allows other interested parties to receive copies of the reservation request and any changes that may be made to the event at a later date.

The lower section of the **Add Event Info** page lists the new meetings that will be created as a result of adding the event. Carefully review this list. If there is a problem, you may click on "Change Selection" to go back and edit these meetings. Clicking the "Submit" button will create the meetings and route them for approval by the responsible event manager(s). An event with meetings in rooms controlled by several managers may have individual meetings approved at different times. The Main Contact and Additional Email addresses will receive notices when the meetings are approved or rejected, as well as an email confirming receipt of the request.

Upon clicking "Submit", the **Event Detail** page will be displayed. This page will look similar to the screen capture below.



At this point it is possible to click on the "Add Meetings" button (circled above) in order to request additional meetings that occur at a different time from that originally entered on the **Add Event Meetings** page several steps ago. You will be returned to that page, where you may select additional meeting dates, time, and rooms.

From the Event Detail page you can also go to an **Edit Event** page by clicking on the "Edit Event" button. This page is identical to the Add Event Info page and allows the information entered originally to be changed if necessary.

A meeting may be deleted from an event by clicking on the box to the left of the meeting. This will place a check mark in the box. Clicking on the "Delete" button below this row of boxes will delete all checked meetings. Selecting the box on the header line will put check marks in the boxes next to all of the meetings. Clicking on



the "Delete" button in this case will delete all meetings **and delete the event record**. If you wish to change meeting times or dates it is best to add new meetings before deleting all existing meetings.

### Modify or Cancel a Scheduled Event

As discussed in the section on Viewing a Scheduled Event, changes to existing scheduled events can be made from the **Event Detail** page. This page is most readily reached by clicking the "Events" drop down menu button and then selecting the desired event from the **Events** page. (See the View Scheduled Events section of this manual for a more detailed description of this process.)



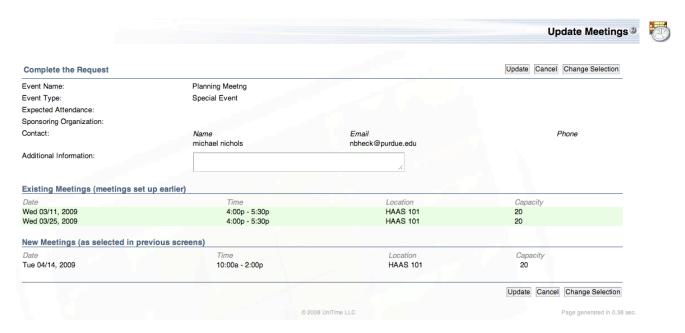
The **Event Detail** page provides an overview of the event and its meetings. Meetings that have not yet been approved are highlighted in yellow, meetings that have been approved are displayed with a green background. Meetings displayed in light gray have occurred in the past and may not be changed in the application.

The main contact (usually the person who has requested the event) may **delete** some or all of the meetings associated with an event from this page. Deleting all meetings will delete the event. He/she may also click on the "Add Meetings" buttons to go to **Add Event Meetings** page where additional meetings may be added to the event. Clicking on the "Edit Event" button will take the user to the **Edit Event** page where Event Name and other general information about the event may be changed.

To delete a meeting, click on the box to the left of the meeting. This will place a check mark in the box. Clicking on the "Delete" button below this row of boxes will delete all checked meetings. Selecting the box on the table heading line will put check marks in all of the boxes next to future meetings. Clicking on the "Delete" button will delete all of these meetings. The event record will also be deleted if there are no past events.

New meetings are added by clicking on the "Add Meetings" button. The process described in in the Schedule a New Event section is then followed, entering time and location requirements on the **Add Event Meetings** page and choosing appropriate rooms on the **Event Room Selection** page. However, once additional meeting locations have been selected, the user is redirected to the **Update Meetings** page to verify the new meetings created rather than the Add Event Info page encountered when creating a new event.

The **Update Meetings** page, as illustrated below, shows the existing meetings that have been scheduled for the event along with the proposed new meetings that are being requested. The user has the option to confirm the new meeting choices by clicking the "Update" button, "Cancel" the addition of new meetings, or "Change Selection", which sends you back to the **Event Room Selection** page.



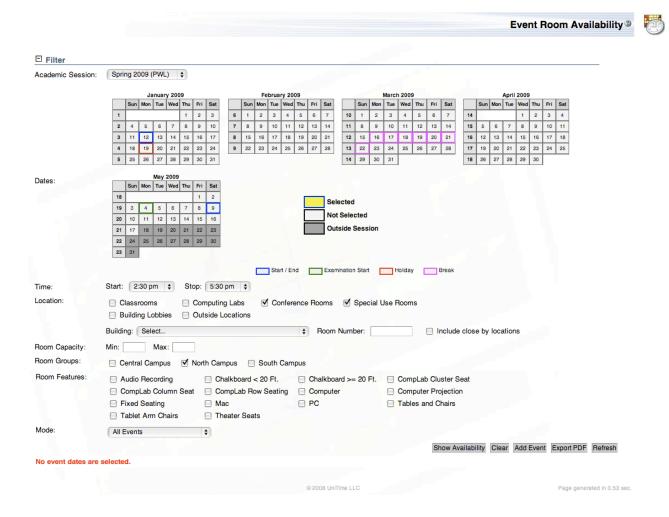
"Update" submits the new meeting request to the event manager for approval and returns the user to the **Event Detail** page.

## **Check Availability of Rooms**



To check the availability of a particular room or group of rooms, click on "Room Availability" in the menu at the left hand side of the application screen.

This will take you to the **Event Room Availability** page, as shown below. This page allows the user to enter date, time, and location parameters in a similar manner as the Add Event page discussed above. After clicking "Show Availability", the user will see a time grid with information about the availability of each of the locations matching his/her criteria. It is then possible to highlight available times and request those times for an event.



Normally, "All Events" should be selected in the **Mode** field to display all events occupying a room and determine when rooms are available.

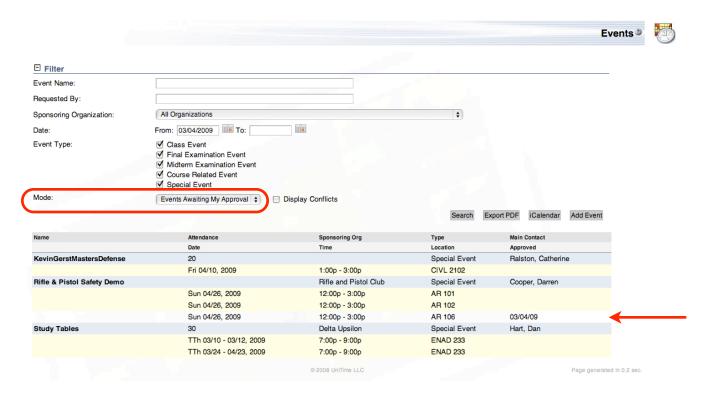
The availability grid, shown below, displays the usage of each each room in 15-minute blocks between the start and stop times chosen in the filter. Clicking and dragging th cursor on any white fields (i.e., not occupied by a meeting or occurring in the past) marks them to be submitted as a new meeting time request. This is illustrated by the blue highlighted cells.

Wednesday Mar 25, 2009	AR 106 (180 seats)	ENAD 401 (14 seats)		PHYS 242 (30 seats)	SCHL 146 (16 seats)	(40 seats)
2:30p			8:00a - 8:00p	1:00p - 3:00p	1:00p - 4:30p	
2:45p	3:30p - 5:30p NS LPO School Special		CERIAS Info Security Symposium	Graduate Student Seminar OPT/CPT Workshop Special		
3:00p			Special			
3:15p			High Energy Experimental			
3:30p				Special		
3:45p						
4:00p						
4:15p						
4:30p						
4:45p						
5:00p						
5:15p						

Clicking on the "Add Event" button will create new meetings at these times and locations and take the user to the **Add Event Info** page, where event information can be entered and the event submitted for approval.

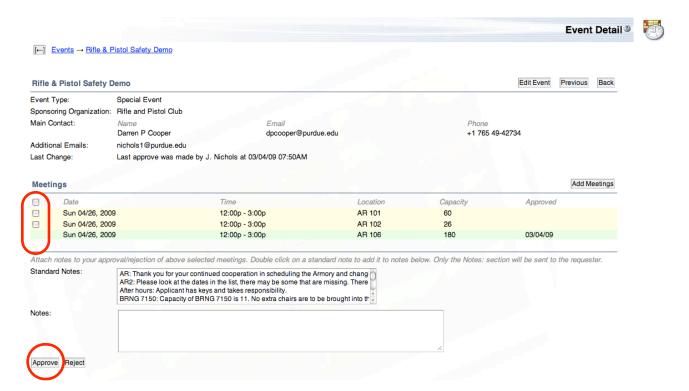
### **Approval of Event Requests**

Individuals with event manager roles have responsibility for a group of rooms (or other meeting locations) and may approve or reject any event that has requested use of a space they control via the Event Management system. There may be multiple event managers who share scheduling responsibility for a group of rooms. Different groups of rooms may also have different event managers within the system. For example, classrooms may be managed by a different person (or organizational unit) than conference rooms. An event with meetings in multiple locations may have a meeting routed to an event manager in one department for approval, while second meeting is routed to a different event manager. The Main Contact will receive email notification of each approval.



Event managers can view requests for facilities they control from the **Events** page by selecting the "Events Awaiting My Approval" option in the Mode section of the Filter (circled above). Meetings highlighted in yellow are awaiting approval. The meeting with no highlight (see arrow above) has already been approved by another event manager. The approval date is shown in the rightmost column of the meeting table.

To approve a meeting or meetings associated with an event it is necessary to select that event from the list by clicking on any of the lines in the table associated with an event or one of its meetings. This will take you to an **Event Detail** page similar to the example at the top of the next page.



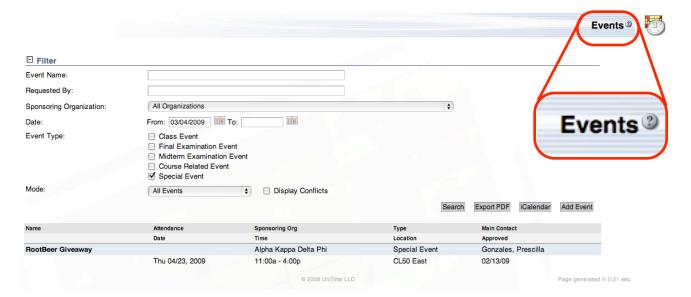
A meeting is approved by clicking on the box to the left of the meeting and then clicking on the "Approve" button at the bottom of the page. Selecting the box on the header line will put check marks in all of the boxes next to meetings you may approve. Note that no box appears by the green line listing the meeting previously approved by another event manager.

Before clicking on the "Approve" button, you may also choose a standard note to be be included in the confirmation email or type a text message to be included with the confirmation.

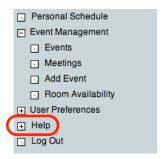
After clicking the "Approve" button the Event Detail page will be updated (newly approved meetings highlighted in green and approval date indicated).

## **Additional Help and Logout**

Each page in the UniTime Event Management Application contains a link to a help page at wiki.unitime.org providing a brief description of that page's functionality and more information on the elements it contains and how it operates. The link icon is a small question mark next to page title in the upper right hand corner (highlighted below).



Additional help resources, including this manual, are available through the "Help" item on the sidebar menu on the left hand side of your screen.



To log out of the UniTime system, click on "Log Out" at the bottom of the sidebar menu.

# Thank you for using the UniTime Event Management system.