

LINDENWOOD

U N I V E R S I T Y

Event Management System Reference Guide

January 3, 2020



Web App Reference Guide for EMS

About this Guide.....	2
EMS Definitions	2
Logging Into EMS.....	2
Navigating the EMS Web App	3
Types of Reservation Templates	4
Status Definitions	4
Making Reservations	5
Single Reservation	5
Recurring Reservation	9
Cancelling a Reservation	10
Editing a Reservation.....	11
Adding Services to an Existing Reservation	13
Browsing.....	14
Events	14
Locations.....	15

About this Guide

This guide is designed to be a quick reference for common tasks within the EMS Web App. You will use EMS Web App to reserve room(s) on the Lindenwood University main campus. For more details about how to make or edit reservations, see an EMS Administrator.

EMS Definitions

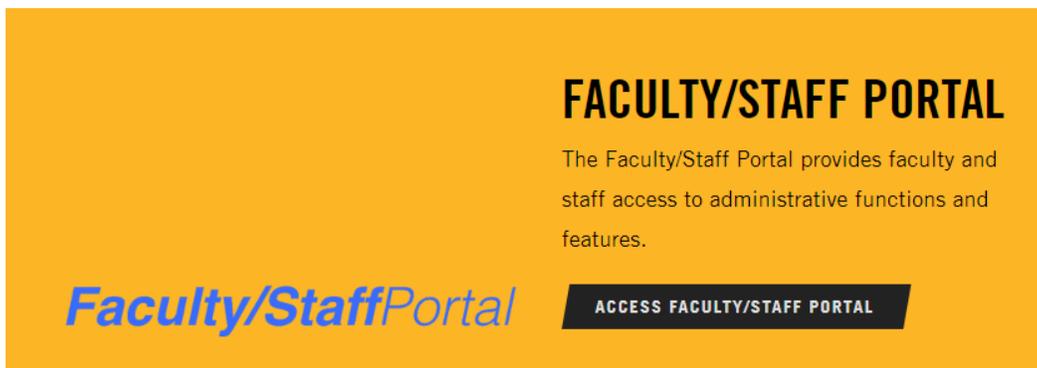
Reservation – The “Who and the What.” This contains the meeting/event host information and what the event is called. A reservation can have multiple bookings.

Booking – The “When and the Where.” This contains the date/time/location information for each occurrence/meeting of a reservation. A reservation has to have at least one booking, but can have as many bookings as needed (think of a recurring meeting – each occurrence is a booking).

Logging Into EMS

To log into the EMS Web App, follow the below instructions:

1. Log into your Faculty/Staff Portal.



2. Click on the “EMS Room Request” tab under the Faculty/Staff Portal column on the left.



Navigating the EMS Web App

Your EMS Web App home page looks like below.

1. On the left, you have a menu bar with the following options:
 - **Create a Reservation:** takes you to your reservation templates.
 - **My Events:** takes you to your event list of upcoming and past events in EMS.
 - **Browse:** takes you to the search features in the Web App.
 - **Events:** See public events in a daily (default), weekly, or monthly view.
 - **Locations:** See the free/busy of all the rooms in your organization.
2. On the main section of the page, you see **My Reservation Templates**, which allows you to make a quick booking right from your home page.
3. Below that is a list of your bookings for the day along with a search option to find your reservations.
4. In the upper right-hand corner, you see your name and a drop-down for your account options.
5. Lastly, there are various  buttons throughout EMS to help you. If you have questions regarding certain pages/templates/services/etc and you see one of those blue question mark buttons, click it for additional information and support.

The screenshot shows the EMS Web App interface. A green header bar at the top contains the Lindenwood University logo on the left, the text 'Virtual EMS' in the center, and a user profile dropdown on the right showing the name 'Henry Stormi'. Below the header is a navigation menu on the left with options: HOME, CREATE A RESERVATION, MY EVENTS, BROWSE, EVENTS, and LOCATIONS. The main content area is divided into two sections. The top section, 'My Reservation Templates', lists four reservation options with 'book now' and 'about' buttons for each. The bottom section, 'My Bookings', shows a search bar for 'JANUARY 3, 2020' and a message stating 'There are no bookings for January 3, 2020'. Numbered callouts (1-5) are placed over the interface to highlight these specific elements.

Types of Reservation Templates

Please review the below descriptions of the available reservation templates for you to determine which to use to request facilities/services on campus as it applies to your event needs.

- **Book a LARC Study Room or LARC AV Edit Room** template allows you to instantly reserve the 3 study rooms and 2 AV edit rooms in the Library and Academic Resource Center.
- **Request an Event/Meeting (No Services Needed)** template allows you to request spaces on campus where you do not require custodial, security, IT assistance, and/or AV equipment.
- **Request an Event/Meeting (Services Needed)** template allow you to request spaces on campus where you do require services such as custodial, security, IT assistance, and/or AV equipment. Food Service through Pedestal is not a service listed as you will use CaterTrax to place your order.
- **Student Organization Event/Meeting Request** template is just for Student Organizations to use for any event/meeting request (with or without services needed).

Status Definitions

There are various statuses your reservation/booking can be in depending on where in the approving process it is. Below are the various statuses used in EMS so you can follow the process:

- **Requested** – this is the automatic state your reservation/booking goes into once you finish a request. Staying in this state means it has not yet been reviewed.
- **Under Review** – this status is used when your reservation/booking is being reviewed further but not ready to be confirmed or denied.
- **Confirmed** – this is the final state that your reservation goes into once officially confirmed and approved. You are able to proceed with publishing information regarding your event/meeting once in this status.
- **Conflict** – this means there is a room or service order scheduling conflict. Once in this state, you will be contacted by Samantha Kennedy to find alternate date/time/location or service availability.
- **Department Approved/Department Conflict** – these statuses mean that your reservation/booking needed to be reviewed by an additional department to verify if the location selected works for that area. If in one of these states, it will be sent off to Samantha Kennedy to review additional service needs being reviewed or to assist you in finding an alternate date/time/location. This is not a final approved status. Once all services are confirmed/denied, it will move into the final *Confirmed* or *Denied* status.
- **Cancelled** – this status means you or an administrator has cancelled your reservation by request.
- **Denied** – this status is used when your reservation/booking is unable to occur and alternate options are not available.

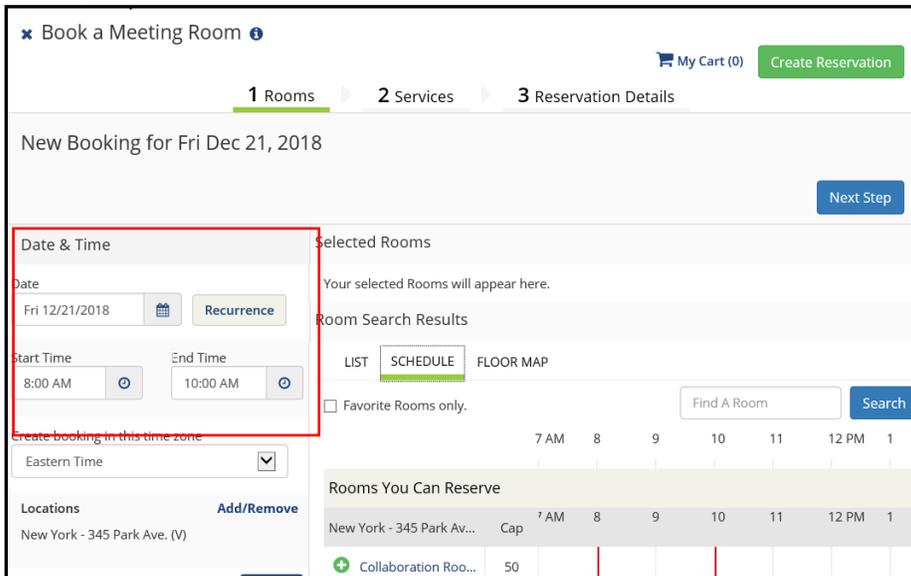
Making Reservations

Single Reservation

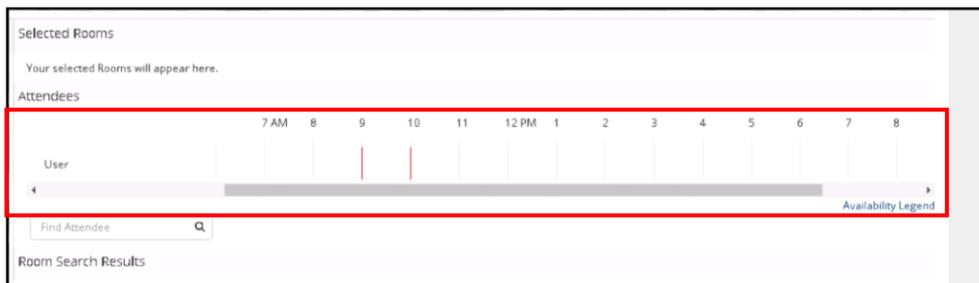
1. To make a reservation, begin at either **My Home** or **Create Reservation**.
2. Click **book now** next to the template you wish to use.
The templates are designed for different kinds of bookings. Use the one that best matches your reservation needs. The **about** button will tell you the rules of the template.



3. Select your date and time.



4. Your availability will be displayed under the Attendee's section. The two vertical red lines indicate the time in which you specified for your meeting. To add an Attendee, start typing in their name and a list of users will populate:



- Once added, the Attendee’s availability will show. If there are conflicts, adjust your time and date accordingly. To view the legend, click on Availability Legend:

Selected Rooms
Your selected Rooms will appear here.

Attendees

User: Employee

Employee

8 9 10 11 12 PM 1 2 3 4 5 6 7 8 9

Find Attendee

Availability Legend

- Free
- Busy
- Out of Office
- Tentative
- No Information

- From the left-hand side, select any filters to limit the number of rooms returned.
- Enter the **Number of People** to find a room that will best fit the size of your meeting.
- Click the Search button to get your list of available rooms.
*If you don’t wish to enter any filtering criteria, click the search icon for a quick search of all spaces.
- A list of rooms will appear. Select a room by clicking on the green + next to the room name.
*Note: Clicking the actual room name will give you the room details.

Let Me Search For A Room

Floors (all) [Add/Remove](#)

Setup Types (no preference) [Add/Remove](#)

Room Types (all) [Add/Remove](#)

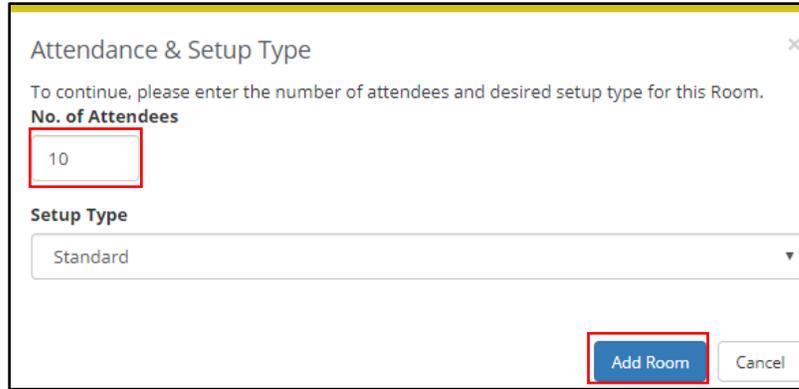
Number of People

7

Search

New York + (ET)	Cap	3 AM	9	10	11
+ NYC 2001 (West)	20				
+ NYC 3000 (East Ro...	22				
+ NYC 3000B (West ...	20				

10. Enter the number of attendees and desired furniture setup type (if prompted) and click **Add Room**.



The dialog box titled "Attendance & Setup Type" contains the following elements:

- A close button (X) in the top right corner.
- Text: "To continue, please enter the number of attendees and desired setup type for this Room."
- Section: "No. of Attendees" with a text input field containing the number "10".
- Section: "Setup Type" with a dropdown menu currently set to "Standard".
- Buttons: "Add Room" (highlighted with a red box) and "Cancel" at the bottom right.

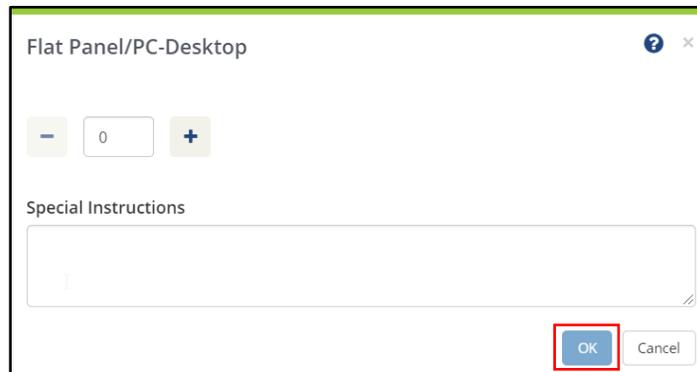
11. To add services, click the **Next Step** button at the top right. If services are not needed, click **Reservation Details** to skip ahead to step 13.



The navigation bar shows the following components:

- Progress steps: "1 Rooms & Attendees", "2 Services" (highlighted with a yellow bar), and "3 Reservation Details" (highlighted with a red box).
- Top right: "My Cart (1)" icon and a green "Create Reservation" button.
- Bottom right: A blue "Next Step" button (highlighted with a red box).
- Bottom center: A "Services Summary" section.

12. If you choose to add services, click on the resource name. A pop up will appear. Enter the quantity of the resource you need and add special instructions to the provider, if needed. Click **OK**.



The pop-up dialog titled "Flat Panel/PC-Desktop" includes:

- A close button (X) and a help icon (?) in the top right.
- A quantity selector with minus (-), plus (+), and input (0) buttons.
- A "Special Instructions" text area.
- Buttons: "OK" (highlighted with a red box) and "Cancel" at the bottom right.

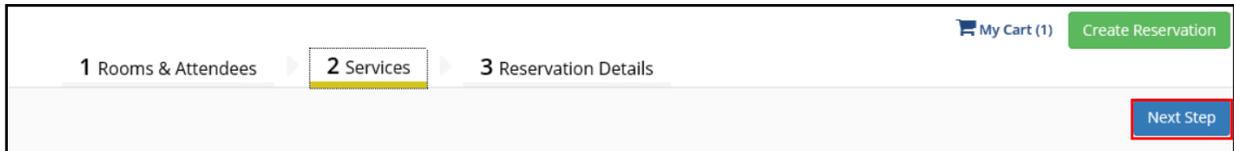
13. A summary of your services will build on the right side of the screen:



The "Services Summary" panel displays:

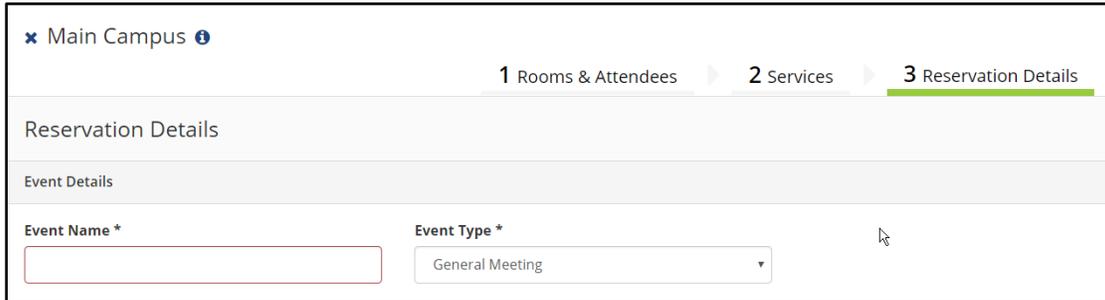
- A red minus sign icon followed by the text "A/V Equipment".
- A sub-item with a red minus sign icon, the number "1", the text "Flat Panel/PC-Desktop", and a blue edit icon.

14. Click **Next Step** to enter your reservation details.



15. Enter your **Event Details**. Anything with **'*'** next to it is required.

- a. Event Name
- b. Event Type



16. Complete any additional calendaring details for the Outlook appointment that will be created with the room reservation.

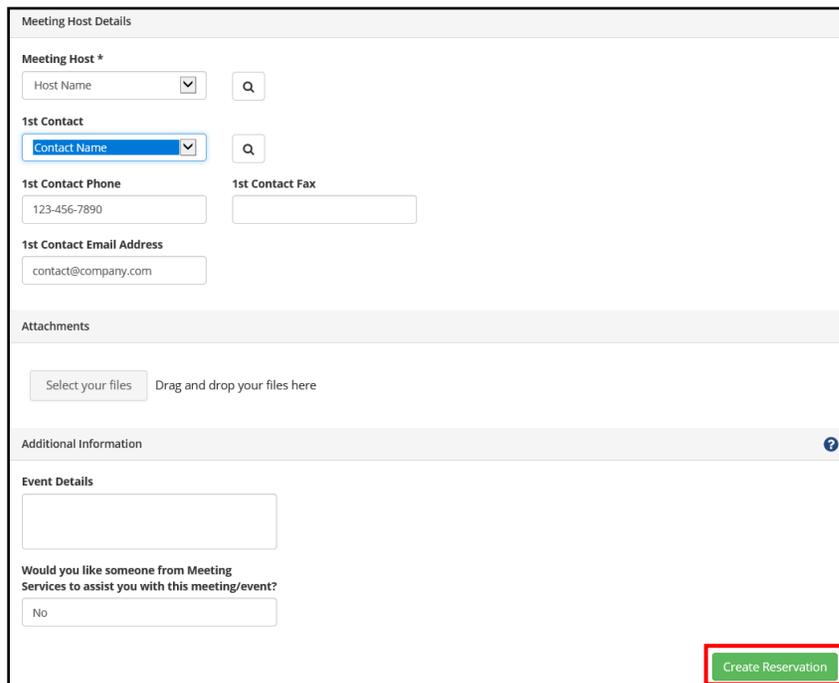
17. Select the **Group** who will be hosting the event.

- a. Your information will be in the drop-down menu.
- b. **1st contact** – Only change the 1st contact information if it is different than the Organizer.

*Note if the desired Group or 1st contact is not listed in your drop down, you can use the magnifying glass to the right to search and add additional resources to select from.

18. Add any additional information (questions will vary depending on the template chosen).

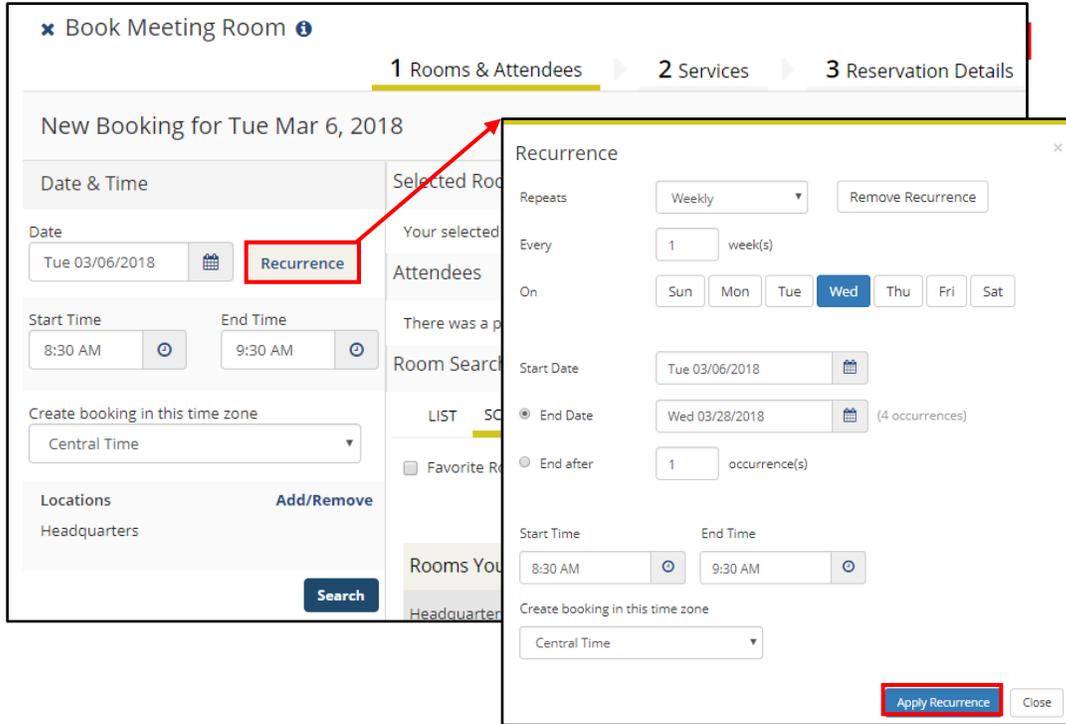
19. Click **Create Reservation**.



20. You will be directed to a success page where you can immediately edit the reservation if needed.

Recurring Reservation

1. Go to **Create Reservation**.
2. Choose your template and click **book now**.
3. When choosing your date/time, select the **Recurrence** button. A new window will open.
4. Enter your recurrence details and click **Apply Recurrence**.



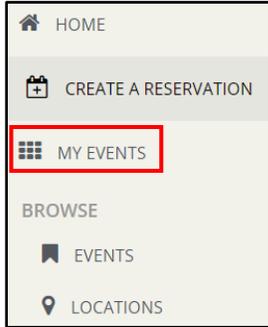
5. Enter your filtering criteria and click the magnifying glass to search for rooms.
6. A list of open rooms will appear with the availability listed in the second column. 4/4, for example, means that the room is available four times out the four dates requested.
7. Click the **green + icon** to add the room you wish to book.

Room	Available	Location	Floor	TZ	Cap	Price	Filter Match
Rooms You Can Reserve							
 Collaboration Room 1	4/4	New York - 345 Park Ave. (V)	(none)	ET	50		
 Collaboration Room 2	4/4	New York - 345 Park Ave. (V)	(none)	ET	60		
 Collaboration Room 3	4/4	New York - 345 Park Ave. (V)	(none)	ET	40		
 Collaboration Room 4	4/4	New York - 345 Park Ave. (V)	(none)	ET	30		
 Conference Room 4	4/4	New York - 345 Park Ave. (V)	(none)	ET	40		

8. Complete the reservation as outlined in the Single Reservation steps.

Cancelling a Reservation

1. Click **My Events** to go your list of events.



2. Click on the **Reservation Name** you wish to cancel

CURRENT		PAST				
Name	First/Last Bo...	Location	Me...	Se...	ID	Status
Meeting	Thu Dec 20, 2018 Thu Dec 20, 2018 (single booking)	New York - 345 Park Ave. (V) - Conference Room 1	Ho...		48...	Request

3. Click either **Cancel Reservation** on the right side to cancel all bookings OR click the **cancel icon** next to the booking (cancels that booking only).

A screenshot of the reservation details page for a meeting on Dec 20, 2018. The page shows reservation details, a sidebar with 'Reservation Tasks' (where 'Cancel Reservation' is highlighted), and a 'Bookings' table. In the bookings table, a red box highlights the cancel icon next to the first booking row.

Date	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Thu Dec 20, 2018	7:00 PM	9:00 PM	ET	New York - 345 Park Ave. (V) - Conference Room 1	5	Conference	Request

4. You will be asked to confirm your cancellation.

A screenshot of a confirmation dialog box titled "Cancel Reservation?". The text inside says: "Both the reservation and bookings will be cancelled. Are you sure you want to proceed?". There are two buttons at the bottom: "Yes, Cancel Reservation" (highlighted with a red box) and "No, Keep Reservation".

Editing a Reservation

1. From your home page, click on **My Events**.

CURRENT		PAST				
Name	First/Last Bo...	Location	Me...	Se...	ID	Status
Meeting	Thu Dec 20, 2018 Thu Dec 20, 2018 (single booking)	New York - 345 Park Ave. (V) - Conference Room 1	Ho...		48...	Request

2. Click on the **Reservation Name** you wish to edit.
3. To edit the Event Name, Event Type, or Employee click the pencil icon next to **Edit Reservation Details**.

My Events / Meeting beginning Dec 20, 2018 (48205)

RESERVATION DETAILS ADDITIONAL INFORMATION ATTACHMENTS

Edit Reservation Details

Meeting Name: Meeting

Meeting Type: Meeting - Internal

Meeting Host: Host Name

1st Contact Name: Host Name

Reservations Tasks

- Add Services
- Booking Tools
- Cancel Reservation
- View Reservation Summary
- View Service Availability
- Send Invitation
- Add to My Calendar

Bookings

CURRENT PAST Include cancelled bookings

Cancel Bookings Booking Tools **New Booking**

Date ^	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Thu Dec 20, 2018	7:00 PM	9:00 PM	ET	New York - 345 Park Ave. (V) - Conference Room 1	5	Conference	Request

4. To edit the name, date, time or location of a booking click the pencil icon next to the booking date.

Bookings

CURRENT PAST Include cancelled bookings

Cancel Bookings Booking Tools **New Booking**

Date ^	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Thu Dec 20, 2018	7:00 PM	9:00 PM	ET	New York - 345 Park Ave. (V) - Conference Room 1	5	Conference	Request

5. You can select a new Name, Date, Time or Location by using the search tools to the left.

6. If the room is open for your new date or time, click **Update Booking** to change your information.

Meeting (115503)

Edit Booking Fri Dec 21, 2018 Update Booking

Meeting Details

Meeting Name *
Meeting

Meeting Type *
Meeting - Internal

Date & Time

Date
Fri 12/21/2018

Start Time
7:00 PM

End Time
9:00 PM

Room Search Results [Attendance & Setup Type](#)

LIST SCHEDULE FLOOR MAP

Favorite R... Find A Room Search

	7 AM	8	9	10	11	12 PM	1	2	3	4
Rooms You Can Request										
New York - 345 Park Av... Cap										
Conference Room 1 50										

Availability Legend

Update Booking Cancel

Adding Services to an Existing Reservation

1. To add services to an existing booking, go to **My Events**.
2. Select the **Reservation Name** to which you wish to add services.
3. Click the **Add Services** link.

My Events / Meeting beginning Dec 20, 2018 (48205)

RESERVATION DETAILS ADDITIONAL INFORMATION ATTACHMENTS

[Edit Reservation Details](#)

Meeting Name: Meeting
 Meeting Type: Meeting - Internal
 Meeting Host: Host Name
 1st Contact Name: Host Name

Bookings

CURRENT PAST Include cancelled bookings

Cancel Bookings Booking Tools [New Booking](#)

Date ^	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Thu Dec 20, 2018	7:00 PM	9:00 PM	ET	New York - 345 Park Ave. (V) - Conference Room 1	5	Conference	Request

Reservation Tasks

- Add Services**
- Booking Tools
- Cancel Reservation
- View Reservation Summary
- View Service Availability
- Send Invitation
- Add to My Calendar

4. Select the service and quantity you wish to add (A summary will display on the right of the screen).
5. Click **Next Step**.

Next Step

Services Summary

- Multimedia & Equipment**
 - 1 Flip Chart

6. Identify the bookings to which you wish to add the service (for recurring reservations, you can add the service to multiple bookings at the same time) and click **Add Services**.

Select Services / Meeting (48205)

Add Services [Add Services](#)

<input checked="" type="checkbox"/>	Date ^	Booking Time	Time Zone	Location	Meeting Name	Meeting Type	Result
<input checked="" type="checkbox"/>	Thu Dec 20, 2018	7:00 PM - 9:00 PM	Eastern Time	New York - 345 Park Ave. (V) - Conference Room 1	Meeting	Meeting - Internal	

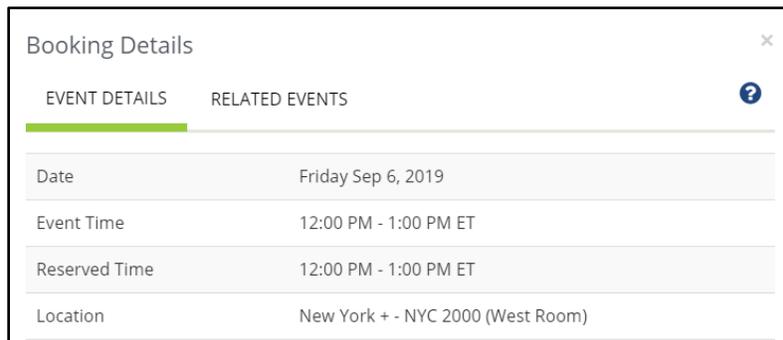
Browsing

Events

Browse events allows you to see all reservations in your organization. This will link you to a reservation calendar.

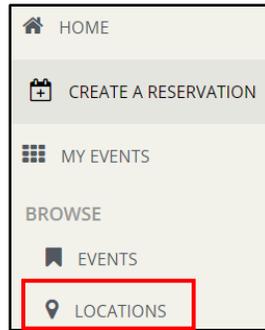


If you click on a reservation, you will get details about that reservation including any related booking (other rooms booked or future occurrences of a recurring reservation).

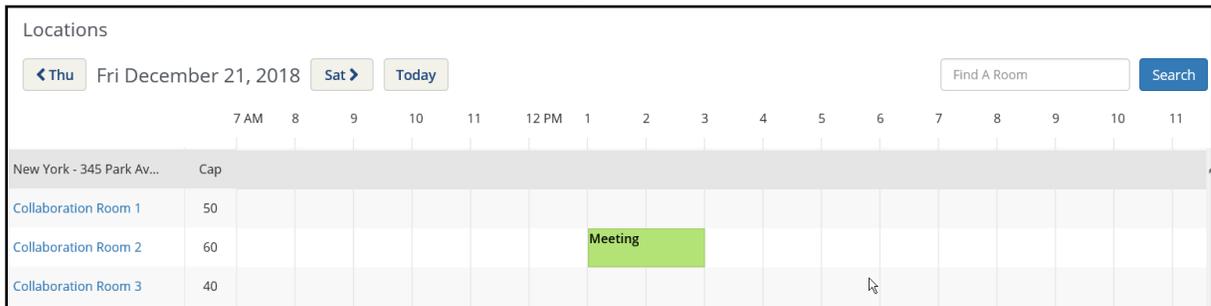


Locations

1. Browse locations will show you free/busy information of all spaces. Click **Locations** in the in the navigation window.



2. The Locations page will open. The colored bar represents when the room is busy and not available.



3. To create a reservation, you can click into a free space on the grid to initiate the reservation process.

