



Hampden-Sydney College Web App Reference Guide for EMS

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About this guide

This guide is designed to be a quick reference for common tasks within the EMS Web App. For more details about how to make or edit reservations, see an EMS Administrator.

EMS Definitions


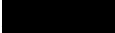
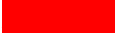




Reservation – The “Who and the What.” This contains the meeting/event host information and what the event is called. A reservation can have multiple bookings

Booking – The “When and the Where.” This contains the date/time/location information for each occurrence 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).

Event Types

| Event Type | Definition |
|---------------------|--------------------|
| Academic Class | For use by Cameron |
| Academic Final Exam | For use by Cameron |
| Accommodations | For use by Events |
| Ball | For use by Events |
| Banquet | For use by Events |
| Camp | For use by Events |
| Ceremony | For use by Events |
| Concert | For use by Events |
| Conference/Seminar | For use by Events |
| Debate | For use by Events |
| Exam | For use by Events |
| Game | For use by Events |
| Information Session | For use by Events |
| Lecture | For use by Events |
| Maintenance | For use by Events |
| Meal - Barbeque | For use by Events |
| Meal - Breakfast | For use by Events |
| Meal - Dinner | For use by Events |
| Meal - Lunch | For use by Events |
| Meeting | For use by Events |
| Open House | For use by Events |
| Orientation | For use by Events |
| Play | For use by Events |
| Practice | For use by Events |
| Reception | For use by Events |
| Registration | For use by Events |
| Rehearsal | For use by Events |
| Study Session | For use by Events |
| Tournament | For use by Events |
| Tutoring | For use by Events |
| Wedding | For use by Events |

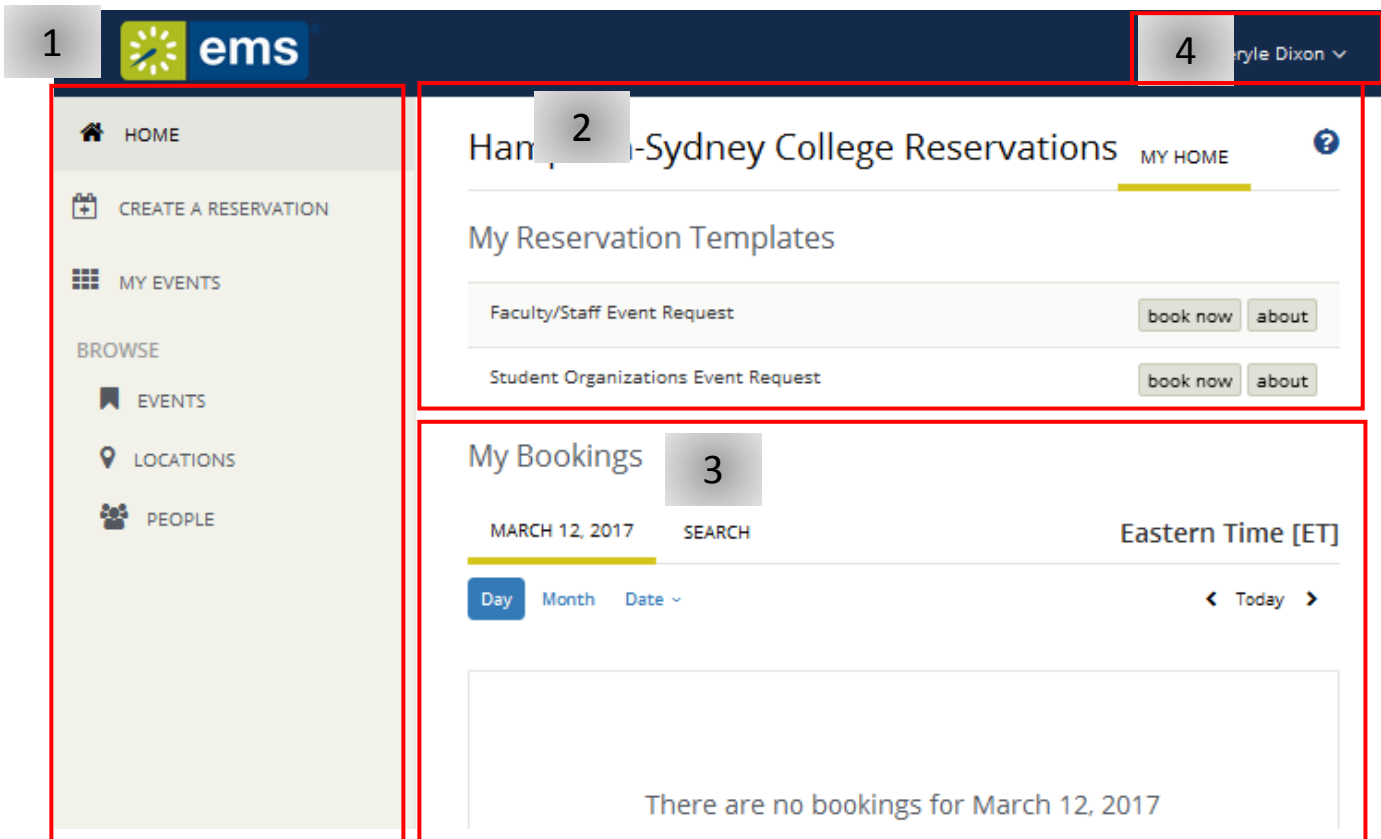
Statuses

| Status | Color | Type | Definition |
|------------------------------|---|--------------|---|
| Confirmed |  | Book Space | Space booked |
| Cancelled |  | Cancel Space | Booking is no longer happening, space and services are released. |
| Web Conflict |  | Info Only | Used when two people book the same space at the same time to allow someone to change one booking. (rare in the Web App) |
| Web Request |  | Book Space | Someone has requested a date from the web App, the space is held, and is pending room moderator's approval. |
| Confirmed - Private |  | Book Space | Used when an event should be kept off the Web App listing of events |
| Confirmed – Private viewable |  | Book Space | Same as old ADMIN – viewable on login |
| Moderator Approved |  | Book Space | Used for the room moderators to approve space and fire off a notification to the EMS admin. |
| Moderator Denied | COLOR | | |
| Academic Confirmed | | Book Space | Academic Classes Only |
| Academic Conflict | | Info Only | Shared Space and Cross-listed Courses Only |
| Academic Cancel | | | |

Navigating the EMS Web App

Your EMS Web App home page looks like below.

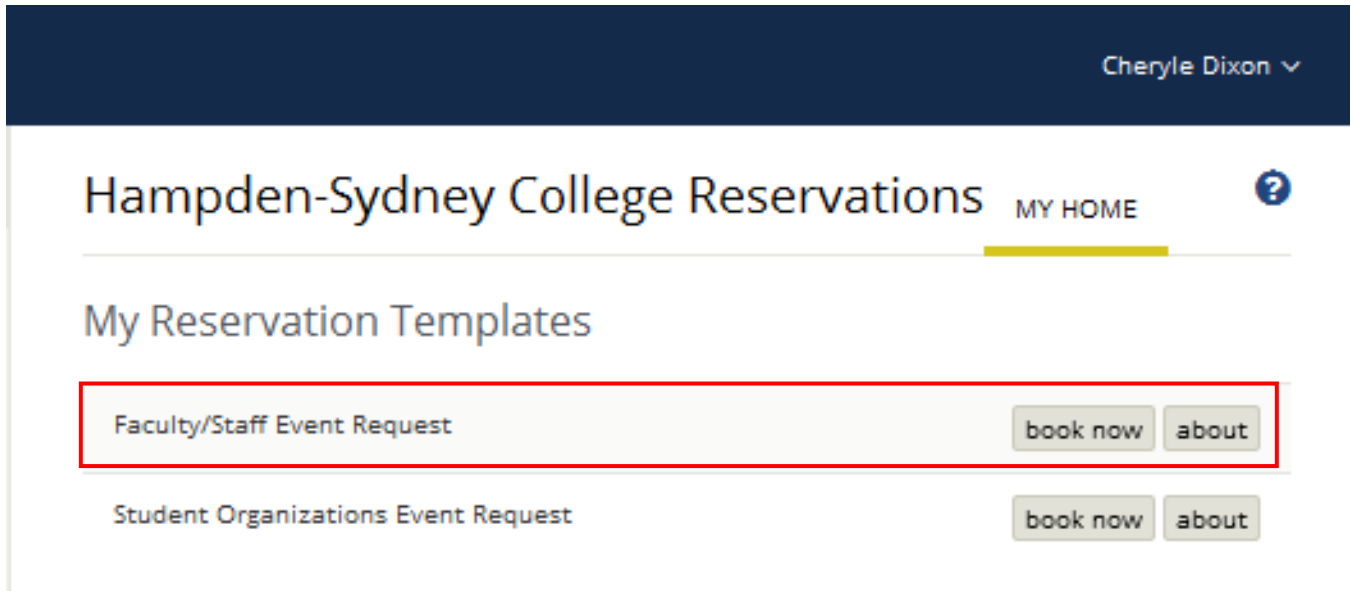
1. On the left, you have a menu bar with the following options:
 - **Create a Reservation:** takes you to your reservation templates
 - **My Events:** takes you to your event list of upcoming and past events in EMS
 - **Browse:** takes you to the search features in the Web App
 - **Events:** See all events in your organization
 - **Locations:** See the free/busy of all the rooms in your organization
 - **People:** See the same-day events for the people 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. Finally, in the upper right-hand corner, you see your name and a drop-down for your account options.



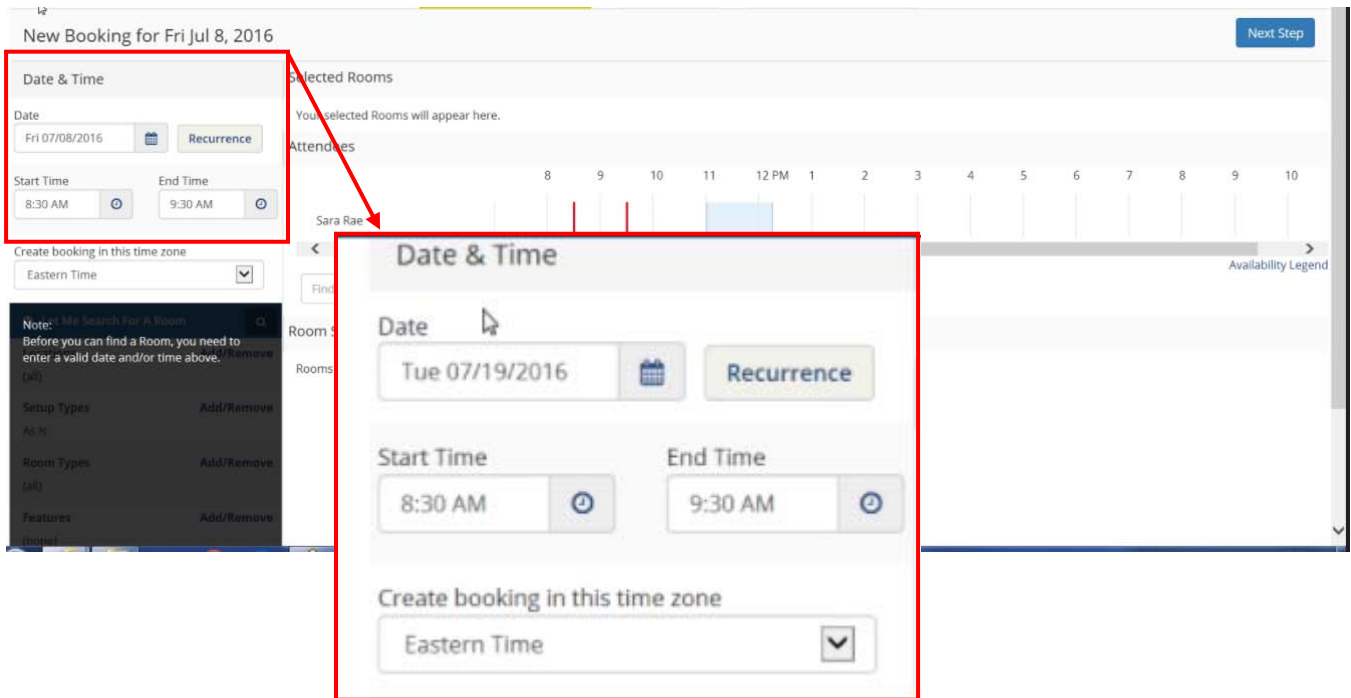
Making Reservations

Single Reservation

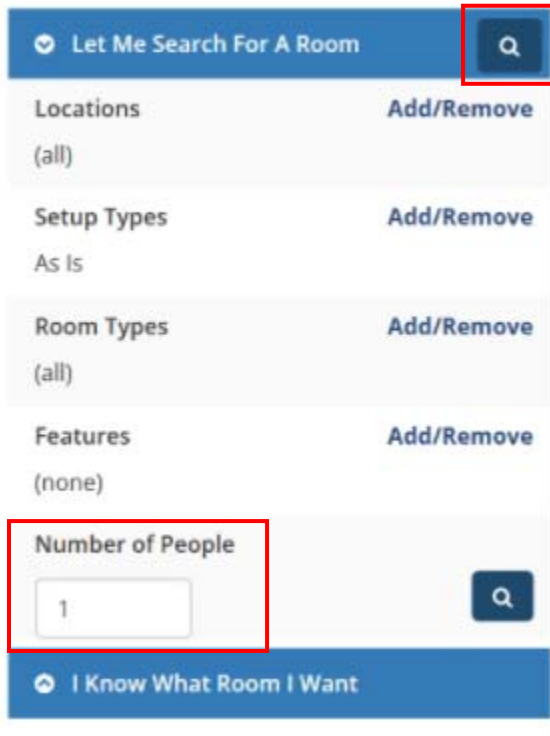
1. To make a reservation, begin at either **My Home** or **Create Reservation**
2. Click **book now** next to the template you wish to use
 - *NOTE – The templates are designed for different kinds of bookings. Use the one that best matches your reservation needs. The **about** button will tell you the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



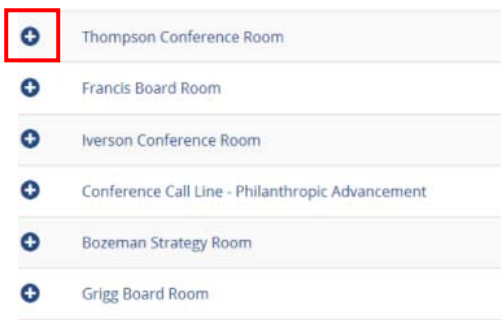
3. Select your date and time



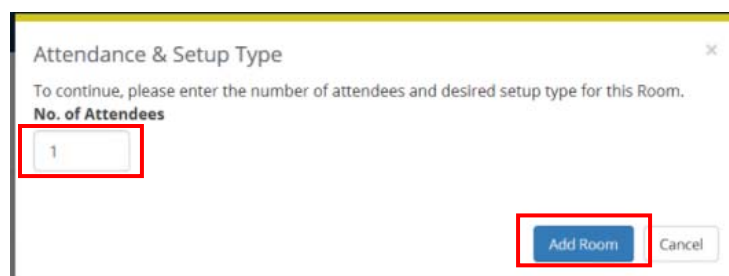
4. **When searching for a LOCATION, try it without the filters first.** This gives you a list of all buildings.
5. If working with only a few buildings to schedule, select any filters to limit the number of rooms returned.
6. Enter the **Number of People** to find a room that will best fit the size of your meeting.
7. Click the magnifying glass to get your list of available rooms.
***NOTE** – If you don't wish to enter any filtering, you can click on the "Search" button for a quick search of all spaces



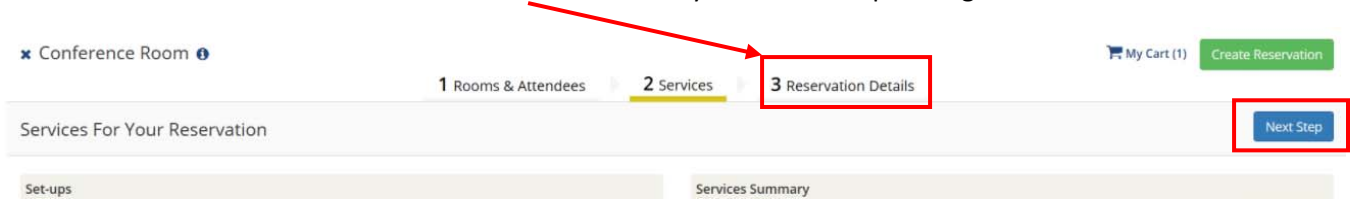
8. Select a room by clicking on the blue + next to the room name
***NOTE** – clicking the room name will give you the room details



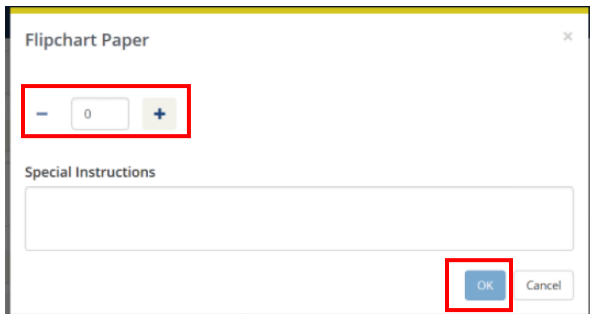
9. Enter the number of attendees and desired setup (if prompted)
10. Click **Add Room**



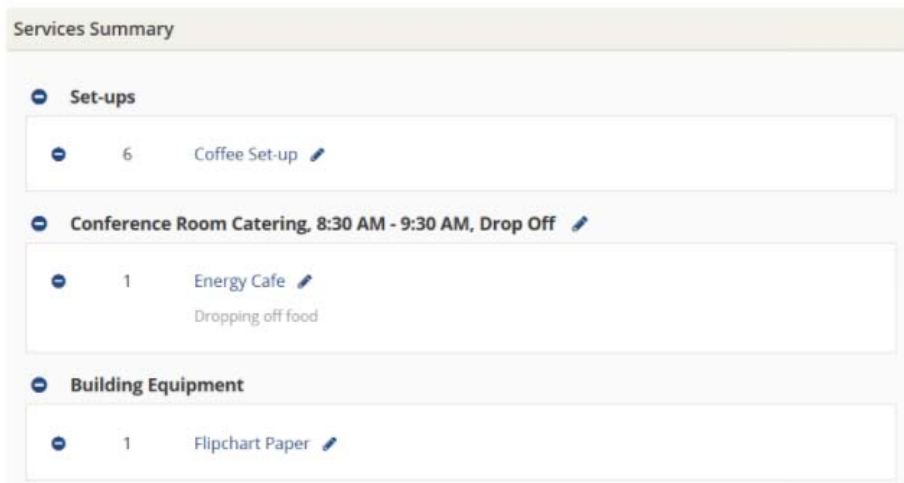
- You can click the **Next Step** button at the top right of the screen to add services
***NOTE – You can click on 3 Reservation Details** if you want to skip adding services



- If you choose to add services, click on the resource you wish to add and enter the quantity of the resource you need and any special instructions (if needed).
- Click **OK** when done adding the resource



- A summary of your services will build on the right side of the screen



- Click **Next Step** to enter your reservation details



16. Enter your **Event Details**

***NOTE** – Anything with an ‘*’ next to it is a required field.

17. Add the **Department** Details – this is your Academic or Staff Department.

- a. **ON FIRST LOGIN**, you have to **search for the Department/Organization**

Then your information will be in the drop-down menu after that.

18. **1st contact** – Pick yourself (or another member of the department) as the Contact

Organization/Individual Details

Organization/Individual *

▼
Q

1st Contact

▼
Q

1st Contact Phone *

704-973-4500

1st Contact Fax

1st Contact Email Address *

srae@fftc.org

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

20. Add **Billing information** if you have ordered catering

21. Click **Create Reservation**

Additional Information ?

Are you validating parking?

No ▼

Billing Information ?

Fund Code *

1111

Account Code *

1111

Create Reservation

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

Reservation Created

Reserved!

What would you like to do now?

[> Edit this reservation.](#)

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
4. Enter your recurrence details and click **Apply Recurrence**

The screenshot shows the 'New Booking for Fri Jul 8, 2016' interface. The 'Date & Time' section has a 'Recurrence' button highlighted with a red box. A red arrow points from this button to a 'Recurrence' dialog box. The dialog box contains the following fields:

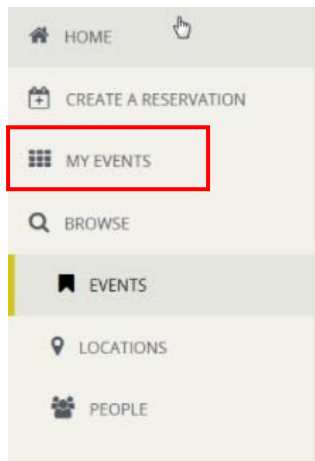
- Repeats: Weekly (dropdown), Remove Recurrence (button)
- Every: 1 week(s)
- On: Sun, Mon, Tue, **Wed**, Thu, Fri, Sat
- Start Date: Wed 07/13/2016
- End Date: Thu 07/14/2016
- End after: 5 occurrence(s)
- Start Time: 1:00 PM
- End Time: 2:00 PM
- Create Booking In: Eastern Time
- Buttons: Apply Recurrence (highlighted with a red box), Close

5. Enter your filtering criteria and click search to find available rooms
6. A list of open rooms will appear with the availability listed in the second column (see below 5/5 means the room is open for 5 out of the 5 requested dates)
7. Click the **blue + icon** to add the room you wish to book.

| | | | | | | | |
|---|--|-----|------------------------------|-----------|----|----|--|
| + | Thompson Conference Room | 5/5 | Foundation For The Carolinas | 3rd Floor | ET | 14 | |
| + | Francis Board Room | 5/5 | Foundation For The Carolinas | 4th Floor | ET | 14 | |
| + | Iverson Conference Room | 5/5 | Foundation For The Carolinas | 4th Floor | ET | 10 | |
| + | Conference Call Line - Philanthropic Advancement | 5/5 | Foundation For The Carolinas | Basement | ET | 99 | |
| + | Bozeman Strategy Room | 5/5 | Foundation For The Carolinas | Mezzanine | ET | 10 | |
| + | Grigg Board Room | 4/5 | Foundation For The Carolinas | 3rd Floor | ET | 38 | |

8. Complete the reservation as outlined in [Single Reservation](#) above.

Cancelling a Reservation



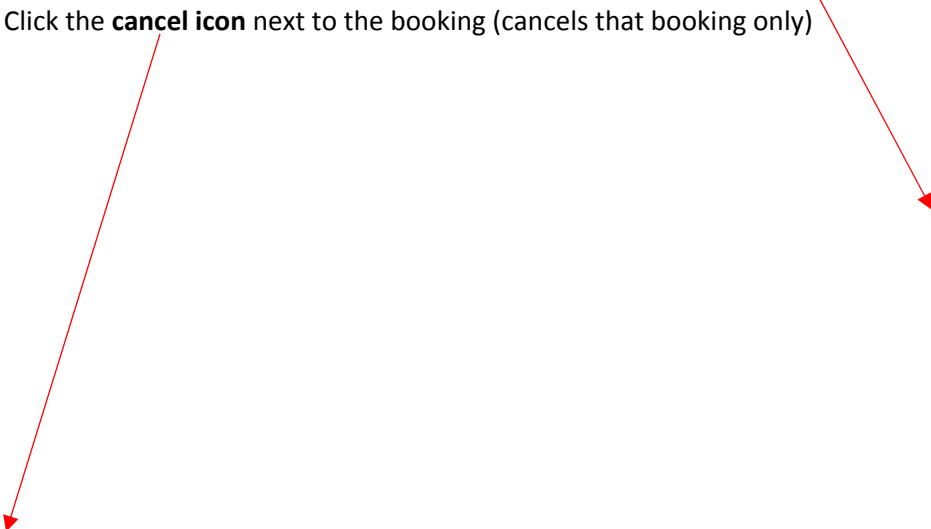
1. Go to **My Events**
2. This will take you to your list of events.
3. Click on the **Reservation Name** you wish to cancel

RESERVATIONS BOOKINGS

CURRENT PAST

| Name | First/Last Booking ^ | Location | Organiza... | Services | ID |
|----------------------|---|---|-------------|----------|-----|
| Covenant Bible Study | Fri Jul 8, 2016/ Fri Jul 8, 2016 (single booking) | Foundation For The Carolinas - Richardson Conference Room | Sara Rae | ✓ | 164 |
| tester | Fri Jul 8, 2016/ Fri Jul 8, 2016 (single booking) | Foundation For The Carolinas - Chambers Conference Room | Sara Rae | ✓ | 165 |

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



My Events / Study Session beginning Jul 12, 2016 (188)

RESERVATION DETAILS ADDITIONAL INFORMATION ATTACHMENTS


[Edit Reservation Details](#)

| | |
|-------------------------|--------------------|
| Event Name | Study Session |
| Event Type | Staff Only Daytime |
| Organization/Individual | Sara Rae |
| 1st Contact Name | (none) |

Bookings

CURRENT PAST Include cancelled bookings

[Cancel Bookings](#) [Booking Tools](#)

| Date ^ | Start Time | End Time | Time Zone | Location | Status |
|--|------------|----------|-----------|---|-----------|
|  Tue Jul 12, 2016 | 8:30 AM | 9:30 AM | ET | Foundation For The Carolinas - Babb Study/CT Project Room | Confirmed |

[View Services](#) | [Manage Services](#)

Reservation Tasks

- Add Services
- Cancel Services
- Booking Tools**
 - ✕ Cancel Reservation**
 - View Service Availability

6. You will be asked to confirm your cancellation

Cancel Booking? ✕

Tuesday, July 19th, 2016, from 8:30 to 9:30 AM

Internal Staff Meeting
Bernstein Conference Room

Yes, cancel the booking.

Editing a Reservation

1. From your home page, click on **My Events**
2. Click on the **Reservation Name** you wish to edit

RESERVATIONS BOOKINGS

[Search Reservations](#) Include cancelled reservations

CURRENT PAST

| Name | First/Last Booking ^ | Location | Organiza... | Services | ID | Status |
|----------------------|---|---|-------------|----------|-----|-----------|
| Covenant Bible Study | Fri Jul 8, 2016/ Fri Jul 8, 2016 (single booking) | Foundation For The Carolinas - Richardson Conference Room | Sara Rae | ✓ | 164 | Confirmed |
| tester | Fri Jul 8, 2016/ Fri Jul 8, 2016 (single booking) | Foundation For The Carolinas - Chambers Conference Room | Sara Rae | ✓ | 165 | Confirmed |
| meet with ss | Fri Jul 8, 2016/ Fri Jul 8, 2016 (single booking) | Foundation For The Carolinas - Bessant Conference Room | Sara Rae | | 166 | Confirmed |
| CHS | Mon Jul 11, 2016/ Mon Jul 11, 2016 (single booking) | Foundation For The Carolinas - Francis Board Room | Test User | ✓ | 167 | Confirmed |
| tester | Wed Jul 20, 2016/ Wed Jul 20, 2016 (multi-booking) | Multiple | Sara Rae | ✓ | 156 | Confirmed |
| Tester | Wed Jun 21, 2017/ Wed Jun 21, 2017 (single booking) | Foundation For The Carolinas - Richardson Conference Room | Sara Rae | | 160 | Confirmed |

3. You can edit **Reservation Details** (Event Name, Event Type, Organization/Individual, First Contact) by clicking on the pencil icon next to the Reservation Details.

← My Events / Study Session beginning Jul 12, 2016 (188)

RESERVATION DETAILS ADDITIONAL INFORMATION ATTACHMENTS

[✎ Edit Reservation Details](#)

| | |
|-------------------------|--------------------|
| Event Name | Study Session |
| Event Type | Staff Only Daytime |
| Organization/Individual | Sara Rae |
| 1st Contact Name | (none) |

Reservation Tasks

- Add Services
- Cancel Services
- Booking Tools
- ✕ Cancel Reservation
- View Service Availability

4. You can edit the booking by clicking on the pencil icon next to the booking.

My Events / Study Session beginning Jul 12, 2016 (188)

RESERVATION DETAILS ADDITIONAL INFORMATION ATTACHMENTS

Reservation Tasks

- Add Services
- Cancel Services
- Booking Tools
- Cancel Reservation
- View Service Availability

Bookings

CURRENT PAST Include cancelled bookings

| Date | Start Time | End Time | Time Zone | Location | Status |
|------------------|------------|----------|-----------|---|-----------|
| Tue Jul 12, 2016 | 8:30 AM | 9:30 AM | ET | Foundation For The Carolinas - Babb Study/CT Project Room | Confirmed |

View Services | Manage Services

5. You can select a new 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.

Edit Booking Tue Jul 12, 2016 Update Booking

Event Details

Event Name *
Study Session

Event Type *
Staff Only Daytime

Date & Time

Date
Tue 07/12/2016

Start Time
9:30 AM

End Time
10:30 AM

Create booking in this time zone
Eastern Time

Room Search Results Attendance & Setup Type

LIST SCHEDULE

Favorite Rooms only. Find A Room Search

Rooms You Can Reserve

| Room | Cap | 7 AM | 8 | 9 | 10 | 11 | 12 PM | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|---------------------------|-----|------|---|-----------|----|----|-------|---|---|---|---|---|---|--------|---|---|----|
| Foundation For The Car... | Cap | | | | | | | | | | | | | | | | |
| Babb Study/CT Proje... | 5 | | | Study Ses | | | | | | | | | | Closed | | | |

Update Booking Cancel

Availability Legend

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 / Study Session beginning Jul 12, 2016 (188)

RESERVATION DETAILS ADDITIONAL INFORMATION ATTACHMENTS

[Edit Reservation Details](#)

Event Name: Study Session
 Event Type: Staff Only Daytime
 Organization/Individual: Sara Rae
 1st Contact Name: (none)

Bookings

CURRENT PAST Include cancelled bookings

Cancel Bookings Booking Tools

| Date ^ | Start Time | End Time | Time Zone | Location | Status |
|------------------|------------|----------|-----------|---|-----------|
| Tue Jul 12, 2016 | 8:30 AM | 9:30 AM | ET | Foundation For The Carolinas - Babb Study/CT Project Room | Confirmed |

[View Services](#) | [Manage Services](#)

Reservation Tasks

- Add Services**
- Cancel Services
- Booking Tools
- ✖ Cancel Reservation
- View Service Availability

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

Study Session (188)

Select Services [Next Step](#)

Rental Notes

Conference Room Catering

Services Summary

- Building Equipment
 - 1 Whiteboard / Easel

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).

Select Services / Study Session (188)

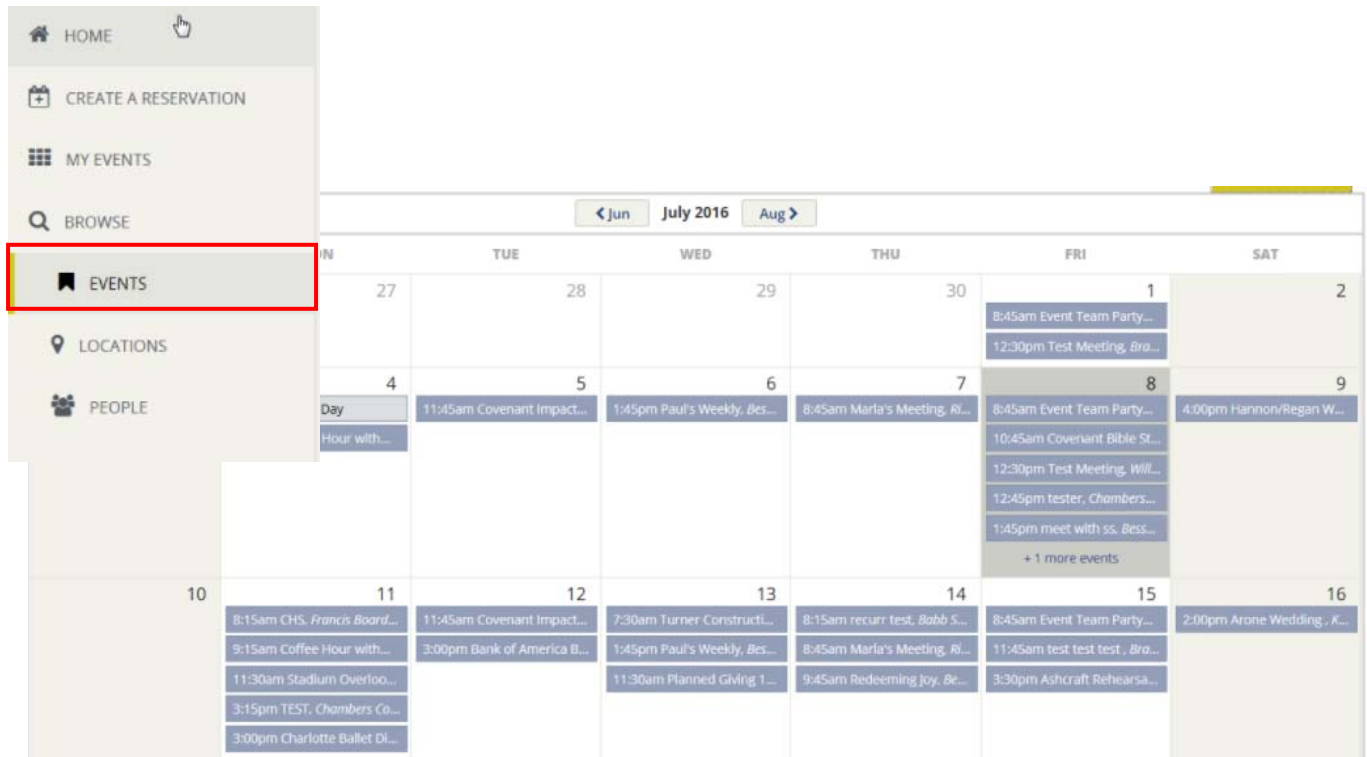
Add Services [Add Services](#)

| <input type="checkbox"/> | Date ^ | Booking Time | Time Zone | Location | Event Name | Event Type | Result |
|-------------------------------------|------------------|--------------------|--------------|----------------------------|---------------|--------------------|--------|
| <input checked="" type="checkbox"/> | Tue Jul 12, 2016 | 9:30 AM - 10:30 AM | Eastern Time | Babb Study/CT Project Room | Study Session | Staff Only Daytime | |

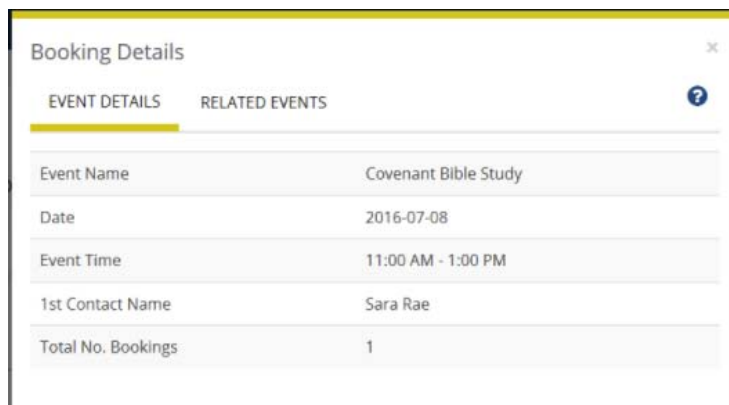
Browsing

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

Location will show you a free/busy of all spaces.

