

## Overview of the Calendar and Events Tool

The Calendar and Events tool is a collaborative effort among all Business School units which allows them to directly enter and manage their own events on the web. Beyond a room reservation system, it is seamlessly integrated with our Facilities Office, Classroom Support equipment team, and various promotional service teams to streamline related requests, such as the need for a poster, video-taping or web-streaming of an event, and more.

Most importantly, it serves as a promotional tool to showcase the vitality of the school for faculty, staff, students, media, and external audiences. Items that appear on the Calendar and Events section of our website, as well as the selection that appears on the front page of the Business School website, are drawn from the calendar to promote the great depth and breadth of events, seminars symposiums, lectures, conferences, and meetings that are of general interest to the public as well as our Business School community.

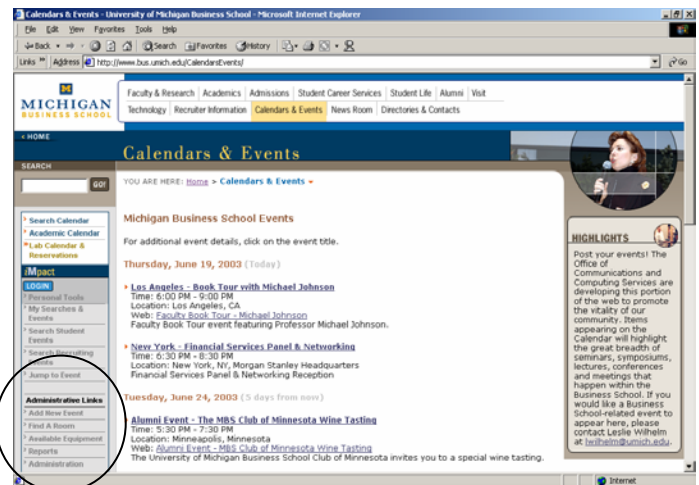
## Getting Started

**From the Business School website, click on the Calendar and Events link in the top menu bar. Login into iMPact from the side menu bar if you have not already.**

The Calendar is accessed from the Business School website [www.bus.umich.edu](http://www.bus.umich.edu) from the Calendar and Events link in the top menu bar.

Management tools are found under the Administrative Links section in the side menu bar. To add or edit events, you will need to login to iMPact.

*The online guide linked from the Calendar and Events side bar menu provides details on how to use the Calendar and Events tool for those who will be using it to enter events and reserve rooms.*



## Introducing the Interface

The interface to add an event or reserve a room is divided into six tabs that allow you to enter, save, and later edit or delete related information:

**Event Details:** Use this page to manage the critical details of your entry, including date and time, the description and type of event, the event contacts (both the publicized contact and the planning contact who have editing rights to manage the entry), the intended audience, related service needs such as posters, and more. Some fields are required (title, event type and description, and audience type) before you can proceed to the other tabs. Note that entries coded as "Event" in the event type field will flag the Communications Office and may appear on the website

Calendar and Events page and possibly the website's home page, so be certain that this is your intent and that the description is written clearly and proofread carefully.

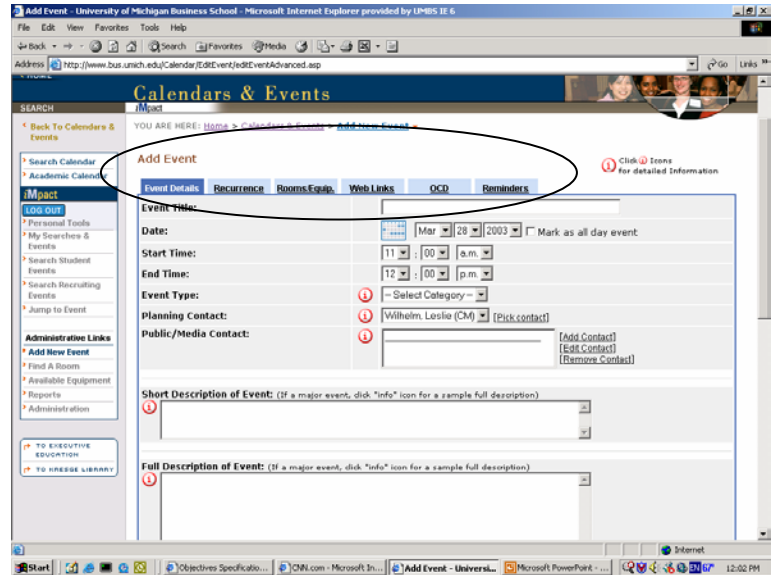
**Recurrence:** Use these options if you are scheduling a recurring meeting, class, etc. Choices are daily, weekly, or monthly. The default for all entries is no recurrence ("Do not repeat").

**Rooms and Equipment:** This tab allows you to search for available rooms and reserve a room that you have "keys" to reserve (or contact Facilities), and request equipment. Requests for keys to specific rooms can be addressed to the Facilities Office. Please note that reserving your equipment is very important. Never assume a room will have what you need - be sure to request in your reservation a computer, projector, Internet access, etc. - even if you believe it is built into the room. Your equipment request will trigger a report to ensure that our Classroom Support staff is aware of your needs. You will need to request equipment at least 24 hours in advance.

**Web Links:** Use this tab to enter any hyperlinks related to your event that you wish to be published (on the kiosks, in the calendar, etc.).

**OCD:** This tab is used exclusively by OCD staff to enter additional information about recruiting company contacts, etc.




**Reminders:** You can manage the frequency and type of your event reminders from this tab. By default, you will receive an event reminder one month, one week, and one day



before your event. If your event has been cancelled or you no longer need the reservation, it will remind you to delete the entry.

When you make changes on any of these pages, be sure to click on the “Save” button on the bottom of the page to save your entry details.

### ***Keys to Symbols:***

-  This symbol identifies that information is available for that field. Mouse over the icon to see a brief description. Click on the icon for details about that field.
-  This symbol is a warning message that critical information is missing.
-  This symbol is an indicator that the requested function is not possible with the information currently entered.

## ***Where to begin?***

There are two basic approaches to beginning a new entry, each with different starting points in the Calendar tool: "Add New Event", which begins on the Events tab, or "Find a Room", which begins on the Find a Room search page. These options are both linked under the Administrative Tools heading in the side menu bar. You will need to login to iMpact to access either of these choices.

The other Administrative links on the side menu bar are tools for calendar administrators, such as Facilities and the Classroom Support team, who generate daily equipment reports, etc.

**Begin with Add an Event** if the date and time of the event is already determined. This link takes you to the Events Details page where you enter the basic event information. Once you have completed all required fields (such as title, event type, and description) on the Event Details page, you can proceed to click on the other tabs to reserve a room and request equipment, add any related web links, manage event reminders, etc.

If you attempt to click on one of these tabs before you have finished filling out the Event Details tab, the required fields that still need to be filled in are noted in a box at the top of the entry form and the fields are then highlighted in red. Complete these fields, then click on the other tabs.

You will then want to search for all rooms that you have keys to reserve that are available at the desired time, and then reserve one if available. (If you do not have keys for an available room, simply contact Facilities and they will add it to your entry.)

**Begin with the Find a Room link** if you first want to see when a room that you have keys to reserve is available before you set the date and time of the event. This link will take you directly to the Find a Room search page where you can search for a room, reserve it and note any equipment you may need. Please note only rooms that you have keys to reserve will appear - work with Facilities if you need a room type other than these.

After you complete and save a room reservation, you will be able to access and fill out the other tabs in the calendar tool, such as Event Details, Recurrence, Web Links, Reminders, etc. At this point there is no difference in your entry whether you began with the Add New Event or Find a Room option.

**Be sure to Save Your Entry:** Click on the "Save" button on the bottom of any of the tab pages when you wish to save your entry details. If you do not click "Save" your entry will not be retained.

**Editing or Deleting Your Entry Later:** Once you have saved it, to edit the event in the future, click on the "My Searches and Events" link on the side menu bar. A list will

appear of the upcoming events that you have set up (or that someone has set up with you as a planning contact).

Click the event you wish to edit, then click "Edit Event." Click the "Save" button when finished. To delete an event completely, proceed to edit the event, then click the "Delete" button at the bottom of the page.

### ***Tips Before You Begin:***

- It is useful to know what rooms you have keys to reserve. Consider if these will meet your needs or if you need to begin by contacting Facilities for another type of room.
- Consider your audience and what type of promotional level you will need (internal only, entry to appear on kiosks for visitors, entry to appear on Calendar and Events page, home page, posters, etc.).
- Consider if you will need any equipment. Never assume - be sure to request a computer, projector, Internet access, etc. as part of your reservation - even if you believe it is built into the room. Your equipment request will trigger a report to ensure that our Classroom Support staff is aware of your needs.
- Determine when you wish the event to be published on the calendar. Use the Event Type field on the Event Details page to control publishing. Set the type to Room Reservation until you are ready - once you change the event type to "Event" it will be published.

### **If you are planning a major event:**

1. Contact Facilities to reserve a classroom, Hale Auditorium, or any room you do not have keys to reserve. If you have keys to reserve the room, you may wish to code the event type as "Room Reservation" and not as "Event" until you are ready for your entry to show publicly on the website.
2. Facilities will reserve a room and delegate the management of the calendar entry to you. Note they will set it up and code it as a Room Reservation. It will not be published on the calendar at this point.
3. You can open the event and fill in further descriptions and details in the Calendar Tool using the My Searches and Events link. Note you cannot change the time, location, or equipment request for rooms you do not have keys to reserve - contact Facilities to make these changes.
4. Fill out your equipment request and your promotional materials request as early as possible, to give ample lead time for staff to work with your request for posters, multimedia support, and classroom equipment. Please note you need to request all of these within your event entry.
5. Proofread your entry carefully. When ready, change the coding of your event type from Room Reservation (or other) to "Event" and fill out any publishing options (to notify Communications, etc.)

**If you are planning an internal meeting (for Business School staff or faculty, etc.):**

1. Find a room that meets your time. Begin with the Find a Room link on the side menu bar. Only rooms that you have keys to reserve will be searched and appear if available.
2. Schedule the room by completing the room reservation process. You can open the event and fill in further descriptions and details in the Calendar Tool using the My Searches and Events link. Note you cannot change the time, location, or equipment request for rooms you do not have keys to reserve - contact Facilities to make these changes.
3. Fill out details on the Events tab.
4. If there will be visitors from outside the Business School, consider if the meeting information needs to be published on the kiosks, in which case it needs to be coded as an "event."

**If you begin a room reservation in the Calendar and realize you don't have keys for the room you need:**

1. Enter your event details and information, then save the event without a room assigned. You will immediately receive a confirmation in your email.
2. Forward the email confirmation to Facilities and request the room you want. Note to Facilities that you have already begun the reservation process.
3. Continue to manage your Calendar entry, entering details, equipment reservations, etc. as above.
4. Turn on publishing options when ready.

**If you enter the Event/Room Reservation for someone else:**

1. On the Event Details tab, you can choose another's name as a Planning Contact by clicking on the "Pick Contact" link. That person can then manage and edit their entry directly.
2. Notify the person that they have rights to edit this entry. The event will appear under the "My Searches and Events" link on the side menu bar.

## ***What You Should Know:***

- Keys to reserve a room are requested from Facilities. Typically Facilities manages classrooms and major public venues such as Hale auditorium and Phelps Lounge. Faculty and staff typically have rights to general conference rooms, and other rooms as needed. If you frequently request a certain room from Facilities, discuss with them whether it is appropriate for you to have a key to directly reserve it.
- All Room Reservations (except general conference rooms) are subject to approval by Facilities.
- All Room Reservations are subject to being moved by Facilities to another location, sometimes at the last minute, due to necessity. This is especially true for classrooms, when there are many changes to recurring class reservations near the beginning of each semester, and occasionally for public venues like Phelps Lounge or Hale Auditorium.
- All equipment requests are subject to approval, according to availability.
- Requests for special services such as posters, multimedia taping or streaming, etc. are not automatically guaranteed, and should be worked out between the requester and the service provider. The request process simply notifies the service providers to get in touch with you to begin a discussion regarding your needs. Please request these services well in advance and allow several weeks for planning.
- All wording for major events, particularly those appearing on the website Calendar and Events page and/or home page, is subject to editorial review by the Communications Office.

## ***FAQ***

### **I began a room reservation, but don't have keys to the room I want. What do I do?**

Either cancel or save your entry with other details and forward your confirmation email to Facilities. If you call them, be sure to let them know you have already begun an entry. You can then access and continue to edit your entry using the “My Searches and Events” link on the side menu bar of the Calendar page.

### **Why can't I access any of the tabs except the Event Details page?**

You have not filled in all of the required fields necessary to make a reservation. Note the message at the top of the screen that appears when you try to click on another tab. It will tell you which fields need information before you can proceed.