

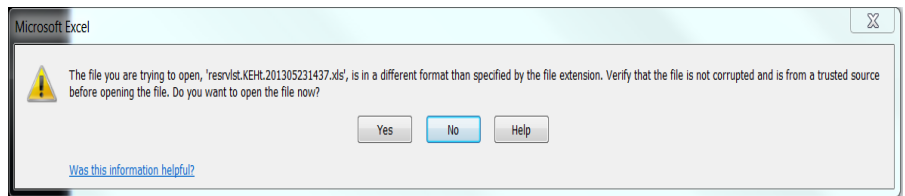
How to Upload Reservation Data into Outlook

The following steps describe the process of uploading EMS reservation data into MS Outlook Tasks. Upload into your Calendar can be accomplished by substituting steps specifying *Tasks* with *Calendar*. The various options to control what data gets loaded into Outlook is dependent upon the desired outcome of the user. This discussion is based upon the use of Office 2010.

Steps

- Log onto EMS using the Appx Desktop Client
- Navigate to the Reservations menu or use Menu bar Process option to display pop-up menu
- Run **Resrv List**
- Select **Outlook Upload** option
- Enter **Record Selection** criteria – *Pool ID* at a minimum and press **Enter** key
- Accept or modify **Sort Order** information and press **Enter** key
- Press **Enter** when **Disposition** screen is displayed or set *Prt Hardcopy = Y* if you also want to print the list
- Click **Close** button when report is displayed

Click **Yes** when this screen is displayed.



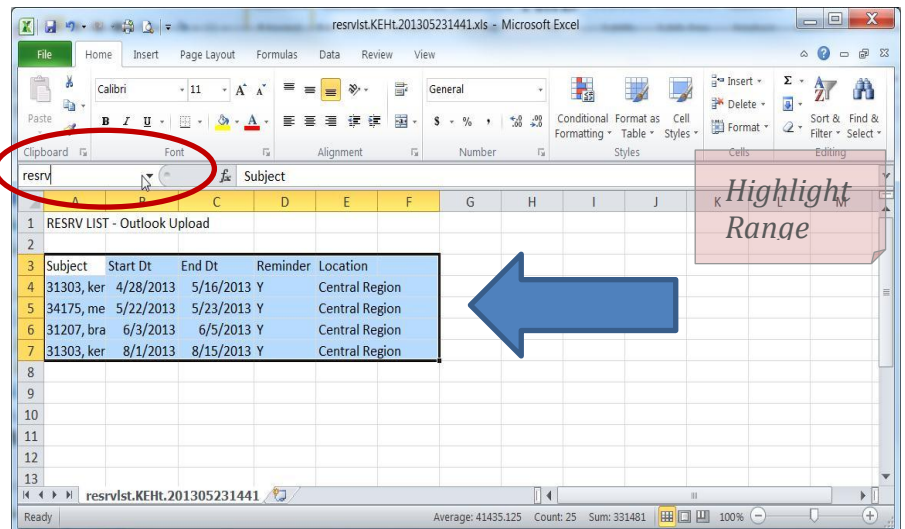
Highlight range of cells, A3 to last row/cell to be included by click/hold/drag cursor. In this example, click cell A3 and then drag to F7.

Click on the **Name** box and enter range name, e.g., resrv

Click **File** on Menu Bar

Save as 97-2003 Excel Workbook

Exit Excel



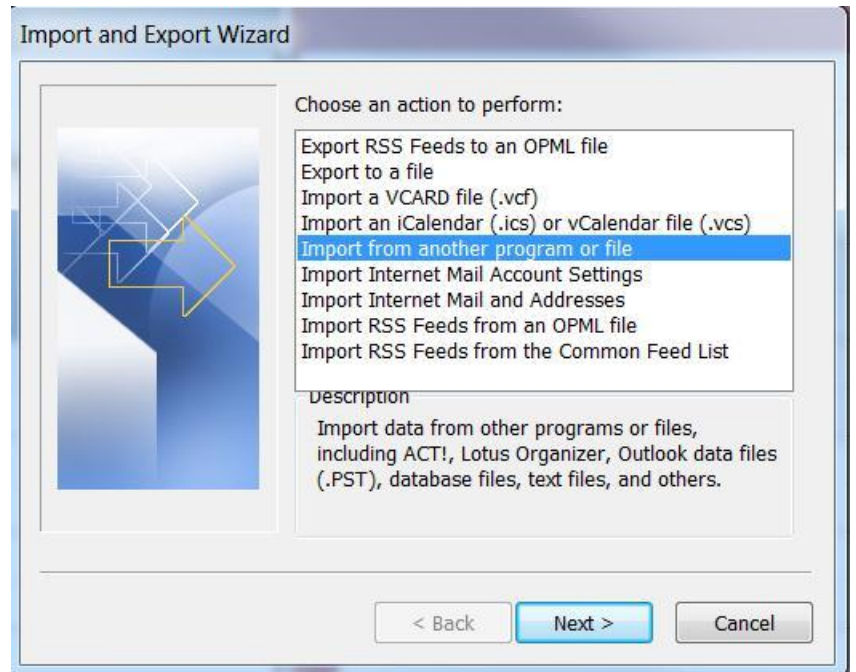
Open or switch to Outlook

Click **File** on Menu Bar

Click **Open**

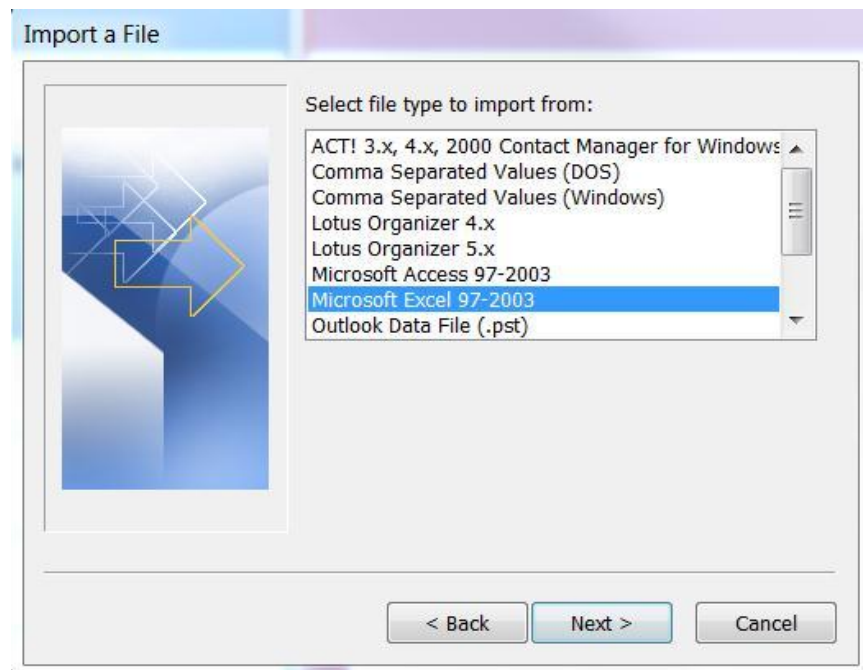
Click **Import**

Select **Import from another program or file** and click **Next**



Select **Microsoft Excel 97-2003**

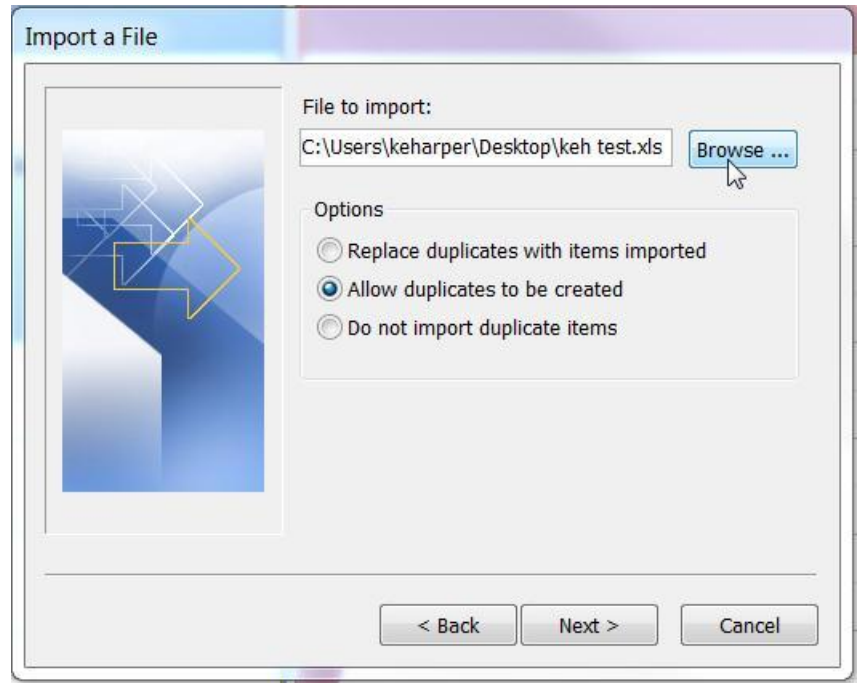
Click **Next**



Click **Browse** button to find the Excel workbook previously saved *OR* type full path to the file in the dialog box

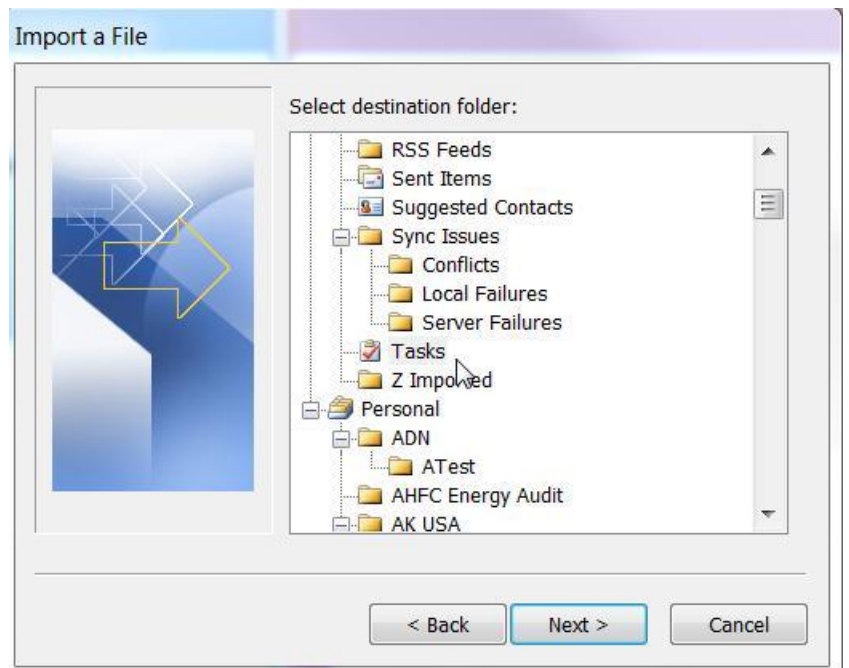
Set options to desired outcome and click **Next**

Default is *Allow duplicates to be created*



Select folder (Calendar or Tasks)

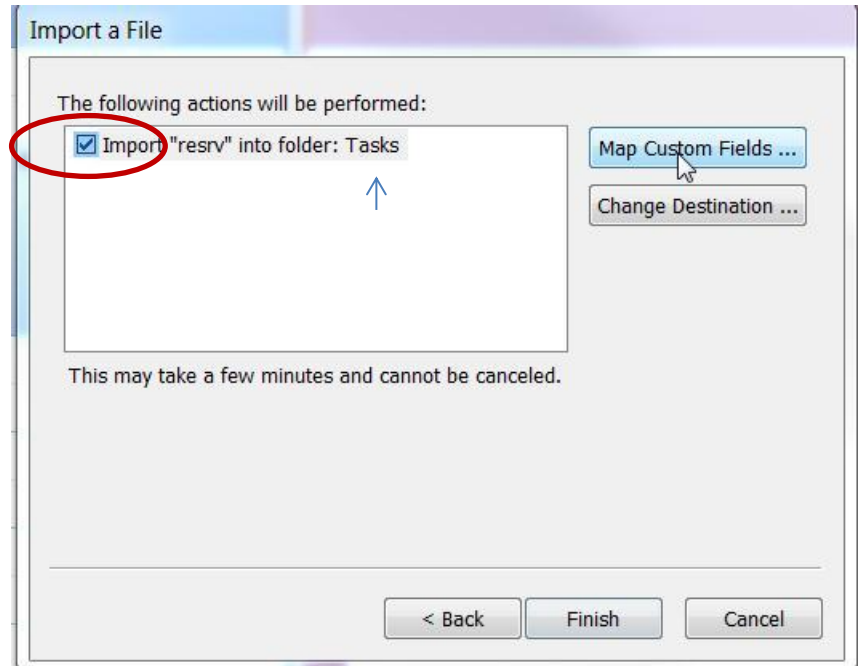
Click **Next**



Place checkmark on box to left of **Import "resrv" into folder: Tasks**

Note: Tasks or Calendar will appear in the **Import** message depending upon the destination folder selected in previous step

Click **Map Custom Fields** button



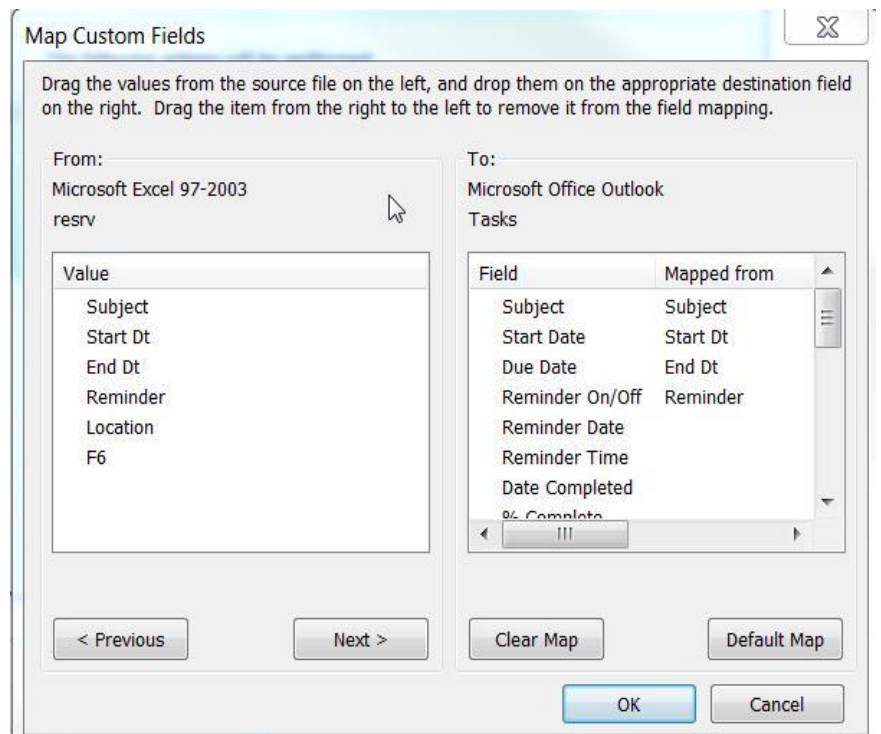
Drag the **Value** field displayed in left panel to corresponding **Field** in right pane

The **Mapped from** column displays the Association made by dragging operation

Fields to map:

- Subject
- Start Date
- Due Date
- Reminder

Click **OK**



Click **Finish** to complete the task

The selected folder, Calendar or Tasks, will now be populated with the contents of the Excel workbook.

Each workbook row will create a corresponding entry in Calendar or Tasks, excluding Column Headings.

