

EMS

(Event Management Systems)

Simon School of Business

Implementation 1/1/2013

Virtual EMS website:

<https://www.calendar.rochester.edu>

Login:

Username and password will be provided to you after attending the EMS training session. Your password can be changed once you log in and access the “Edit my account” area under “My Account”.

Questions:

Academic questions

- Sean Kunow
- Amy McNiven

Event questions

- Melissa Kunzer
- AJ Warner

Timeline:

November 2012 – training classes

1/1/2013 – “go” date; reservations occurring on or after 1/1/2013 will be booked into EMS (and should be submitted through Virtual EMS); dates in 2012 will continue to use the current room system

Terms:

Booking – a one time/one room event

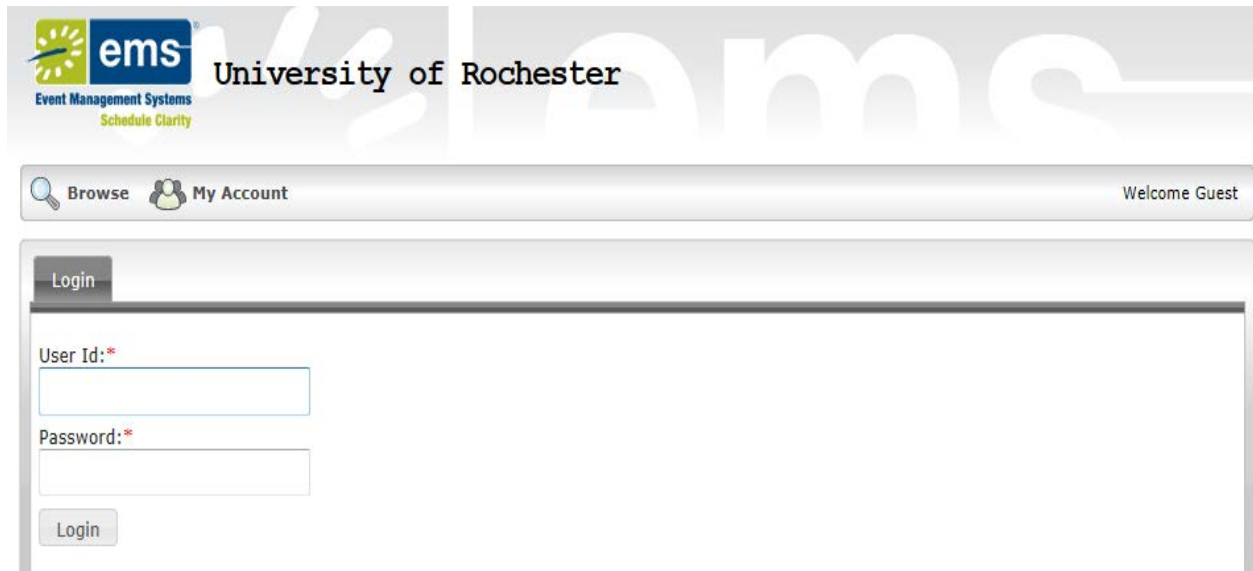
Reservation – consists of one or more bookings

Event Time – actual time that event is taking place

Reserved Time – the times that you are reserving; may differ from event time if setup/teardown is needed

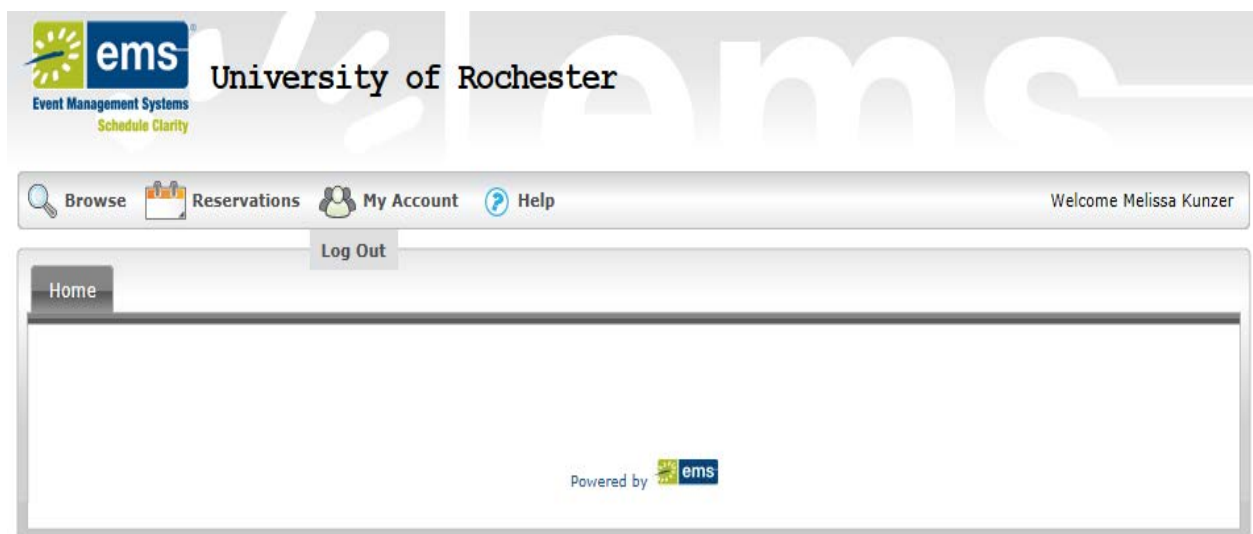
Overview of Virtual EMS:

Log in information will be sent to you via email after you attend a training session.



The screenshot shows the login page of the Virtual EMS system. At the top left is the logo for 'ems Event Management Systems Schedule Clarity' and the text 'University of Rochester'. Below the logo is a navigation bar with 'Browse' and 'My Account' links. On the right side of the navigation bar, it says 'Welcome Guest'. The main content area is titled 'Login' and contains two input fields: 'User Id:*' and 'Password:*'. Below the password field is a 'Login' button.

1. Log into Virtual EMS (website provided on page 2) using your assigned username & password.
(Passwords can be changed under “My Account”, “Edit My Account” – if you need your password reset at any point, please contact one of the individuals listed on page 2)



The screenshot shows the home page of the Virtual EMS system. At the top left is the logo for 'ems Event Management Systems Schedule Clarity' and the text 'University of Rochester'. Below the logo is a navigation bar with 'Browse', 'Reservations', 'My Account', and 'Help' links. On the right side of the navigation bar, it says 'Welcome Melissa Kunzer'. Below the navigation bar is a 'Log Out' button. The main content area is titled 'Home' and is currently empty. At the bottom center of the page, it says 'Powered by' followed by the 'ems' logo.

2. On the home screen you will see 4 different choices:

A. Browse – this allows you to look for space in a calendar format (you will notice that you can see all areas of the University of Rochester which use this system)

- To help narrow your search you can select “Filter” in the upper right corner. There are 4 items listed under “Facilities” that you might find most helpful:

RC-Carol Simon Hall

RC-Gleason Hall

RC-Schlegel Hall

Simon All

Simon Classrooms

Simon Conference Rooms

B. Reservations – this will allow you to actually place a reservation request (it will also help you search for rooms without the need to “Browse” first)

- Simon Academic Room Request is used for:

Grading

Lunch Seminar

Make-up Class

Make-up Exam

Midterm Exam

Office Hours

PhD Thesis Defense

PhD Thesis Proposal

Presentation

Recruiting Seminar

Research Seminar

Review Session

Team Meeting

Video Recording Session

- Simon Non-Academic Room Request is used for:
 - Competition
 - Conference/Symposia
 - Dinner
 - Fair/Information Session
 - Lecture/Speaker
 - Meeting
 - Orientation
 - Private Event
 - Reception
 - Training Session
 - Workshop
- My Requests allows you to see any requests that you have placed.

C. My Account is where you will log out or edit your account

D. Help takes you to the EMS Users Manual (it has lots of information, so if you have a quick question, feel free to ask us first)

How to Submit a Room Request:

1. Log into Virtual EMS using your username (email) and password.
2. Select the appropriate Room Request Template under “Reservations”
 - A. Simon Academic Room Request
 - B. Simon Non-Academic Room Request

The screenshot displays the 'Simon Academic Room Request' web interface. At the top, a navigation bar includes 'Browse', 'Reservations', 'My Account', and 'Help' links, along with a user greeting 'Welcome Melissa Kunzer'. The main content area is titled 'Simon Academic Room Request' and features two tabs: 'Location' (selected) and 'Details'. The 'Location' tab is divided into two main sections. On the left, there are three sections: 'When and Where' with fields for Date (11/4/2012 Sun), Start Time, End Time, and Facilities; 'Setup Information' with an Attendance field set to 0; and 'Availability Filters' with a Room Type dropdown set to '(all)'. A 'Find Space' button is at the bottom of these sections. On the right, the 'Selected Locations' section shows 'No rooms currently selected' and 'List' and 'Grid' buttons.

3. Select your date(s) by typing in the date, using the calendar, or selecting Recurrence for a date pattern:

A. In the calendar view, you can only select one date.

- When using the calendar to select dates you will notice that some of the dates have a light red outline on them – that indicates a holiday either in terms of an actual holiday or a holiday as defined by the University. (For example, you will see the use of ESM and RC to represent events for Eastman School of Music and River Campus) These are just reminders to the Virtual user. *It does not mean that the reservation will not be allowed.*

- B. Recurrence acts similar to Outlook calendar in the method of selecting dates based on a pattern. (If you select Recurrence, you will have to enter the times of your event on this pop-up screen)
- Random allows you to pick various dates with the same time
4. Select the times of your event (if not already selected in Recurrence)
 - Keep in mind that this is the actual event time. If you will need setup time, you can indicate that in a later field.
 5. *Optional field:* Select one of the five options in the Facilities drop down menu, based on where you would like to book your room:
 - RC-Carol Simon Hall
 - RC-Gleason Hall
 - RC-Schlegel Hall
 - Simon All
 - Simon Classrooms
 - Simon Conference Rooms
 6. List an approximate attendance count. (This step helps limit the list of rooms that are available by what can accommodate your attendance.)
 7. *Optional field:* You can further filter your results based on classroom, conference room, or lounge, but this step is not a necessary field.
 8. Click “Find Space”. This will show the available rooms, meeting your criteria, on the right hand side. Based on your preference you can see the available rooms either as a list or on a timeline grid. (List & Grid are located above your returned results.)

Simon Non-academic Room Request

Location Details

When and Where

Date: * 12/12/2012 Wed Recurrence

Start Time: * 3:00 PM End Time: * 4:00 PM

Facilities: Simon Conference Rooms

Setup Information

Attendance: * 10

Availability Filters

Room Type: (all)

Find Space

Selected Locations

DATE	HOLIDAYS	START	END	LOCATION	STATUS	SETUP COUNT	CONFLICT
12/3/2012 Mon		12:00 PM	1:00 PM	CSH - 3-327 (Fishbowl)	Request	10	
12/3/2012 Mon		12:00 PM	1:00 PM	Gleason - G218 Farash Room	Request	10	
12/12/2012 Wed	Simon Fall C Final Exams	3:00 PM	4:00 PM	Gleason - G244 Davenport Hatch Room	Request	10	

List Grid

Wednesday, December 12, 2012 16 Hours

Room	Cap	7	8	9	10	11	12 P	1	2	3	4	5	6	7	8	9
RC-Carol Simon Hall																
+ 3-131	10															
+ 3-327 (Fishbowl)	14															
RC-Gleason Hall																
+ G218 Farash Room	16															
+ G243 Reading Room	15															
G244 Davenport Hatch Room	12															
+ G335 Collins Room	20															

9. Click on the green plus sign next to the room you wish to reserve. It will jump up above your returned results in a method similar to loading a shopping item into your online shopping cart.
 - A. If you'd like to select more than one room for this same date/time, then you can add more rooms by clicking on their green plus signs and adding them to your "cart".
 - B. If you'd like to select different dates/times for this event, return to the left hand column and search again. Your original selection will be held in queue until you complete your final process.
10. Once you have selected all the rooms, dates and times for your event, click "Continue" on the bottom of the screen.

Simon Non-academic Room Request

Location Details

When and Where

Date:* 12/12/2012 Wed Recurrence
 Start Time:* 3:00 PM End Time:* 4:00 PM
 Facilities: Simon Conference Rooms

Setup Information

Attendance:* 10

Availability Filters

Room Type: (all)

Find Space

Event Details

Event Name:* EMS testing party Event Type:*

Client Details

Client:*
 1st Contact:*
 Phone:* Fax:
 Email:*

Other Information

Will you be serving alcohol?: No

Setup Notes

Submit

11. Enter your Event Name and Event Type. Then select your Client and 1st Contact from the drop-down menus. Your phone and email should default in.

12. In the case of Non-Academic Room Requests, you must answer the question if you will be serving alcohol.

13. The Setup Notes field allows you to write any detail you may need the recipient of your request to be aware of. If you'll need tables, chairs, or any other items, please indicate that in this field. This is where you will also indicate if you need any setup or teardown time and what those times would be.

14. Click “Submit”. Your reservation request has now been submitted.

ems University of Rochester
Event Management Systems
Schedule Clarity

Browse Reservations My Account Help Welcome Melissa Kunzer

Reservation Details Additional Information Attachments [Back to My Requests](#)

Reservation Id 253687 **Client Name** Simon - Admin [Edit Reservation](#)
Event Name Test - do not work yet **1st Contact Name** Melissa Kunzer [Add Booking](#)
Event Type Training Session **Phone** 585-275-4968 [Cancel Bookings](#)
[Cancel All Bookings](#)
[View Reservation Summary](#)
[Add booking to personal calendar](#)
[Booking Tools](#)

All Current Historical

Bookings							
ACTIONS	SERVICES	DATE ^	TIME	TITLE	LOCATION	STATUS	SETUP
		11/8/2012 Thu	2:00 PM - 3:00 PM	Test - do not work yet	Gleason - G218 Farash Room	RC- Web Request	Large Square Conference Style (10)

Powered by ems

15. If you have made any errors in this reservation request, you may make adjustments from this page (once the reservation status is changed from “Web Request” to “Confirmed” you can no longer edit it on Virtual – you can either cancel and submit a new request or contact one of the individuals listed on page 2 to make adjustments)

A. To adjust the entire reservation, use the selections available in the upper box (Reservation Details):

- Edit Reservation
- Add Booking (additional room or additional date needed)
- Cancel Bookings (to select a specific booking to cancel)
- Cancel All Bookings

B. To adjust a specific booking, use the selections available in the lower box (Bookings):

- Click on the Red X icon if you'd like to cancel a booking
- Click on the pencil and notepad icon to edit any details of the booking
- Click on the Green + icon if you'd like to add any services to the booking

16. You will receive a confirmation email after it has been final approved (please allow upto 24 hours for processing). In the meantime, the selections that you have requested will be unavailable for other users to select, therefore reducing the possibility of double-booking.

Simon School of Business
 PO Box 270107
 Schlegel Hall Rm 210
 Rochester NY 14627
 585-275-0328

Confirmation

Client	Reservation: 251100
Karen Grip	Event Name: CMC Student Advisory
Simon - Career Management Center	Status: Simon - Confirmed
Box 270107	Phone: 585-273-4448
219 Gleason Hall	Email Address: karen.grip@simon.rochester.edu
Rochester, NY 14627	Event Type: Meeting*

Bookings / Details	Quantity	Price	Amount
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Monday, January 07, 2013

12:40 PM - 1:20 PM CMC Student Advisory (Simon - Confirmed) Gleason G244 Davenport Hatch Room
 Conference Style for 8

Friday, January 18, 2013

2:00 PM - 3:00 PM CMC Student Advisory (Simon - Confirmed) Gleason G244 Davenport Hatch Room
 Conference Style

Monday, January 21, 2013

12:40 PM - 1:20 PM CMC Student Advisory (Simon - Confirmed) Gleason G244 Davenport Hatch Room
 Conference Style for 8

Friday, January 25, 2013

How to Edit/Cancel a Request (before it is confirmed):

1. Access your request by selecting “My Requests” under “Reservations”.
2. Select the reservation you would like to edit.

The screenshot displays the EMS University of Rochester interface. At the top, there is a navigation bar with 'Browse', 'Reservations', 'My Account', and 'Help' options. The user is identified as 'Welcome Melissa Kunzer'. Below the navigation bar, there are tabs for 'Reservation Details', 'Additional Information', and 'Attachments'. The 'Reservation Details' tab is active, showing the following information:

Reservation Id	253692	Client Name	Simon - Admin	Edit Reservation Add Booking Cancel Bookings Cancel All Bookings View Reservation Summary Add booking to personal calendar Booking Tools
Event Name	test	1st Contact Name	Melissa Kunzer	
Event Type	Meeting™	Phone	585-275-4968	

Below the reservation details, there are tabs for 'All', 'Current', and 'Historical'. The 'Current' tab is selected, and a 'Bookings' table is displayed:

ACTIONS	SERVICES	DATE ^	TIME	TITLE	LOCATION	STATUS	SETUP
		11/8/2012 Thu	3:00 PM - 4:00 PM	test	Gleason - G244 Davenport Hatch Room	RC- Web Request	Conference Style (10)
		11/15/2012 Thu	3:00 PM - 4:00 PM	test	Gleason - G244 Davenport Hatch Room	RC- Web Request	Conference Style (10)
		11/22/2012 Thu	3:00 PM - 4:00 PM	test	Gleason - G244 Davenport Hatch Room	RC- Web Request	Conference Style (10)
		11/29/2012 Thu	3:00 PM - 4:00 PM	test	Gleason - G244 Davenport Hatch Room	RC- Web Request	Conference Style (10)
		12/6/2012 Thu	3:00 PM - 4:00 PM	test	Gleason - G244 Davenport Hatch Room	RC- Web Request	Conference Style (10)

At the bottom of the interface, it says 'Powered by EMS'.

3. Follow the editing instructions on Pages 10-11.

How to Cancel a Reservation/Booking (after it is confirmed):

1. Access your request by selecting “My Requests” under “Reservations”.
2. Select the reservation you would like to cancel.
3. From here you can cancel all bookings by selecting “Cancel all bookings” on the right hand side. You can also cancel a specific booking by selecting “Cancel booking” on the right hand side or by clicking on the Red X next to the specific booking.

Alternative Methods for Adjustments:

1. Once you have made a reservation you may add on additional time at the beginning or end of it by creating a new booking within that reservation.
2. To make any other major adjustments, please contact the appropriate party (Amy/Sean for Academic or AJ/Melissa for Non-Academic) . Whenever possible, please reference your reservation #, which is provided to you in your email confirmation or by referencing your reservations under “My Requests”

******As a reminder, all room requests are subject to change until final approved. You will be notified if any changes will need to be made to your original request. Also, requests may be approved but may still be subject to being “academic bumped” if space is needed for classes.******

We are more than willing to help answer any questions you may come across in the process of adapting to the new system. This is a system that continues to develop and we will keep you informed as it evolves. Please feel free to provide us with any feedback you may have regarding the usability or options that you would like to see in this system. Thank you in advance for your patience as we work through any kinks that may occur as we transition.