How to Add a Reservation record

The following steps describe the process of creating a reservation record. Since reservations can be added by different user groups, the main menu from which the Reservations menu is invoked will differ as will the contents of the Reservations menu. However, the menu selections to Add reservation records are consistent among the various user groups.

Reservations can only be made by authorized users. These users must access EMS via the Appx Client software (use of mouse for navigation).

Reservations can be accessed by two methods:

1. **Display all pool assets**, in reservation pool, spec class and asset sequence. Pools are: A (Central region), B (Northern region, C (Southeast region). You may enter the desired Pool ID to display all assets in the pool entered. You may further constrain your display by entering the spec class (if known) and asset id if desired.

    The default display is: Pool/Class/Asset. The user may alter the order in which pool assets are displayed by modifying the Access Path. Alternate paths are: Class/Pool, asset id.

    Access Path is invoked by:
    a. clearing screen (press *F11* or *Inquiry* button)
    b. Press *F3*. Pop-up menu will appear with available display paths.
    c. Position cursor on desired path and press *Enter* (left-click if using Appx Client)
    d. May have to reposition cursor if you want to Scan file otherwise simply type starting key value and the cursor will automatically position itself in the key field on the screen.

2. **Display all Reservation records** currently defined in EMS. The default display is by pool id and the begin date of the reservation. You may alter the Access Path by following the aforementioned instructions.

    Only authorized users can add, change and delete reservations. A user may only change and delete reservation records added by them. Changes and deletion can be made until the *Check-Out* flag has been set to Y by SEF staff.

The steps/instructions to add a reservation via *Select by Resrv* are essentially the same as *Select by Pool*. When running Select by Resrv, you will be presented with a blank screen. You can press F9 or Add button 📤. The Reservation Detail screen will be displayed. Enter asset id and then follow instructions below for Reservation Detail screen. If you display reservation records and then press F9, the Reservation Detail screen will be displayed along with the asset id. The asset id can be changed. If it is the correct asset, simply press Tab key or position cursor to the Collocode field and continue with Reservation Detail instructions.

It is assumed most users will add reservations from Select by Pool. Therefore steps to add are based on this assumption.

Steps

1. Select by Pool
- Log onto EMS using the Appx Desktop Client
- Navigate to the Reservations menu or use Menu bar Process option to display pop-up menu
- Select **Reservation Entry – Slct by Pool**
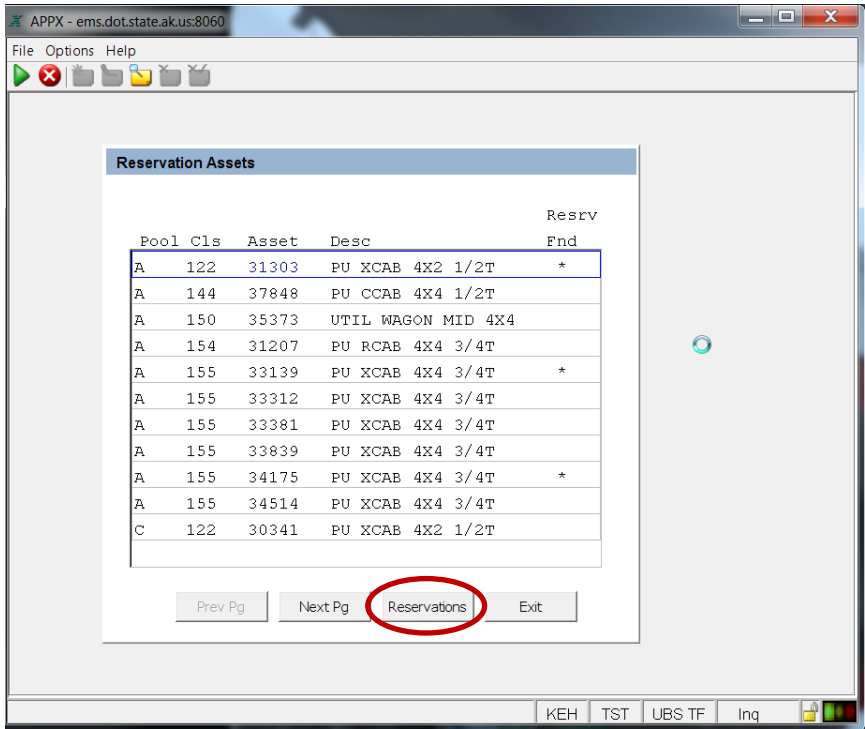
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Scroll through displayed records to find asset

Press *F11* or *Inquire* button and enter starting range.
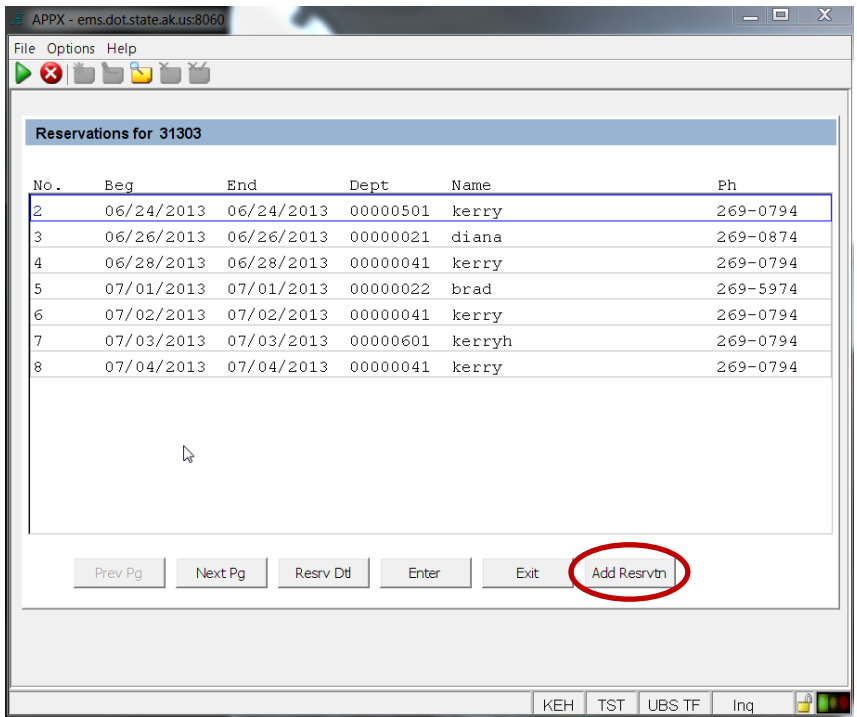
An asterisk (*) indicates one or more reservations currently exist for the asset.

Highlight the desired asset

Click *Reservations* button

Click *Add Resrv* button

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Enter **Collocd** (or Scan to find desired collocode). F2 or [icon] to invoke Scan.

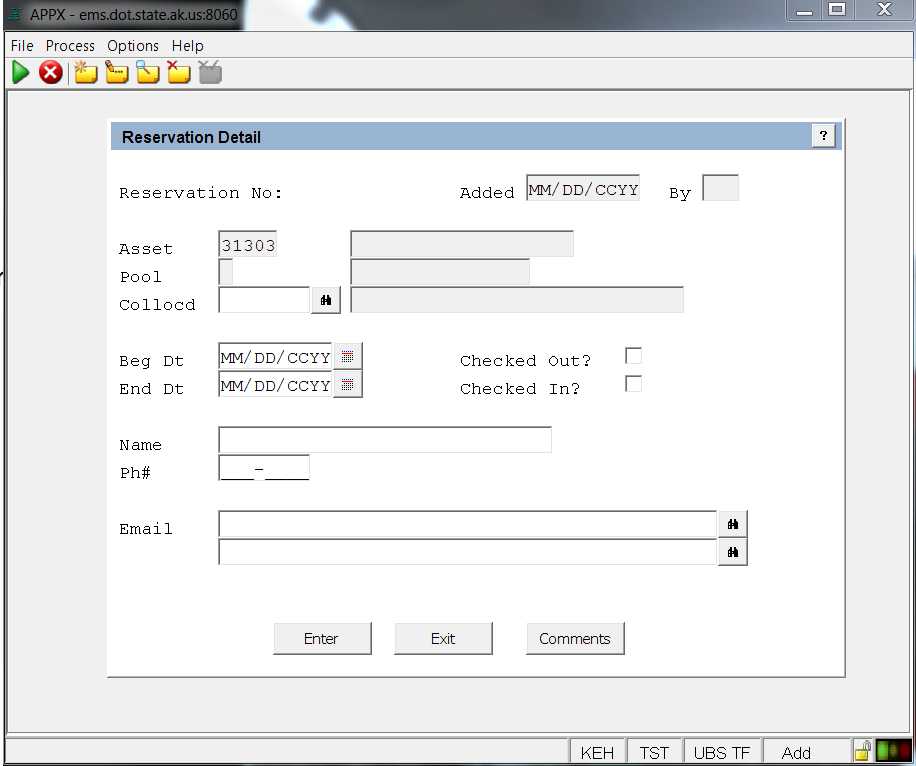Enter **Beg and End Dates**. Can use Date widget to display graphical calendar.

Enter **Name and phone number** of person under whom the reservation is being made[1].

Enter **email address**[2].

Optionally, you can click on **Comments** button to add notes regarding the reservation.

Press/Click *Enter*. Reservation number and descriptive fields will be displayed

Press/Click *Enter* again. Reservation record will now be saved and a blank screen displayed to allow the entry of another reservation for the asset.

Click *Exit* button to return to the Pool Asset display screen.

Select another asset for which to add a reservation or Click *Exit* to return to the Reservations menu

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[1] This info should be the name and phone number SEF will use to contact agency regarding this reservation.

[2] This will be used to automatically send an email notification message 5 days prior to the reservation start date.

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