

Virtual EMS ~ User Guide

You may use Internet Explorer, Mozilla Firefox, Safari and other internet browsers to work with this system. To locate Virtual EMS, go to the Conference Services web page. It can be accessed via Kutztown University's Faculty/Staff home page under the Faculty/Staff Tools section and following the Virtual EMS link or by visiting www.kutztown.edu/admin/confserv/ directly. Choose **Room Reservations** on the left side of the page. Next click the **Virtual EMS** link on the left-hand side menu.

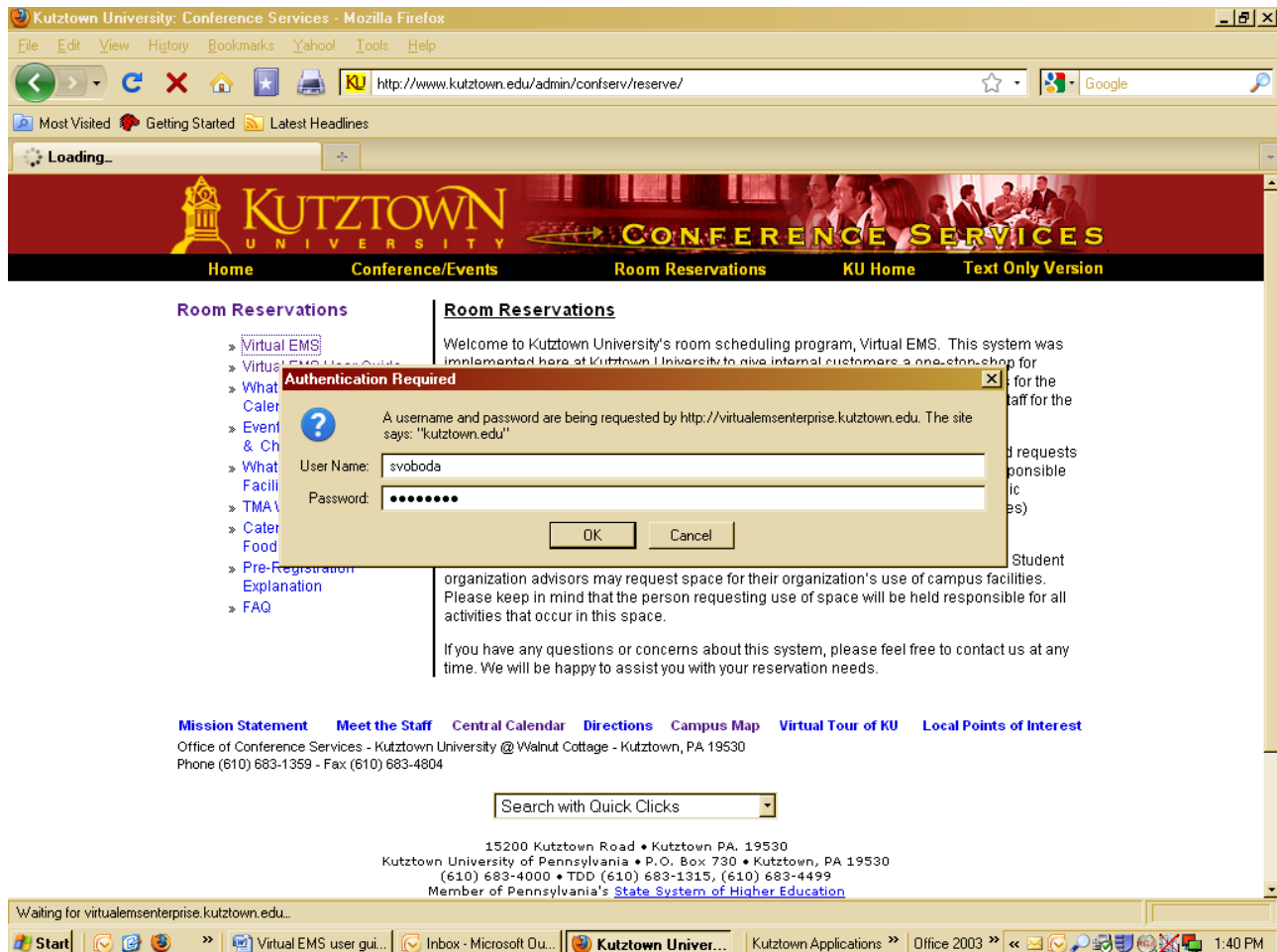


Figure 1 - Network Login Screen

You will now be asked to supply your University network login and password. This is your windows login/password (the first login/password that you use to access your computer each day). This step is required to gain access to the scheduling program and has been put into place as a safeguard against unauthorized use. Please keep in mind that this system is part of KU's intranet so therefore is not accessible from off campus without a link into the system (VPN, etc.).

Once you have entered your login and password you are directed to Virtual EMS home page:

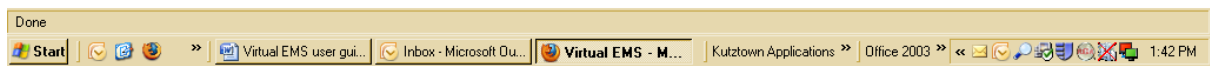
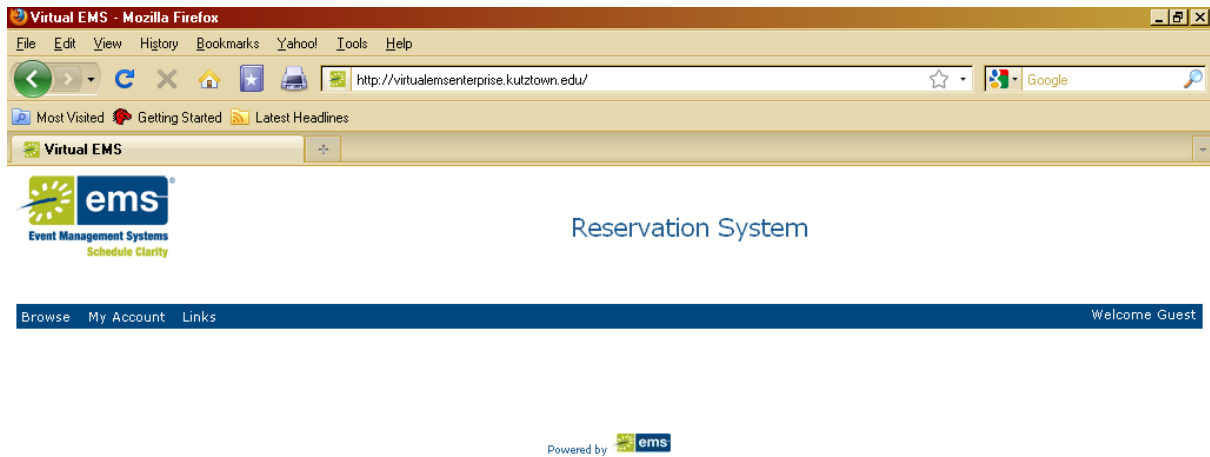


Figure 2 - Virtual EMS home screen

Once you've gotten to this screen, you are still considered a visitor since you have not actually logged into the system. As a visitor you may:

Browse for Events, Browse for Facilities, Browse for Space, Log in, Create an Account and Access Links

Once you create an account you will have full access to these options in addition to the ability to make room reservation requests and to manage all events you have submitted (including cancelling, updating, etc.).

My Account

Creating an Account

In order to create an account, please click on the **Create an Account** link under the **My Account** menu. The page below will be displayed. You will need to completely fill in the information listed below.

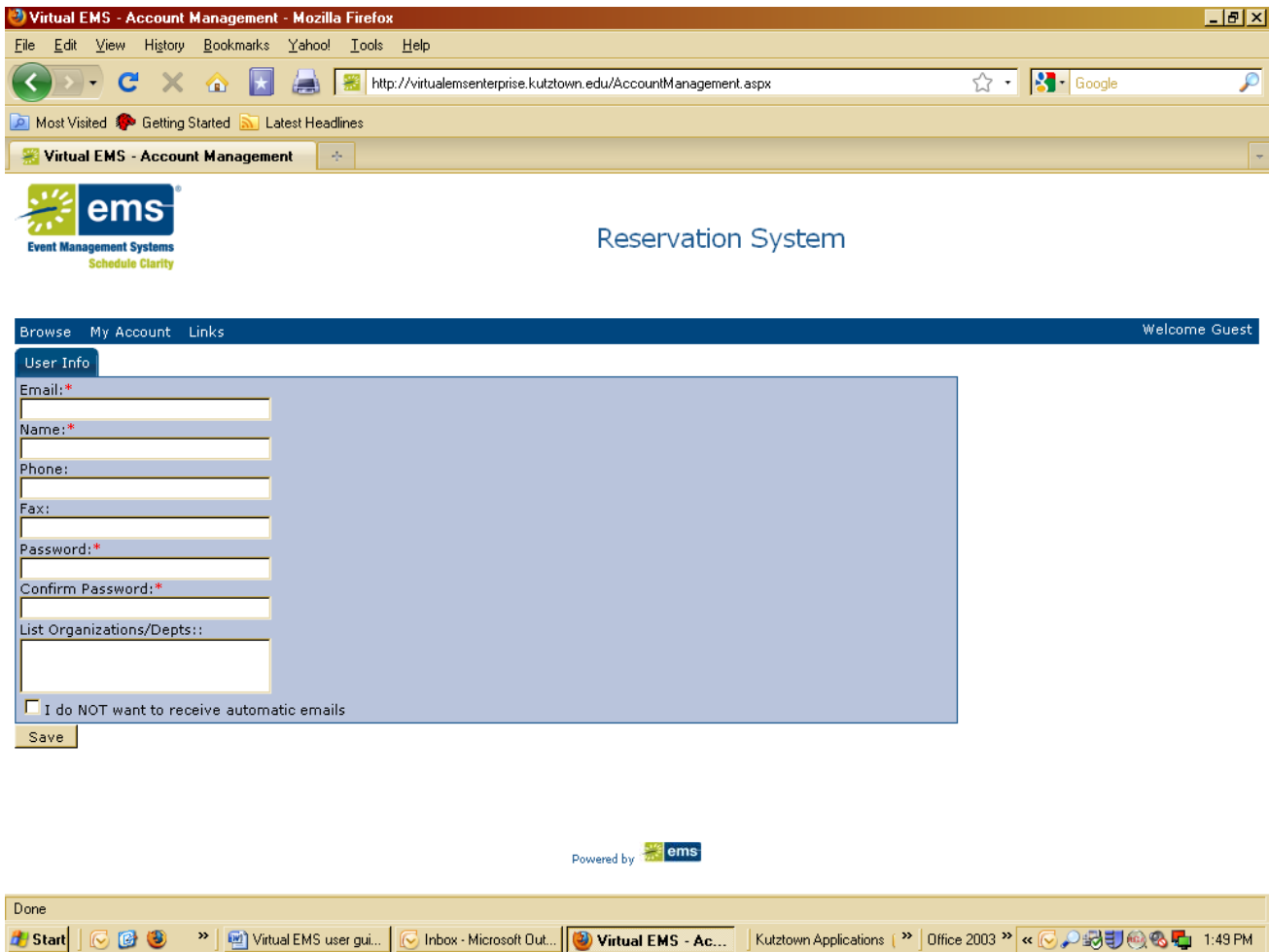


Figure 3 - Account Management screen

Personal Information

- E-Mail:** Only KU addresses should be entered here. All room reservation requests made by non-University accounts will be rejected. **This will be your "User ID" for the system.**
- Full Name:** As you would like it to appear in the system – please include capitalization.
- Phone:** Please enter the entire telephone number.
- Fax:** Please enter the entire facsimile number.
- Password:** This password is case sensitive. The system administrators do not know what your password is but if you forget it, you may send it to yourself from the log in screen.
- Confirm:** Retype the password you just entered above to confirm.
- List Orgs./Depts:** Please list all of the departments and/or organizations you may be making reservations for. This could include student organizations, multiple departments (if you work for two different depts., etc.)
- Email Opt Out:** You have the ability to stop the automatic email that you will receive upon completion of a reservation request. This does not prevent the administrators from sending you a confirmation email once the request has been processed and an actual reservation of space has been made.

Once you have filled in all the required fields and press the Save button you will get a system message telling you your account has been successfully saved. You are now logged into the system for the first time and should see your name on the right hand side of the blue menu bar.

Once you have created an account for the first time you will not need to do so again. You are allowed only one account on your e-mail address. There is no need to create a new account if you switch to a new department or organization.

Log in

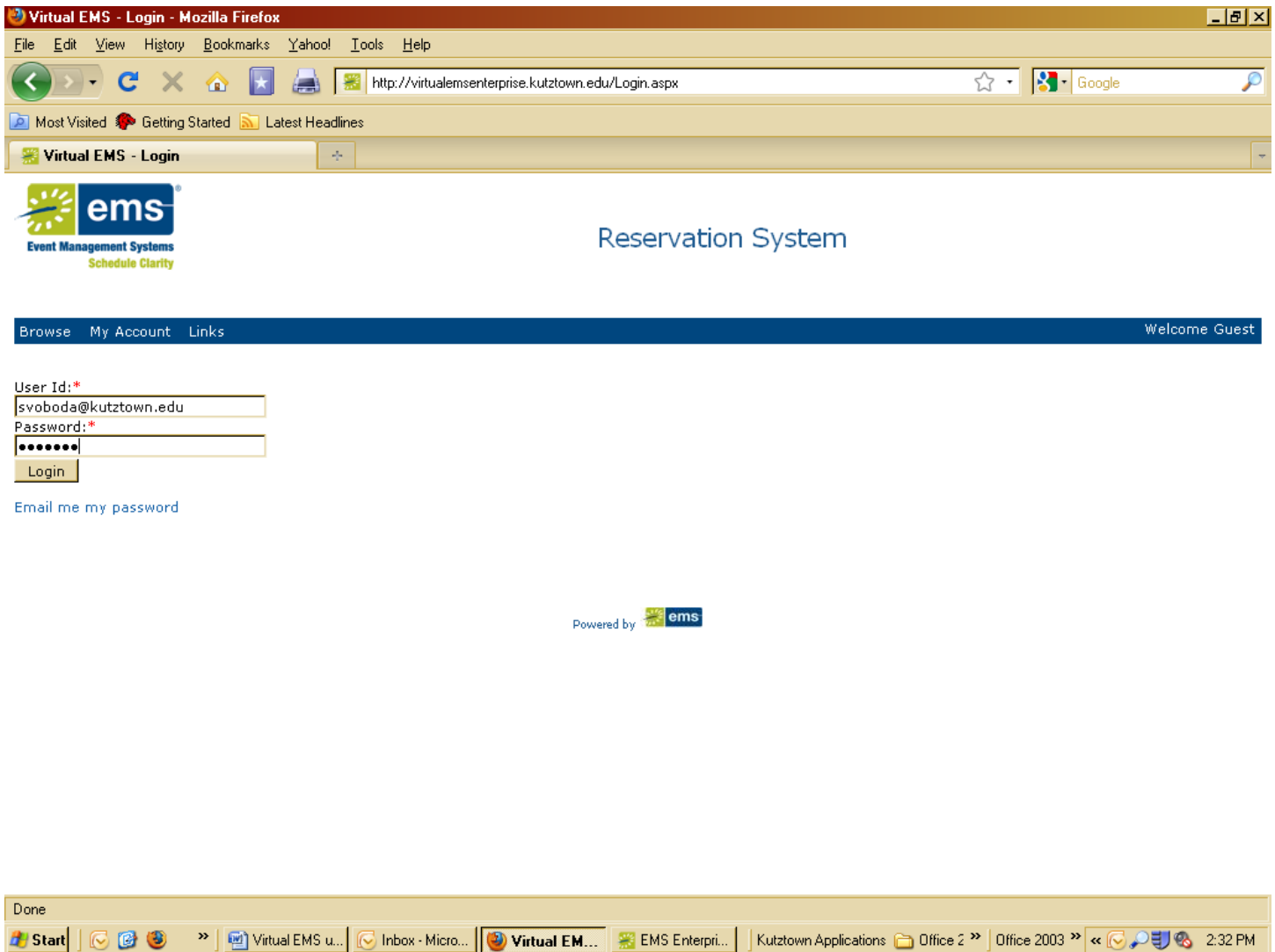


Figure 4 - Log In screen

Once you have created your account you may log in. Choose the **Log In** option from the **My Account** menu. You will need to enter your KU e-mail address and the password you created earlier. If you do not remember your password, simply click on the link titled **E-mail me my password** and it will immediately be sent to your e-mail's inbox.

Once you have logged in you will have full access to Virtual EMS (as you are no longer considered a visitor). This will allow you complete access to the following menu options: Browse (for Events, Facilities and Space, Locate Group), Reservations (Request and My Reservations), My Account (Log Out or Edit My Account) and Links.

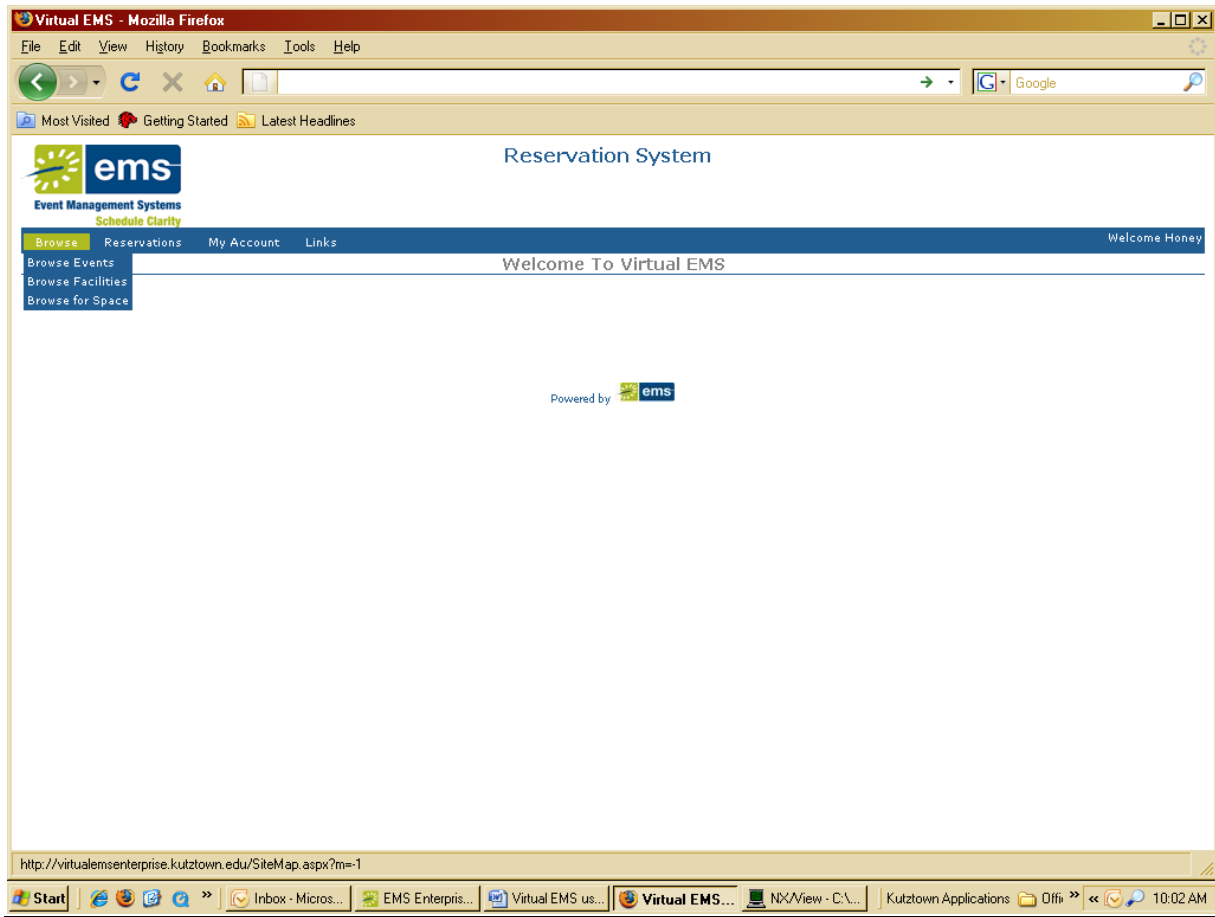


Figure 5 - The Browse menu

Browse

There are four options under the Browse Menu: Browse Events, Browse Facilities, Browse Space and Locate Group.

Browse Events

The Browse Events function displays a list of events for a day, week, month or a weekly or monthly calendar, depending on which option you choose. The actual date will always be the default date. The daily view is the default view.

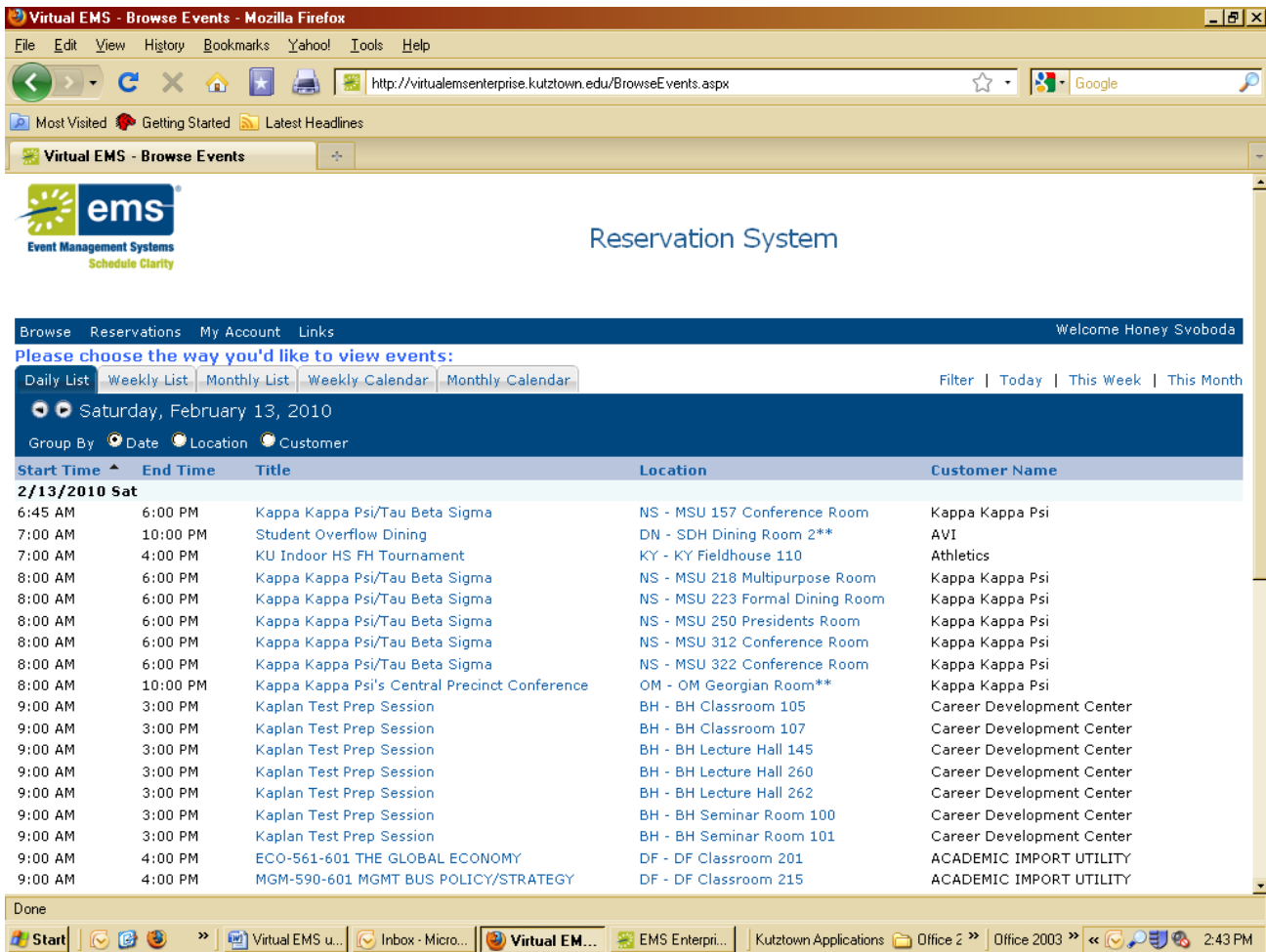


Figure 6 - An unfiltered listing of activity

Clicking **Filter** (located in the middle/right hand side just above the wide blue band) brings up fields that allow filtering of the list by Date, Building, Room, Event Type, Event Name and Customer Name. To filter the list of events, make an entry into one or more fields and click **Apply Filter**. Check the **Save** box to save your criteria for future use. Note: changes made in the **Filter** but not saved will continue to be displayed there until you leave **Browse Events** and return, at which time your saved settings (if created) are once again displayed.

Examples of using the filter (see Fig 7) and applying the filter (see Fig, 8) are shown below.

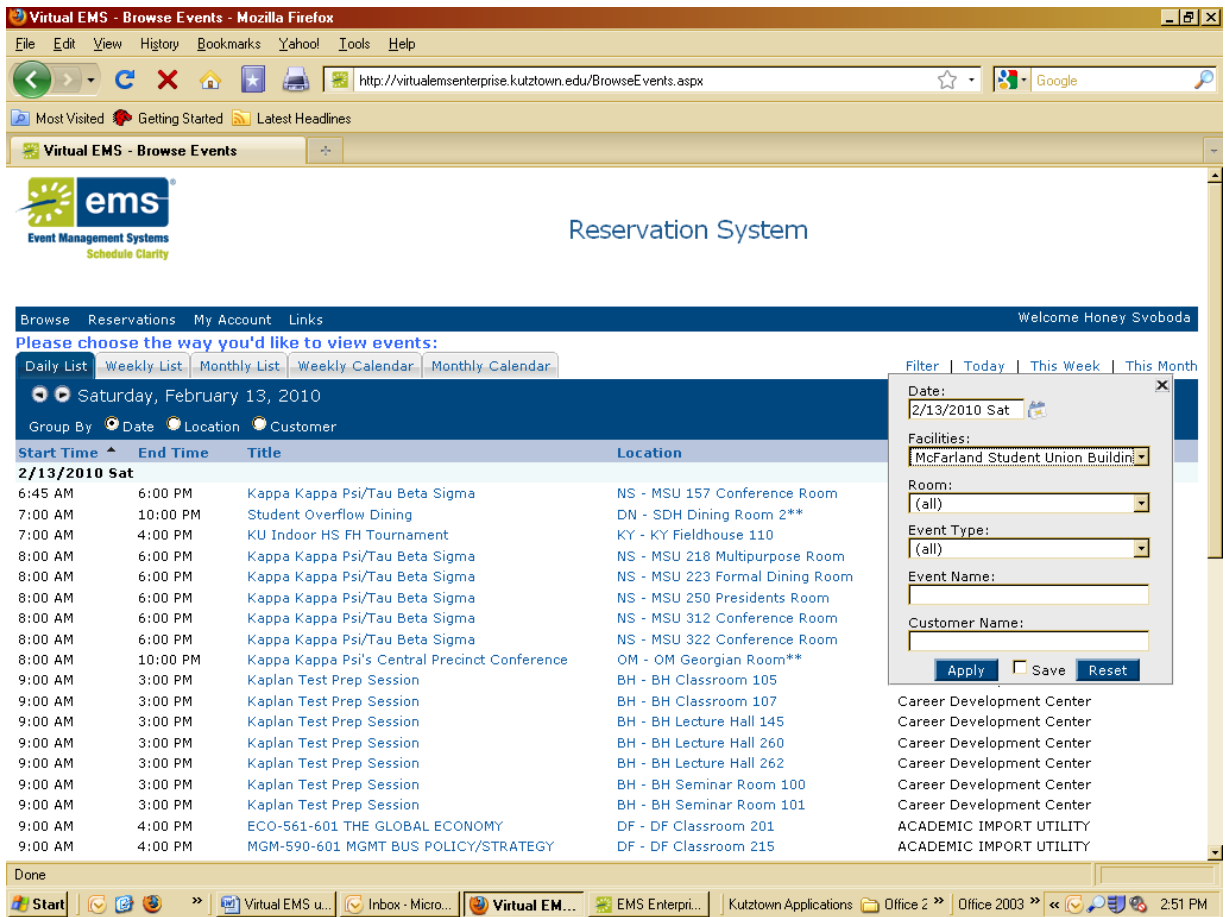


Figure 7 - The Filter drop down menu

Note – you can use partial names within the Event Name and Customer Name fields to get all results that contain what you have specified. You do not need to have the exact name match in order to use the filter effectively. With that being said, the partial listing that you specify must be spelled correctly.

In the example shown below, the Facilities field is being used to only see events that are located within the McFarland Student Union building. You can use any or all of the filters if you so choose.

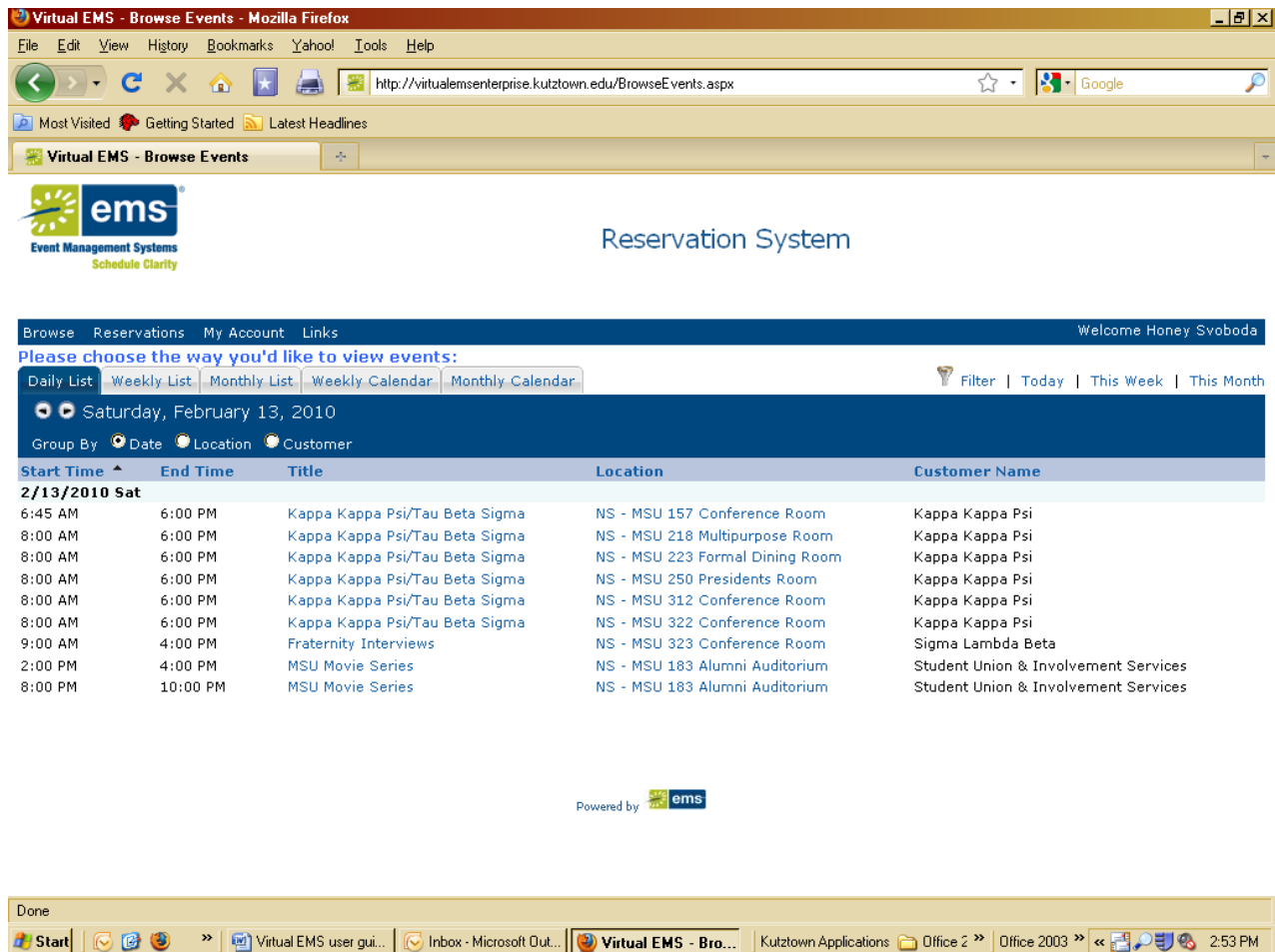


Figure 8 - The Filter applied to listing

Note – You can change dates or change your listing view without using the **Filter**. To change dates from the **Browse Events** page, use the arrows on the side of the calendar date heading. To see event information listed in a different format, click on the tab at the top of the calendar/list. To sort based on a particular column, click the column heading. To reverse the sort order click the heading again.

Browse Facilities

The **Browse Facilities** function displays a list of rooms by building along with the set up types and capacities that are valid for the rooms. People interested in scheduling an event can use this information to determine which rooms could accommodate their gathering. By default, the **Browse Facilities** display shows all buildings and all room types initially. To limit the display to a certain building and/or room type use the **Filter** to narrow down the listing. The display refreshes automatically when you apply the **Filter**.

Note – you can gather further information about a specific room by clicking on the room name (which appears as a blue link). If pictures of the room are available they will appear here but only if you are logged in. If you are browsing as a visitor the pictures of the room will not appear but the rest of the information can still be seen.

In Figure 9 below the **Filter** has been used to show only rooms in the McFarland Student Union Building. You will need to scroll down to see further information on that particular screen.

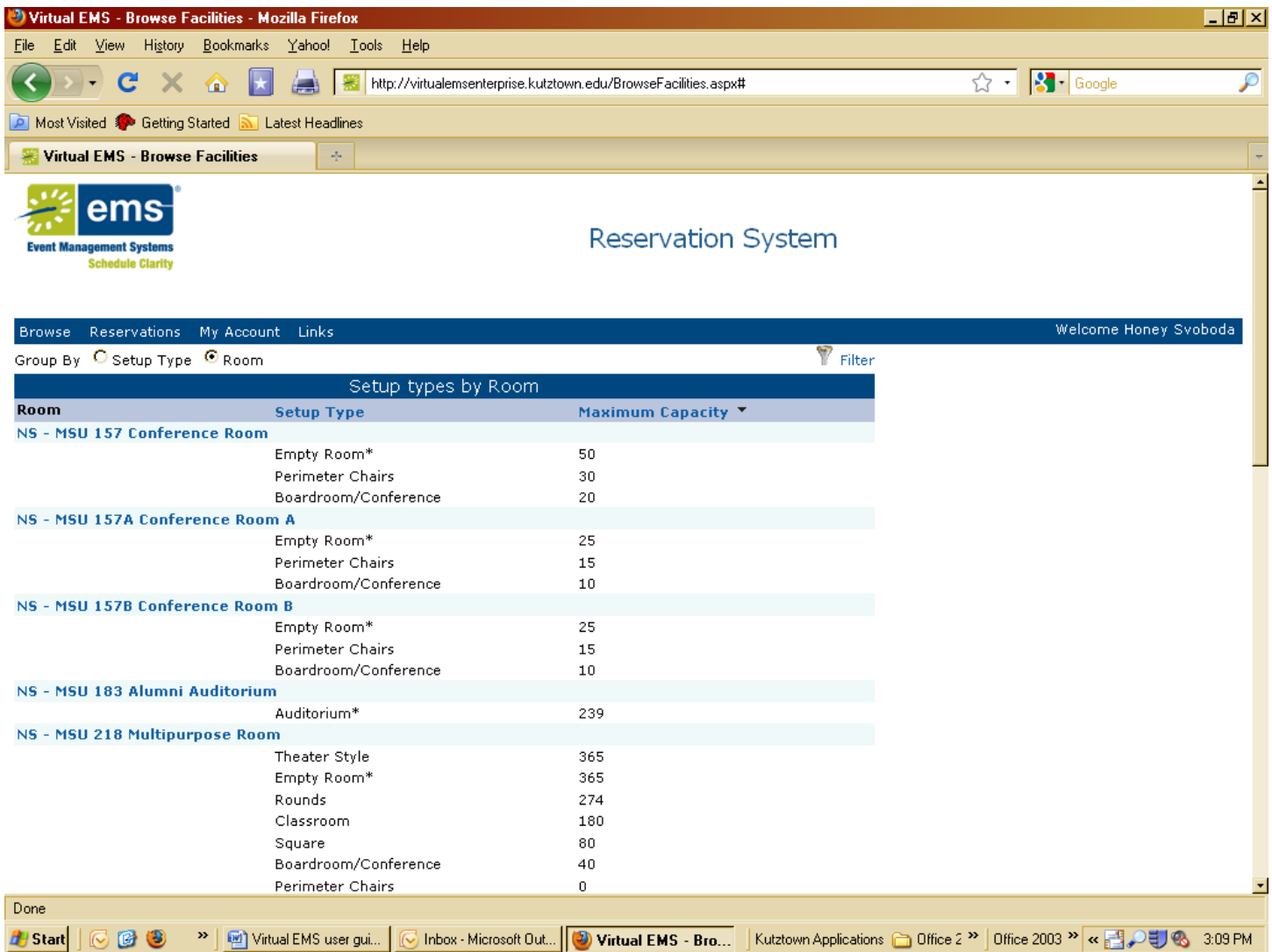


Figure 9 - Browse for Facilities screen

Browse for Space

The **Browse for Space** function shows what space is either booked or available on a particular date and shows this information in a grid format. To get information on a particular event listed in the grid you can hover over the event and a box will load that gives you information on the event including its current status and the name of the customer and contact person for the event (Figure 10 below).

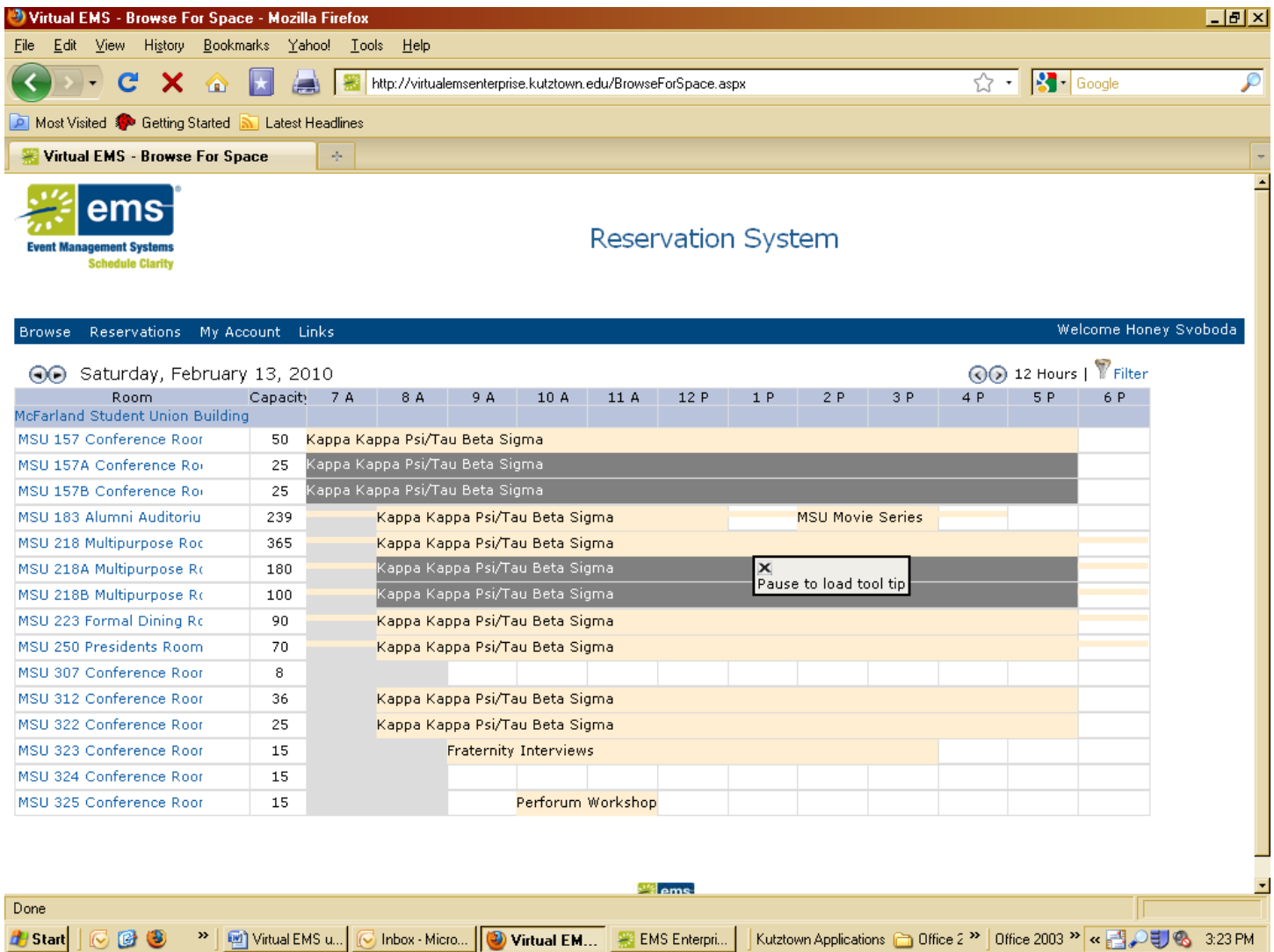


Figure 10 - Browse for Space screen

Locate group

The **Locate Group** function allows you to search for a particular customer (department or student organization) and the activities that are scheduled for the particular group on that date. Keep in mind it is **ONLY** for the current date and does not allow you to search using other criteria or dates.

In Figure 11 (below) the customer name chosen is "Kappa Kappa Psi" and the listing show all of the activities associated with this student organization on today's date.

Virtual EMS - Mozilla Firefox

File Edit View History Bookmarks Yahoo! Tools Help

http://virtualemsenterprise.kutztown.edu/LocateGroup.aspx

Virtual EMS

Event Management Systems
Schedule Clarity

Reservation System

Browse Reservations My Account Links Welcome Honey Svoboda

Customer Name: kappa kappa psi Locate

Time	Title	Location
6:45 AM - 6:00 PM	Kappa Kappa Psi/Tau Beta Sigma	NS - MSU 157 Conference Room
7:00 AM - 10:00 AM	Kappa Kappa Psi Conference	RS - RS Arena - 100
8:00 AM - 6:00 PM	Kappa Kappa Psi/Tau Beta Sigma	NS - MSU 322 Conference Room
8:00 AM - 6:00 PM	Kappa Kappa Psi/Tau Beta Sigma	NS - MSU 312 Conference Room
8:00 AM - 6:00 PM	Kappa Kappa Psi/Tau Beta Sigma	NS - MSU 250 Presidents Room
8:00 AM - 6:00 PM	Kappa Kappa Psi/Tau Beta Sigma	NS - MSU 223 Formal Dining Room
8:00 AM - 6:00 PM	Kappa Kappa Psi/Tau Beta Sigma	NS - MSU 218 Multipurpose Room
8:00 AM - 1:00 PM	Kappa Kappa Psi/Tau Beta Sigma	NS - MSU 183 Alumni Auditorium
8:00 AM - 10:00 PM	Kappa Kappa Psi's Central Precinct Conference	OM - OM Georgian Room**

Powered by Virtual EMS

Done

Start Virtual EMS u... Inbox - Micro... Virtual EM... EMS Enterpri... Kutztown Applications Office 2 Office 2003 3:34 PM

Figure 11 - Locate Group results

Reservations

Room Request

The **Room Request** tool is used to make a request for space on campus. It can be used to find all available spaces on a single date or multiple dates in one operation, and to book one room or multiple rooms.

To create a reservation, click **Reservations** and select the **Room Request** function.

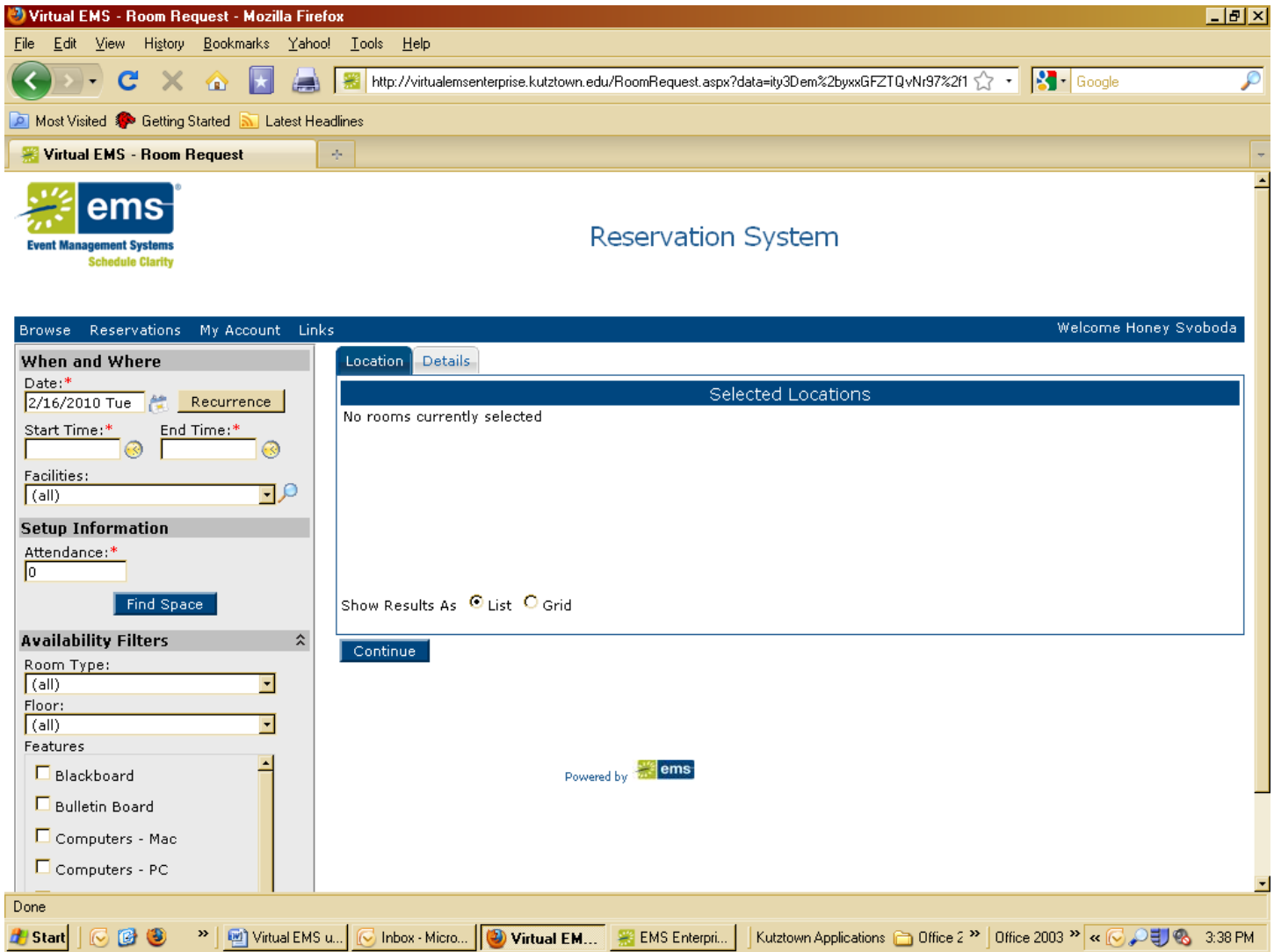


Figure 12 - Reservation Request screen

For any request you make, at minimum you will need to supply the date(s), start time, end time and the number of people you expect to attend. This information can be entered on the left side of the window.

When and Where

For a single-day event, enter the date manually or select it by clicking the calendar icon next to the date field. You will then need to supply the start and end times. (See Figure 12)

For multi-day events, select the Recurrence button located to the right of the date field and a pop-up menu will appear allowing you to select a date pattern. (See Figure 13)

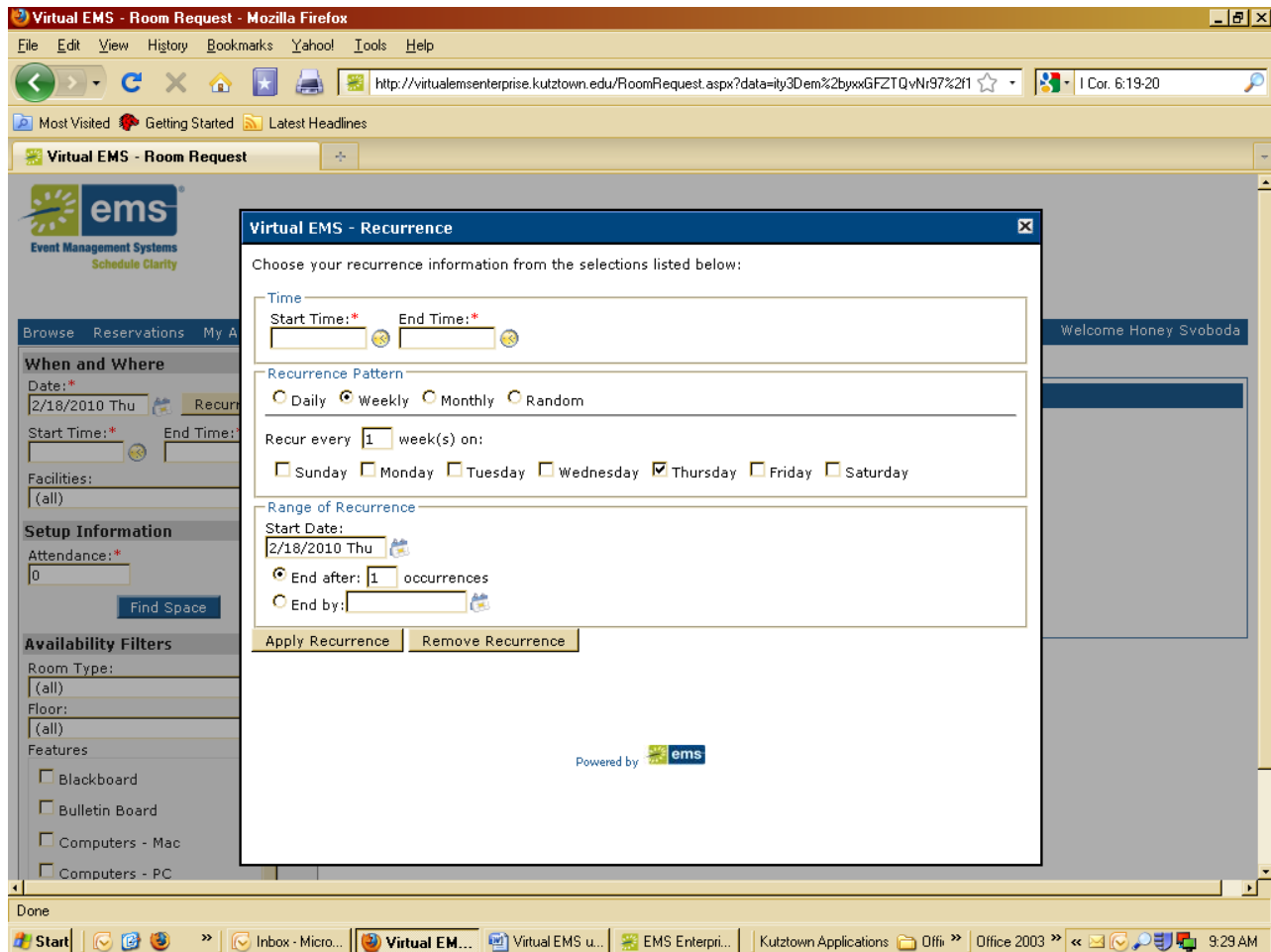



Figure 13 – Reservation Request Recurrence Screen

From the **Recurrence** pop up box you will need to provide your Start and End Times. For any recurring activity, these times must be the same. If you have multiple events that you want to keep together in the same reservation use the single date method and request them one date at a time. Each date/time can be chosen prior to providing the overall event details of the reservation.

Next you must choose your **Recurrence Pattern**. Depending on your choice of pattern you will be asked further information in regards to the pattern. For instance, in the example shown above the Weekly recurrence pattern has been chosen. The next information required is what day or days you are requesting. Or as another example, if you have a meeting that is held the third Thursday of every month, choose the Monthly recurrence pattern and then the system will ask you to provide the information relative to that choice (third week on a Thursday). If you happen to have an event that will be held at the same time on each occurrence but doesn't have a recurrence pattern, choose Random to hand pick the dates of the activity.

Next you will need to choose the **Range of Recurrence**. This allows you to choose how long the recurrence should occur by choosing either the number of times this event should be requested or you can provide an actual end date for the request.

Finally you will need to **Apply Recurrence** to complete the date/time submission. Once you submit the recurrence pattern you will notice that the pattern and times chosen will be listed under the **Where and When** heading. If there is a mistake you may hit the **Recurrence** button again and either change the pattern information or **Remove Recurrence** altogether by choosing that option (located to the right of the **Apply Recurrence** button).

For both single and multi-day events you must choose the **Facilities** you are interested in searching for room availability. You may leave the selection at '(all)' to see every available space on campus that meets the criteria you listed above, or you may limit your search to either one specific building or multiple buildings. To choose only one building to search simply pick it from the drop down list. If you would like to search for space in specific buildings but not all buildings, click the blue  to the right of the **Facilities** box to get a drop down list allowing you to select multiple buildings at one time.


Set up Information

Attendance is required in order to make a room request. Enter a number in the Attendance field. Note – this number is important and should be provided as a real estimate of attendance. Rooms that are too small for your event will be automatically ruled out as an available option.

From here you can press the Find Space button to get a listing of all spaces that match your criteria. You can also hit the grid button listed to the right of the Find Space button. Please note that this option shows all of the available facilities but also shows other scheduled events (if there are any). You can switch between these two views if you choose to view by grid initially.

Availability Filters

You may also choose to narrow your selections down by choosing the type of room, the floor the room is located on or specific room features. These options will help you if you have a specific need to consider. You may check them either before you use the Find Space button or you can choose them afterwards and hit the Find Space button again.

Once you hit the Find Space button a list of available rooms will appear in the lower portion of the screen (see example below). You will notice that there is a green  listed to the left of every available room, a listing of availability, the room name and the maximum capacity of the room.

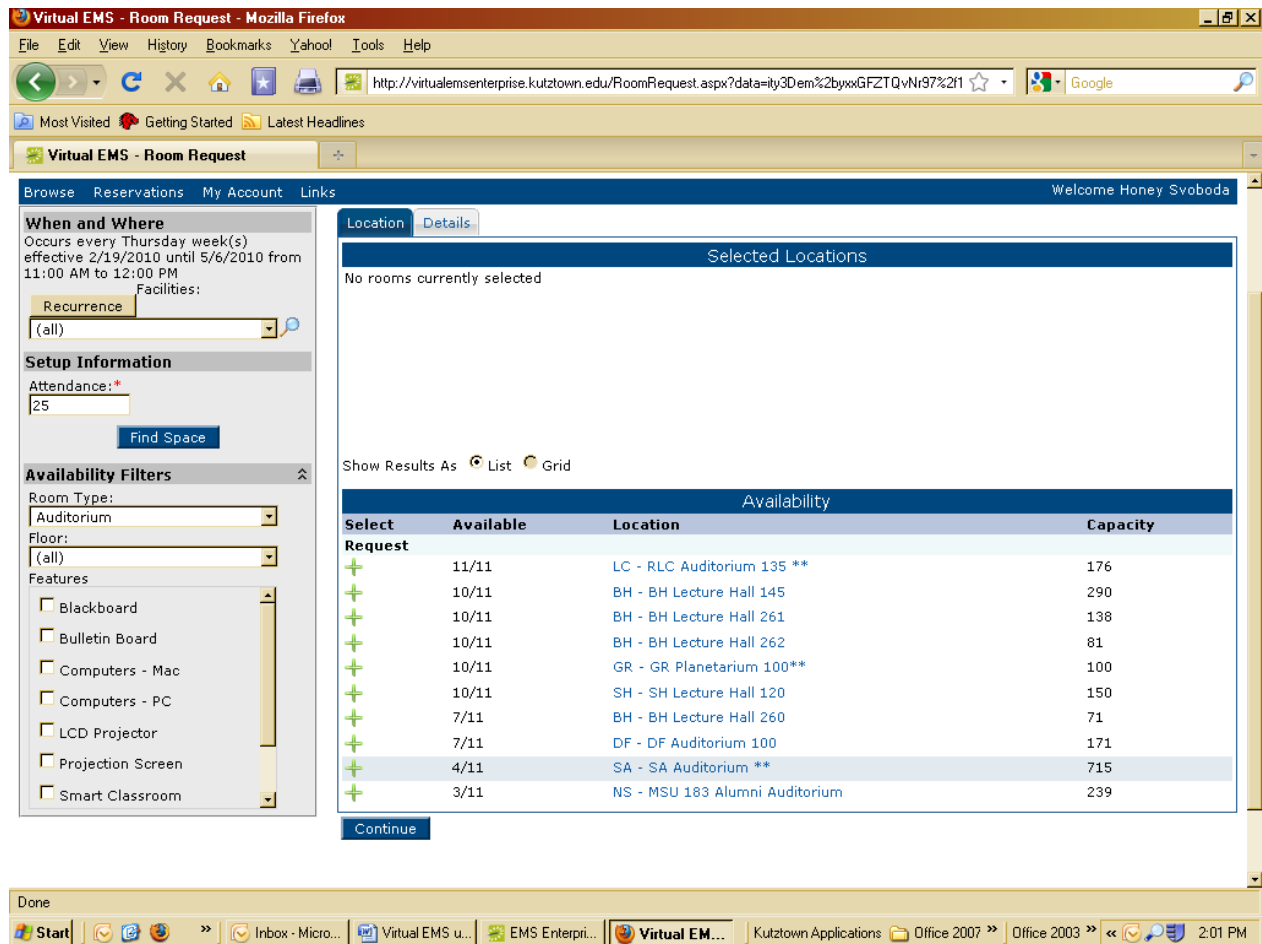


Figure 14 - Reservations screen after criteria entered

The green is used to choose the room for your request. If you click on this icon your chosen room will be placed in the upper portion of the window as the space(s) you'd like to reserve. You may pick any or all of the selections provided they meet your needs.

The entry in the Available column (e.g. 7/11 in DF Auditorium 100) indicates the number of dates on which this room is available (7 in this example) and the total number of dates requested (11 in this example). To get a list of the dates when the room is not available, hover over the availability number and a list of dates and the reason why the room is not available will show up. This information can help you find an alternate facility on the dates that aren't available.

For more information on a particular room that is listed you may click the name. You can get specific room information and have access to pictures if they are downloaded for that particular space. And finally, the capacity listed will be the maximum capacity of the room.

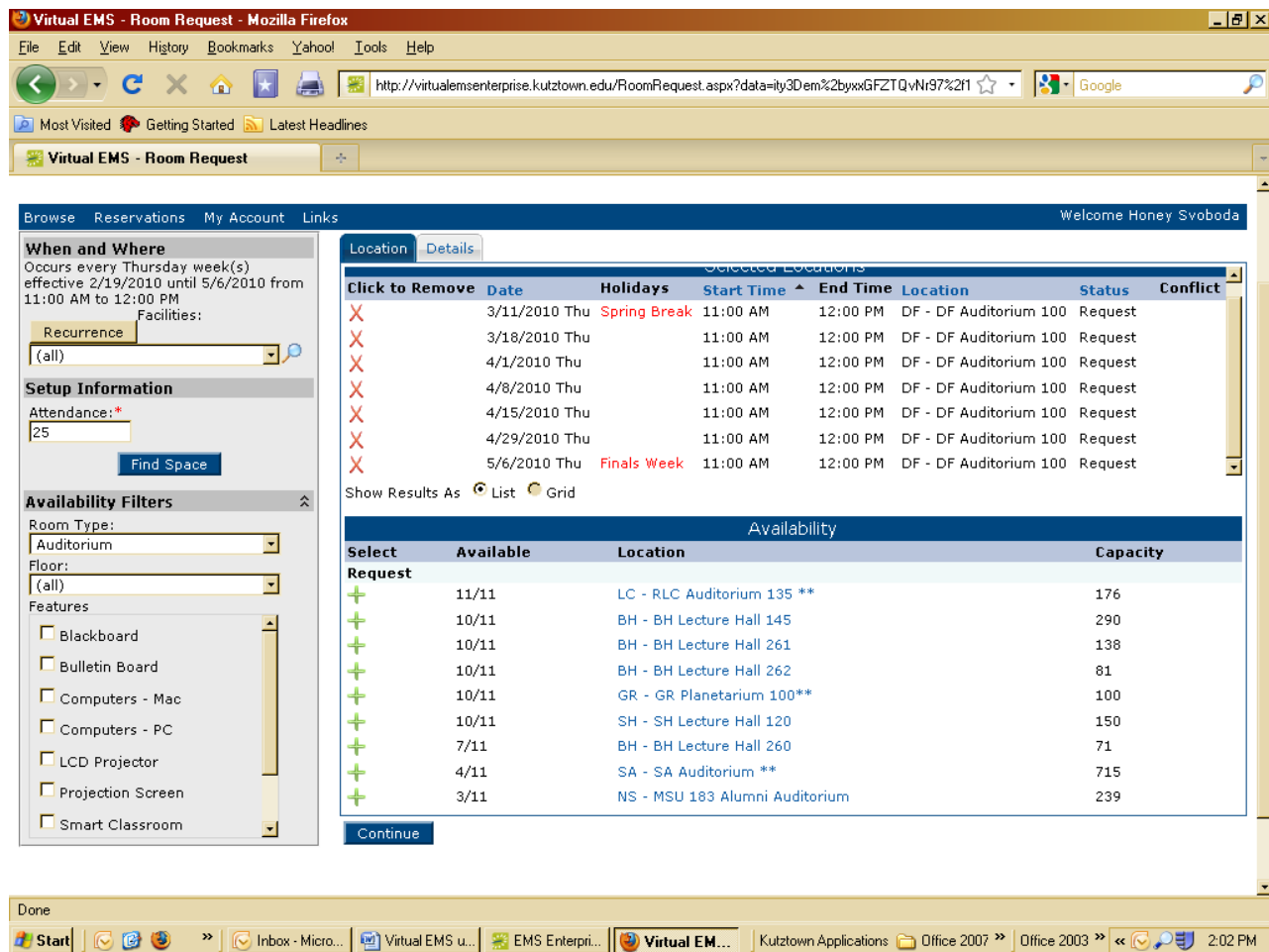


Figure 15 – Location Selection screen

As described above, to continue through the request process you will need to select the desired room from the list of rooms that appear. Once you make your selection and it is transferred to the upper portion of the selection window you can add additional dates/times by changing your criteria and finding other rooms (perhaps to reflect alternate times for related event, or perhaps to find rooms for the dates that couldn't be accommodated with your original request). This is a great way to keep your associated events contained within one reservation.

If you do not find an acceptable room you will need to modify your criteria. Perhaps you have made your request too narrow by placing a lot of restrictions on your request (through either filters or attendance). If you need the exact criteria you have entered and there are no acceptable options, you may have to reevaluate your event. This could include a change of date or location of the event.

You have the ability to remove dates once they've been placed into the upper selection window. For instance, you may notice that a particular meeting occurs during Spring Break and you may not need the room on that date. To remove any date you no longer need, simply click the red **X** to remove the date.

Once the upper selection window contains the dates and locations you would like to choose you will need to provide more information about your event by using the **Details** tab. You can access this tab from either above the top of the upper selection window or by pressing the **Continue** button located beneath the lower selection window. Keep in mind that you can toggle between the **Location** and **Details** tabs. Once the information is provided on both tabs you may **Submit Your Request** from either tab.

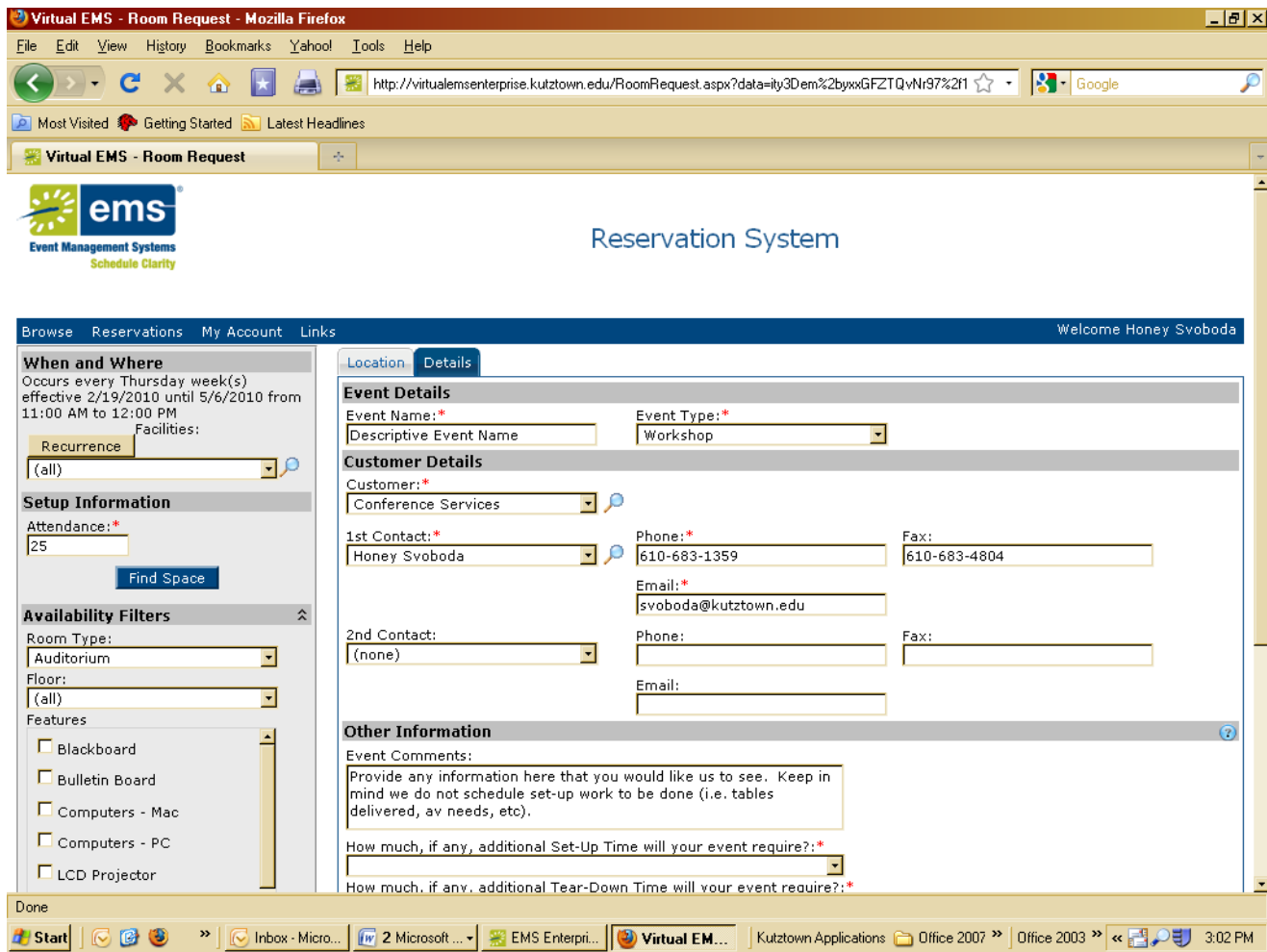






Figure 16 - Upper portion of Details screen

Event Details

Once you are on the **Details** tab, you will need to fill in the requested event details. Enter the event name and select an event type. (**Note:** the event name should be as descriptive as possible. It will be displayed in the browser and calendars exactly as you have it typed.)

Customer Details

Next you must supply the **Customer Name** (this is either the KU department name or student organization name). If you have used the system in the past you are able to use the drop down menu to select the appropriate customer name. If you are new to the system, need to change your department name or make an addition to your department list you can do so by clicking on the blue  to the right of the **Customer Name** field.

Clicking on the hour glass icon  will open a box that will allow you to search for the **Customer** that you wish to associate with your account. The top portion of this box contains the name of the **Customer** that is associated to your account. Below this is the search box. You may use partial names to get a listing of all groups that contain the search string you've entered. Once you locate the correct **Customer**, simply click the green  to select it. Once selected, the name will move to the top portion of the box and is now associated with your account. In the same way, you may remove **Customer** that you wish to remove from your account by clicking the red . To get out of the screen simply close the box from the top right hand corner.

Note: you can only associate **Customers** that are currently built into the system. If you do not see the **Customer** that you are looking for, please contact Conference Services. We will be able to add them to the system or modify the name of an existing **Customer** if there is such a need.

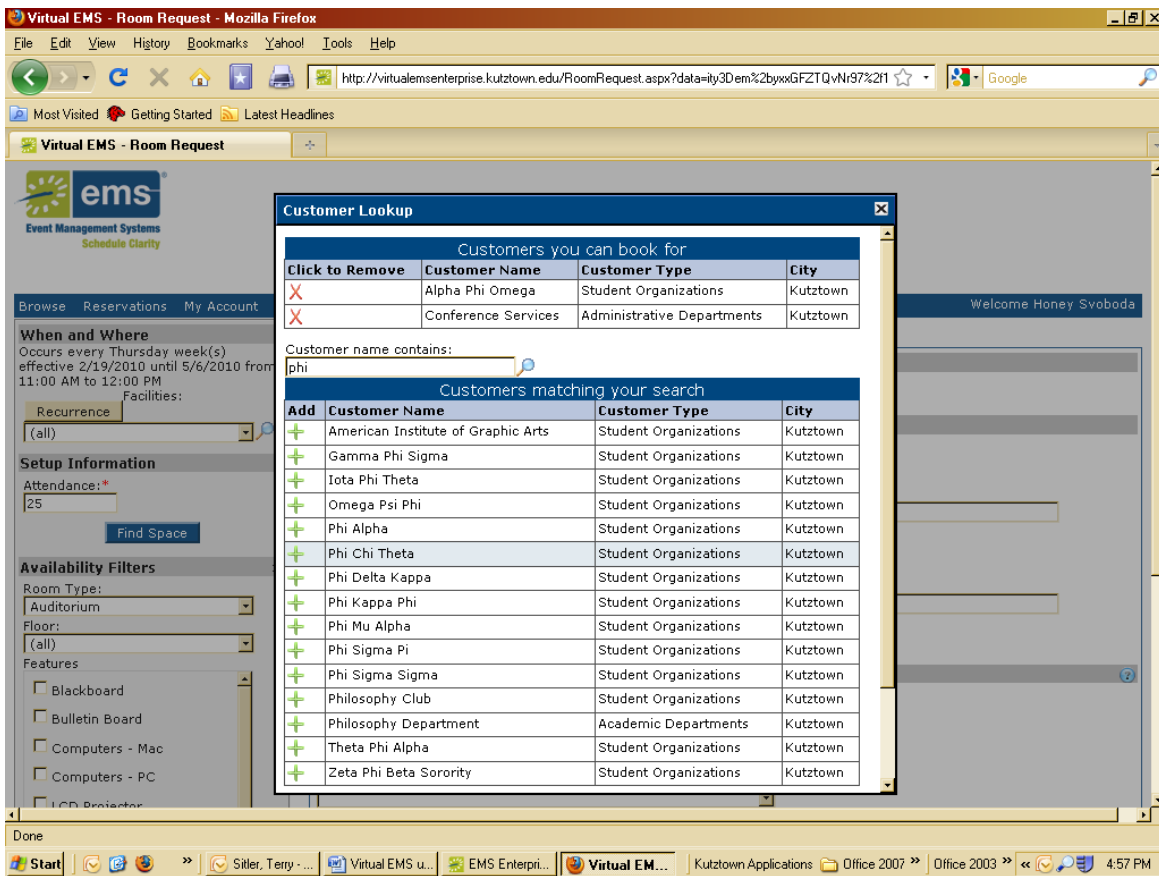


Figure 17 - Associating customers to your account

Once you have selected the **Customer** you will have access to drop down list all of the **Contacts** currently associated with the **Customer**. You can choose your name from the list and it will automatically fill in the rest of the required information. If your name is not yet associated with the **Customer** you are making reservations for, choose **Temporary Contact** and you can manually fill in your contact information including name, email address and telephone number.

Once a **Temporary Contact** is submitted, the Conference Services office is flagged and you will be added as a **Contact** of the **Customer** you are associating yourself with. (Note - we will verify that you belong to the KU department name or student organization prior to making this connection to the **Customer**.)

The **Secondary Contact** is optional. You may add another person to the reservation or you can leave it empty. If another contact person is added they will also receive the system generated confirmations. Please keep in mind that student email addresses or non-KU email addresses will not be processed.

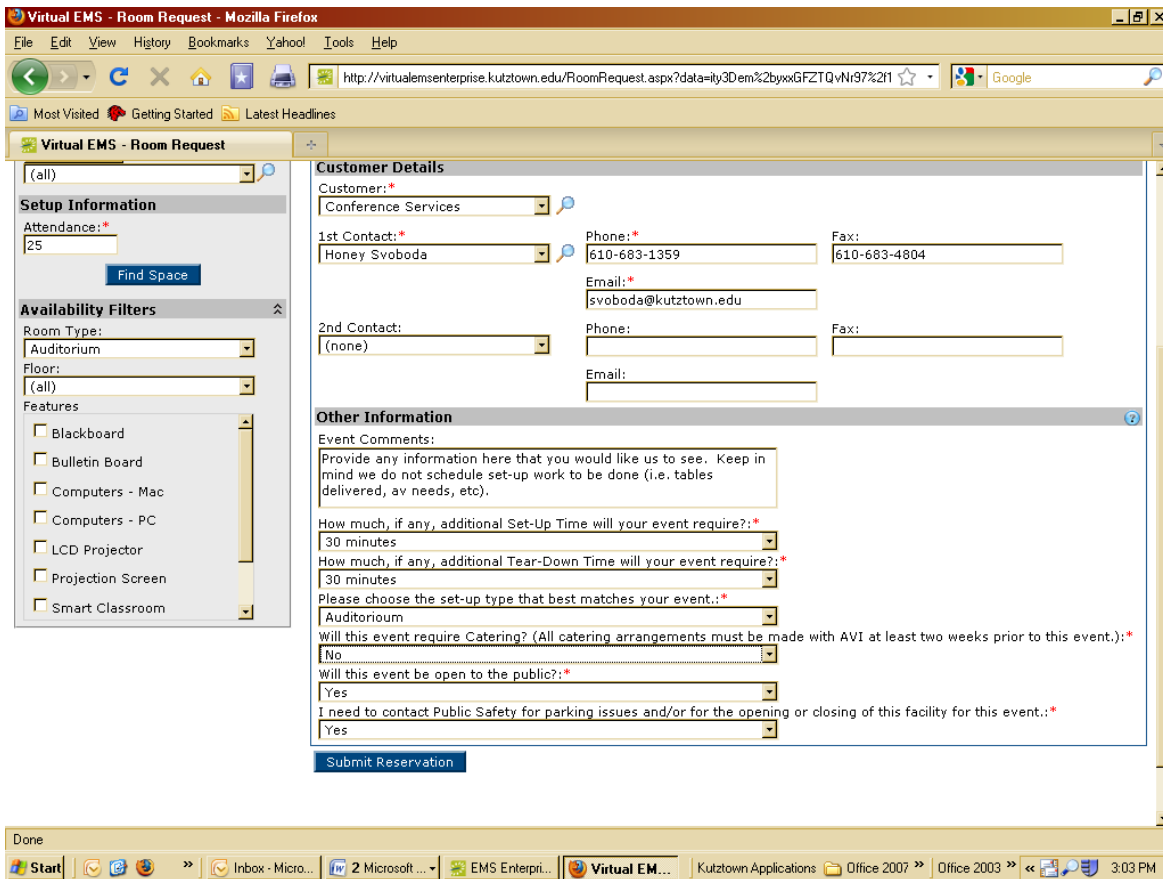


Figure 18 - Lower portion of Details screen

Other Information

The **Event Comments** box is an optional text box. You can use this box to provide event information. Keep in mind that the information submitted here will only be seen by Conference Services. You will still need to place work orders and or submit catering requests through the appropriate channels. (Keep in mind that links to these services are provided in the blue menu bar at the top of the screen. You can click on a link to open a new web page without affecting your reservation request page.)

Finally there are five questions that must be answered in order to complete the reservation request process. These questions are designed to help you think about details of your event such as pre and post event time needs, a potential room set up, whether this is a private or public event (which is used for reporting purposes) and whether you have a need for catering or public safety.

Once this information is filled in completely, click on the **Submit Reservation** button to complete the reservation request. You are then directed to a **Reservation Detail** screen (see Figure 19). You will also receive an email from the system stating the **Reservation Request Summary** (assuming you have not opted out of receiving them).

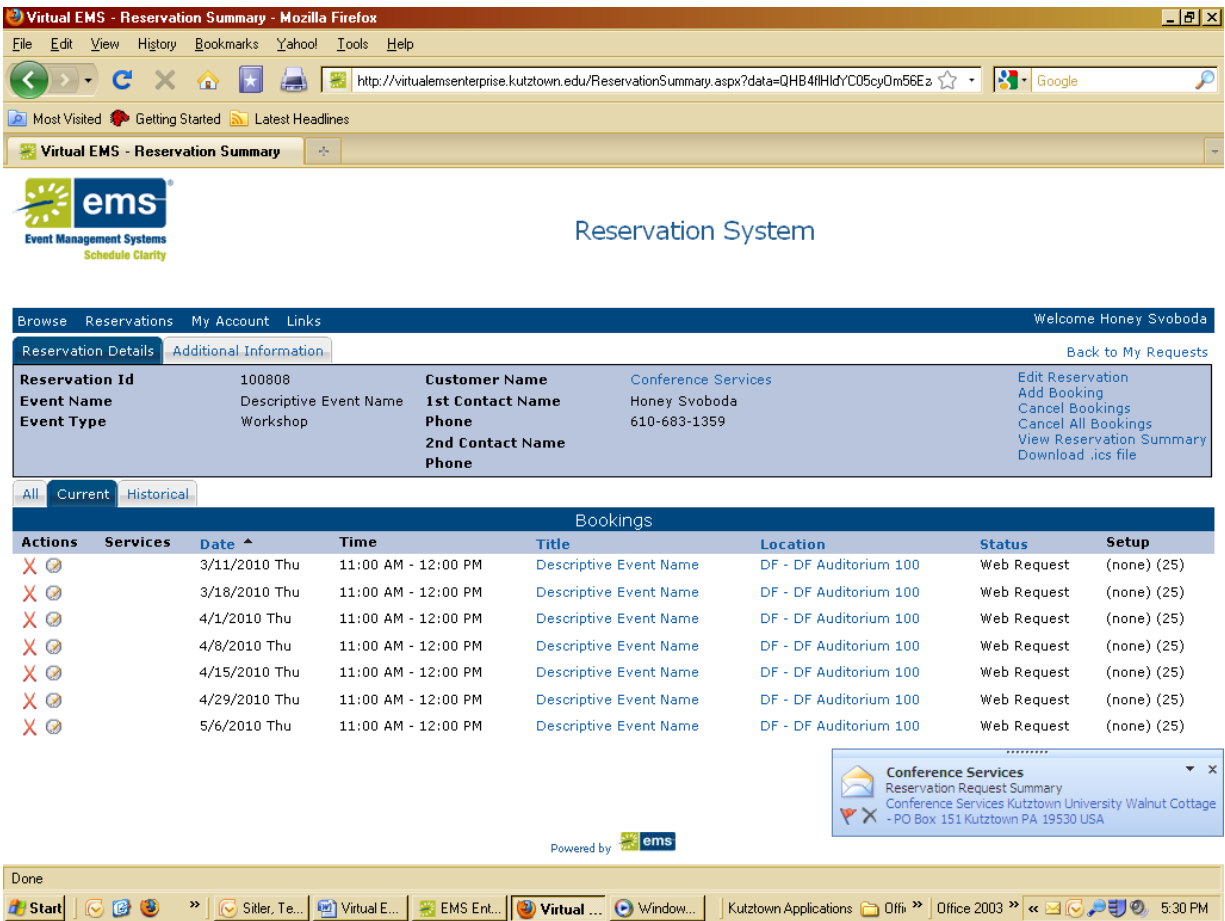




Figure 19 - Reservation Request Summary screen

This screen provides all of the details of the request that has been submitted. There are several things you can do to manage the request even further.

If you look at the right hand side of the screen you will see several blue links. These are the fastest ways to manage your booking details. From here you can:

- Edit Reservation:** This will allow you to update the name of the event, type of event, customer and contact information.
- Add Booking:** This will allow you to add more booking dates to this reservation.
- Cancel Bookings:** This will allow you to cancel bookings individually.
- Cancel All Bookings:** This will cancel all of the bookings associated with the reservation in one shot.
- View Reservation Summary:** This will provide a copy of the Virtual EMS request summary.
- Download .ics File** This will allow you to add the booking details to your personal calendar.

Below this, notice the red  on the left hand side of the booking detail line. You may cancel a booking detail from this area as well. Clicking on this will only affect the date chosen.

Next is the white time clock . This will allow you to change the time for a booking item – but only if the space is open for the time you are now requesting. It will provide the screens necessary to make this adjustment.

You can click on the **Event Name** since it is a blue link. This will allow you to add specific dates to your personal calendar. You can also click on the **Location** to get further information on the room you have chosen to hold your event.

The **Status** will keep you up to date with the current status of your request. Notice below the two changes to the reservation statuses as reflected below in Figure 20:

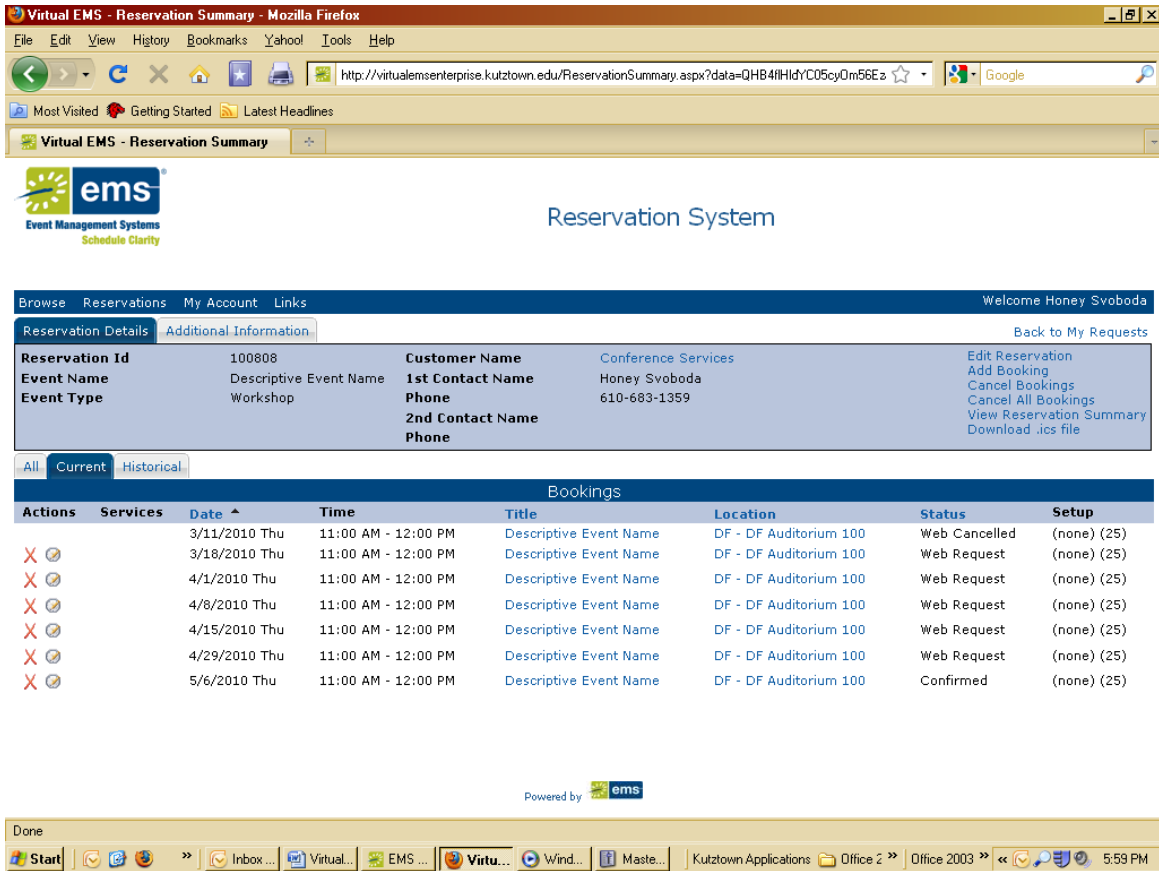




Figure 20 - Reservation details screen

On the first line of the booking detail you will notice that there is no longer an  or  option. This is because the event has been cancelled from within the **Reservation Detail** screen. The status is now **Web Cancelled**. (If the event had been cancelled through the Conference Services office the status would be listed as **Cancelled** instead of **Web Cancelled**).

On the last line of the booking detail you will notice that the **Status** is now listed as **Confirmed**. This means that the booking has been processed by the Conference Services office and the room reservation process has been completed.

Online changes to reservation requests or confirmed reservations can be made only by the person who submitted the request. Once a change has been made to a **Confirmed** event, the status will be returned to the **Web Request** status.

It is important to keep in mind that there is a three (3) day window for all reservation request submissions and changes. This procedure was created to ensure that all requests can be processed prior to the actual event date. If you need to make an initial reservation or an update to an existing reservation within this time frame you must contact the Conference Services office via e-mail.

You have access to all of your events – both past and current by **Viewing Your Requests**. This can be done from the **Reservation Details** screen (look for the **All**, **Current** and **Historical** tabs, located above the Actions column) of a reservation or by choosing **View My Requests** from the **Reservations** option located in the blue menu bar.

View My Requests

The screenshot shows a web browser window titled "Virtual EMS - View My Requests - Mozilla Firefox". The address bar shows the URL "http://virtualemsenterprise.kutztown.edu/BrowseReservations.aspx". The page header includes the "ems" logo (Event Management Systems) and the text "Reservation System". Below the header is a navigation menu with "Browse", "Reservations", "My Account", "Links", and "Admin". A user greeting "Welcome Honey Svoboda" is visible in the top right. The main content area features a "Current" tab selected, with a "Historical" tab also present. There are input fields for "Reservation Id:" and "Event Name:" and a "Quick Search" button. A "Show Cancelled" checkbox is located in the top right of the table area. The table below lists reservations with columns: Id, Name, Customer, First Booking, Last Booking, Status, Location, and Has Services. The table contains 14 rows of reservation data.

Reservations							
Id	Name	Customer	First Booking	Last Booking	Status	Location	Has Services
96335	US Youth Soccer ODP	Conference Services	7/14/2009 Tue	7/17/2010 Sat	Confirmed	Multiple	No
87625	Reading Hospital Center for Mental Health	Conference Services	9/3/2009 Thu	8/26/2010 Thu	Confirmed	Boehm Science Building - BH Seminar Room 100	No
87767	YMCA Swim team	Conference Services	9/15/2009 Tue	4/23/2010 Fri	Confirmed	Multiple	No
91487	YMCA Swim Lessons	Conference Services	10/18/2009 Sun	3/14/2010 Sun	Confirmed	Keystone Hall - KY Swimming Pool - 115	No
96349	Blue Mountain Academy	Conference Services	1/23/2010 Sat	3/27/2010 Sat	Tentative - Pending Paperwork	Keystone Hall - KY Swimming Pool - 115	No
96639	SOPA Committee Meetings	Conference Services	2/11/2010 Thu	4/29/2010 Thu	Confirmed	Multiple	Yes
97291	O'Pake Small Business development presentation	Presidents Office	3/4/2010 Thu	3/24/2010 Wed	Confirmed - Pending Auth.	Multiple	No
97311	EAC Meeting	Conference Services	3/17/2010 Wed	3/26/2010 Fri	Confirmed - Pending Auth.	McFarland Student Union Building - MSU 323 Conference Room	No
96682	Regensperger Event	Conference Services	3/27/2010 Sat	3/27/2010 Sat	Confirmed - Pending Auth.	McFarland Student Union Building - MSU 250 Presidents Room	No
79390	HMC Boy Scouts First Aid Meet	Conference Services	3/29/2010 Mon	3/29/2010 Mon	Confirmed	Keystone Hall - KY Arena - 100	No
100244	Apperson Education Test Scoring Scanner Demo	Conference Services	4/1/2010 Thu	4/1/2010 Thu	Confirmed - Pending Auth.	McFarland Student Union Building - MSU 322 Conference Room	No
97760	Hamburg Track & Field	Conference Services	4/1/2010 Thu	4/1/2010 Thu	Confirmed	Sports Field/Court - USF US 1 - University Stadium	No

Figure 21 - My Requests screen listing current requests

When viewing the list, there are options for seeing current reservations (reservations with one or more bookings on or after today's date) or historical reservations (those with no bookings on or after today's date.)

Both types of reservations can be viewed by clicking on the **Event Name** (see Figure 22 below). Current reservations can be edited or cancelled, provided that the modification is made far enough in advance of the next booking date (3 days). Check the **Show Cancelled** box to include cancelled events in the list. These items will appear with a strike through all of the information listed.

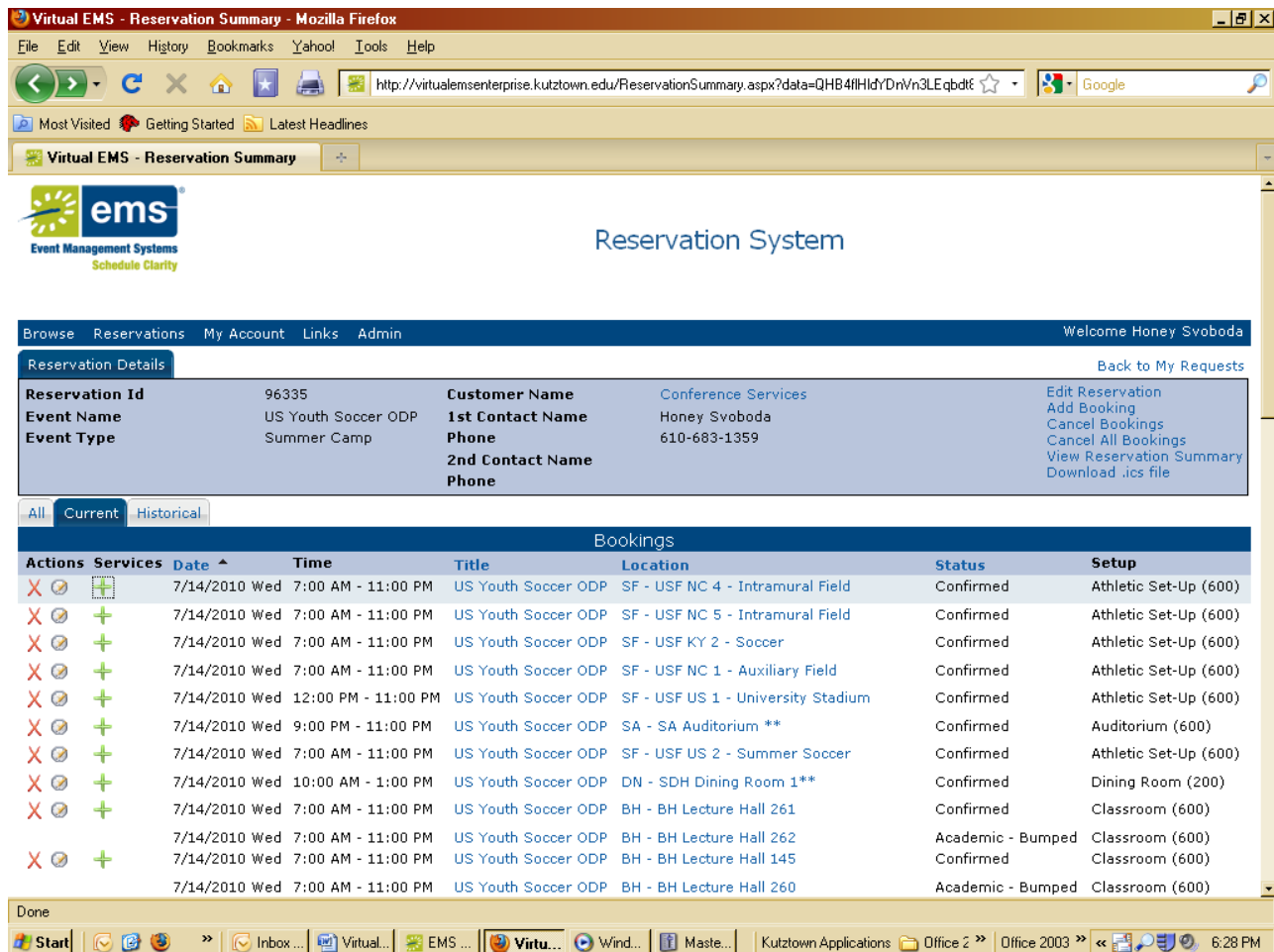



Figure 22 - Viewing your requests

On this **Reservation Details** screen notice that there is now a green  under **Services**. This icon will allow you to add set-up notes to a confirmed and active booking. Keep in mind that this is informational only and will not replace your need for a work order through Facilities or direct contact with Catering Services.

If you need further clarification on any topic discussed in this User Guide please do not hesitate to contact the Conference Services office. We will be happy to help you with all of your campus reservation needs.

Kutztown University
Conference Services
Education House
610-683-1359
610-683-4804 (fax)
www.kutztown.edu/admin/confserv