EMS Plan-a-Meeting (PAM)
How-To Document
For Department Conference Rooms

Updated October 2015
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EMS Plan-a-Meeting (PAM) Overview

Plan-a-Meeting (PAM) is a component for Virtual EMS™ that integrates with Microsoft Exchange. With this module, web users can view the availability of both meeting rooms and attendees, and send Microsoft Exchange® meeting invitations - all from within Virtual EMS.

PAM offers users of the Virtual EMS™ Request/Reserve functionality the convenience of scheduling rooms, resources, and services - and viewing/confiming attendee availability - all at one time. PAM, which works with Microsoft Exchange® not only simplifies meeting scheduling, it can also generate emailed meeting invitations.

Features and Benefits

- View attendee availability (free/busy schedules) before requesting a Department Conference room
- Check room details to confirm that the space will meet your needs
- Streamline the process of arranging meetings
- Request Department Conference rooms, resources and attendee participation all from one intuitive interface
- Make last minute modifications to meeting information quickly and easily, with attendees automatically receiving change notifications
How to make a Room Request with Plan-a-Meeting (PAM)

Notice there is a checkbox to add to calendar/send invitations. In order to send and invitation and add the meeting to the Outlook calendars, this must be checked. If you do not want to add your meeting to Outlook or send an Outlook invitation, uncheck this check box.

Attention!! Note the following deadlines for submitting room requests for the 2015 Spring Semester:

- Distance Room Schedule Requests: Deadline - October 19, 2015
- Master Class schedule Requests: Deadline - October 26, 2015
- Notification of Room Assignments: Week of November 9 - 13, 2015
- Conflict Resolution: Week of November 16 - 23, 2015
- Non-Course Event Requests Review: Week of November 30 - December 4, 2015

Include a course number on all degree required core and elective course titles.
You can invite attendees and view their free/busy information. The steps will be explained later in this document.
Setup your meeting by entering the number of “Attendees”. This is a required field “*”. Then click the “Find Space” button.

CU Anschutz Conference

Please include time for set up:
1. "Find Space" on the left
2. Select rooms on the "Location" tab
3. Complete the "Details" tab
4. "Submit Reservation" at

Attention!! Note the following for the 2015 Spring Semester:

Distance Room Schedule Request
Master Class schedule Request
Notification of Room Assignments
Conflict Resolution
Non-Course Event Requests

Include a course number on all
If the room is available, it will be displayed in the “Availability” section. If you want to see the free/busy for the room, click the “Grid” tab.

From the “List” tab, add the desired room by clicking the green plus sign button.
The room is moved up to the “Selected Locations” section.

To added attendees and view their free/busy, enter their names (Last Name, First Name) into the “Find Attendee” field and click the search button (magnifying glass).
The results will be listed at the bottom of the page. Locate the desired attendee and clicking the green plus sign button.

The attendee will move up to the “Attendees” section and display their free/busy information. To remove them, click the red X button. Once you have added all the attendees, click the “Continue” button at the bottom of the page.
Fill out all the necessary details and/or services for the meeting.

Once the details/services have all been added, click the “Submit” button.

Congratulations, your meeting has been submitted.
The meeting will be added to the attendees Outlook calendar.

<table>
<thead>
<tr>
<th>SUNDAY</th>
<th>MONDAY</th>
<th>TUESDAY</th>
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<td>28</td>
<td>29</td>
</tr>
</tbody>
</table>

- **PAM Documentation**
- BLD 500 Test Conf. Room
- Weaver, Steve A
Recurring meeting

Prior to selecting your desired room, click the “Recurrence” button

Note: You must set your recurring pattern first so when you “Find Space” it will only show you rooms that are available for all the dates in your recurring pattern.
Select your recurring pattern and click the “Apply Recurring” button.

Start Time: 7:00 AM
End Time: 8:00 AM

Recurrence Pattern
- Daily
- Weekly
- Monthly

Recur every 1 week(s) on:
- Sun
- Mon
- Tue
- Wed
- Thu
- Fri
- Sat

Range of Recurrence
- Start Date: 9/28/2015 Mon
- End after: 1 occurrences
- End by: 9/28/2015 Mon

Apply Recurrence
Remove Recurrence
To change your recurring pattern, click the “Recurring” button.

**When and Where**

- **Add to Calendar/Send Invitations**
  Occurs every Monday week(s) effective 9/28/2015 until 9/28/2015 from 7:00 AM to 8:00 AM

- **Facilities:**
  Building 500

Process request by adding the room and other attendees.
How to Modifying your Request

The make changes to your meeting, select the “View My Requests” from the “Room Request” pull down menu.

Open the desired meeting by clicking the “Name” of the meeting.
Change Date and Time

To change the date and time, click the “Edit” icon to the right of the meeting date and time.

Make your desired date and time changes and click “Update Booking(s)” button.
The free/busy information for this day will now be displayed.

### Add Attendees

You can also add attendees from within this editing area by entering the desired attendee (Last Name, First Name) and click the search icon (magnifying glass).
Add the desired attendee by clicking the green plus sign button to the right of the person’s name.

The attendee will be moved up to the “Attendees” section displaying the person’s free/busy information.

Click the “Update Booking(s) when finished.
Cancel a Meeting

You can cancel the meeting by clicking the RED cancel button to the right of the Room.

Provide the “Cancel Reason”, “Cancel Notes”, then click the “Update Booking(s) button.

Are you sure you want to remove this location?

Cancel Reason:*

Cancelled by Client

Cancel Notes:

Cancel Booking(s)  Cancel

Update Booking(s)
Booking Tools

The following actions can be applied to your reservation:

- Edit Reservation
- Manage Attendees
- Cancel All Bookings
- Service Availability
- View/Email Reservation Summary
- Add booking to personal calendar

Edit Reservation

Event Details:

- Event Name:
- Event Type:

Group Details:

- Group:
- 1st Contact:
- 2nd Contact:

Phone:
Fax:
Email:

Contact Details:

Phone:
Fax:
Email:
Manage Attendees

Cancel All Bookings

Are you sure you want to cancel all bookings?

Cancel Reason: *

Cancel Notes:

Cancel Booking(s)  Cancel
Service Availability

- **Housekeeping**
  - Must be submitted at least 72 hour(s) prior to the start of the booking
  - Available to the following Buildings
- **Parking and Transportation**
  - Must be submitted at least 48 hour(s) prior to the start of the booking
  - Available to the following Buildings
- **Police**
  - Must be submitted at least 72 hour(s) prior to the start of the booking
  - Available to the following Buildings
- **Electronic Security**
  - Must be submitted at least 72 hour(s) prior to the start of the booking
  - Available to the following Buildings
- **Setup**
  - Must be submitted by 4:00 PM at least 4 day(s) prior to the start of the booking
  - Available to the following Buildings
- **Traffic**
  - Must be submitted by 4:00 PM at least 7 day(s) prior to the start of the booking
  - Available to the following Buildings
University of Colorado - Anschutz Medical Campus
Technology Support Services
13120 E 19th Ave. - Campus Box A006
Aurora CO 80045
303-724-8118 Reservations / 303-724-8129 Equipment / 303-724-7714 Billings

Confirmation

Reservation 102288
Event Name: Pam Documentation
Phone: 303-724-7714
Email Address: APRIL.JARMSTRONG@UCDENVER.EDU

GROUP
April Armstrong
CUA-CSA-OIT Technology Support Services
13120 E 19th ave
CB - A006
Aurora, CO 80045
USA

BOOKINGS / DETAILS
QUANTITY

Monday, September 28, 2015
7:00 AM - 8:00 AM Pam Documentation (Web Request) Bldg 500 BLD 500 Test Conf. Room
Conference for 3

View Summary
Email the “Details” or “Summary” to one or all of the invitees. Determine who you want to send the information to by checking their name. Uncheck those you do not want to send the information to.

Email Options

To:  

- Steve Weaver (Steve.Weaver@ucdenver.edu)
- April Armstrong (APRIL.J.ARMSTRONG@UCDENVER.EDU)

CC:  

Subject:  

Message:  

Send
Add booking to personal calendar

This tool is used to generate an ics file that can be sent to someone outside of your email system or domain so they can add the invite to their calendar. You must save the file to your hard drive then send it to the designated person so they can save it into their calendar.

What is an ics file?

An ICS file is a universal calendar format used by several email and calendar programs, including Microsoft Outlook, Google Calendar, and Apple Calendar iCal; enables users to publish and share calendar information on the Web and over email; often used for sending meeting requests to other users, who can import the events into their own calendars.

To create the ics file, click the tool link

**Add booking to personal calendar**

You will be prompted to save the file. Save the file to a familiar location on your computer.

Distribute it to the designated people.