

Spartan Reservation System Reference Guide

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About this guide

This guide is designed to be a quick reference for common tasks within the Spartan Reservation System (www.case.edu/reservations). For more details about how to make or edit reservations, please contact us at emshelp@case.edu.

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








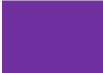
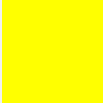


Booking – The “When and the Where.” This contains the date/time/location information for each occurrence of a reservation. A reservation has to have at least one booking, but can have as many bookings as needed (think of a recurring meeting – each occurrence is a booking).

Available Event Types

Event Type

- Breakfast
- Breakout
- Ceremony
- Class
- Concert
- Dance
- Dinner
- Dissertation
- Exam
- Fundraiser
- Initiation
- Interview
- Lecture
- Lesson
- Luncheon
- Meeting
- Memorial
- Open House
- Orientation
- Outdoor
- Poster Session
- Presentation
- Rainsite
- Reception
- Rehearsal
- Research Project
- Retreat
- Review
- SI Session
- Special Event
- Study Session
- Thesis
- Training
- Vendor Fair
- Workshop

Available Statuses

Status	Color	Type	Definition
Academic Confirmed		Book Space	Space booked for classes
Cancelled		Cancel	Space has been cancelled by user
Confirmed		Book Space	Space has been booked by user and confirmed by facility
Confirmed - Private		Book Space	Space has been booked by user and confirmed by facility, although the details of reservation will not be visible to the public
Declined		Cancel	Space has been declined by facility
Info Only		Info Only	Space has not been exclusively reserved and details are noted for informational purposes only
No Show		Book Space	User did not utilize a space at the time of reservation
Requested		Book Space	Space has been booked by user, but not yet confirmed by facility
Tentative		Book Space	Space has been booked by user, but the facility has yet to determine the viability of the request
Wait List		Info Only	Used when the space is officially reserved for someone else, but a user would like to be notified if the space were to become available
Walk Up		Book Space	Used for walk-up reservations when a room is available on the day of booking

Navigating the Spartan Reservation System

- 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 list of upcoming and past events
 - Browse:** takes you to the search features in the Web App
 - Events:** See all events
 - Locations:** See the free/busy of all the rooms
- 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.
 - Note:* Not all templates are available to everyone. Some templates are authenticated and only available to certain users depending on the form's booking rules.
- Below that is a list of your bookings for the day, along with a search option to find your reservations.
- Finally, in the upper right-hand corner, you see your name and a drop-down for your account options.
 - Note:* The system is authenticated by your CWRU username and password.

The screenshot displays the Spartan Reservation System interface. The top navigation bar includes the EMS logo, the system name "Spartan Reservation System", a user profile for "Jason Hawk", and a red callout box with the number "4".

The left sidebar contains a menu with the following items: HOME, CREATE A RESERVATION, MY EVENTS, BROWSE, EVENTS, and LOCATIONS. A red callout box with the number "1" is positioned at the bottom of this sidebar.

The main content area is divided into two sections. The upper section, titled "My Reservation Templates", lists various room request categories such as "Classrooms - University Registrar", "Dively Building - Meeting/Event Request", "Music Department Space Requests", "Mandel School", "Non-academic Space Requests", "PBL-WSOM Faculty/Staff", "Gund Hall Room Request", and "Science Room Request". Each category has "book now" and "about" buttons. A red callout box with the number "2" is located at the bottom left of this section.

The lower section, titled "My Bookings", shows a date filter for "JANUARY 2, 2019" and a "SEARCH" button. It also includes a time zone indicator for "Eastern Time [ET]" and navigation buttons for "Day", "Month", "Date", "Previous", "Today", and "Next". A message at the bottom states "There are no bookings for January 2, 2019". A red callout box with the number "3" is positioned at the bottom left of this section.

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.

The screenshot shows a navigation bar with 'SITE HOME' and 'MY HOME' (the latter is active). Below is the 'My Reservation Templates' section. A table lists various templates, each with a 'book now' and 'about' button. The 'Non-academic Space Requests' template is highlighted with a red border.

Template Name	book now	about
Classrooms - University Registrar	book now	about
Dively Building - Meeting/Event Request	book now	about
Music Department Space Requests	book now	about
Mandel School	book now	about
Non-academic Space Requests	book now	about
PBL-WSOM Faculty/Staff	book now	about
School of Law - Gund Hall Room Request	book now	about
School of Medicine Room Request	book now	about

3. Select your **date, time and location**
 - a. **Date:** Each form has different booking rules and will only allow users to select dates that are available. For example, the form “Non-academic Space Requests” allows users to reserve a space at least three business days prior to an event, up to one year in advance. If you are making a reservation with multiple dates, please see [Recurring Reservations](#).
 - b. **Times:** Each building has different building hours and will only allow users to select times that are available. For example, the Tinkham Veale University Center only accepts reservations between the hours of 7 a.m. – 10 p.m.
 - c. **Location:** If you are searching for a specific building, select that building from the options. Otherwise, all available rooms within that form will be displayed.

The screenshot shows the 'New Booking for Sat Jan 5, 2019' form. It includes a 'Date & Time' section with a 'Date' field (Sat 01/05/2019), a calendar icon, and a 'Recurrence' button. Below are 'Start Time' (9:00 AM) and 'End Time' (5:00 PM) fields, each with a clock icon. A 'Create booking in this time zone' dropdown menu is set to 'Eastern Time'. At the bottom, there is a 'Locations' section with '(all)' and an 'Add/Remove' link, and a 'Search' button.

- Select any filters to limit the number of rooms returned (optional, although highly recommended).

▼
Let Me Search For A Room

Setup Types Add/Remove

(no preference)

Room Types Add/Remove

(all)

Features Add/Remove


(none)


Number of People


▼

Search


Setup Types:



Banquet



Classroom



Conference


Empty


Horseshoe


Lecture


Pod/Mini-squares


Reception
(Cocktail Tables)

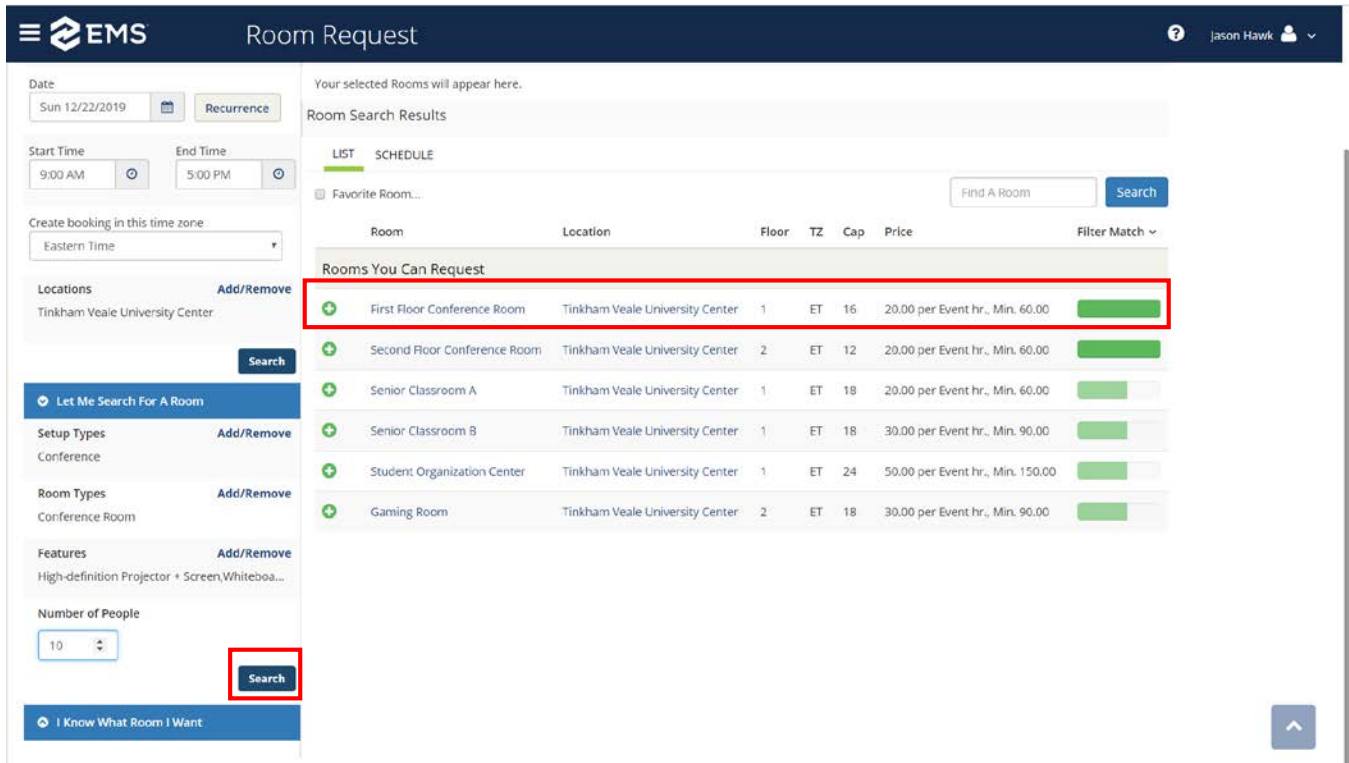

Square

Room Types: Room types vary per building.

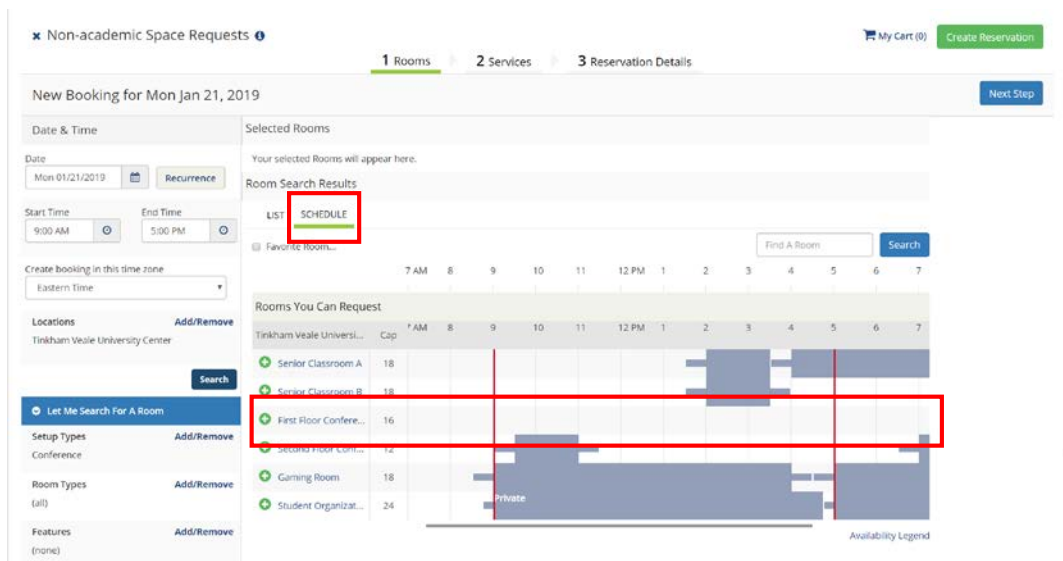
Features: Features vary per room.

Number of People: All rooms have a maximum capacity. Some rooms have a minimum capacity. Please enter your best estimate.

- Click the **search button** to get a list of available rooms.



- Clicking the room name or location name will give you details about the room
- The **filter match indicator** displays if a room matches all designated filters requested. If it does not, the indicator will display partial completion and hovering over it will display a list of features not available in that space.
- You may also choose to **toggle to the "Schedule" view** and see the availability of each space in a different format.



6. Select a room by clicking on the **green + button** next to the room name
7. **Confirm the number of attendees and desired setup.** The system will display an error message if the room cannot accommodate what's entered. When finished, click the **Add Room** button.

Attendance & Setup Type ✕

To continue, please enter the number of attendees and desired setup type for this Room.

No. of Attendees *

Setup Type *

Add Room
Cancel

8. You will now see the room you selected listed at the top under the selected rooms heading. If you wish to add additional rooms to the reservation, repeat all steps. If you are finished adding rooms, click the **Next Step** button to add Services (if available in that building).

EMS
Room Request
Jason Hawk

Non-academic Space Requests My Cart (1) Create Reservation

1 Rooms 2 Services 3 Reservation Details

New Booking for Sun Dec 22, 2019 Next Step

Date & Time

Date: Sun 12/22/2019

Start Time: 9:00 AM

End Time: 5:00 PM

Locations: Tinkham Veale University Center

Room Types: Conference Room

Features: High-definition Projector + Screen, Whiteboa...

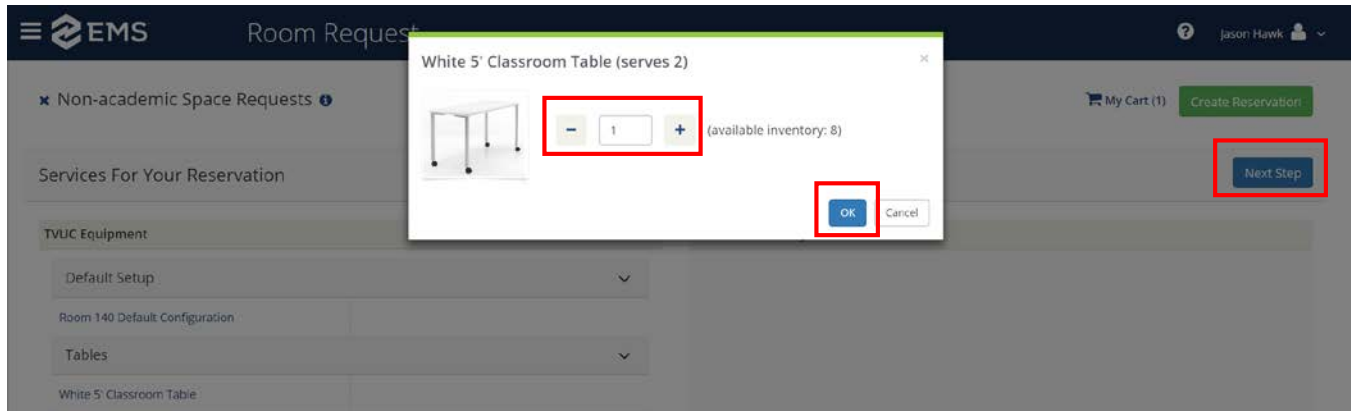
Selected Rooms Attendance & Setup Type

First Floor Conference Room

Room Search Results

Room	Location	Floor	TZ	Cap	Price	Filter Match
First Floor Conference Room	Tinkham Veale University Center	1	ET	16	20.00 per Event hr., Min. 60.00	+
Second Floor Conference Room	Tinkham Veale University Center	2	ET	12	20.00 per Event hr., Min. 60.00	+
Senior Classroom A	Tinkham Veale University Center	1	ET	18	20.00 per Event hr., Min. 60.00	+
Senior Classroom B	Tinkham Veale University Center	1	ET	18	30.00 per Event hr., Min. 90.00	+
Student Organization Center	Tinkham Veale University Center	1	ET	24	50.00 per Event hr., Min. 150.00	+
Gaming Room	Tinkham Veale University Center	2	ET	18	30.00 per Event hr., Min. 90.00	+

9. Services will vary per room. Please add any desired equipment/services to your reservation by **selecting it, entering the desired quantity and hitting ok** to move that service into Services Summary Column. When you are finished adding services, click the **next step button** to finalize your reservation details.

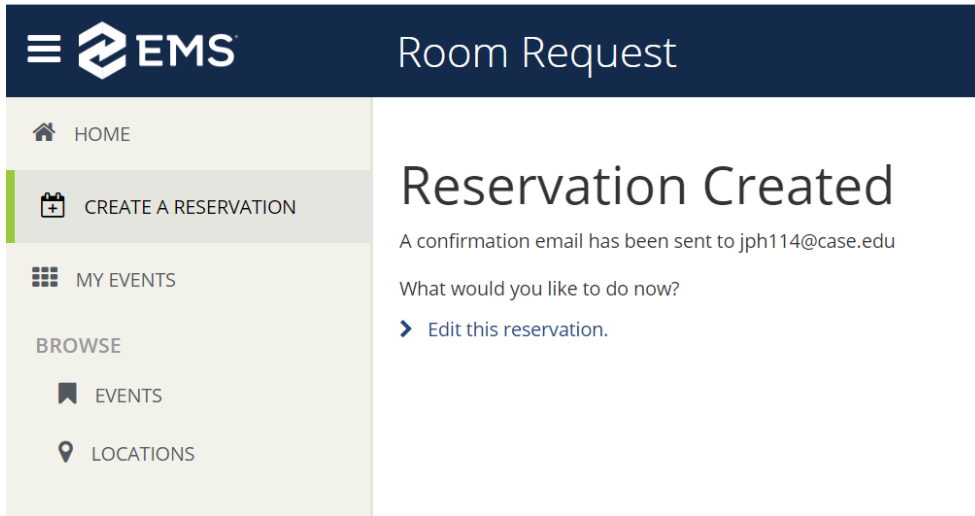


10. Enter your Event Details

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

- Event Name** – This should NOT include the name of the group. Please do not use abbreviations.
- Event Type** – Choose the most applicable
- Group** – If you’ve used the system before, you should see your group listed in the drop-down list. Click the magnifying glass to search for your group otherwise. Remember that the group you are searching for may require you search an alternative name. For example, the Chemistry Department may be listed as Department of Chemistry. If you are unable to locate your group, email emshelp@case.edu to have it added. Only registered student organizations may be added to the system.
 - NOTE:** Please select the correct group. Groups determine the pricing plan associated with each room. If you select the wrong group, not only are you advertising an event for the wrong organization, but fees vary per group.
- Contacts** – At least one contact person is required. Please enter an appropriate name, phone number and email address.
- Attachments** – Feel free to upload any attachments you may have at this time.
- Additional Information** – Each form has different questions. Please answer each question to the best of your ability.
- Speedtype** – Enter an appropriate speedtype for billing purposes (if applicable)
- Terms and Conditions** – Agree to the terms presented in order to process your request

11. Click the green **Create Reservation** button at the bottom of the screen to finalize your request.
12. You will be directed to a success page where you can immediately edit the reservation if needed.
 - a. **Note:** Your reservation is only in requested status. Each facility will approve and send confirmation when they have reviewed your request.



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**

Recurrence ×

Repeats

Every week(s)

On

Start Date

End Date (17 occurrences)

End after occurrence(s)




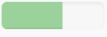




Start Time

End Time


Create booking in this time zone



5. Enter any filtering criteria you desire and click the search button

- A list of open rooms will appear with the availability listed in the second column (see below 17/17 means the room is open for 17 out the 17 requested dates)

Room	Available ▾	Location	Floor	TZ	Cap	Price	Filter Match
Rooms You Can Request							
 First Floor Conference Room	17/17	Tinkham Veale University Center	1	ET	16	20.00 per Event hr., Min. 60.00	
 Gaming Room	16/17	Tinkham Veale University Center	2	ET	18	30.00 per Event hr., Min. 90.00	
 Senior Classroom A	14/17	Tinkham Veale University Center	1	ET	18	20.00 per Event hr., Min. 60.00	
 Senior Classroom B	13/17	Tinkham Veale University Center	1	ET	18	30.00 per Event hr., Min. 90.00	

- Click the **green + icon** to add the room you wish to book.
- If you select an option that does not have complete availability, the system will automatically update and show you any available rooms for the dates not available in the original selection. You can add that additional room as well to your reservation

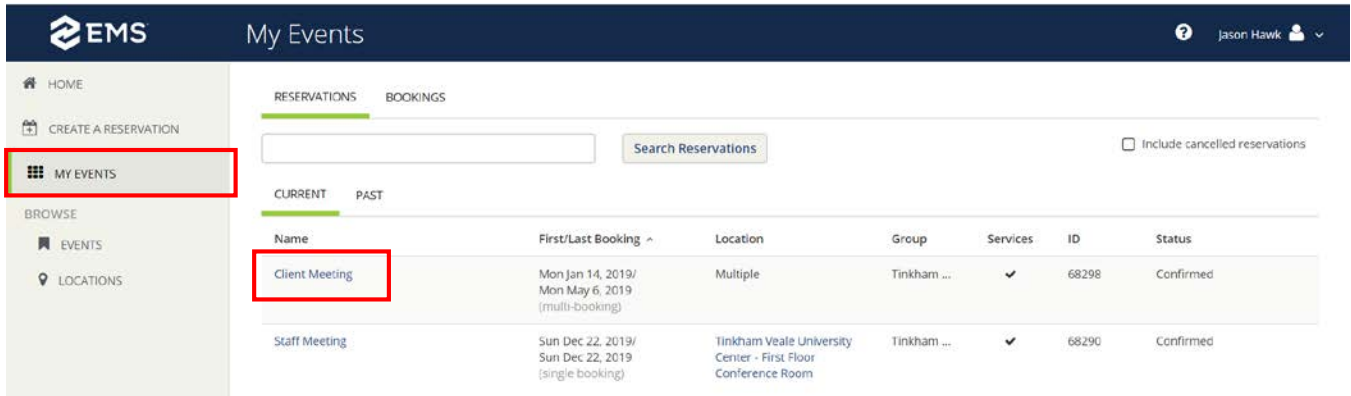
Selected Rooms  Attendance & Setup Type

 Gaming Room (16 of 17 occurrences),  Senior Classroom A (1 of 17 occurrences)

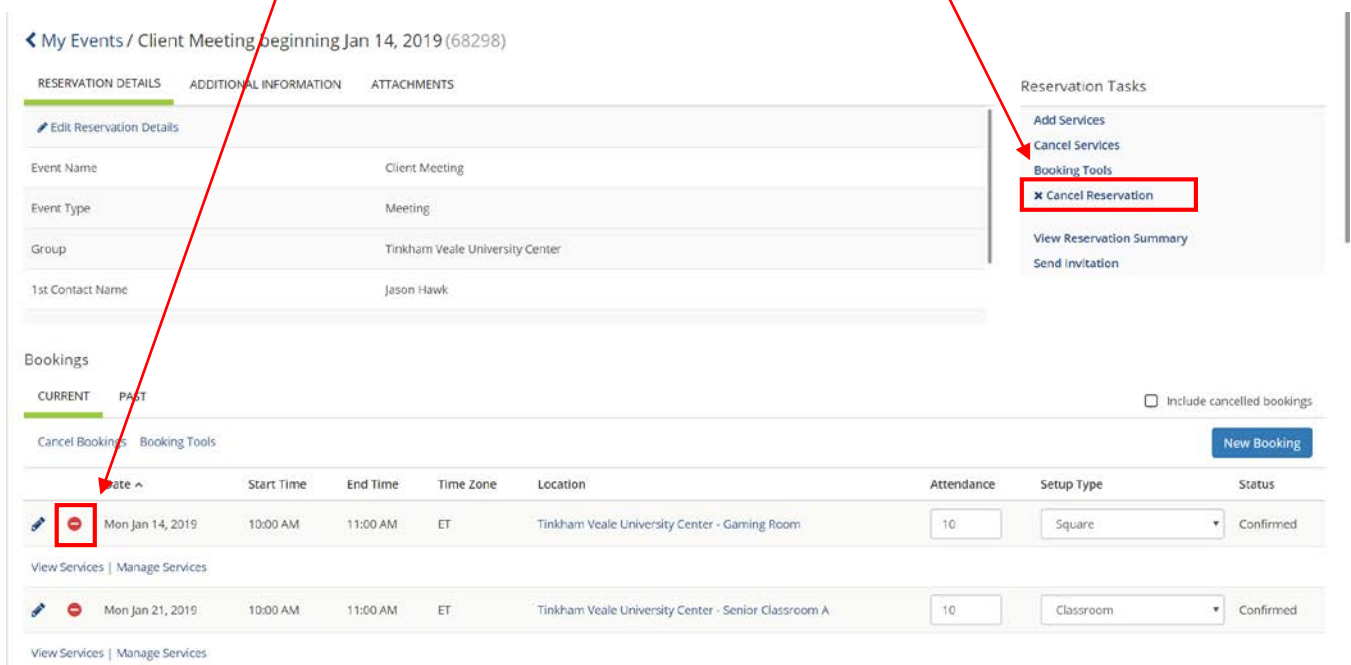
- Complete the reservation as outlined in [Single Reservation](#) above.

Cancelling a Reservation

1. Go to **My Events** from the left navigation pane
2. Click on the **Reservation Name** you wish to cancel



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



Note: Depending on the booking rules, some reservations may not be able to be cancelled online if it's within so many hours of the event. Please see the booking rules for each location for further clarification.

- 5. You will be asked to confirm your cancellation and provide a reason.

Cancel Reservation? ✕

Both the reservation and bookings will be cancelled. Are you sure you want to proceed?

Cancel Reason

Date Not Needed ▾

Cancel Notes

Meetings are canceled 🔄

Yes, Cancel Reservation No, Keep Reservation

Editing a Reservation

1. Go to **My Events** from the left navigation pane
2. Click on the **Reservation Name** you wish to edit

The screenshot shows the EMS 'My Events' interface. On the left, the 'MY EVENTS' menu item is highlighted with a red box. The main content area shows a table of reservations under the 'RESERVATIONS' tab. The 'Staff Meeting' reservation is highlighted with a red box. The table has the following data:

Name	First/Last Booking ^	Location	Group	Services	ID	Status
Client Meeting	Mon Jan 14, 2019/ Mon May 6, 2019 (multi-booking)	Multiple	Tinkham ...	✓	68298	Confirmed
Staff Meeting	Sun Dec 22, 2019/ Sun Dec 22, 2019 (single booking)	Tinkham Veale University Center - First Floor Conference Room	Tinkham ...	✓	68290	Confirmed

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

The screenshot shows the 'My Events / Staff Meeting beginning Dec 22, 2019 (68290)' page. The 'RESERVATION DETAILS' tab is selected, and the 'Edit Reservation Details' link is highlighted with a red box. The reservation details are as follows:

Event Name	Staff Meeting
Event Type	Meeting
Group	Tinkham Veale University Center
1st Contact Name	Jason Hawk

On the right side, there is a 'Reservation Tasks' panel with the following options: Add Services, Cancel Services, Booking Tools, ~~Cancel Reservation~~, View Reservation Summary, and Send Invitation.

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

The screenshot shows the 'Bookings' section for the 'Staff Meeting' reservation. The 'CURRENT' tab is selected, and the 'Edit Booking' link is highlighted with a red box. The booking details are as follows:

Date ^	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Sun Dec 22, 2019	9:00 AM	5:00 PM	ET	Tinkham Veale University Center - First Floor Conference Room	16	Conference	Confirmed

At the bottom left, there are links for 'View Services' and 'Manage Services'.

- You can select a new Date, Time or Location by using the search tools to the left. If the room is open for your new date or time, click **Update Booking** to change your information.

The screenshot displays the 'Staff Meeting (665090)' booking page. On the left, the 'Event Details' sidebar is highlighted with a red box. It contains the following fields:

- Event Name ***: Staff Meeting
- Event Type ***: Meeting
- Date & Time**:
 - Date**: Mon 02/04/2019
 - Start Time**: 9:00 AM
 - End Time**: 5:00 PM
 - Create booking in this time zone**: Eastern Time
- Locations**: Tinkham Veale University Center

On the right, the 'Room Search Results' section shows a grid of available rooms. The 'Update Booking' button is highlighted with a red box. The grid shows two rooms: 'Tinkham Veale Universi...' and 'First Floor Conferenc...'. The 'Update Booking' button is located below the grid.

Note: By making any changes to your reservation, it will automatically shift your reservation back into requested status and the facility will have to review all details again before these changes are confirmed.

Adding/Removing Services to an Existing Reservation

1. Go to **My Events** from the left navigation pane
2. Select the **Reservation Name** to which you wish to add services

The screenshot shows the EMS 'My Events' interface. On the left, the 'MY EVENTS' menu item is highlighted with a red box. The main area displays a table of reservations under the 'CURRENT' tab. The table has columns for Name, First/Last Booking, Location, Group, Services, ID, and Status. The 'Staff Meeting' row is highlighted with a red box.

Name	First/Last Booking	Location	Group	Services	ID	Status
Client Meeting	Mon Jan 14, 2019/ Mon May 6, 2019 (multi-booking)	Multiple	Tinkham ...	✓	68298	Confirmed
Staff Meeting	Sun Dec 22, 2019/ Sun Dec 22, 2019 (single booking)	Tinkham Veale University Center - First Floor Conference Room	Tinkham ...	✓	68290	Confirmed

3. Click the **Add Services** link

The screenshot shows the 'Staff Meeting' reservation details page. The 'Add Services' link in the 'Reservation Tasks' sidebar is highlighted with a red box. The main area shows reservation details for 'Staff Meeting' beginning Feb 4, 2019 (68290).

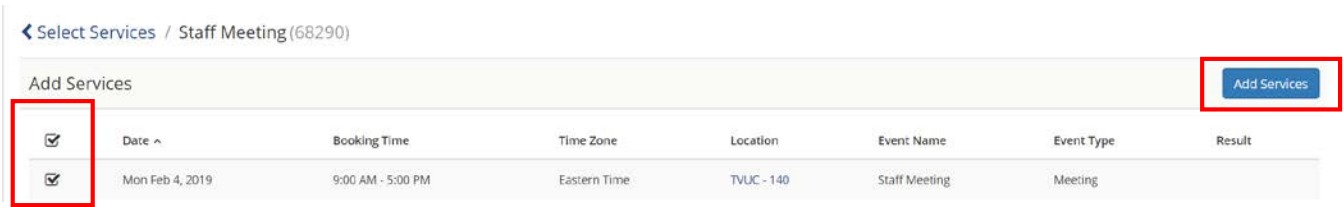
Event Name	Staff Meeting
Event Type	Meeting
Group	Tinkham Veale University Center
1st Contact Name	Jason Hawk

4. Select the service(s) and quantity you wish to add (A summary will display on the right of the screen)
 - a. Note: Depending on the date requested, not all services may be available if you are too close to the date of the reservation.

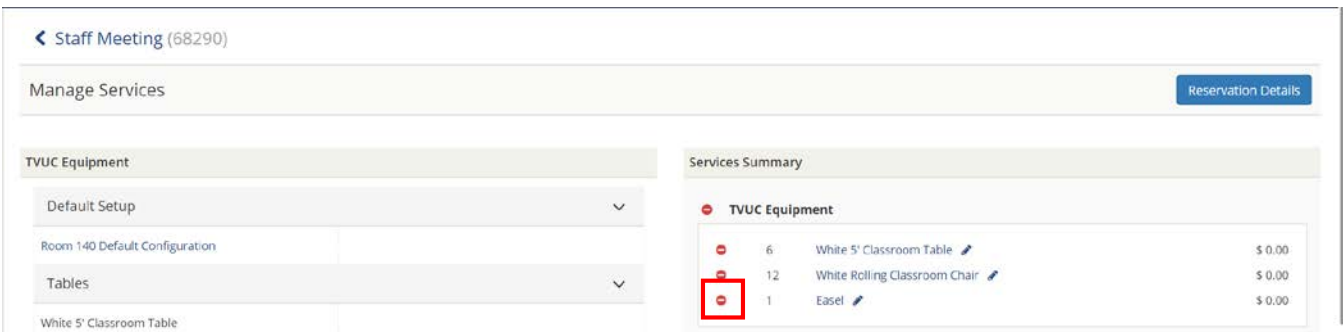
5. Click **Next Step**

The screenshot shows the 'Staff Meeting' reservation page with the 'Select Services' section. The 'Next Step' button is highlighted with a red box. The 'Services Summary' section is also highlighted with a red box, showing 'TVUC Equipment' with a quantity of 1 and an 'Easel' icon.

6. Identify the bookings to which you wish to add the service by **selecting the checkbox** next to the booking name(s) and clicking the **Add Services** button.
 - a. For recurring reservations, you can add the service to multiple bookings at the same time.



7. Similarly, if you want to remove services, click the **Manage Services** button under the booking and follow the prompts to remove the service(s).



Browsing

Events

Browse events allows you to see all reservations within the system. This will link you to a reservation calendar where you can view events on a daily, weekly or monthly list. Use the filter option to narrow results.

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

Browse location will show you a free/busy status of all spaces. This will link you to a book where you can view availability of spaces on a daily basis. Use **Add Filter** to narrow results and browse by specific locations or views.

The screenshot displays the 'Locations' view in the Spartan Reservation System. The left sidebar contains navigation options: HOME, CREATE A RESERVATION, MY EVENTS, BROWSE, EVENTS, and LOCATIONS (highlighted with a red box). The main content area shows filters for Date (Wed 02/20/2019) and Time Zone (Eastern Time), with an 'Add Filter' button (also highlighted with a red box). Below the filters, the 'Locations' section shows a calendar for Wednesday, February 20, 2019, with a search bar and a 'Find A Room' button. The calendar displays a grid of room availability for Tinkham Veale University Center, with columns for hours from 7 AM to 11 PM. Rooms listed include Ballroom (Full), Ballroom A, Ballroom A + B, Ballroom B, Ballroom B + C, Ballroom C, First Floor Conference, Gaming Room, and Second Floor Conference. Each room has a capacity and a status (e.g., Closed). Thick blue bars indicate actual event times, while thin blue bars indicate reservation times for setup/teardown purposes.

Notes:

- The thick bar is the actual event time.
- The thin bar is the time the room is reserved for setup/teardown purposes.
- If a room is designated as a combo room, a reservation in one room may impact the availability of other rooms. (For example, a reservation in Ballroom A will not allow a reservation in Ballrooms A/B or the Full Ballroom because those spaces are not available. Only Ballrooms B, C or B/C would be available.)
- 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).
- If you click on a room name, you will get details about the space.

You can make a reservation from any open spot by clicking and dragging your mouse from the start to the end time of an open slot. Select your template and click continue to complete the reservation.

