BRIGHAM YOUNG UNIVERSITY-IDAHO

Event Management System (EMS) Guidelines for Users

BYU IDAHO

Event Management

191 Manwaring Center · Rexburg, ID · 83460-0750 · Phone: (208) 496-3120

Contents

Introduction 4
Event Management System Components
The Event Management Process
Using Virtual EMS for Scheduling.....5
Register a Virtual EMS account
Log In
Browsing.....6
Browse Events
Browse Facilities
Browse for Space
Locate Group
Requesting a Reservation 7
Designating Time and Date
Requesting Location
Adding Details
Adding or Editing Services to a Current Booking.....12
Adding Setup Notes
Editing a Service
Adding a New Service
Adding a New Item
Cancelling.....13
Canceling a Service
Canceling a Booking
Editing a Booking.....14
Editing Reservation
Add Booking
Cancel Services
Service Availability
Reservation Summary.....15
Delegation 15
Using Master Calendar for Viewing and More 16
Viewing the BYU-Idaho Calendar
Using Icons for Personal Reminders
Receiving I-Cal and RSS Feeds
Adding Descriptions and Images as a User
Appendix 19
Instructions for Adding Ticketing through Virtual EMS
Glossary.....24

Introduction

BYU-Idaho has implemented the Event Management System (EMS) as a tool to track reservations and details associated with them. The software includes utilities to create, manage, and report on events. Benefits of EMS include:

Facilities and resources become better utilized through improved *management*:

- Space utilization can be optimized.
- Requestors gain more input and control on the details of their reservations.
- Filters make it possible to search for locations by audience size, room type, and features.
- Coordinated use of resources can be controlled by inventory.
- Event coordinators facilitate requests of support services (audio/visual, custodial, setups, equipment, etc.).

Better *communication* comes as institutional planning, scheduling, and resource utilization are combined into a consistent central operation. Key aspects include:

- More thoughtful preparation results in better communication and more complete bookings.
- Filters enable calendars displaying information for specific interest.
- RSS feeds give updates for new events, changes, delays, or cancelations.
- Event dates can be transferred to personal calendars.

Event Management System Components

There are three components to the Event Management System:

- *Campus:* the architecture that provides structure and definition to the management and communication processes. Access is limited to personnel within Event Services and Information Technology.
- *Virtual EMS:* a web-based application used by employees to submit requests for events, room reservations, and equipment usage. Accessed by authorized users; guests may browse lists for facilities and space. (Go to http://scheduling.byui.edu)
- *Master Calendar*: the BYU—Idaho Calendar online used to view audience– specific or highlighted calendars. Information may be filtered by preset groupings or for custom views based on personal interest. Access by public; authorized web users may add description and images through Master Calendar to help promote their events. (Go to http://calendar.byui.edu)

The Event Management Process

Policies approved by President's Executive Group direct the decision process for Event Services and the implementation of the Event Management System throughout campus.

1. When authorized, users may submit requests through the web-based Virtual EMS.
2. Based on policies and within the availability of resources and services Event Management confirms the reservation and sends an email notification to requestor.
3. An event coordinator will be assigned to assist with the event when applicable to assist with additional details.
4. Confirmed events are included on Master Calendar (BYU—Idaho Calendar Online) if that option has been requested and approved.

Using Virtual EMS for Scheduling

Virtual EMS is a web-based scheduling application used by employees. Events have three main components:

Reservation: the who and what of an event (like a file folder label: Group X has Event Y).

Bookings: the where and when of an event (like the sheets of paper in a folder, there can be more than one booking per reservation – maximum is 15).

Booking details: resources and services needed for the event (A/V services, custodial resources, etc.).

Register a Virtual EMS account

Go to **Create An Account** to submit a request to be approved as a Virtual EMS user.

1. Go to http://scheduling.byui.edu to access Virtual EMS.
2. In Virtual EMS, go to **My Account – Create An Account** and enter your information.
3. Click **Save.** Your request will be reviewed by Event Services. Notification will be forthcoming by email.

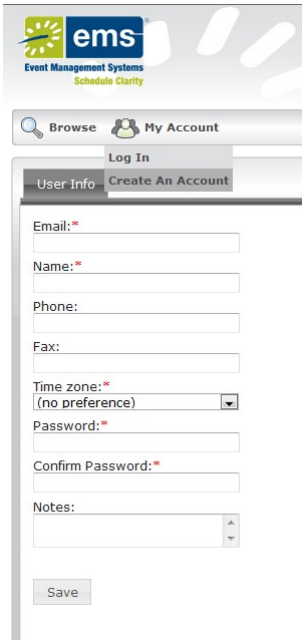


Figure 1 – Virtual EMS My Account Prompt

Log In

1. If approved as a Virtual EMS user, select **My Account – Log In**.
2. Enter your User ID (network email address) and Password.
3. Click **Login**.(To later log out of Virtual EMS, click the **Log Out** option.)

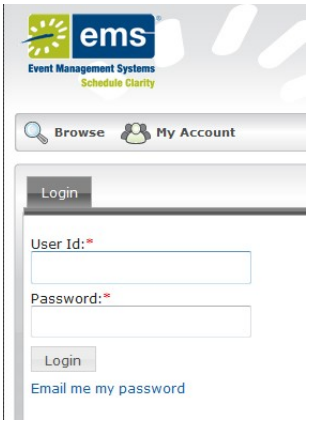


Figure 2 – Virtual EMS Login Prompt

Browsing

The Browse dropdown menu contains **Browse Events**, **Browse Facilities**, **Browse for Space**, and **Locate Group**.

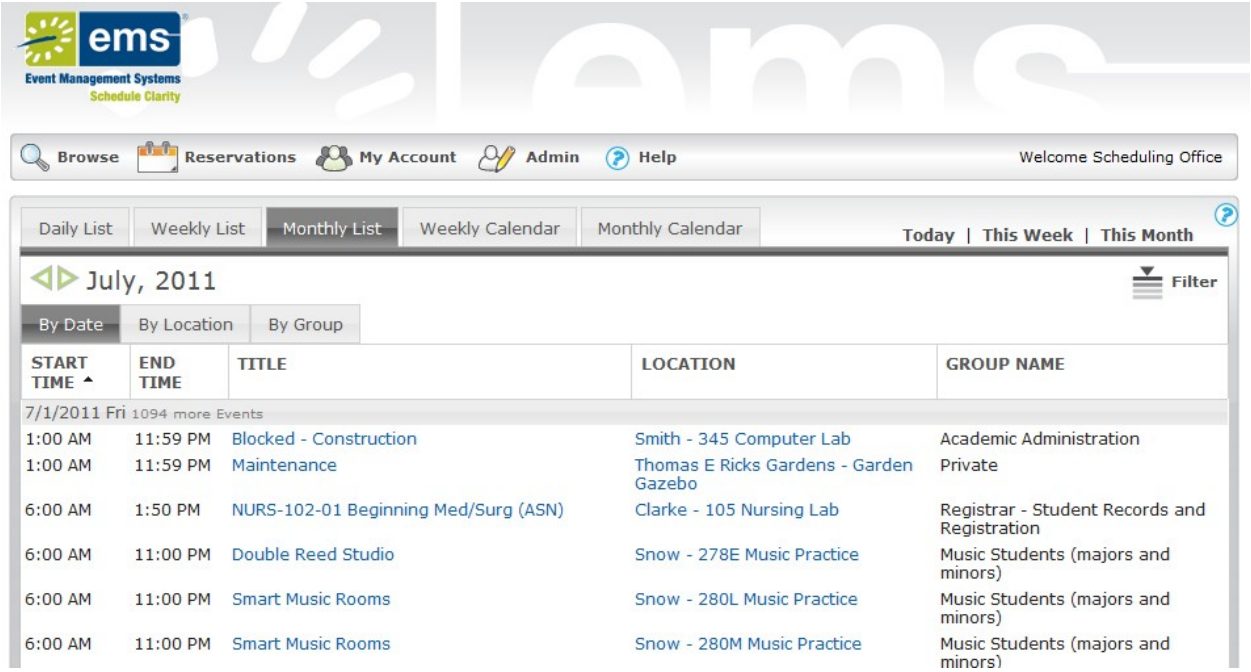


Figure 3. Virtual EMS Browsing

Browse Events (login required)

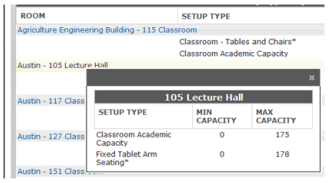
The *Browse Events* window displays a calendar that lists all the scheduled events. The events can be displayed by day, week, or month. (Please remember the general public will view events through the Master Calendar.)

- Click the **Daily List**, **Weekly List**, or **Monthly List** tab.
- Sort the list by clicking on column headings; reverse the sort by clicking again.
- Hover over each event listed to see specific information.
- To change the dates shown, use the arrows on either side of the date heading.
- Click **Filter** to specify the searchable items for an event (e.g. **Date**, **Facilities**, **Room**, **Event Type**, **Event Name**, **Group Name**, and/or **Group Type**).

Browse Facilities (available to guests and users)

The *Browse Facilities* window is a read-only display listing rooms by building, setup 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.

- Select the displayed rooms to be grouped by **Setup Type** or **Room**.
- Sort the list by clicking on column headings; reverse the sort by clicking again.

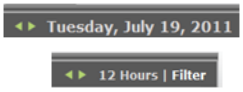


- Click on room for additional details, features, and images, and floor plan where available.
- Optional: Hover or pause over each room to display room details.

Browse for Space (available to guests and users)

The Browse for Space is a read-only window to look for available space at a particular date and time. The system displays a grid showing room availability.

- Use the arrows to scroll forward or backward in time.
- Use the filter to view specific date, building, or room type.



Locate Group (login required)

1. Select **Locate Group** to find the events that are taking place *today* for a specific group.
2. In the **Group Name** field, enter the name of the group or a portion of a group's name.
3. Click on desired group name to complete the search.
4. Click **Locate.** Virtual EMS shows the events currently scheduled for today, otherwise, a message indicating there are no events displays will show.

Requesting a reservation

BYU-Idaho has multiple Reservation Request links, each with its own set of features and permission levels:

- Event Request — Web request accepted 10-180 days in advance; Multiple Rooms/Resources; AV Production
- Room with Basic Set Up — Web request accepted 3-120 days in advance; Reserved with Basic Resources
- Room only Request — Web request accepted 1-120 days in advance; No resources included

Figure 4 – Virtual EMS Reservation Options

Click on the link that best describes your need. The Request window displays.
Note: Each of these listings is a process template with specific booking rules (e.g. "Room Only Requests" have a broader time frame; however, no resources can be scheduled. Requests for resources need to have more lead time.)

Designating Time and Date

In the *When and Where* section, enter or click on the calendar icon to select a **Date** or range of dates for the event. (If your event occurs more than one time in the future, click on the **Recurrence** button and enter appropriate sequencing details.)

In the *Time* section, manually enter **Start Time** and **End Time** in the blank fields or select the time using the clock icons to the right of the field. (Make sure am/pm is correct.)
Please make a note (in the user defined field) if you need additional set up time before your event starts.

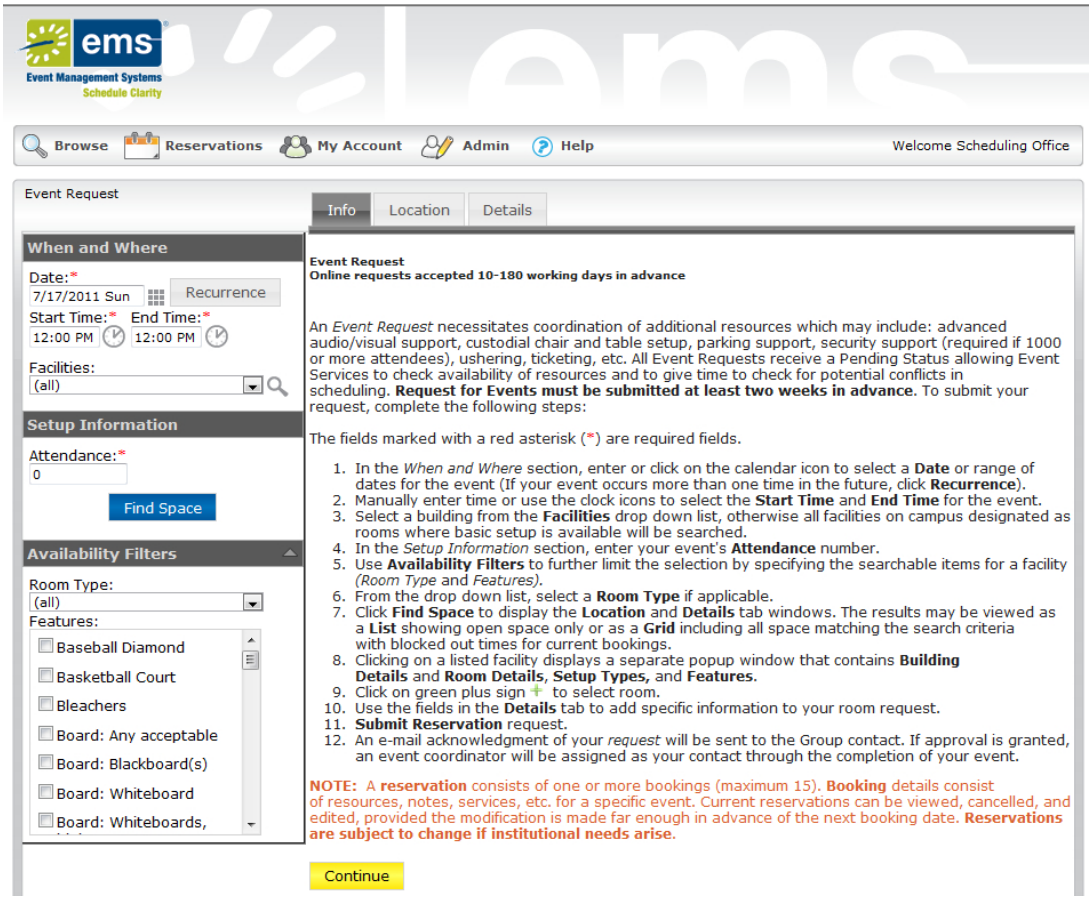


Figure 5 – Virtual EMS search for locations

Requesting Location

1. Begin your search for a location by choosing the building or area from the **Facilities** dropdown list where the event will take place. **Note:** If you do not specify this field, all facilities will be searched for available rooms.
2. In the *Setup Information* section, enter your event's **Attendance** number. The attendance number you enter is applied as the setup count to your bookings.
3. From the dropdown list, select a **Setup Type,** if applicable.
4. Use **Availability Filters** dropdown menu to further refine your search by room type or features, if desired. **Note:** Features are used for searching only and won't be stored with your request.
5. Click **Find Space** to display the **Location** and **Details** tab windows.

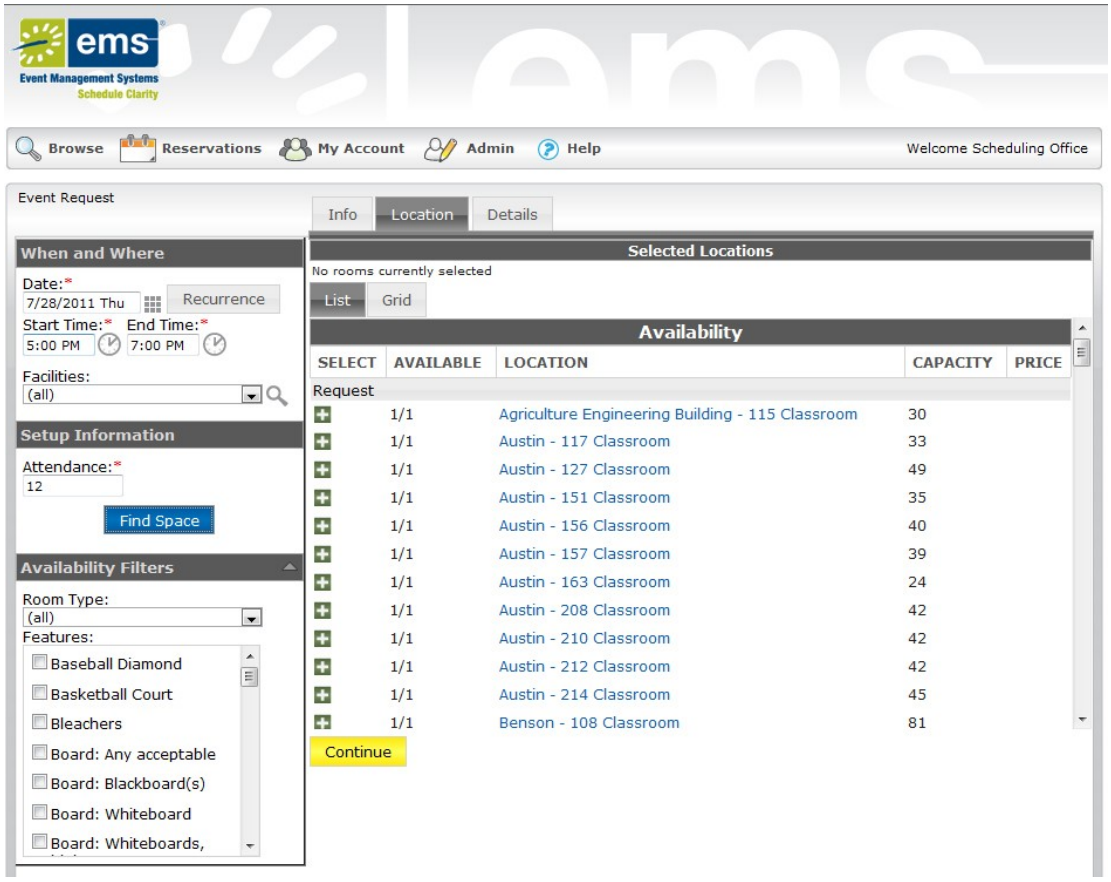


Figure 6 – Virtual EMS Location list

From the *Location* tab, the results may be viewed as a *list* showing open space that can accommodate your request or as a *grid* including all space matching the search criteria with blocked out times for current bookings. The resulting list appears in the Availability window:

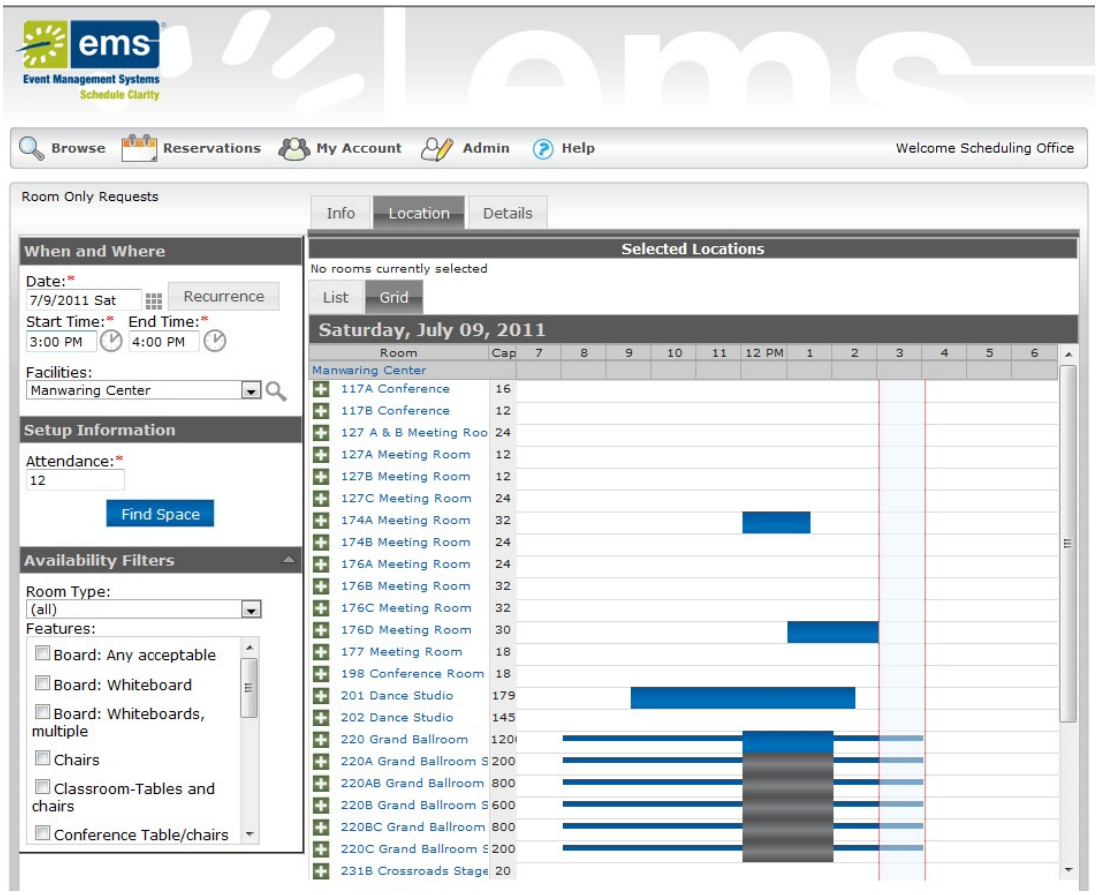
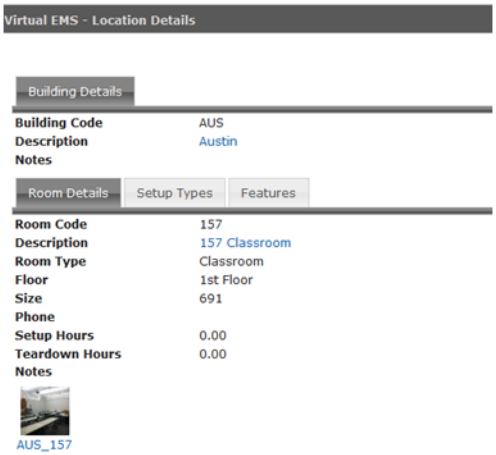


Figure 7—Virtual EMS filtered location grid

6. Click on a room to view **Building Details**, **Room Details**, **Setup Types**, and **Features**.



7. Choose a location or locations by clicking on the corresponding plus sign icon under the *Select* column.

Adding Details

Use the fields in the **Details** tab to add specific information to your room request.

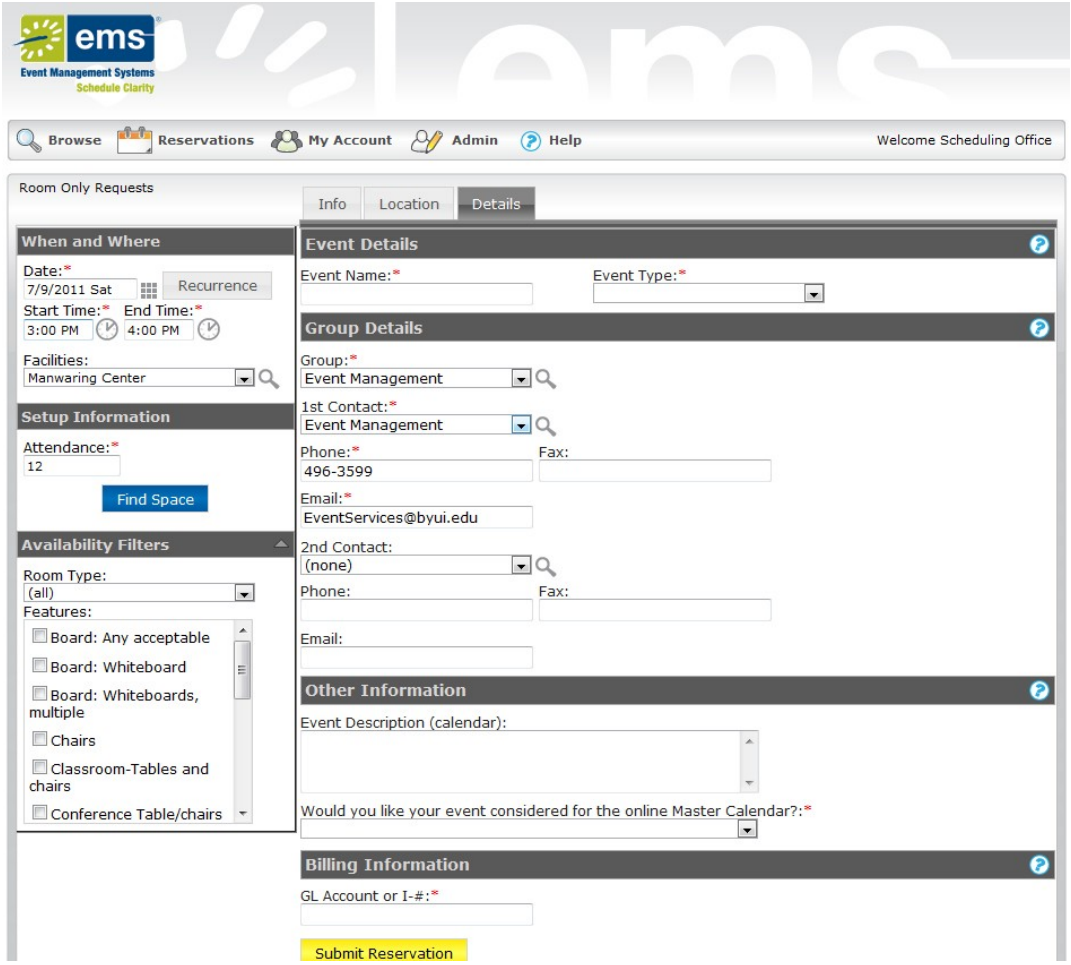


Figure 8—Virtual EMS Adding Details

1. In the Event Name field, give your event a descriptive name.
2. Select an Event Type from the dropdown list. (The event type becomes the Master Calendar filter.)
3. Select the Group that holds the reservation. (You can search for your name or department by clicking the magnifying glass icon.)Specify the name of a **Contact** person or click the magnifying glass icon to display the *Contact Lookup* dialog box. **Note:** If you select **Temporary Contact**, you will be required to enter a **Name**. Click the green plus sign next the contact name and the contact information is placed in the *Current Contact* area. (Click the person icon to make the current contact the default contact, if desired.)
4. Enter the General Ledger account code (required field for reports and billing).
5. **Other Information:** Please indicate whether or not your event will include parking, ushering, or ticketing and if it should be considered for **Master Calendar** (the public view of the web calendar).

7. Depending on the room selected, additional available resources and services will be listed (e.g., audio/visual, furniture, custodial setups, ticketing, and ushers). Please check the items needed and add quantities where appropriate.
8. Remember that, if ticketing is used as a resource, you must include ticketing details (see Appendix).

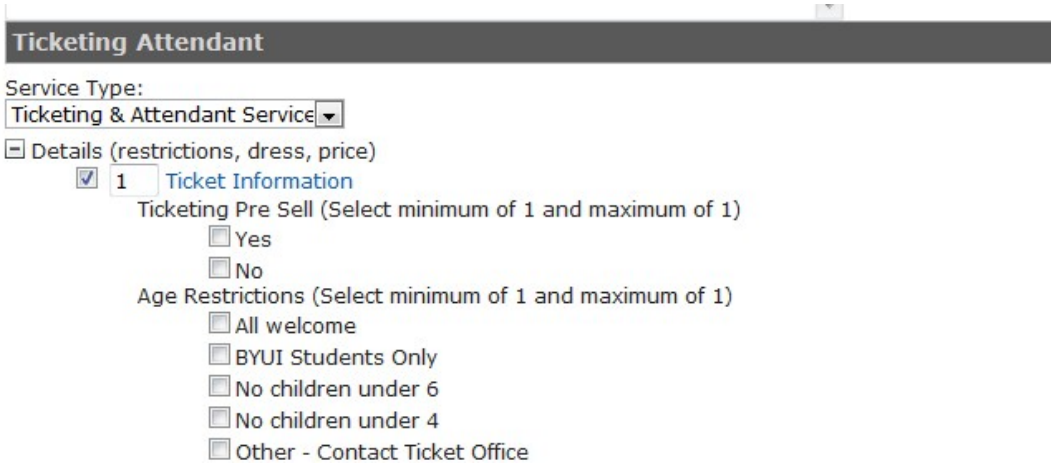


Figure 9—Virtual EMS Ticketing Details

9. Include your GL account for expenses and Revenue account if tickets are being sold.
10. Return to the **Details** tab, click **Submit Reservation Request.**

Your request will be reviewed by Events Management as consideration is given to existing scheduling policies and the availability of resources. An approval notification should be returned within two working days but could require several weeks depending upon the complexity of the request.

Adding or Editing Services to a Current Booking

Changes must be requested at least three working days prior to the event to facilitate good communication and planning for the service providers. On the *Reservation Summary* window, click the green plus sign in the *Services* column next to the event to which you want to add a service or services. The **Booking Details** tab displays with *Booking Details*, *Additional Details*, *Available Services*, and *Existing Services* areas.

1. Select the *Available Services* to apply to your event and a new area displays.
2. Enter the **Start** and **End Time** of your service, if applicable. Please include any time you may need to setup or clean up.
3. Choose the **Service Type**, if applicable.
4. Click the plus sign icon to see a list of individual items. **Note:** Hover or pause your mouse over a resource to view additional information.
5. To select an item, click the checkbox next to it and enter the desired quantity.
6. Enter any special instructions, if necessary (See "Adding set up notes" for more information).
7. Click **Save**. (If you have multiple bookings, you can apply your service to some or all of your additional bookings; if you have a single booking, you'll return to the previous screen.)

Adding Setup Notes

Setup notes may be added to your request so the Event Services offices will better understand you needs. From the *Reservation Summary*, click the plus sign icon next to the desired booking. The **Booking Details** tab displays.

1. In the *Available Services* section, select **Setup Notes**. The **Booking Details** tab displays with a **Setup Notes** text entry section.
2. Enter your notes and click **Save**. The **Setup Notes** are added to the existing service.
3. To return to the *Reservation Summary* window, click the Back To Reservation Summary link.

Editing a Service

On the *Booking Details* window, click the pencil icon next to the service you want to edit.

1. Make your edits in the new screen that displays
2. Click **Save**.

Adding a New Service

From the *Reservation Summary*, click the plus sign icon in the *Services* column and select the desired service. Please follow the procedure for "Adding or Editing Services to a *Current* Booking."

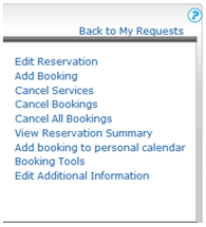
Adding a New Item

To add a new item from the same service:

1. Click the plus sign icon next to the desired booking in the *Existing Services* section.
2. Select the new item you want to add, enter the desired quantities, and click **Save**.
3. Click **OK** to return to the *Booking Details* window, which displays the new items you just added.

Cancelling

Cancelling a Service



To cancel a service:

1. Click the **Cancel Services** button in the upper right hand corner of the page.
2. Select the category that has the resource in it that you would like to cancel. Select the box to the right hand side of each individual resource. When you are satisfied select the **Save** button.

Cancelling a Booking

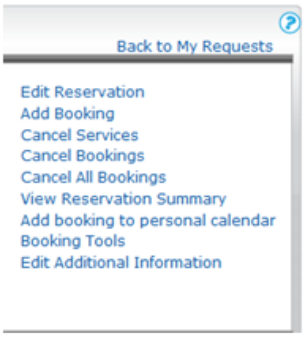
To cancel a booking, click the red X in the *Actions* column and a popup message prompts you.

Editing a Booking

Click the clock icon in the *Actions* column. Make the necessary changes in the window that displays.

Click **Update Booking**.

The **Reservation Summary Window Actions** displayed on the right side of the *Reservation Summary* window include:



- Edit Reservation
- Add Booking
- Cancel Services
- Service Availability
- View Reservation Summary
- Add to Personal Calendar

Edit Reservation

Edit Reservation allows you to edit information completed on the **Details** tab when you originally made your reservation.

1. Click **Edit Reservation** from the *Reservation Summary*.
2. Make the necessary changes in the window that displays
3. Click **Save** and the following message displays.
4. Click **OK** to return to the *Reservation Summary*.

Add Booking

This function allows you to add additional bookings to your reservation.

1. From the *Reservation Summary*, click **Add Booking**.
2. Follow the same steps as in *Requesting A Room*

Cancel Services

This function allows you to cancel a service that was requested for multiple bookings.

1. Select the event's service category that you want to cancel from the **Categories** dropdown list.
2. Select the bookings from which you want to remove the service.
3. Click **Save**.

Service Availability

Service Availability displays all the conditions that apply to your event. If you need a service that is not listed, please contact the Scheduling Office at 496-3120. The ability to request some services is restricted.

Reservation Summary

The *Reservation Summary* window opens, displaying the **Reservation Details** tab, which contains the *Reservation Details* and *Group Details* sections that list the event's information and the **All**, **Current**, and **Historical** tabs.

The *Reservation Details* section contains information regarding your event, including **Reservation ID**, **Event Name**, **Event Type**, and **Billing Reference**.

The *Group Details* section contains information regarding your event, such as **Group**, **Contact Name**, **Phone**, **2nd Contact Name**, and **Phone**.

The **Current** tab displays events occurring today or in the future. It contains the *Actions*, *Services, Date*, *Time*, *Title*, *Location*, *Status*, and *Setup* columns.

Note: The *Date*, *Title*, *Location*, and *Status* columns are sortable.

A variety of icons display in the *Services* column, such as:

A plus sign icon to add or edit services

An envelope icon to display a services summary

A red X to cancel a booking

A clock icon to edit a booking

In addition, a warning icon may appear if you encounter a problem trying to reserve your room and/or service. To identify the issue, please check your booking status or requested services.

The **Historical** tab lists events that occurred in the past only.

Viewing requests as Reservation Summary

This link allows you to view and/or email an HTML-based summary of your reservation. The summary includes room, service, and pricing information, if applicable.

• Click this link to display your booking's information, either in detail or summary format.

Add to Personal Calendar

To add the selected event to your calendar, click **Add to Personal Calendar**. A dialog box displays allowing you to **Open**, **Save**, or **Cancel** adding the event to your calendar. **NOTE:** You may prefer to add events to your personal calendar from Master Calendar after the reservation has been approved.

Delegation

It is possible to assign delegates to work on behalf of virtual users. Contact the Scheduling Office to discuss.

Using the Master Calendar for Viewing and More

The Master Calendar is the public web face http;//calendar.byui.edu to view BYU-Idaho Calendars. Information has been filtered into a collection of preset calendars, or individuals may choose which events they want to view based on their own on personal interest. Subscribing to RSS feeds provide dynamic updates of new events, changes, or cancelations.

Viewing the BYU-Idaho Calendar

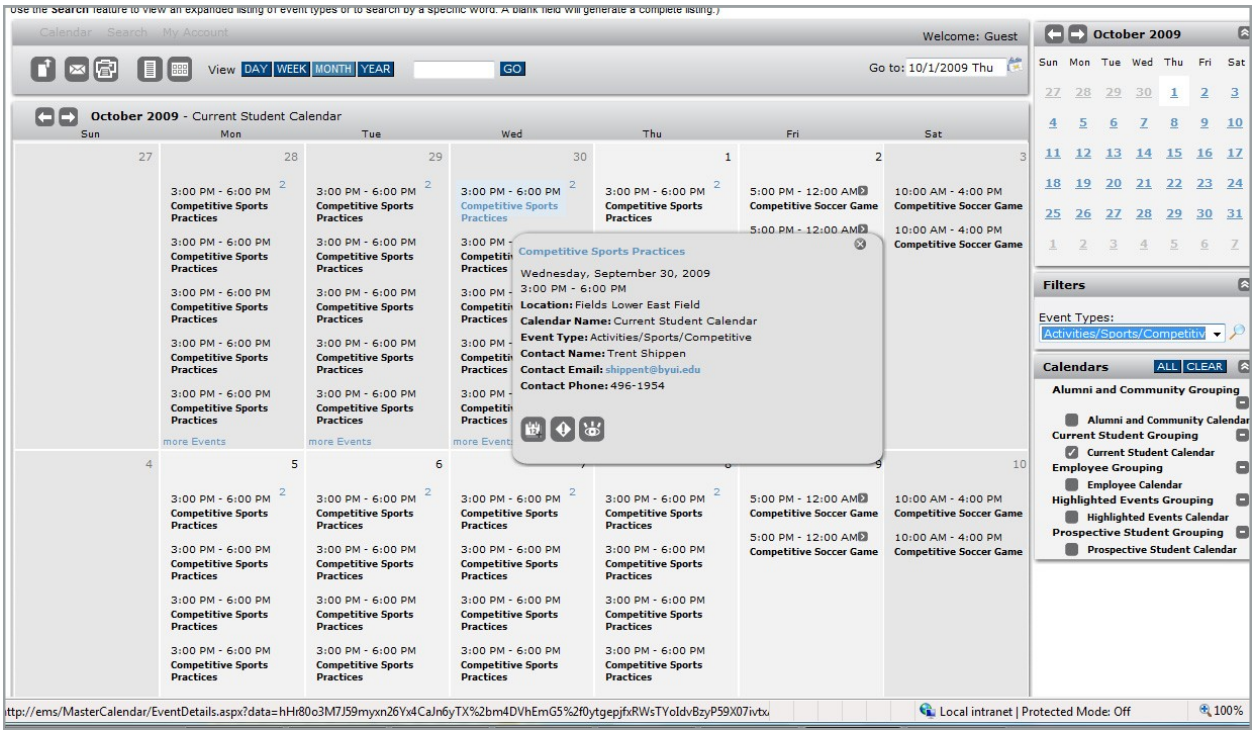


Figure 10 – Master Calendar

- Use toggle boxes to select calendars of events select for specific audiences or categories.
- Pause or hover over an event to receive details.
- Use the **Filter** feature to further limit the display.

Use the Search feature to view an expanded listing of event types or to search by a specific word. A blank field will generate a complete listing.

Using the icons for personal reminders

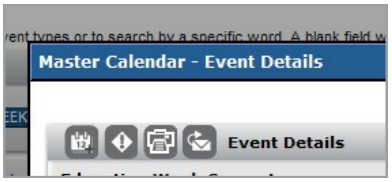


Figure 11 – Master Calendar icons

Figure 12 – Master Calendar option to add event to personal calendar

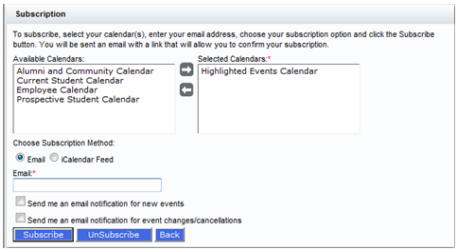
Click on the corresponding icon to add reservation to your personal calendar (e.g. Outlook), set a personal reminder, print, or send an email.

Click on the detail icon for a printable screen listing reservation details including related bookings.

Subscribe to a Calendar

This program gives you updates from the campus calendar through your email or outlook account. You can choose which calendar you would like to have and the updates are constant being refreshed so you have the most up to date information.

To access this go into the any calendar of your choosing and select the envelope icon.



Select the calendar that you wish to have email updates or updates on your outlook calendar. Then select Email or iCalender Feed. Also include your email address and the type of updates you would like to receive. After you have completed this select the **Subscribe** button.

Receiving RSS feeds

Figure 13 – Master Calendar RSS feed

An RSS (or Really Simple Syndication) feed is a method of distributing links to content in Master Calendar for guests or users to use. A featured RSS feed is like a calendar URL. RSS feeds are available through the RSS link at the bottom of each page in the Master Calendar system. All public RSS feeds are always available from this link. (Private RSS feeds are available to users only after they log in to the Calendar system.)

Click on the RSS Feeds link at the bottom of the page to display a list of all currently active RSS feeds. A user or guest can click on the RSS feed button for the specific area of interest to open and view the information selected (event name, date, time, place, and descriptions added by Master Calendar web users). You may opt to add the URL to your favorite RSS feed reader (see Outlook tips at http://www.byui.edu/helpdesk/email/rssfeed.htm or google.com/ig).

Adding descriptions and images as a user

A limited number of EMS users will be granted permission to add descriptions, images, and hyperlinks to help promote their events displayed in Master Calendar (viewed by hovering over event listing). Descriptions entered through Master Calendar are included in RSS feeds; images and hyperlinks are not transferred through RSS feeds. To request permission to become a Master Calendar Web User, please contact the Scheduling Office.

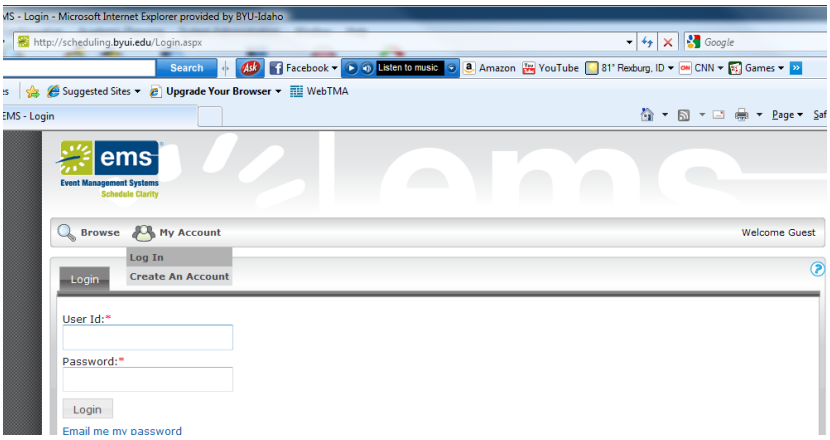
Appendix

Instructions for Adding Ticketing through Virtual EMS

Glossary

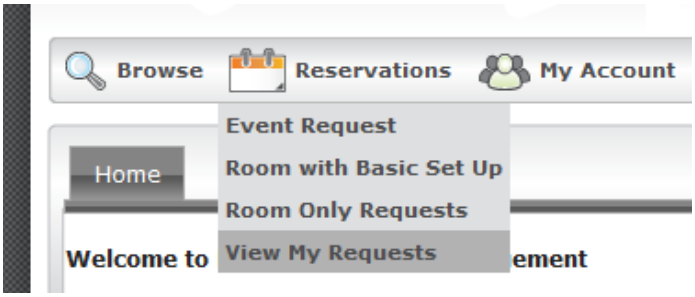
Instructions for Adding Ticketing through Virtual EMS

Login to Virtual EMS at scheduling.byui.edu by using your complete email address and password.



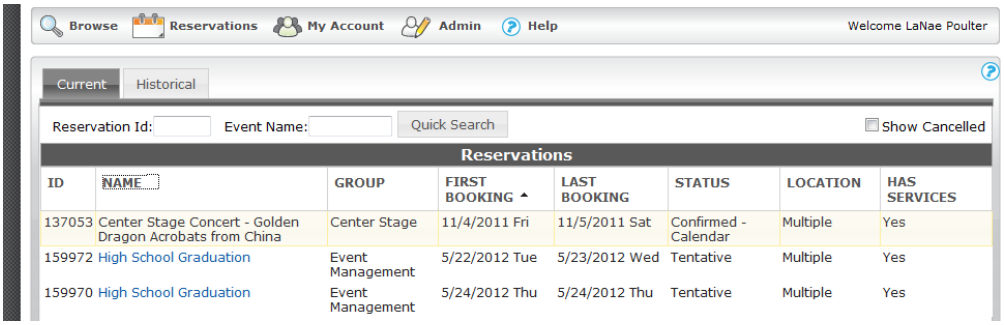
Select Event

Generate a list of your scheduled reservations by clicking on “Reservations” and “View My Requests.”



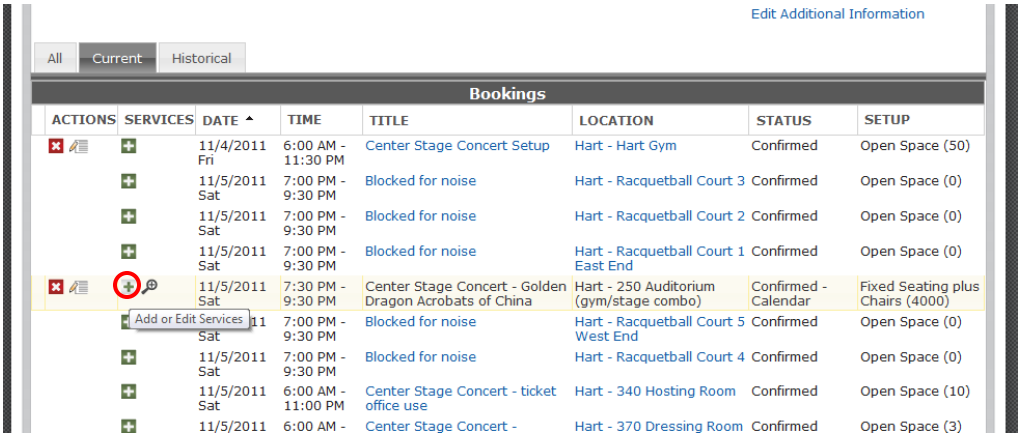
Note: if your list seems incomplete, you probably did not submitted all of your requests through Virtual EMS. You may contact the Scheduling Office and ask for an edit of specific reservations where you want to be designated as the web user.

Click on the event you want to open to add ticketing detail

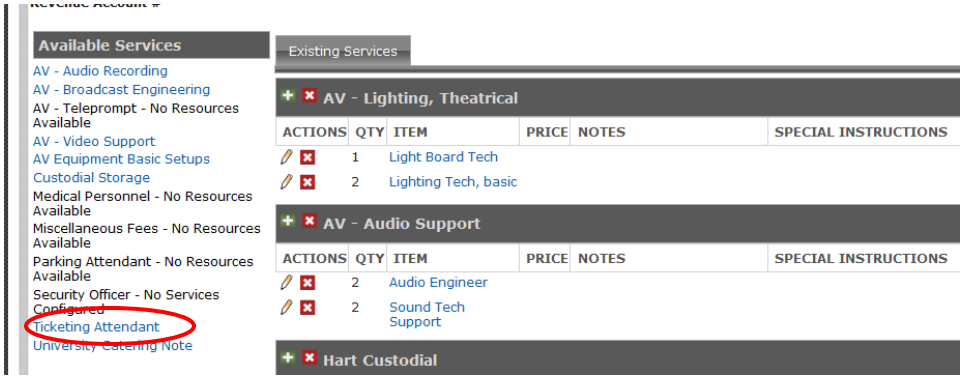


Select Ticketing Service

Your reservation may include multiple bookings. Identify which booking needs ticketing information and click on the green plus sign to add or edit service.

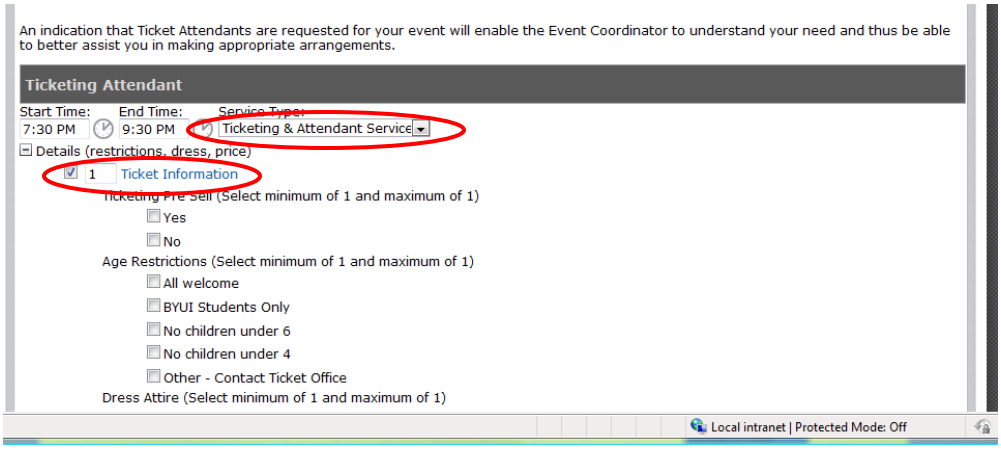


From list of available services, select “Ticketing Attendant”

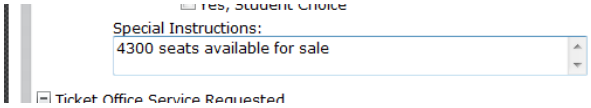


Select service type from drop down menu

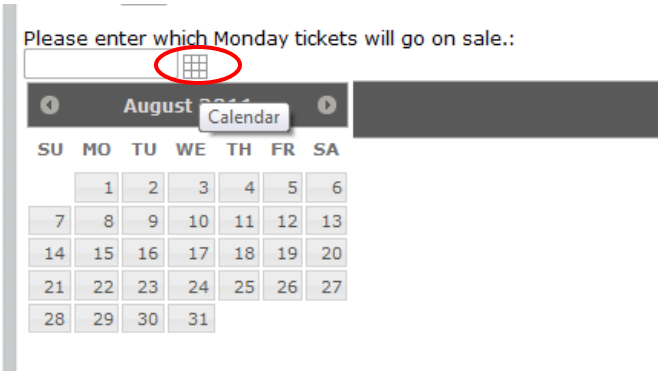
Click in Ticket Information box to open list of selections. Make selections to define your ticketing criteria.



Enter number of tickets to be sold as Special Instructions:



Enter date tickets will go on sale. Type in date m/d/yyyy or click on grid box to generate a clickable calendar

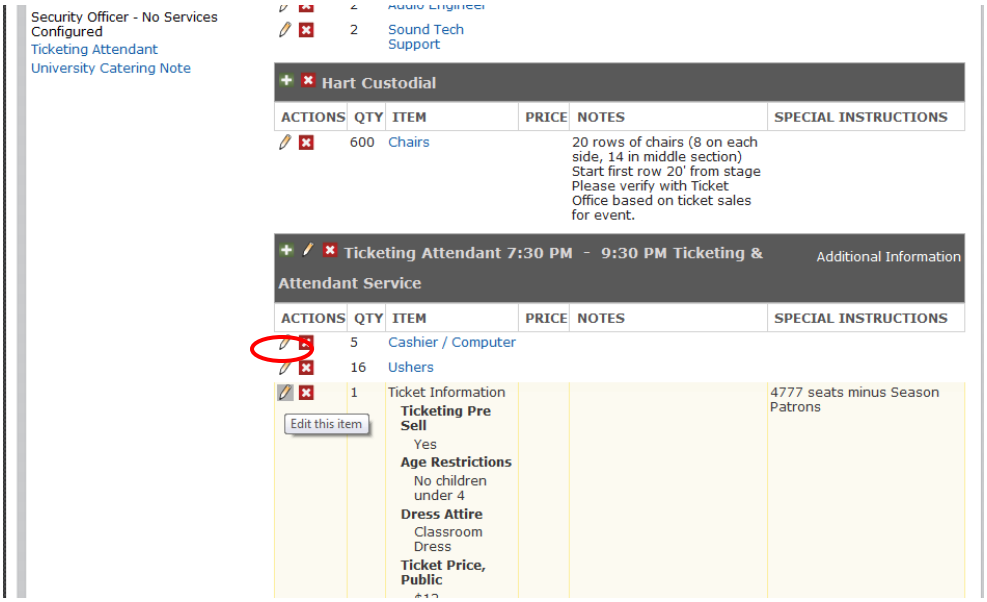


Enter revenue code so the Ticket Office will know how to deposit funds

Click Save

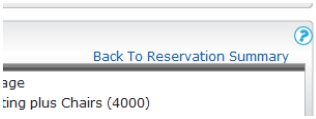
Edit Selections

You may edit selections by click on the pencil icon next to the service requested. This will reopen your selection boxes. Click save when finished with edits.

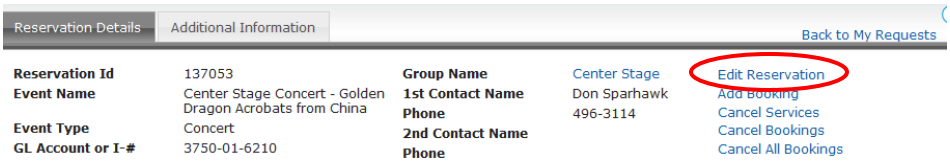


Edit Revenue Account#

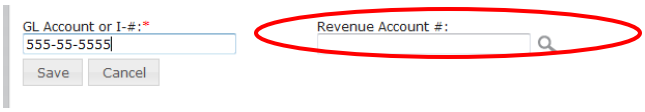
The Revenue Account number may also be edited on the Reservation itself. Click on “Back to Reservation Summary” if needed.



Click on Edit Reservation



Complete billing information. Type in Revenue Account or use magnifying glass to browse for account codes already associated with your group.



Click save

Glossary

Active Status
Active users can log into Virtual EMS; active users have full access to the system.

Bookings
Bookings are the where and when of an event (like the sheets of paper in a folder, there can be more than one booking per reservation – maximum is 30).

Booking Details
Booking details consist of resources, notes, services, etc. for a specific event or event.

Category
Categories are groupings of resources such as items or services that are needed for an event.

Current Reservation
A current reservation is a reservation with one or more bookings on or after the current date. Current reservations can be viewed, cancelled, and edited, provided the modification is made far enough in advance of the next booking date.

Custom Links
Custom links are character strings that users can copy into a web browser or click on as a hyperlink to be directed to the Virtual EMS calendar for a specific building.

Delegate
Delegates are people who can log into the system with their own user ID and password to assume another user's identity to perform work on that user's behalf.

Features
Features are attributes of rooms that can be used for searching in Virtual EMS.

Group Types
Group types categorize a user's list of groups that are available for searching within Virtual EMS.

Guest
A guest is someone who accesses/opens a Virtual EMS page to view a list of events, but doesn't log into the system.

Historical Reservation
Historical reservations are those reservations with no bookings on or after the current date. Historical reservations can be viewed, but not edited.

Master Calendar
Master Calendar (http://calendar.byui.edu) is the public web face used to view calendars. Information may be filtered by preset groupings or for custom views based on personal interest.

Pricing Plan
The pricing plan determines how all of the bookings and resources within a reservation are priced. BYU-Idaho has separate plans for internal and external users.

Reservation
A reservation is the who and what of an event (like a file folder label: Group X has Event Y).

Virtual Calendar
Virtual Calendar (http://scheduling.byui.edu) is a web-based scheduling application used by BYU-Idaho employees to submit requests for events, room reservations, and equipment usage.