



Event Management Systems

Schedule Clarity

North East ISD Event Management System

# ***NORTH EAST ISD EVENT MANAGEMENT SYSTEM (EMS) EXTERNAL USERS GUIDE***

*As of July 20, 2016*

# **EMS User Guide**

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# **EMS User Guide**

## **Helpful Terms**

**Reservation:** The Who (the Group/Contact) and What (Event Name) of the event

**Booking:** The Where (Rooms) and When (Time/Date) of an event under a Reservation. (A reservation can have one booking or multiple bookings)

**Reservation ID** – The number assigned to a facility reservation request

**Group** – Department making reservation

**1<sup>st</sup> Contact** – Person usually making reservation and name that will be noted as the primary contact of reservation. e.g., the contact for setup details for custodial staff



**Cancel Icon-** Used to Cancel or remove Reservations/or Bookings



**Edit Icon** – Used for editing Bookings



**Add Icon** – Used to Select/or Add

## **Getting Started**

### **General Terms and Rules for Use:**

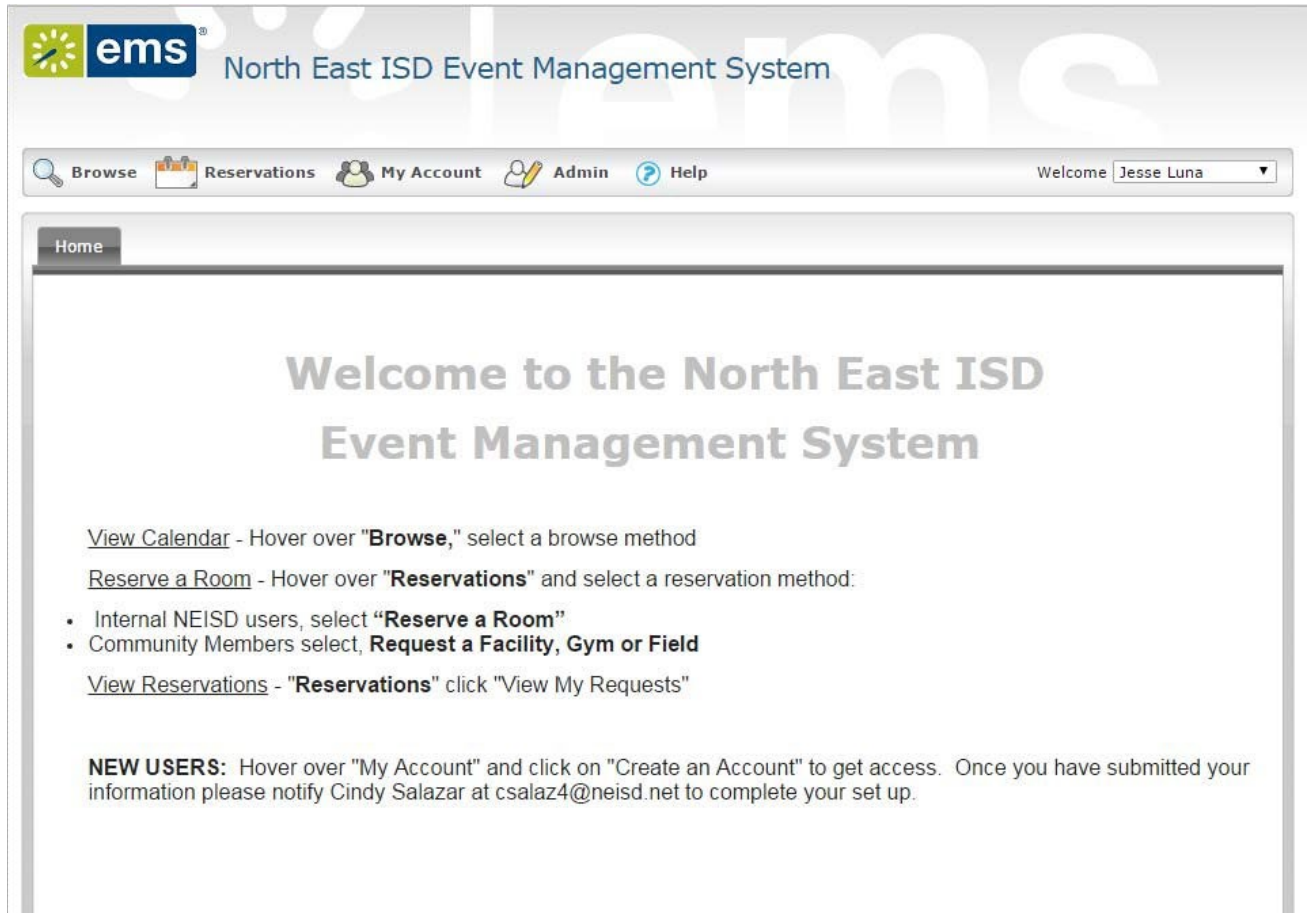
The North East ISD Event Management System has been created for approved community organizations to request the use of our facilities. All facilities primarily serve District and campus activities, and as such always have first priority. Any request may be declined, cancelled or modified the District or campus/facility at any time. A complete list of terms and conditions will be provided when completing a request, or by contacting the Facility Reservations Office.

**New Users** - Users not already set up with an account will need to create an account to request access. Please note, only one main user and a backup from each organization will be given access to the system. Not every

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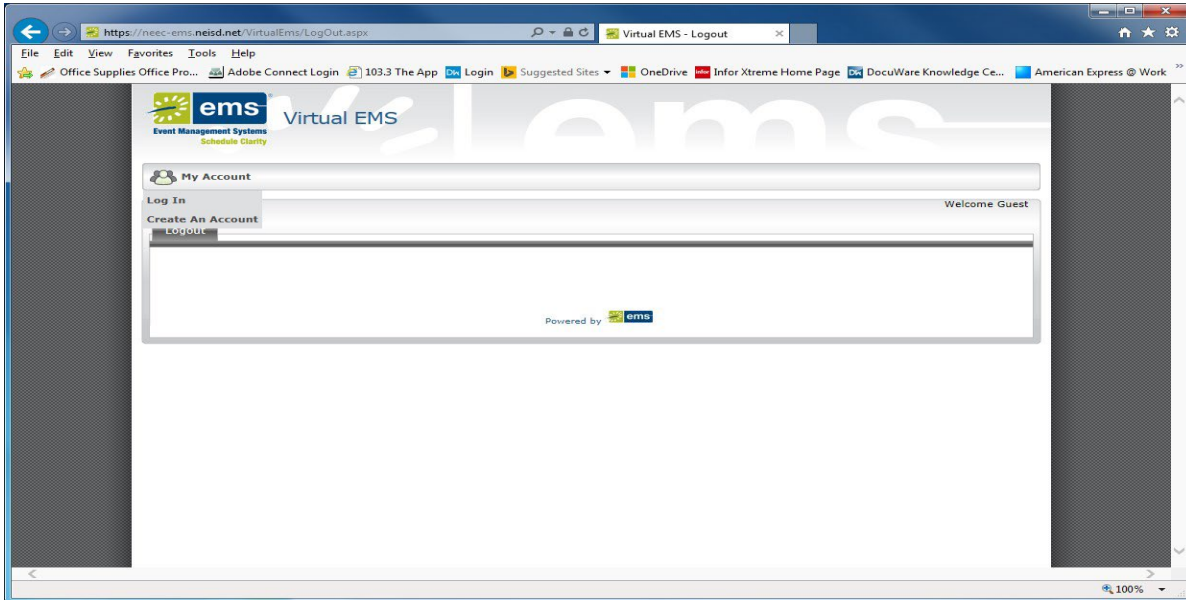
member of a community organization will be given access to submit requests. 1. Follow the link below to access the North East ISD Event Management System

<https://ems.neisd.net/virtualemsexternal>



2. Hover mouse over **"My Account"** and Click **"Create an Account"**

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### 3. Fill out User Information (All Fields Mandatory)

Provide information for each field. (Your name, Office Phone, Email, Fax)

### 4. Click “Save”

5. Send an email to the Facility Reservations Office at [facrent@neisd.net](mailto:facrent@neisd.net), letting us know that you have submitted a request for access. You will be notified via email when access is granted.

A screenshot of the Virtual EMS Account Management page. The address bar shows 'https://neec-ems.neisd.net/VirtualEms/AccountManagement.aspx'. The page has a 'My Account' section with a 'User Info' tab. The form contains fields for Email, Name, Phone, Fax, Time Zone, Password, and Confirm Password. Below these is a 'Department Name' dropdown menu and a 'kadsv' logo. A 'Type the code shown:' field is next to the logo. There is a 'Show another code' checkbox and a 'Save' button at the bottom. The page is powered by 'ems'.

## Request a Facility

### Reserve a Single Date Request

## EMS User Guide

Single Date Reservation:

1. Hover cursor over “Reservations”
2. Select “Request a Facility”
3. Enter the date of the event
4. Start and End Time
5. Select a Facility (campus)
6. Enter attendance #
7. Click “Find Space”

The screenshot displays the EMS North East ISD Event Management System interface. At the top, there is a navigation bar with links for Browse, Reservations, My Account, Admin, and Help. The main content area is titled 'Request a Facility' and includes tabs for Info, Location, and Details. The 'Info' tab is active, showing a form with the following sections:

- When and Where:** Includes fields for Date (7/30/2016 Sat), Start Time (7:00 AM), End Time (10:00 AM), and Facilities (Eisenhower Middle School). There is also a 'Recurrence' button.
- Setup Information:** Includes an 'Attendance' field with the value 10 and a 'Find Space' button.

On the right side of the form, there is a 'Request a Facility' section with a 'View available rooms by date' link and a 'Quick Tips' section. The 'Quick Tips' section contains 13 numbered instructions for using the system.

8. Available rooms meeting your criteria will be displayed.
9. Click the “+” to select a room. Selected Room will move up into “Selected Locations” pane. You may select multiple rooms at a time. (Please see image on next page)
10. Click “Continue” after you have selected all your rooms.

# EMS User Guide

## Request a Facility Continued

Request a Facility

Info Location Details

**When and Where**

Date: 7/30/2016 Sat Recurrence  
Start Time: 7:00 AM End Time: 10:00 AM  
Facilities: Eisenhower Middle School

**Setup Information**

Attendance: 10  
Find Space

**Selected Locations**

No rooms currently selected

List Grid

**Availability**

| SELECT | AVAILABLE | LOCATION                       | CAPACITY | PRICE |
|--------|-----------|--------------------------------|----------|-------|
| +      | 1/1       | Eisenhower MS Parking Lot      | NA       |       |
| +      | 1/1       | Eisenhower MS Library          | 0        |       |
| +      | 1/1       | Eisenhower MS Kitchen          | NA       |       |
| +      | 1/1       | Eisenhower MS Teacher's Lounge | 0        |       |
| +      | 1/1       | Eisenhower MS Restroom         | NA       |       |
| +      | 1/1       | Eisenhower MS Portables        | 0        |       |
| +      | 1/1       | Eisenhower MS Cafeteria        | 0        |       |
| +      | 1/1       | Eisenhower MS Band hall        | 0        |       |
| +      | 1/1       | Eisenhower MS Auditorium       | NA       |       |
| +      | 1/1       | Eisenhower MS Hallway          | NA       |       |
| +      | 1/1       | Eisenhower MS Entry/Foyer      | NA       |       |
| +      | 1/1       | Eisenhower MS Classrooms       | 0        |       |

11. Enter the Event Details including:

- Event Name**
- Event Type**
- Group Detail** -Select the Group this reservation is for and 1<sup>st</sup> Contact.
- HVAC** - HVAC - For evening (after 7 p.m.), weekend and holiday dates, "Check" the box and enter the Budget Code in the field provided.
- Additional Event Information** – Provide additional setup details if needed (A/V Equipment, etc.)

12. Click "Submit" to submit your request.

Reserve a Room

Info Location Details

**When and Where**

Date: 9/5/2015 Sat Recurrence  
Start Time: 7:00 AM End Time: 8:00 AM  
Facilities: Richard A. Middleton Education

**Setup Information**

Attendance: 5  
Setup Type: Conference  
Find Space

**Event Details**

Event Name: Event Type:

**Group Details**

Group: 742-Procurement & eComme  
1st Contact: Yvonne Lussier  
Phone: 210-407-0397 Fax: 210-804-7105  
Email: ylussi@neisd.net

**Additional Setup Information**

HVAC  
☒ HVAC for weekend and evening events  
☐ If yes, please enter budget code for HVAC below

**Billing Information**

Budget Code:

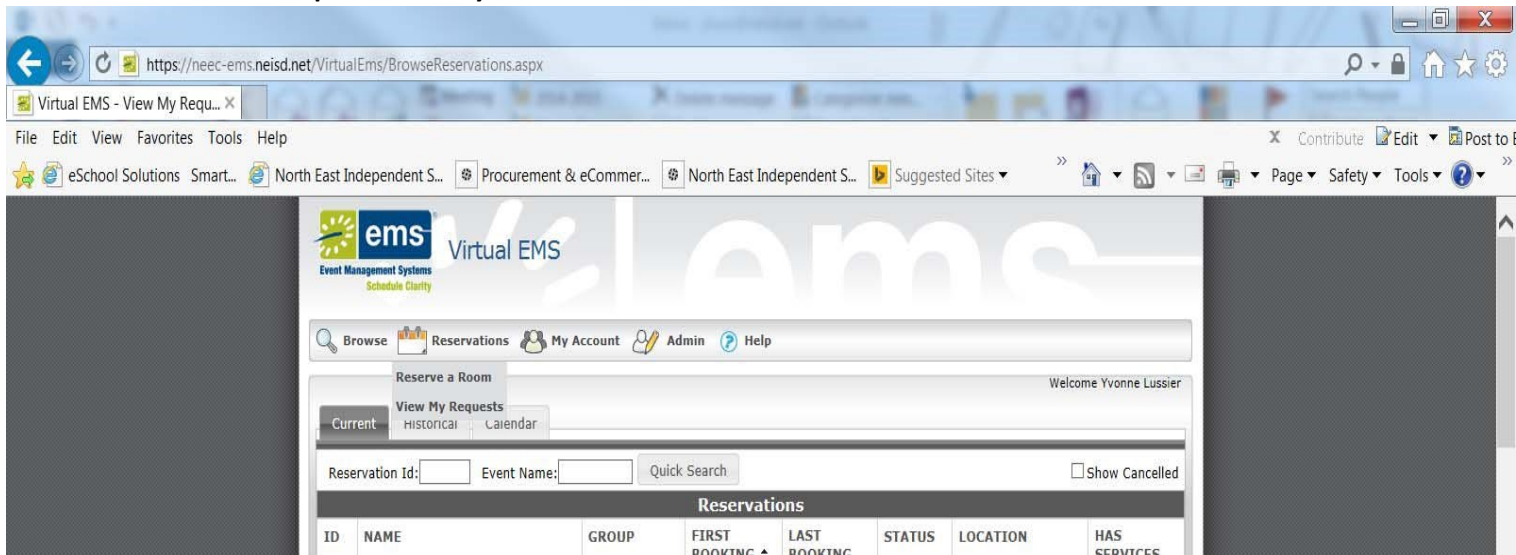
Submit

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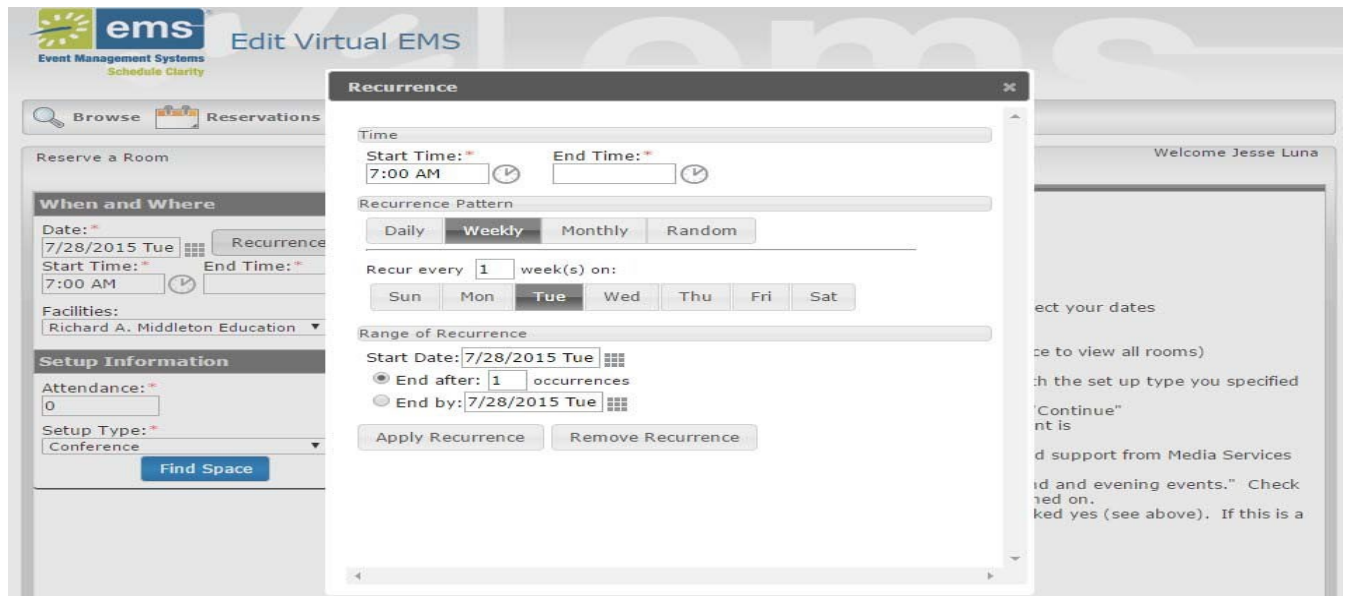
7

### Making Multiday and Recurring Requests

1. Hover cursor over “Reservations”
2. Select “Request a Facility”



3. Click “Recurrence”
4. Enter a Start and End Time
5. Create a recurrence pattern
6. Click “Apply Recurrence”

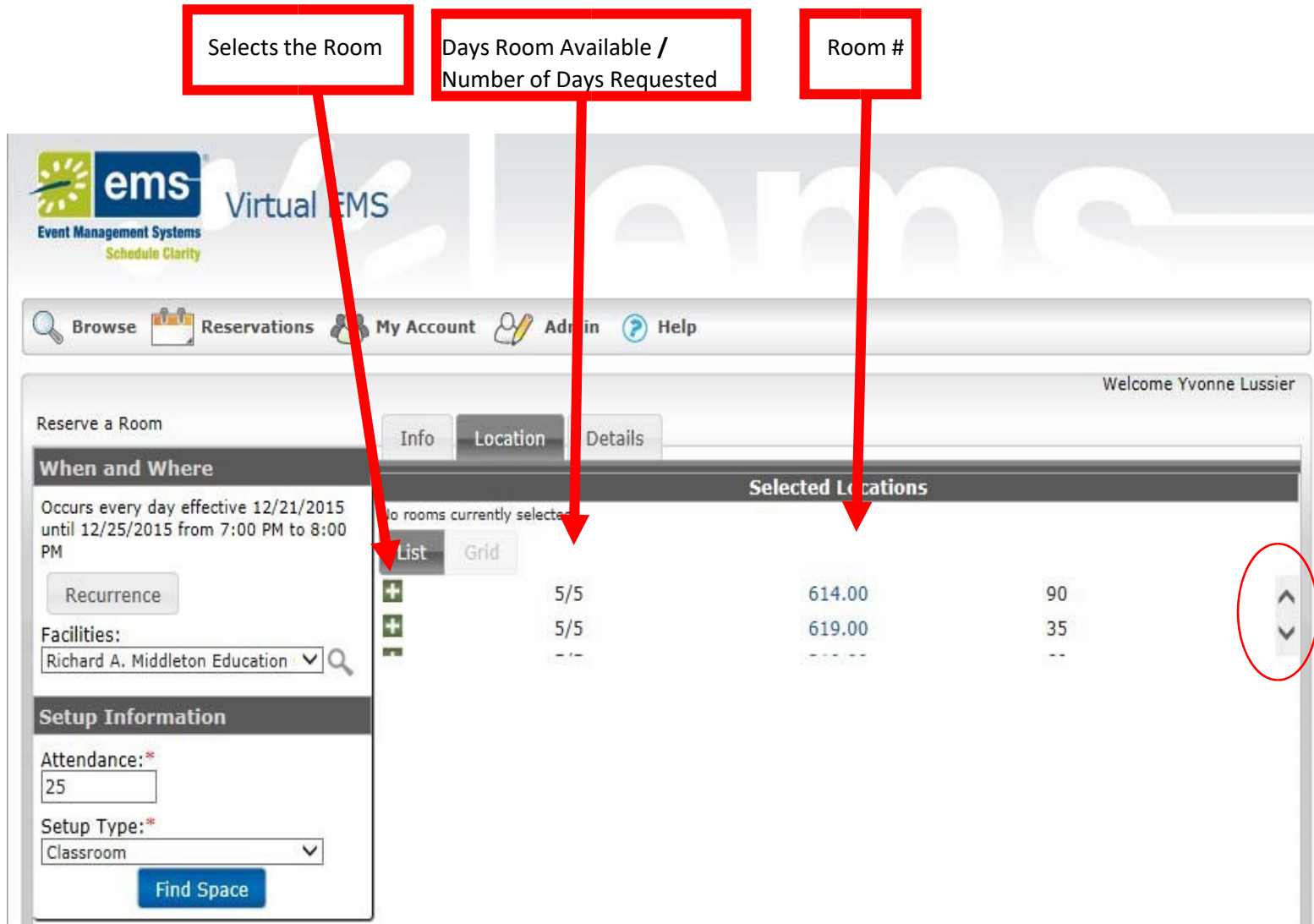


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### Making Multiday and Recurring Requests – Continued

7. Enter Attendance
8. Select a Setup
9. Click “Find Space”
10. Click the scroll arrows  up or down to view the room lists availability

A list view of available rooms meeting **your criteria** will be displayed. An example of the list view below provides the following information



The screenshot displays the EMS Virtual EMS interface. On the left, the 'Reserve a Room' section includes a 'When and Where' tab, a 'Recurrence' button, and a 'Facilities' dropdown menu set to 'Richard A. Middleton Education'. Below this is the 'Setup Information' section with 'Attendance' set to 25 and 'Setup Type' set to 'Classroom'. A 'Find Space' button is at the bottom of this section. The main area shows a 'Selected Locations' table with columns for room availability, price, and room number. Red boxes and arrows highlight specific elements: 'Selects the Room' points to the 'List' button; 'Days Room Available / Number of Days Requested' points to the '5/5' entries; 'Room #' points to the room numbers '90' and '35'. A red circle highlights the scroll arrows on the right side of the list.

| Days Room Available / Number of Days Requested | Room # |
|------------------------------------------------|--------|
| 5/5                                            | 90     |
| 5/5                                            | 35     |

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### **Making Multiday and Recurring Requests – Continued**

11. Click the “+” to select a room. \* Notice all available dates for the room selected move up into the “Selected Location” pane.
12. Click the “x” next to the dates to remove rooms not needed. Continue removing as needed. What should remain are the dates and rooms you want to keep.

\* In Example below\*, Rm 210, Rm 614 and Rm 619 were selected and all available dates for those Rooms moved up into “Selected Locations”. For Date 12/28/15, if user wanted to keep Room 210, Rooms 614 and 619 can be removed for 12/28/15 by clicking “x” next to those dates.

#### **To Edit Recurrence Criteria:**

For changes to Setup or Attendance

- a. Make changes to Setup or Attendance in “Setup Information Box”
- b. Click “Find Space” for new availability options

For changes to Recurrence Pattern, Date, or Time

- a. Click “Recurrence”
- b. Make Changes to recurrence pattern, date or time as needed
- c. Click “Apply Recurrence”
- d. Click “Find Space” for the new availability options

13. After all selections have been made for the recurring reservation Click **“Continue”**

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Welcome Yvonne Lussier

Reserve a Room

**When and Where**

Occurs every Monday week(s) effective 12/22/2015 until 1/11/2016 from 7:00 AM to 9:00 AM

**Recurrence**

**Facilities:**

Richard A. Middleton Education

**Setup Information**

Attendance: 25

Setup Type: Classroom

**Find Space**

**Details**

| DATE           | HOLIDAYS | START   | END     | LOCATION | STATUS  | SETUP COST | CONTACT |
|----------------|----------|---------|---------|----------|---------|------------|---------|
| 12/28/2015 Mon |          | 7:00 AM | 9:00 AM | 210.00   | Reserve | 25         |         |
| 12/28/2015 Mon |          | 7:00 AM | 9:00 AM | 614.00   | Reserve | 25         |         |
| 12/28/2015 Mon |          | 7:00 AM | 9:00 AM | 619.00   | Reserve | 25         |         |
| 1/4/2016 Mon   |          | 7:00 AM | 9:00 AM | 210.00   | Reserve | 25         |         |
| 1/4/2016 Mon   |          | 7:00 AM | 9:00 AM | 614.00   | Reserve | 25         |         |
| 1/4/2016 Mon   |          | 7:00 AM | 9:00 AM | 619.00   | Reserve | 25         |         |
| 1/11/2016 Mon  |          | 7:00 AM | 9:00 AM | 210.00   | Reserve | 25         |         |
| 1/11/2016 Mon  |          | 7:00 AM | 9:00 AM | 619.00   | Reserve | 25         |         |

**Continue**

### Making Multiday and Recurring Requests - Continued

14. Enter the Event Details including:

- Event Name**
- Event Type**
- Group Details** (Your Dept.) for the reservations and 1<sup>st</sup> Contact
- Additional Setup Information**-Provide additional setup details if needed.
- HVAC** - For evening (after 7 p.m.), weekend and holiday dates, "Check" the box and enter the Budget Code in the field provided.

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The screenshot shows the 'Edit Virtual EMS' interface. A 'Recurrence' dialog box is open, allowing users to set recurring reservations. The dialog includes fields for Start Time (7:00 AM), End Time, Recurrence Pattern (Daily, Weekly, Monthly, Random), Recur every (1 week(s) on), and Range of Recurrence (Start Date: 7/28/2015 Tue, End after: 1 occurrences, End by: 7/28/2015 Tue). There are 'Apply Recurrence' and 'Remove Recurrence' buttons at the bottom of the dialog. The background shows the 'When and Where' section with fields for Date, Start Time, End Time, Facilities, and Setup Information.

2. Click "Submit" (Rooms are now reserved)

\*Notice the **Reservation Detail Tab** opens and summarizes the reservation just made. A **Reservation ID** has been assigned and the **booking/s** will display under the reservation detail.

The screenshot shows the 'Reservation Details' tab in the EMS interface. It displays reservation information for Reservation ID 46, including Event Name (TEST SPED Meeting), Event Type (Meeting), Budget Code, Group Name (742-Procurement & eCommerce), 1st Contact Name (Yvonne Lussier), and Phone (210-407-0397). The 'Bookings' section shows a table of reservations with columns for ACTIONS, SERVICES, DATE, TIME, TITLE, LOCATION, STATUS, and SETUP. The table lists several reservations for 'TEST SPED Meeting' at '313.04' location, all with a status of 'Reserved' and a setup of 'Classroom (50)'.

| ACTIONS | SERVICES | DATE          | TIME               | TITLE             | LOCATION | STATUS   | SETUP          |
|---------|----------|---------------|--------------------|-------------------|----------|----------|----------------|
|         |          | 8/3/2015 Mon  | 8:00 AM - 10:00 AM | TEST SPED Meeting | 313.04   | Reserved | Classroom (50) |
|         |          | 8/6/2015 Thu  | 8:00 AM - 10:00 AM | TEST SPED Meeting | 313.04   | Reserved | Classroom (50) |
|         |          | 8/10/2015 Mon | 8:00 AM - 10:00 AM | TEST SPED Meeting | 313.04   | Reserved | Classroom (50) |
|         |          | 8/13/2015 Thu | 8:00 AM - 10:00 AM | TEST SPED Meeting | 313.04   | Reserved | Classroom (50) |
|         |          | 8/17/2015 Mon | 8:00 AM - 10:00 AM | TEST SPED Meeting | 313.04   | Reserved | Classroom (50) |
|         |          | 8/20/2015 Thu | 8:00 AM - 10:00 AM | TEST SPED Meeting | 313.04   | Reserved | Classroom (50) |
|         |          | 8/24/2015 Mon | 8:00 AM - 10:00 AM | TEST SPED Meeting | 313.04   | Reserved | Classroom (50) |
|         |          | 8/27/2015 Thu | 8:00 AM - 10:00 AM | TEST SPED Meeting | 313.04   | Reserved | Classroom (50) |

### View My Requests

Under "Reservations" select "View My Requests" to view all Reservations made by the user for a Group.

**Current Tab:** Shows all current reservations

**Historical Tab:** Show all past reservations

Clicking a reservation, opens the **Reservation Detail Tab** and allows the "Cancel" and "Edit" option for the reservation/or bookings.

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ems<sup>®</sup> North East ISD Event Management System

Browse Reservations My Account Admin Help Welcome Jesse Luna

Current Historical Calendar

Reservation Id: Event Name: Quick Search Show Cancelled

| ID   | NAME                      | GROUP                       | FIRST BOOKING | LAST BOOKING  | STATUS         | LOCATION          | HAS SERVICES |
|------|---------------------------|-----------------------------|---------------|---------------|----------------|-------------------|--------------|
| 4553 | David's Drumming Practice | 742-Procurement & eCommerce | 7/4/2016 Mon  | 7/28/2016 Thu | Request Sports | NEISD - NEISD Gym | Yes          |

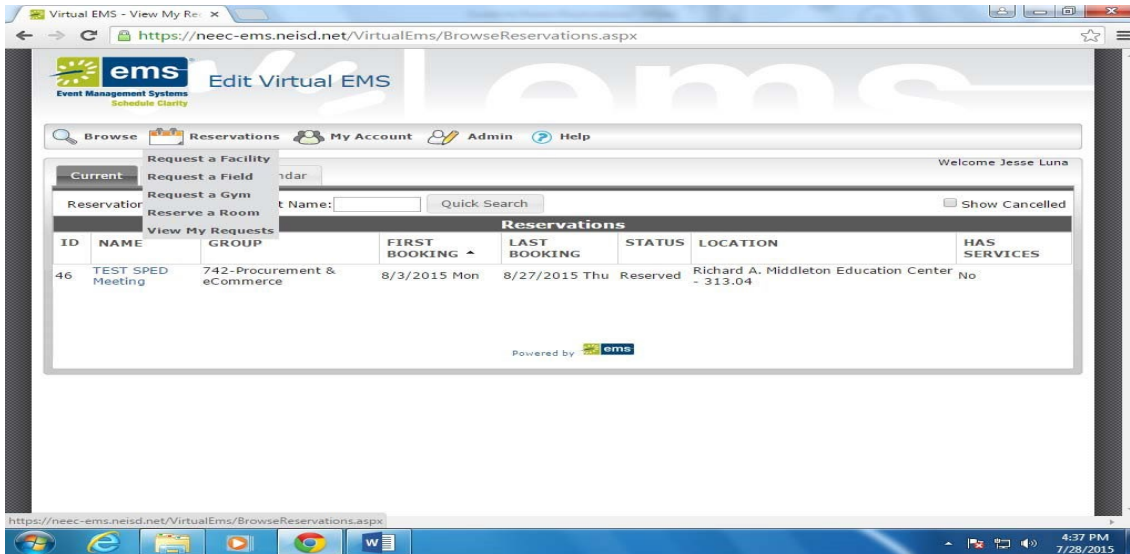
**Status:** This will show you the status of your request. Below is a list of potential statuses and their meanings:

- **Request/Request sports** - This is the initial status of your request, and indicates it is still pending processing by the Facility Reservation Office.
- **Pending Campus Review** - The request has been submitted to the campus and is pending their decision.
- **Tentative Campus Approval** - The campus has approved your request, as is, and has returned it to the Facility Reservation Office for further processing.
- **Tentative Campus Approval w/Changes** - This indicates the campus has not denied your request, but has proposed changes to the request. This may include a shift in time, or a different proposed date. The Facility Reservations office should contact you regarding these changes.
- **Pending Cust Approval w/Changes** - This indicates the changes proposed by the campus have been sent to you for your review/approval.
- **Pending Cust Approval w/Costs** - The request has been sent to you, the organization with all agreed upon times/dates with the costs, and the final approval is pending only signatures and payment (if applicable). This will be sent via e-mail.
- **Approved** - The request has been approved by all parties involved, paid for, confirmed and you are now authorized to use the facilities on the dates and times indicated on the final contract that will be provided to you when you pay.
- **Declined** - This indicates your request was declined by either the campus/facility or the district.

### Editing Reservations

Under “**Reservations**” Select “**View My Request**”. Select the reservation to edit. The **Reservation Detail** will open for the selected reservation. This can only be done while it is still pending review by the Facility Reservation Office. Once it is submitted to the campus for review and beyond, you must contact them for any changes/cancellations.

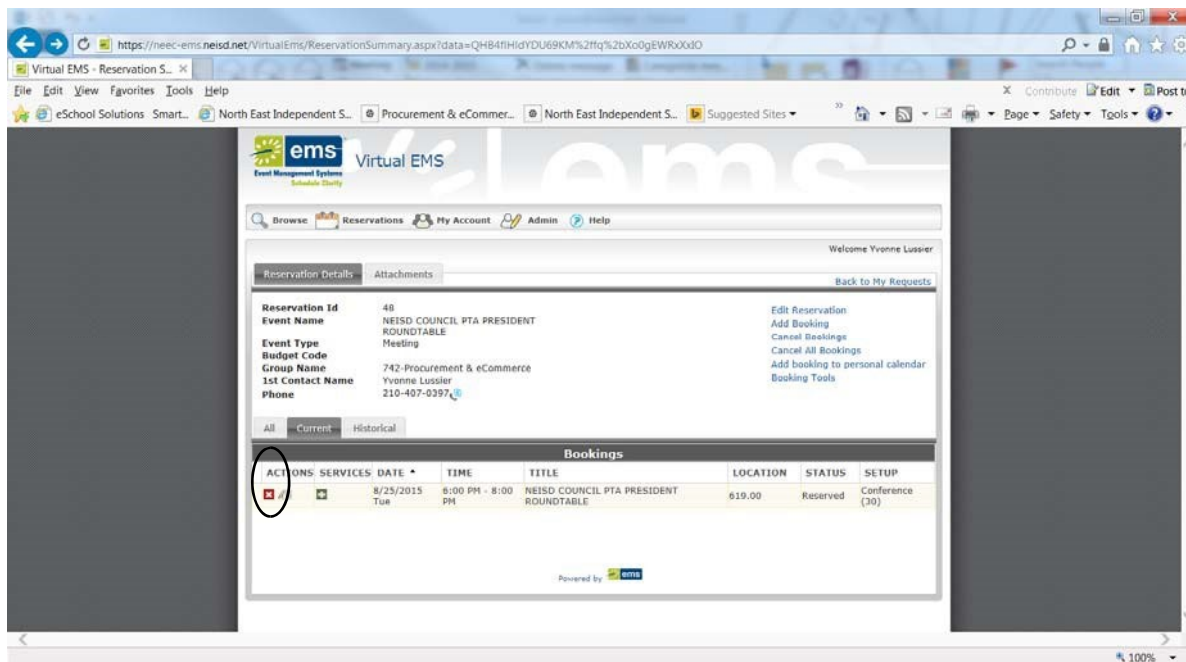
## EMS User Guide



You can edit a reservation booking using the icons under “Actions”

### Cancel Requests

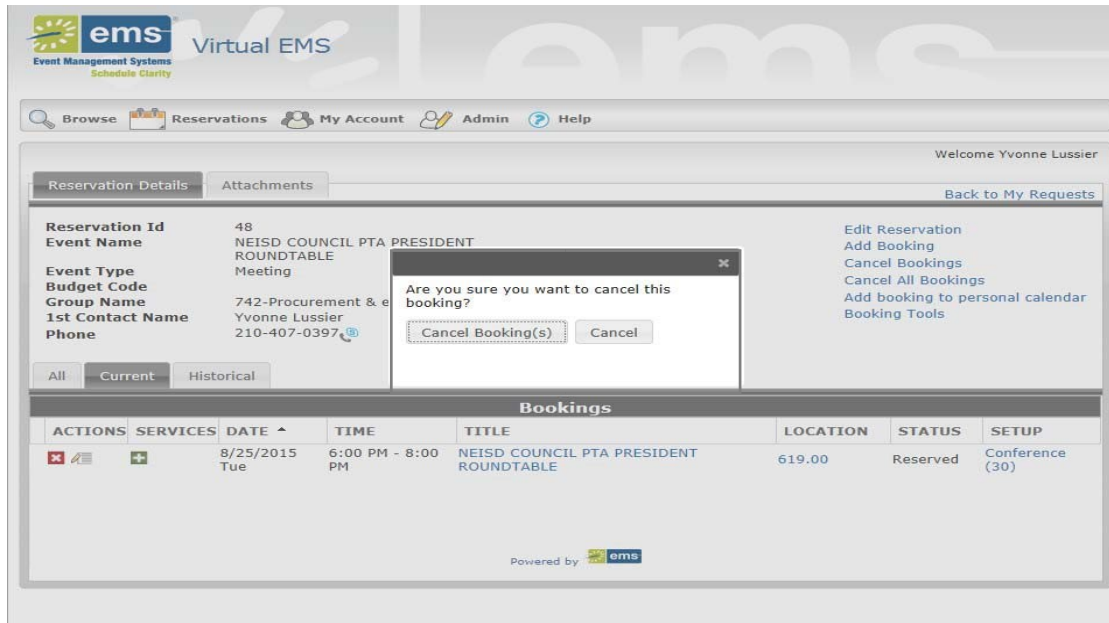
1. Select the “x” next to booking to cancel



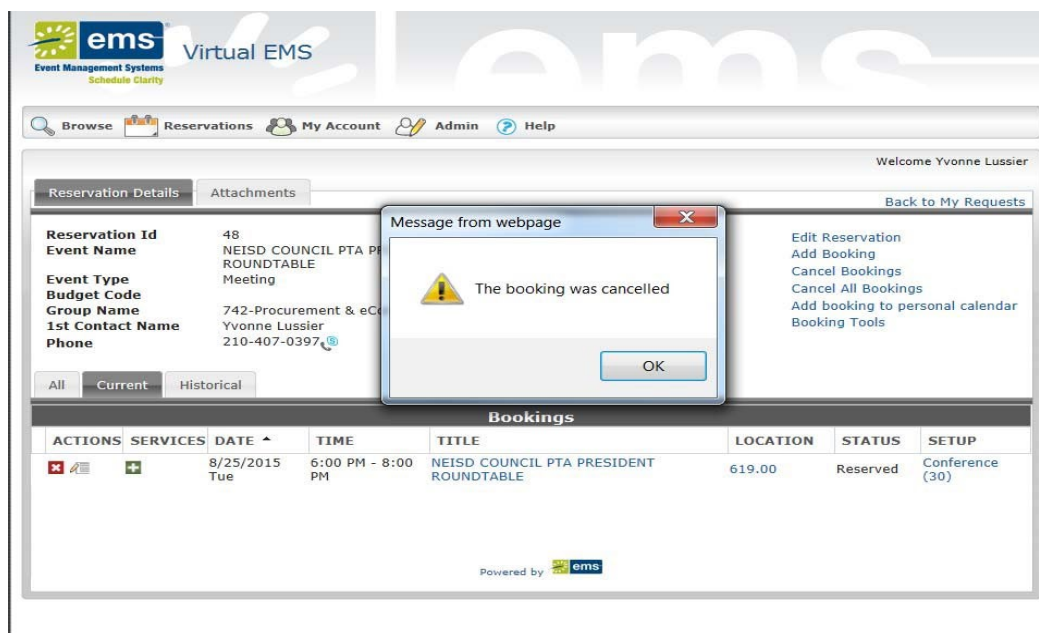
### Editing Reservations - Continued

A message will appear to confirm your cancel request

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2. Click "OK" to complete the cancel action. Reservation status will change to "Cancelled"

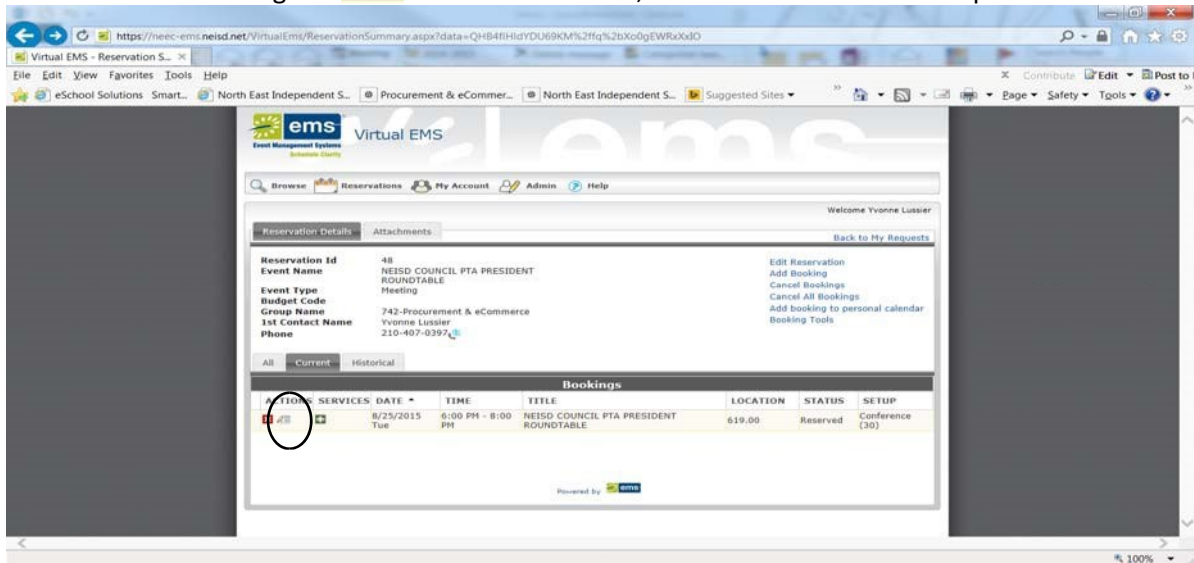


## Editing Reservations - Continued

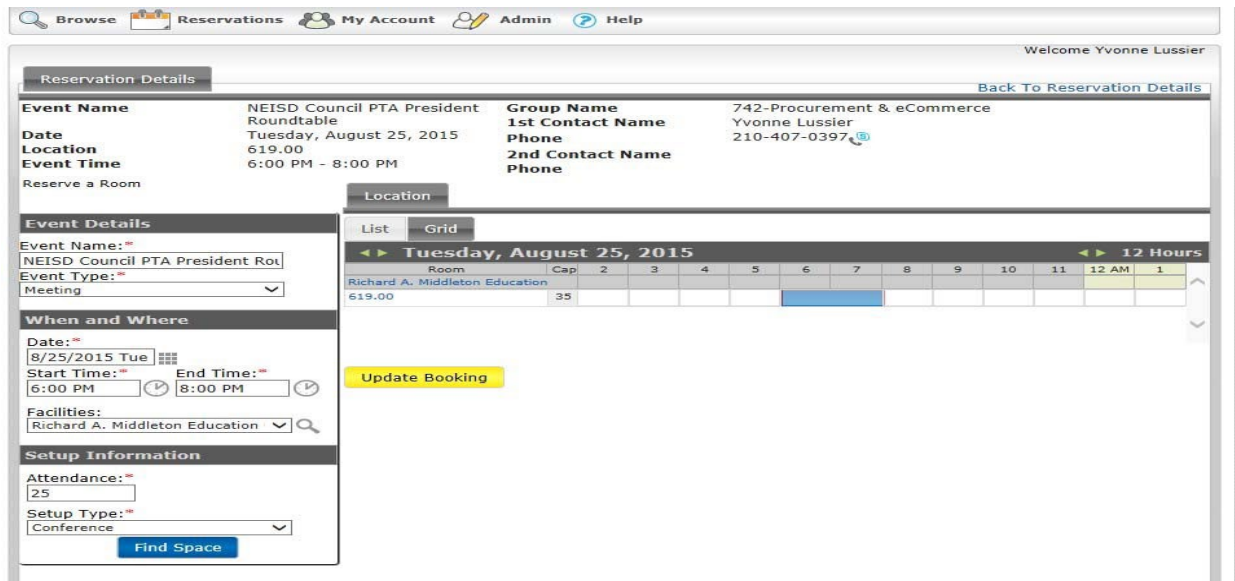
# EMS User Guide

## Edit Bookings

1. Click Edit Booking icon  to edit Event Details, When and Where and Setup information



2. Make changes to Event Details, When and Where and/or Setup information
3. Click "Find Space"
4. If needed, Click "+" to select a new room
5. Click "Update Booking"



The screenshot shows the 'Edit Booking' form in the Virtual EMS web application. The form is divided into several sections:

- Reservation Details:** Includes fields for Event Name (NEISD Council PTA President Roundtable), Date (Tuesday, August 25, 2015), Location (619.00), Event Time (6:00 PM - 8:00 PM), Group Name (742-Procurement & eCommerce), 1st Contact Name (Yvonne Lussier), Phone (210-407-0397), and 2nd Contact Name (Phone).
- Event Details:** Includes fields for Event Name (NEISD Council PTA President Roundtable), Event Type (Meeting), and a dropdown for Facilities (Richard A. Middleton Education).
- When and Where:** Includes fields for Date (8/25/2015 Tue), Start Time (6:00 PM), End Time (8:00 PM), and a dropdown for Facilities (Richard A. Middleton Education).
- Setup Information:** Includes fields for Attendance (25), Setup Type (Conference), and a dropdown for Facilities (Richard A. Middleton Education).

Buttons for 'Find Space' and 'Update Booking' are visible at the bottom of the form.

## Editing Reservations - Continued

6. Message will appear verifying update. Click "OK" to complete update

EMS User Guide

Reserve a Room

Event Details

Event Name: \*  
NEISD Council PTA President Rot

Event Type: \*  
Training

When and Where

Date: \*  
8/25/2015 Tue

Start Time: \*  
6:00 PM

End Time: \*  
8:00 PM

Facilities:  
Richard A. Middleton Education

Setup Information

Attendance: \*  
25

Setup Type: \*  
Conference

Find Space

Location

ListGrid

Tuesday, August 25, 2015 - Wednesday, August 26, 2015

12 Hours

| Room                           | Cap    | 2  | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 AM | 1 |
|--------------------------------|--------|----|---|---|---|---|---|---|---|----|----|-------|---|
| Richard A. Middleton Education | 614.00 | 40 |   |   |   |   |   |   |   |    |    |       |   |

Update

Message from webpage

 Booking successfully updated

OK