# 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 |

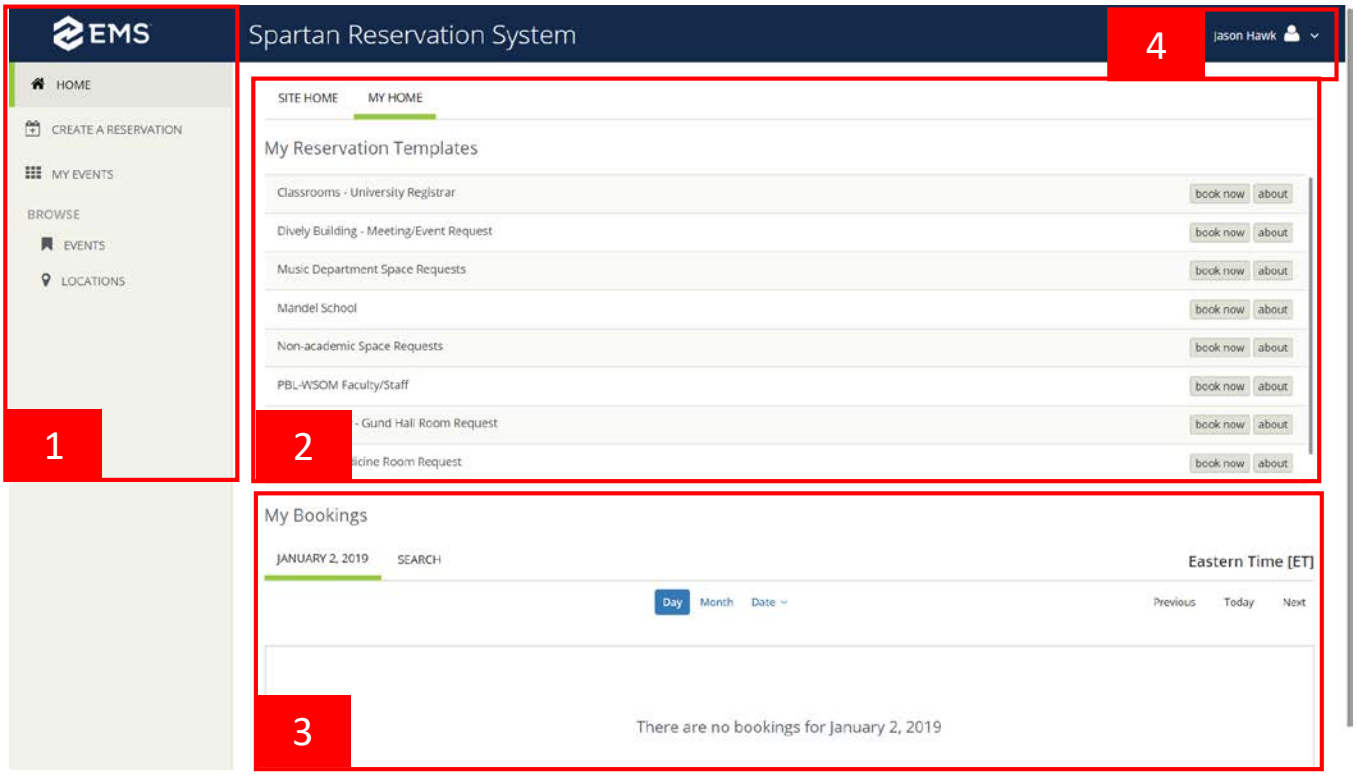
# Navigating the Spartan Reservation System

1. On the left, you have a menu bar with the following options:
   - **Create a Reservation:** takes you to your reservation templates
   - **My Events**: takes you to your 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

2. On the main section of the page, you see **My Reservation Templates**, which allows you to make a quick booking right from your home page.
   a. *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.

3. Below that is a list of your bookings for the day, along with a search option to find your reservations.

4. Finally, in the upper right-hand corner, you see your name and a drop-down for your account options.
   a. *Note:* The system is authenticated by your CWRU username and password.



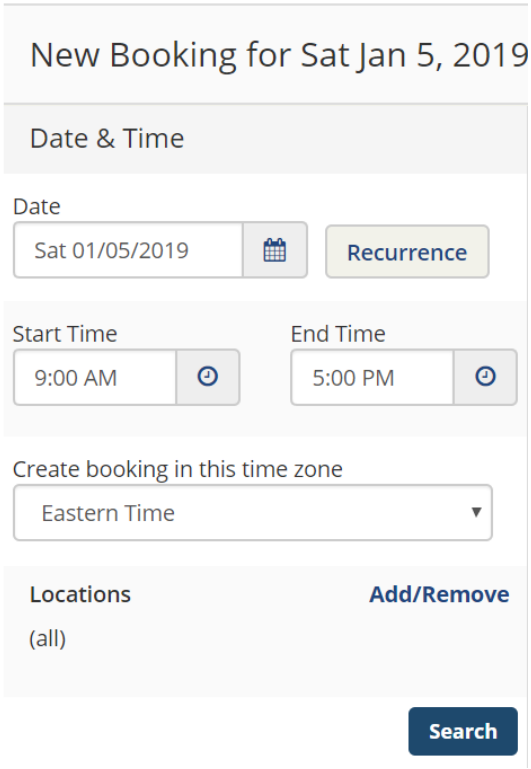
# Making Reservations

## Single Reservation

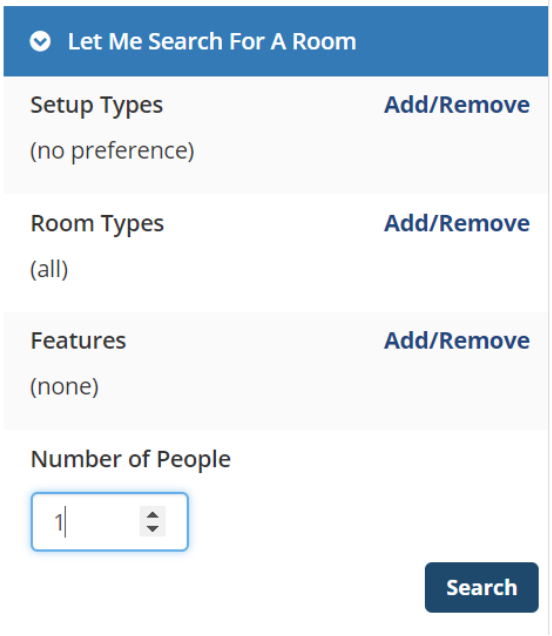
1. To make a reservation, begin at either **My Home** or **Create Reservation**

2. Click **book now** next to the template you wish to use
   ***NOTE** – The templates are designed for different kinds of bookings. Use the one that best matches your reservation needs. The **about** button will tell you the rules of the template.

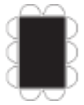
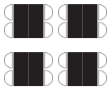
3. Select your **date, time and location**
   a. **Date:** Each form has different booking rules and will only allow users to select dates that are available. For example, the form "Non-academic Space Requests" allows users to reserve a space at least three business days prior to an event, up to one 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.



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




**Setup Types:**

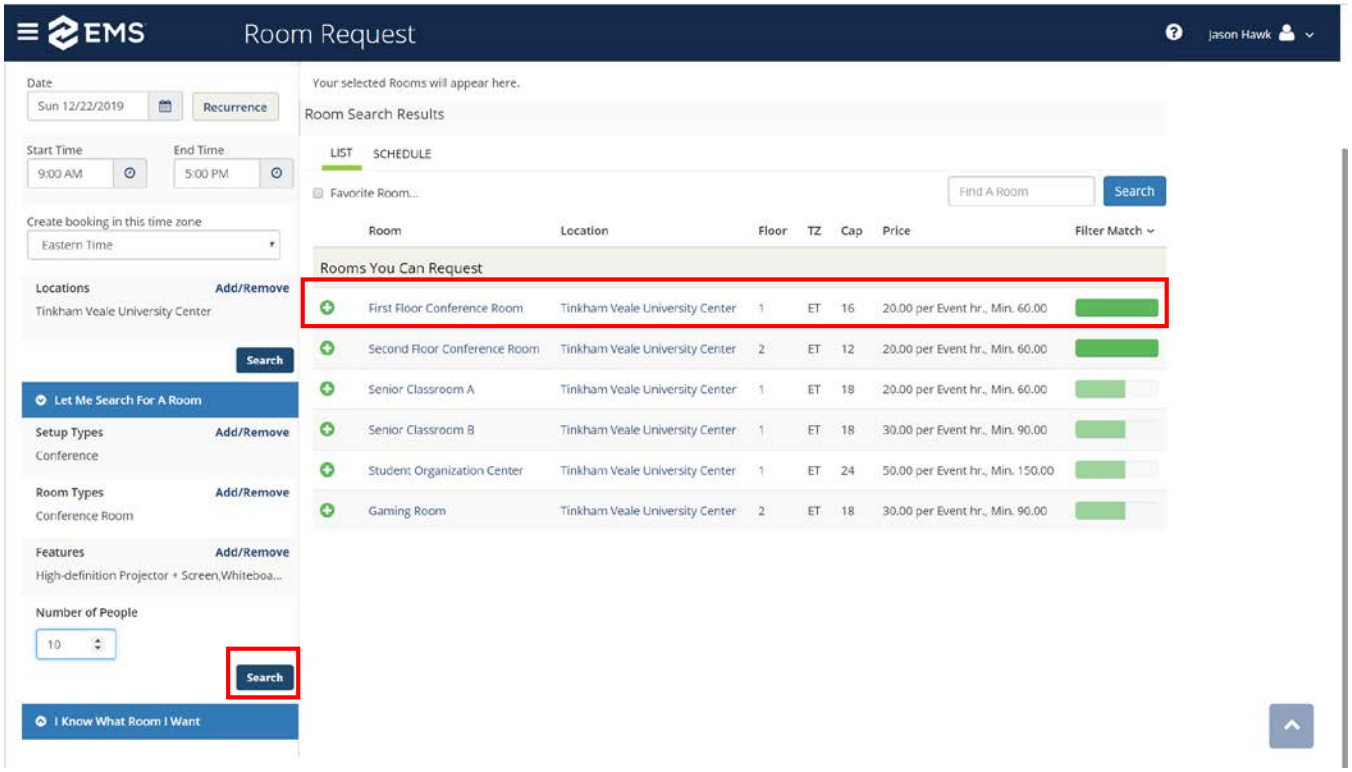
| | |
|---|---|
| | Banquet |
| | Classroom |
|  | Conference |
| | Empty |
| | Horseshoe |
| | Lecture |
|  | Pod/Mini-squares |
| | Reception<br>(Cocktail Tables) |
| | Square |

**Room Types:** Room types vary per building.

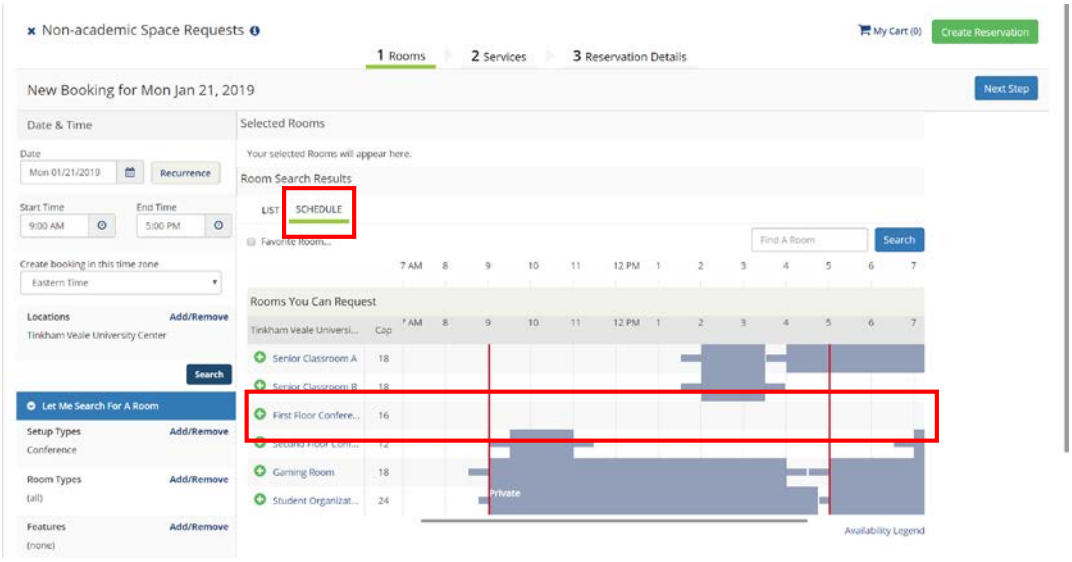
**Features:** Features vary per room.

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

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

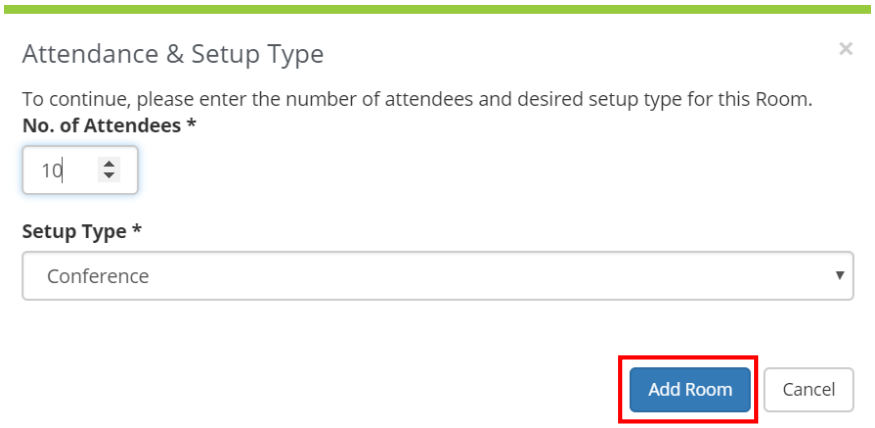



a. Clicking the room name or location name will give you details about the room
b. The **filter match indicator** displays if a room matches all designated filters requested. If it does not, the indicator will display partial completion and hovering over it will display a list of features not available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

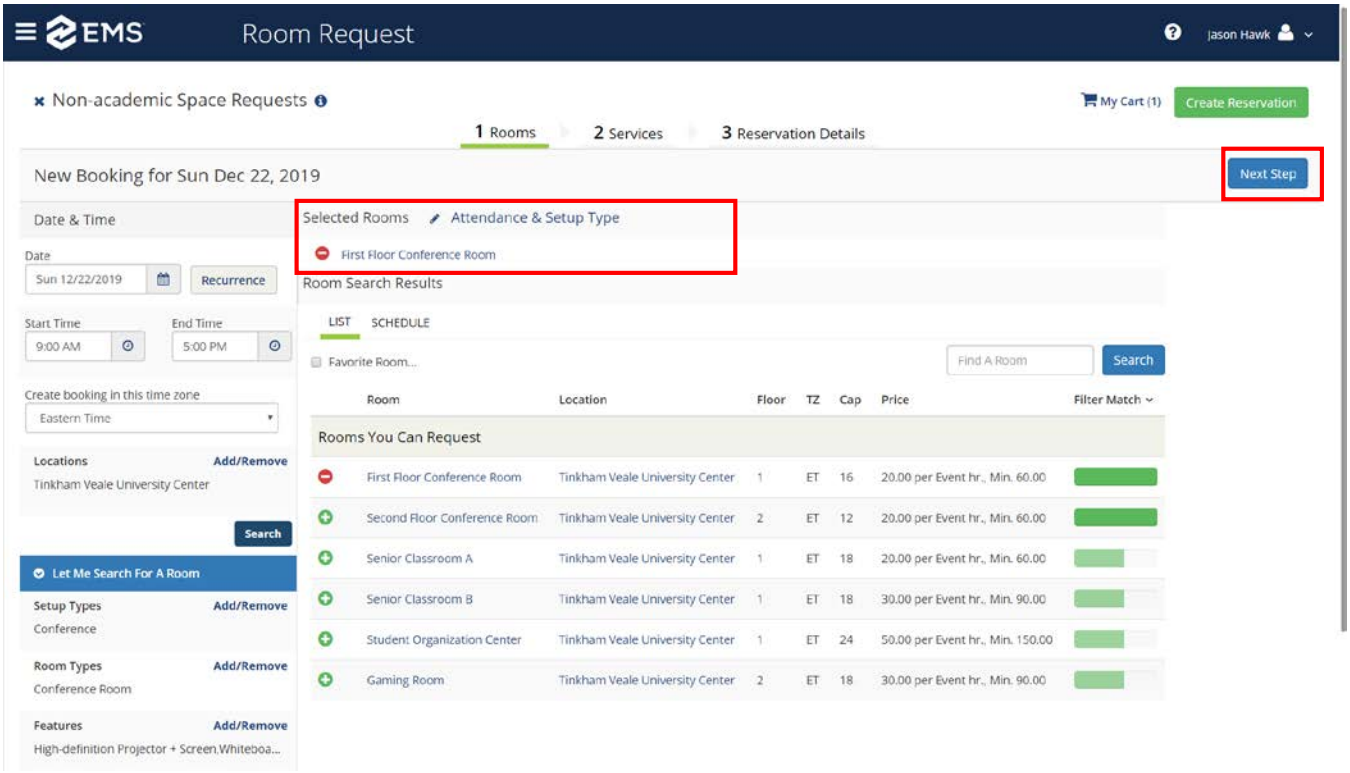


6. Select a room by clicking on the **green + button** next to the room name

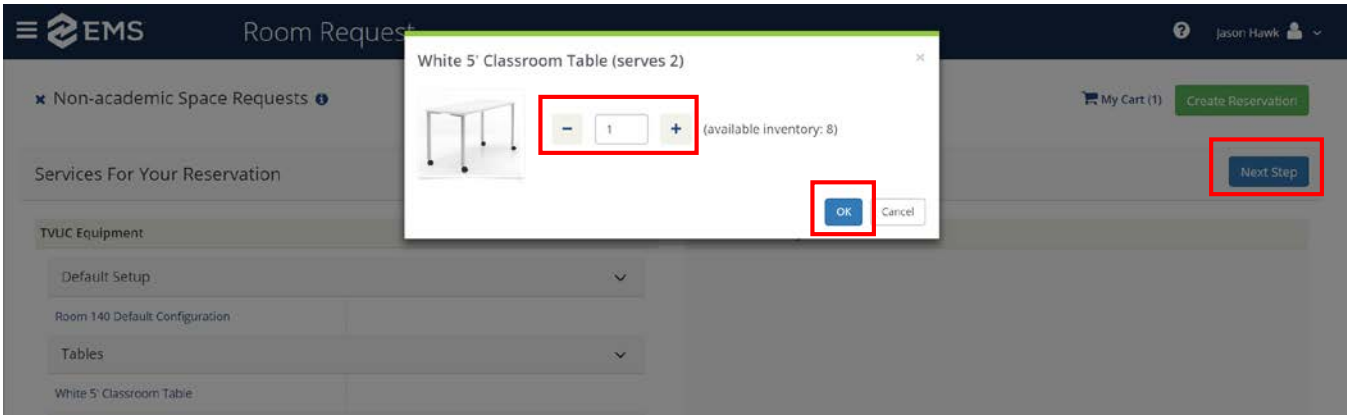
7. **Confirm the number of attendees and desired setup.** The system will display an error message if the room cannot accommodate what's entered. When finished, click the **Add Room** button.




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).



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.



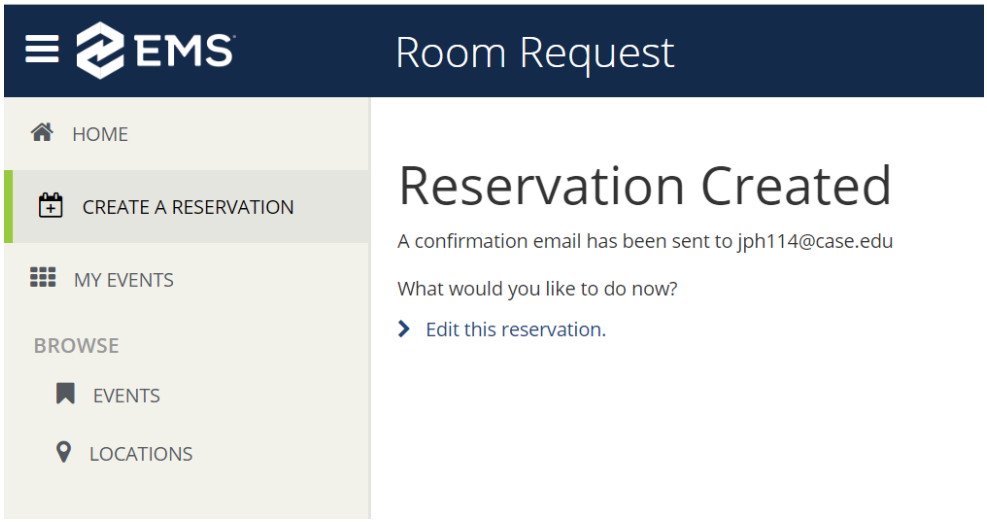

10. Enter your **Event Details**

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

a. **Event Name** – This should NOT include the name of the group. Please do not use abbreviations.
b. **Event Type** – Choose the most applicable
c. **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.
    i. **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.
d. **Contacts** – At least one contact person is required. Please enter an appropriate name, phone number and email address.
e. **Attachments** – Feel free to upload any attachments you may have at this time.
f. **Additional Information** – Each form has different questions. Please answer each question to the best of your ability.
g. **Speedtype** – Enter an appropriate speedtype for billing purposes (if applicable)
h. **Terms and Conditions** – Agree to the terms presented in order to process your request

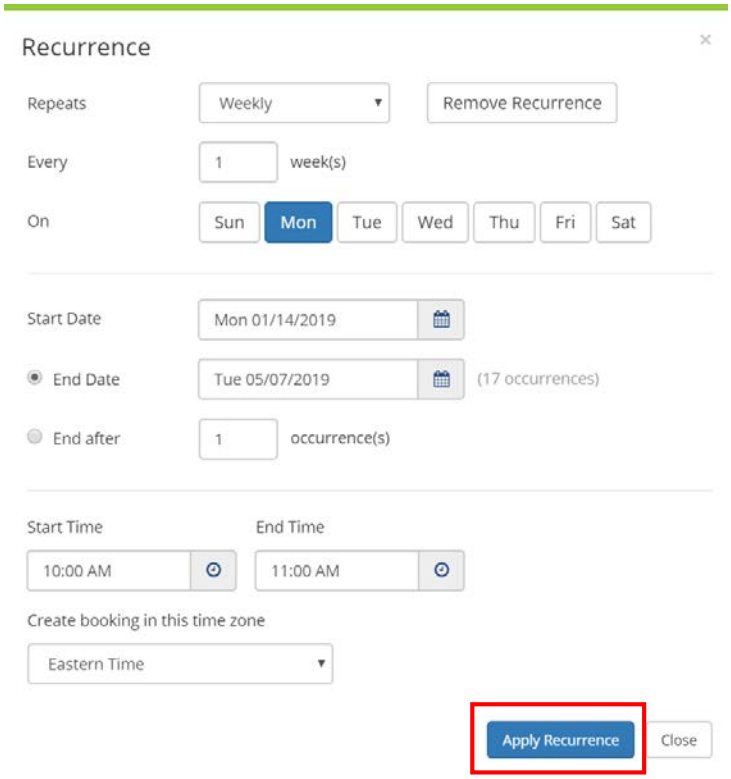
11. Click the green **Create Reservation** button at the bottom of the screen to finalize your request.

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**



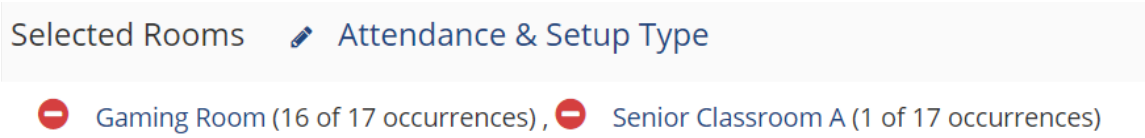

5. Enter any filtering criteria you desire and click the search button

6. 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 | |

7. Click the **green + icon** to add the room you wish to book.

8. 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

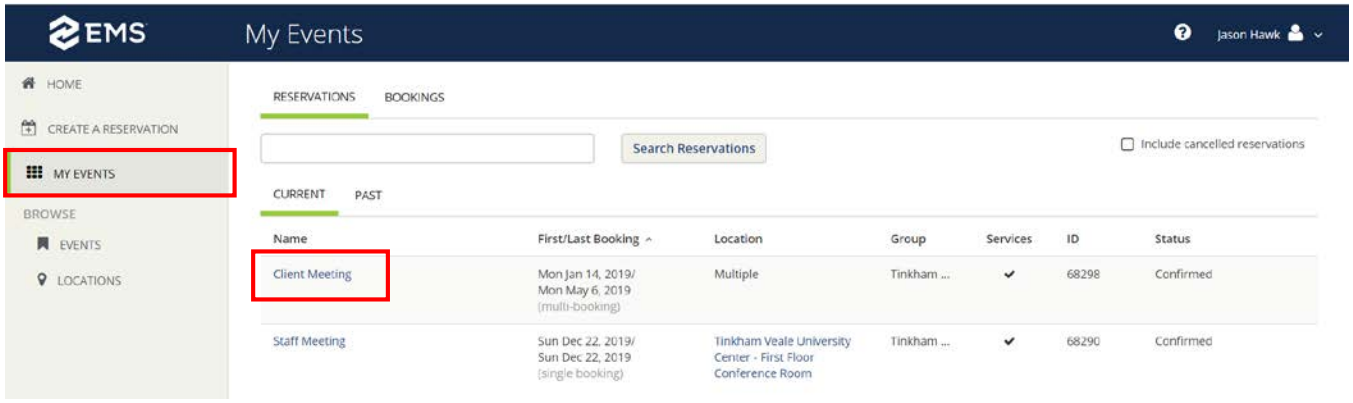



9. Complete the reservation as outlined in *Single Reservation* above.

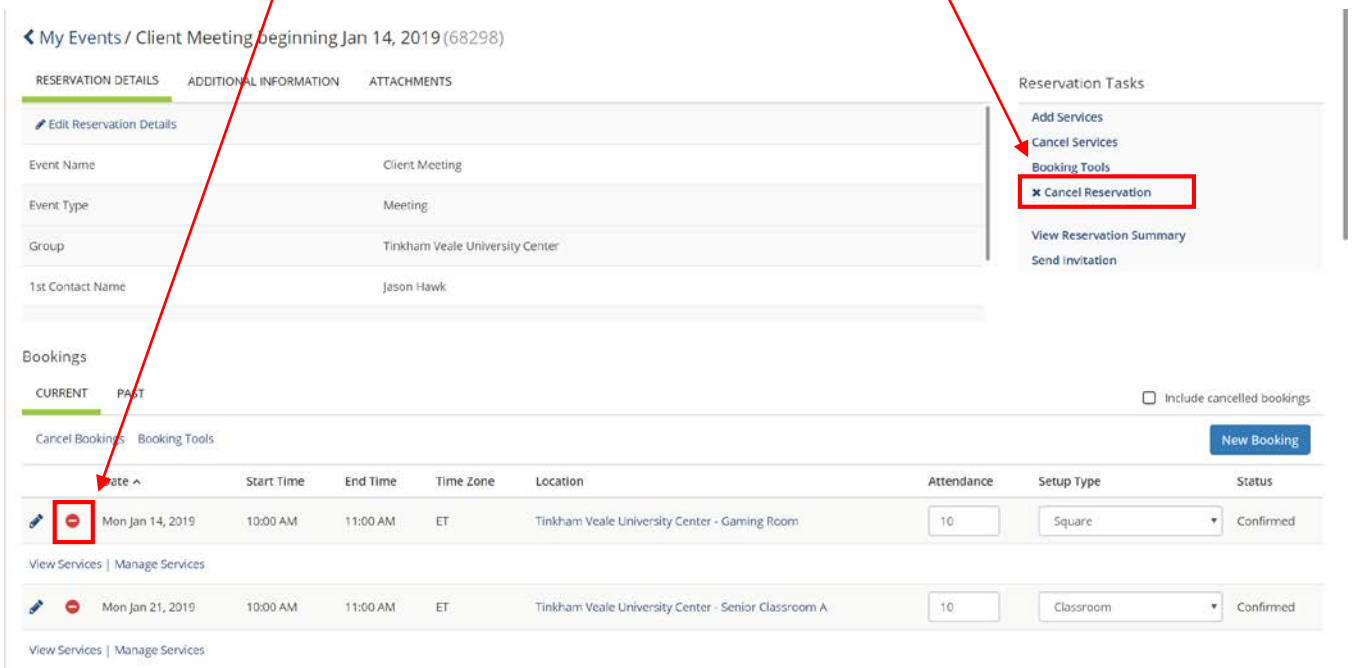
# Cancelling a Reservation

1. Go to **My Events** from the left navigation pane

2. Click on the **Reservation Name** you wish to cancel

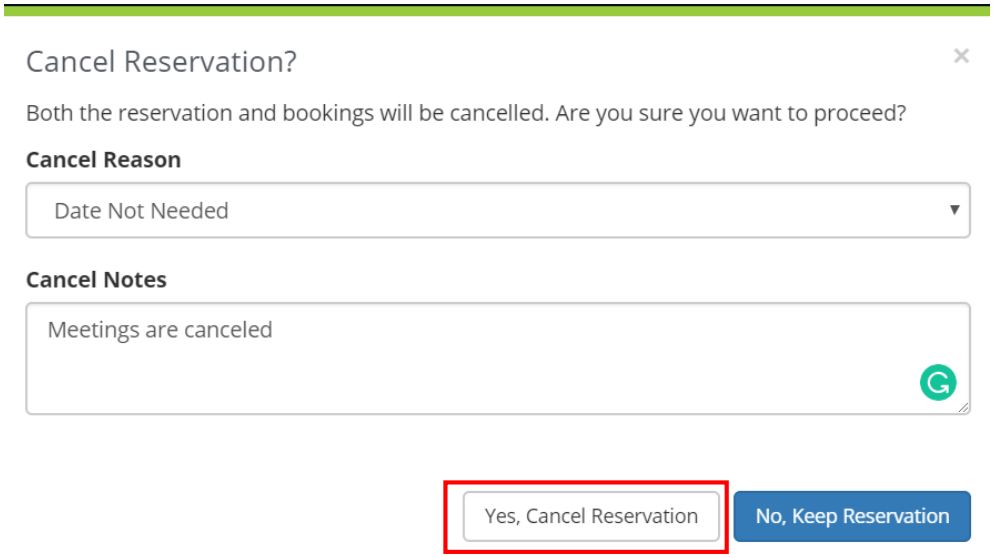



3. Click either **Cancel Reservation** on the right side (cancels all bookings) OR
4. Click the **cancel icon** next to the booking (cancels that booking only)




**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.

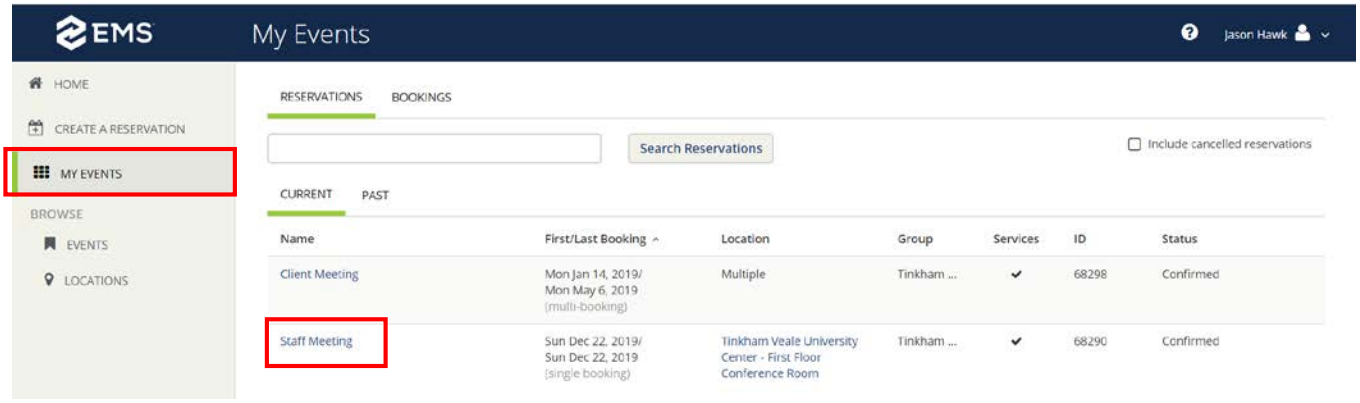
5. You will be asked to confirm your cancellation and provide a reason.



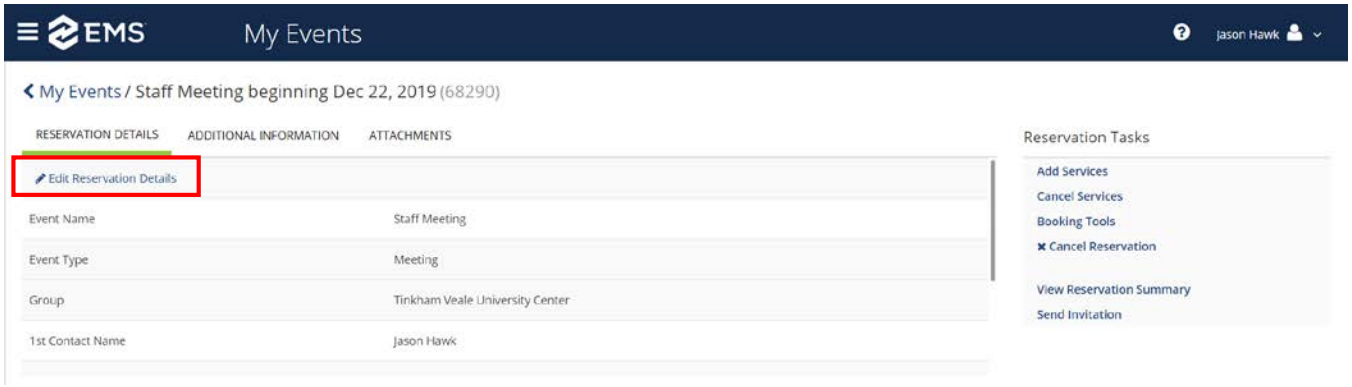
# Editing a Reservation

1. Go to **My Events** from the left navigation pane

2. Click on the **Reservation Name** you wish to edit

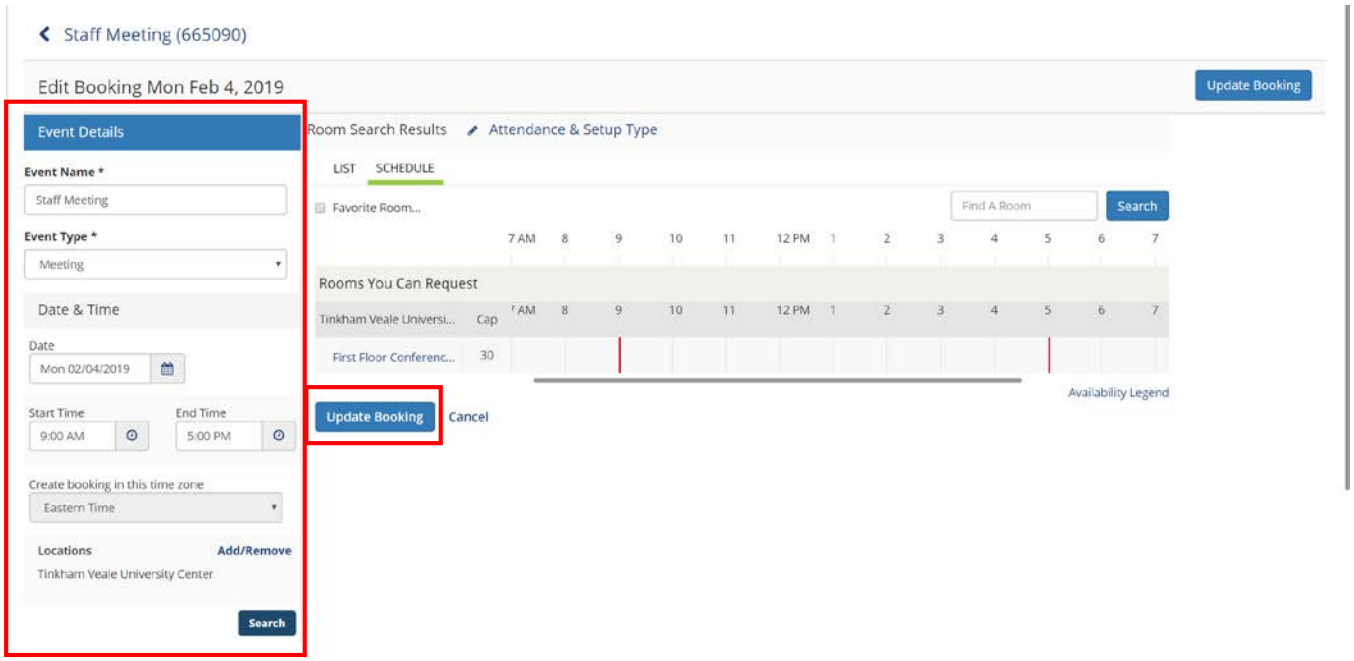



3. You can edit **Reservation Details** (Event Name, Event Type, Group, First Contact, Speedtype, etc.) by clicking on the pencil icon next to the Reservation Details.




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

5. 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.

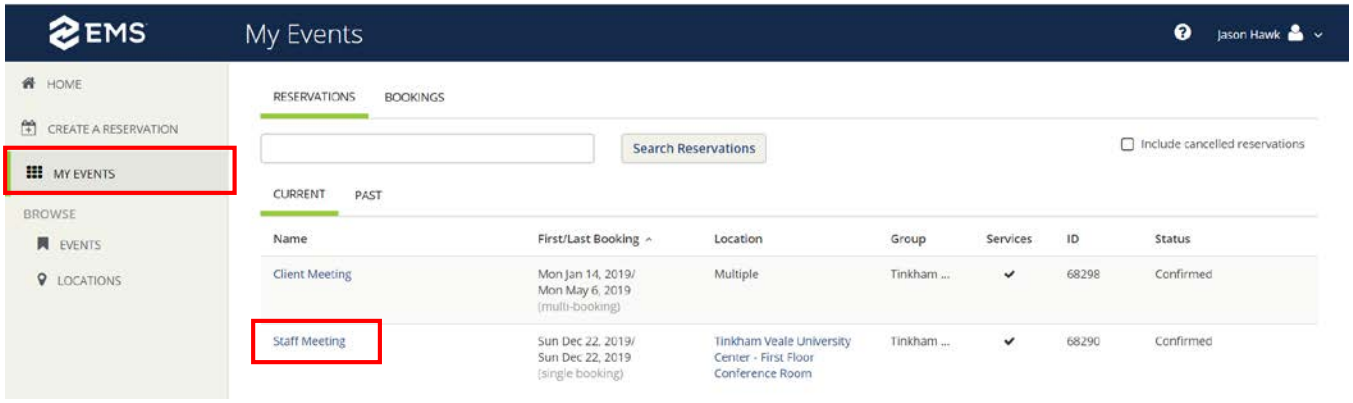



**Note:** By making any changes to your reservation, it will automatically shift your reservation back into requested status and the facility will have to review all details again before these changes are confirmed.

# Adding/Removing Services to an Existing Reservation

1. Go to **My Events** from the left navigation pane

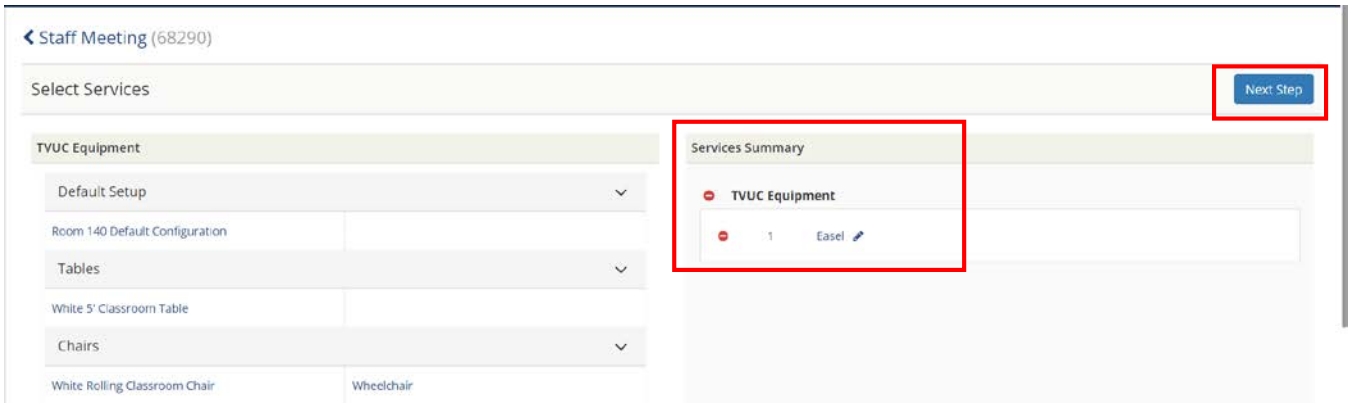
2. Select the **Reservation Name** to which you wish to add services




3. Click the **Add Services** link

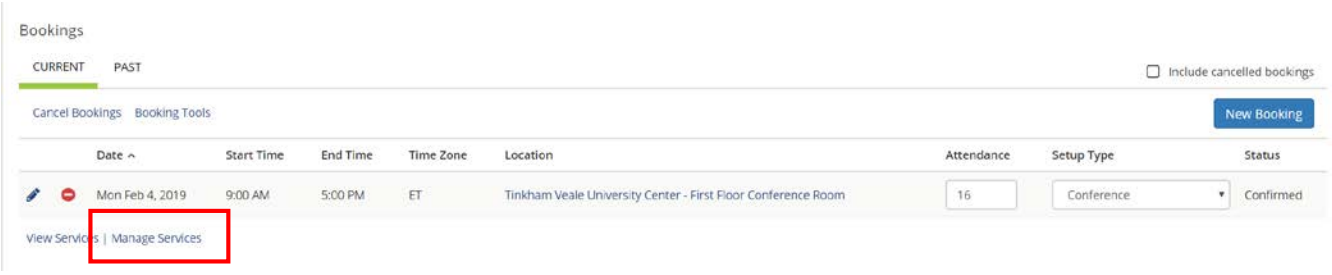
4. Select the service(s) and quantity you wish to add (A summary will display on the right of the screen)
    a. Note: Depending on the date requested, not all services may be available if you are too close to the date of the reservation.

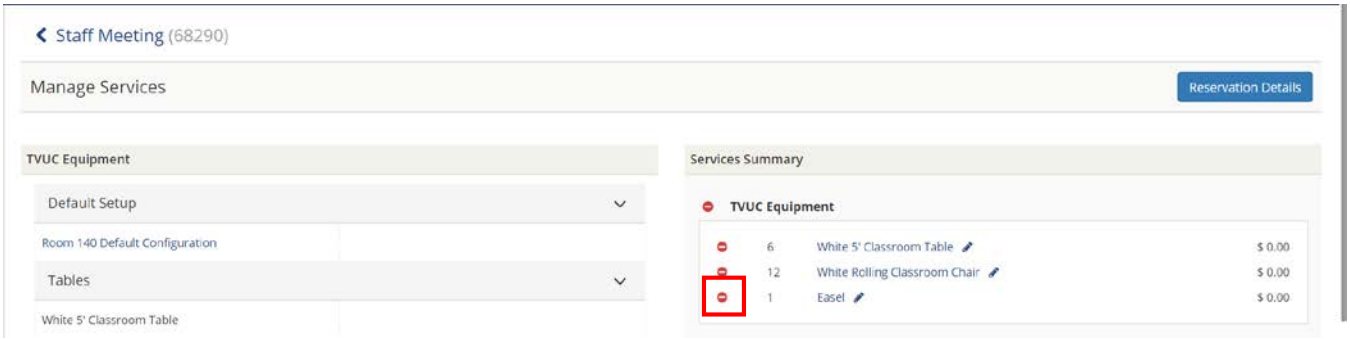
5. Click **Next Step**



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).

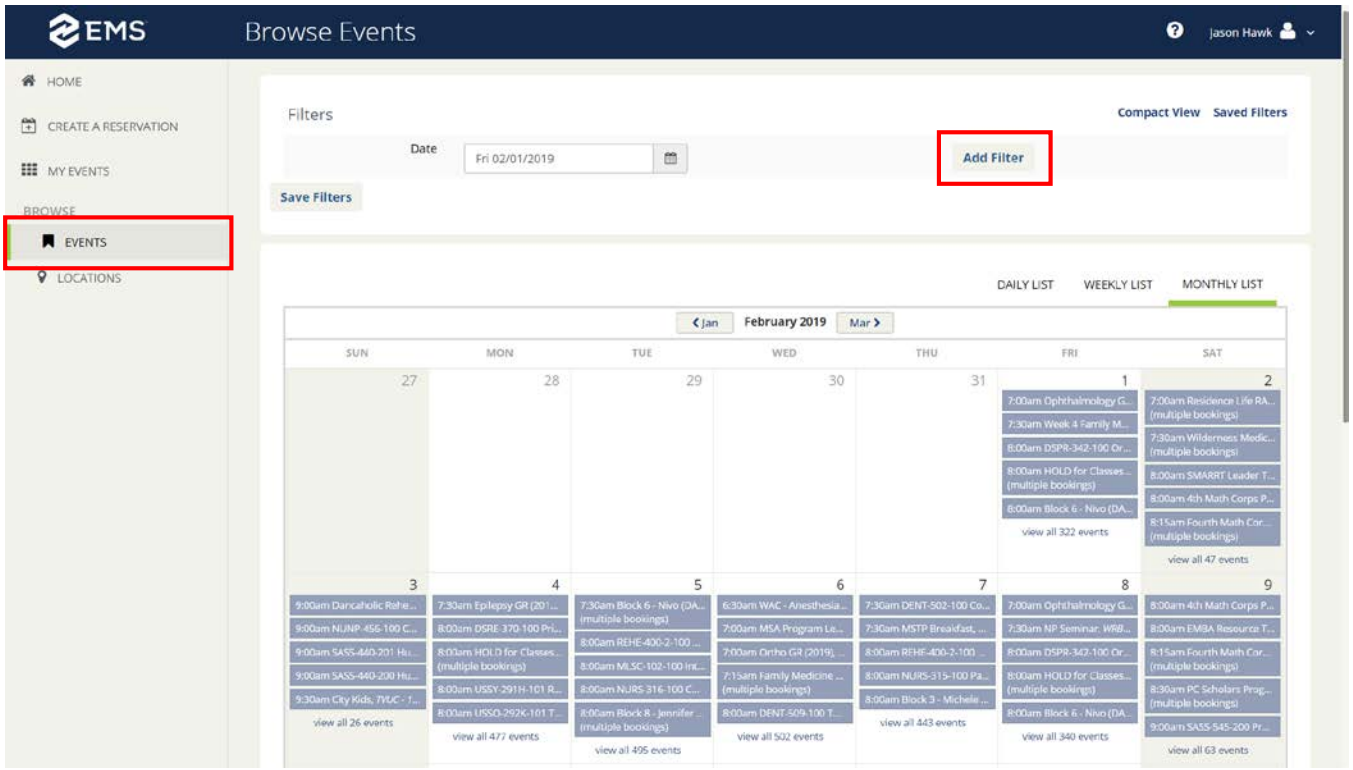


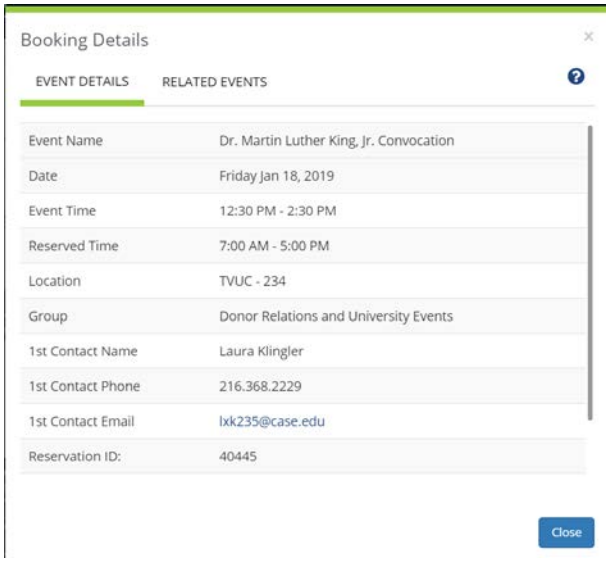
# Browsing

## 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.

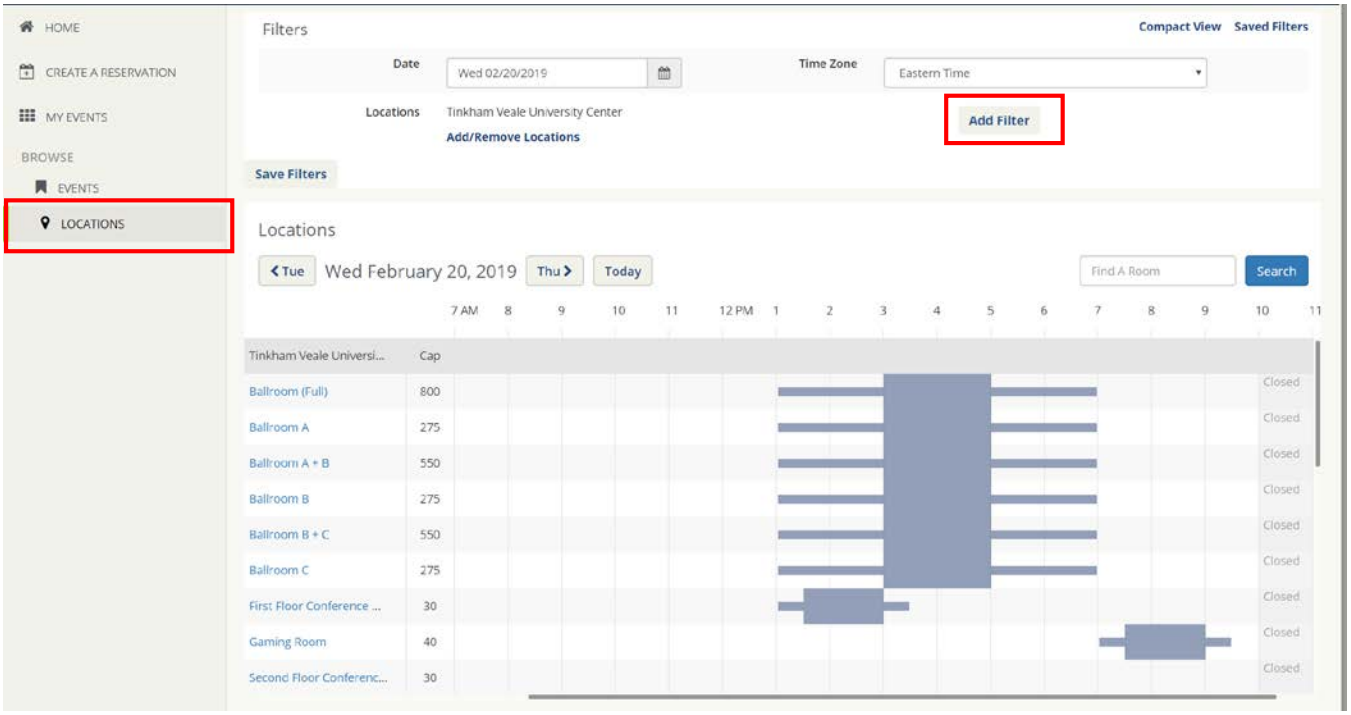



If you click on a reservation, you will get details about that reservation including any related booking (other rooms booked or future occurrences of a recurring reservation).

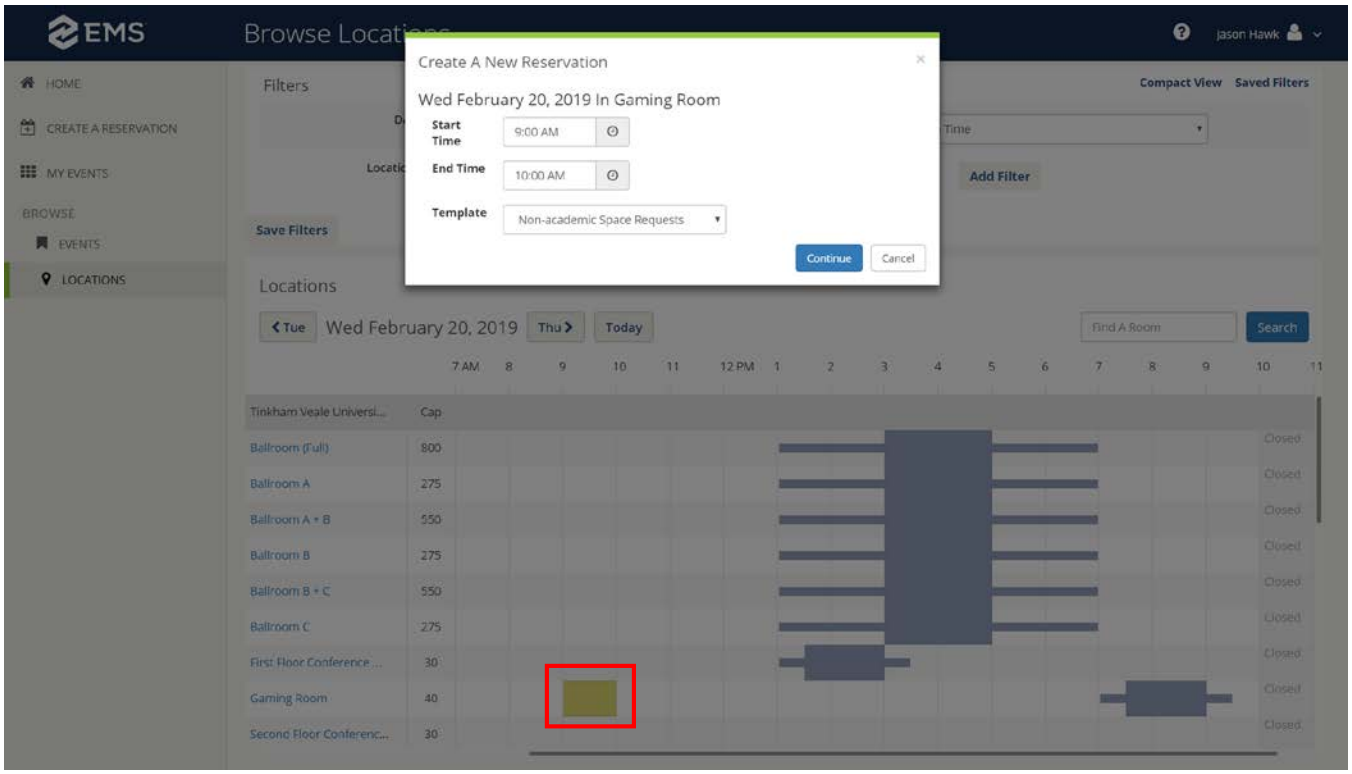


## Locations

**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.




**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.