

# Event Management System User Manual

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**Conference and Event Services**

**216.523.7203**

**[conferenceservices@csuohio.edu](mailto:conferenceservices@csuohio.edu)**

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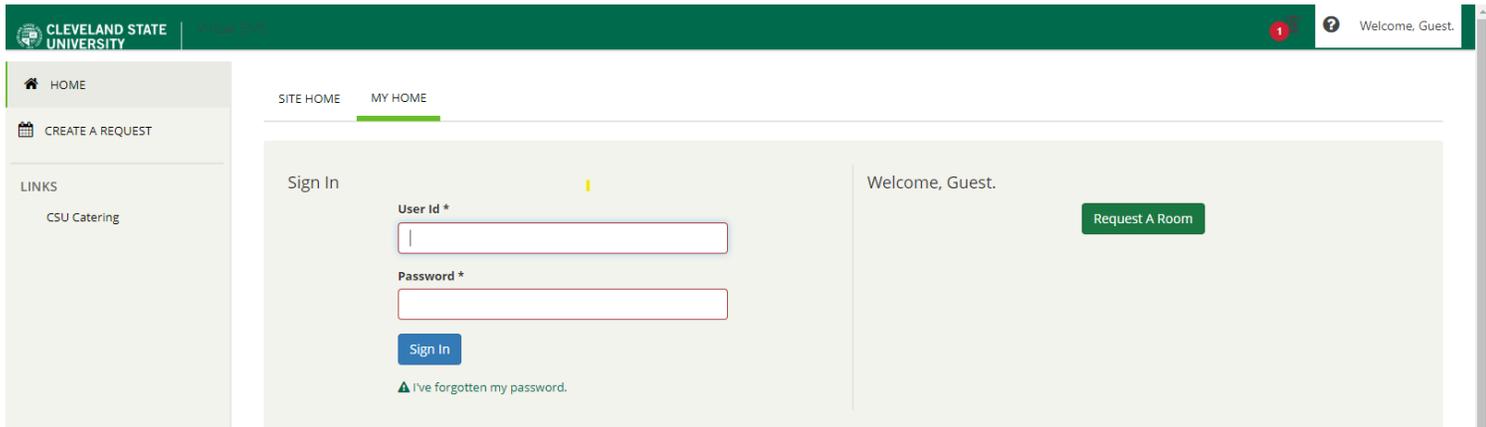
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# Authenticated EMS Accounts

Thank you for using the Cleveland State University Event Management System to request your meeting/event! **[All CSU Faculty, Staff and Students are housed in EMS via PeopleSoft data transfer and verification.]**

Go to <https://csuohio.emscloudservice.com/web/Default.aspx>



In order to access the request forms, you'll first need to log into your account on the My Home page. Click the "I've forgotten my password" link under the blue Sign In button. Follow the directions for 'creating a new password.' Enter your Cleveland State University (j.doe@csuohio.edu) email address. EMS will verify that you are in the system by sending you a link to your CSU email to create a new password. **BE ADVISED: your log into EMS is NOT connected to your standard CSU log in credentials which you use to access the University's network and resources. This log in account is separate. You are able to use your standard CSU password here for EMS access to limit the number of passwords you would need to remember.**

# Signing In

After your password has been created, you'll be able to log-into the system.

Go to <https://csuohio.emscloudservice.com/web/>

SITE HOME MY HOME

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### Sign In

**User Id \***

**Password \***

[Sign In](#)

[I've forgotten my password.](#)

Enter your "User ID/CSU email address" and "Password" into the Sign In fields, and click "Sign In".

CLEVELAND STATE UNIVERSITY

HOME

CREATE A RESERVATION

MY EVENTS

BROWSE

EVENTS

LOCATIONS

PEOPLE

LINKS

CSU Catering

MY HOME

### My Reservation Templates

Basic Meeting Request (No Services/AV Required)	<a href="#">book now</a>	<a href="#">about</a>
Berkman Hall Request Form	<a href="#">book now</a>	<a href="#">about</a>
CIMP Bldg Request Form	<a href="#">book now</a>	<a href="#">about</a>
Fenn Tower Request Form	<a href="#">book now</a>	<a href="#">about</a>
Julka Hall Request Form	<a href="#">book now</a>	<a href="#">about</a>
Law Bldg Request Form	<a href="#">book now</a>	<a href="#">about</a>
Mather Mansion Request Form	<a href="#">book now</a>	<a href="#">about</a>
Parker Hannifin Request Form	<a href="#">book now</a>	<a href="#">about</a>

### My Bookings

MARCH 21, 2023 SEARCH

Eastern Time [ET]

Day Month Date

Previous Today Next

From here, you'll be directed to the My Home page. You'll be able to access all available request forms, browse for both events and available space, as well as manage your reservations/bookings.

# Browse Events

From the My Home, or Site Home tabs, select “Browse – Events” from the navigation pane on the left.

The screenshot shows the Cleveland State University website interface. On the left, a navigation menu is visible with the following items: HOME, CREATE A RESERVATION, MY EVENTS, BROWSE (highlighted with a green circle), EVENTS, LOCATIONS, and PEOPLE. The main content area shows the 'My Reservation Templates' section with a list of templates: Basic Meeting Request (No Services/AV Required), Berkman Hall Request Form, CIMP Bldg Request Form, and Fenn Tower Request Form. At the top, there are tabs for 'SITE HOME' and 'MY HOME', with 'MY HOME' being the active tab.

The current date will automatically load. There are several options to view events in a daily, weekly or monthly list. You can also add filters to sort events by location, event type, etc. by clicking “Add Filter”. You can navigate to an alternate date by clicking on the calendar icon next to the “Date” field.

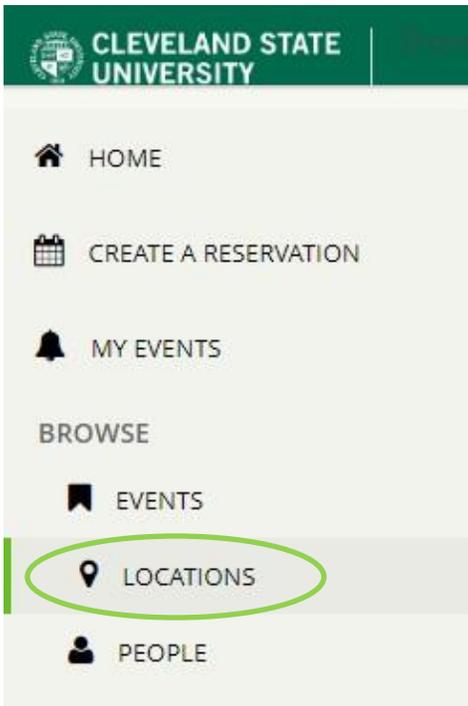
The screenshot shows the Cleveland State University website interface with the 'Browse Events' page. The navigation menu on the left includes HOME, CREATE A RESERVATION, MY EVENTS, BROWSE, EVENTS (highlighted), LOCATIONS, PEOPLE, and LINKS (with CSU Catering). The main content area features a 'Filters' section with a 'Date' field set to 'Tue 03/21/2023' and an 'Add Filter' button. Below the filters is a 'Save Filters' button. The events are displayed in a table with columns for START TIME, END TIME, TIME ZONE, EVENT NAME, LOCATION, and DEPARTMENT/ORGANIZATION. The table shows two events: Varsity Practices (6:30 AM - 6:30 PM, ET, KF - KF, Athletics Administration) and Radiance Filming (8:00 AM - 4:00 PM, ET, SC - SC 0301 V.L., Advancement Services). The table is currently set to 'DAILY LIST' view for 'Tuesday, March 21st 2023'.

START TIME	END TIME	TIME ZONE	EVENT NAME	LOCATION	DEPARTMENT/ORGANIZATION
6:30 AM	6:30 PM	ET	Varsity Practices	KF - KF	Athletics Administration
8:00 AM	4:00 PM	ET	Radiance Filming	SC - SC 0301 V.L.	Advancement Services

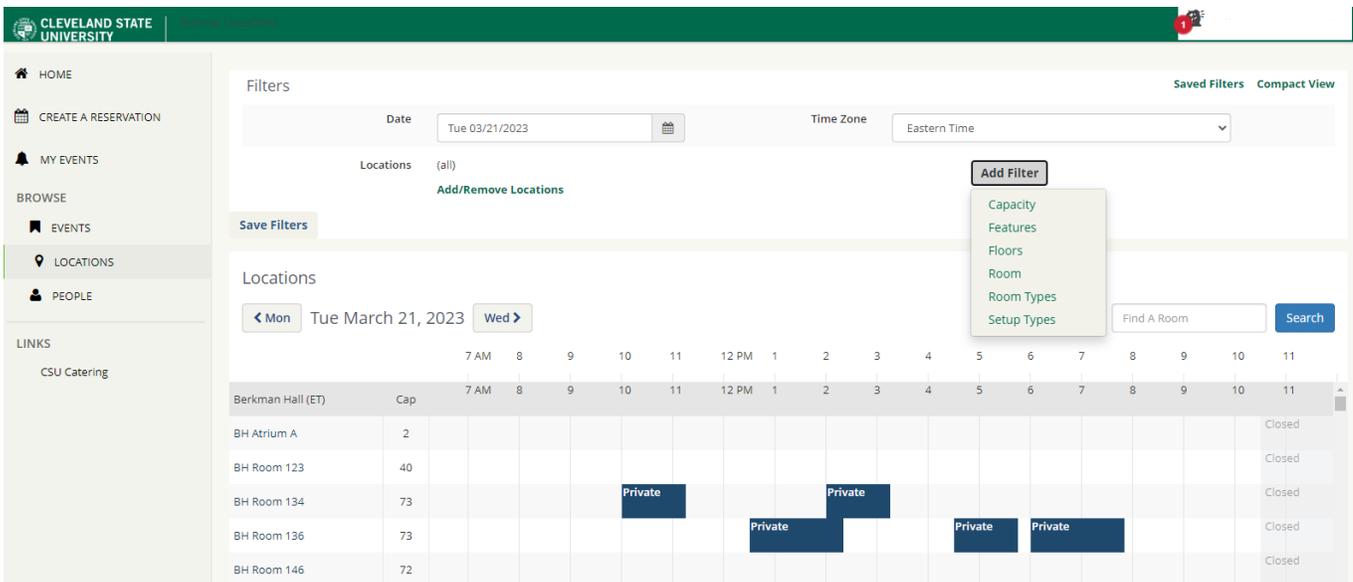
\*If you'd like to **print this list**, right click on any whitespace on the screen, and select print.

# Browse Locations (Search for Available Rooms)

From the My Home, or Site Home tabs, select “Browse – Locations” from the navigation pane on the left:



The current date will automatically load. ***BE ADVISED: only rooms that are able to be requested will show up in this view.*** You may use the arrows to move ahead or back one day, or click the calendar icon in the “Date” Field to select an alternate date. “Click Add/Remove Locations” to find specific buildings. You may also use the “Add Filter” button to filter rooms down to a specific capacity, feature, etc.



# Request a Meeting/Event

To request a meeting/event, click the “book now” tab corresponding to any one of the forms listed on the My Home tab under “My Reservations”, or click “Create a Reservation” from the left side navigation pane.

The screenshot shows the Cleveland State University reservation system interface. At the top is a green header with the university logo and name. Below the header is a navigation menu on the left with options: HOME, CREATE A RESERVATION (highlighted with a green circle), MY EVENTS, BROWSE, EVENTS, LOCATIONS, and PEOPLE. The main content area is titled "My Reservation Templates" and contains a list of reservation forms with "book now" and "about" buttons for each:

Reservation Template	Book Now	About
Basic Meeting Request (No Services/AV Required)	book now	about
Berkman Hall Request Form	book now	about
CIMP Bldg Request Form	book now	about
Fenn Tower Request Form	book now	about
Julka Hall Request Form	book now	about

For the example below, we will use the Event Request Form.

The screenshot shows the "Student Center Request Form" interface. At the top is a green header with the university logo and name. Below the header is a navigation menu with options: Student Center Request Form (with an information icon). The main content area is titled "New Booking for Fri Mar 31, 2023" and contains a form with the following sections:

- Date & Time:** Date \* (Fri 03/31/2023), Recurrence, Start Time \* (10:00 AM), End Time \* (11:00 AM).
- Selected Rooms:** Your selected Rooms will appear here.
- Attendees:** There was a problem accessing the Attendees.
- Room Search Results:** Rooms matching your search criteria will appear here.
- Locations:** Student Center (Add/Remove).
- Search:** Search button.
- Navigation:** Let Me Search For A Room, I Know What Room I Want.
- Room Name:** Search input field.

Once you've selected your form, fill out the following details in the column on the left:

- Date
- Start Time
- End Time

Please include any setup or breakdown time you may need. Another question will ask for actual event time.

Enter your "Number of People".

You may also use the "Room Types" and "Features" filters to further narrow down your return options. Once you've entered in your criteria, click "Search" at the bottom of the left-hand column. A list of rooms matching your criteria will appear:

The screenshot shows the 'Student Center Request Form' interface. The top navigation bar includes the Cleveland State University logo and a 'Create Reservation' button. The main content area is titled 'New Booking for Mon Apr 3, 2023'. On the left, there are input fields for 'Date \*' (Mon 04/03/2023), 'Start Time \*' (10:00 AM), and 'End Time \*' (2:00 PM). Below these are options for 'Create booking in this time zone' (Eastern Time) and 'Locations' (Student Center). A search bar is present. The main area is divided into sections: 'Selected Rooms' (empty), 'Attendees' (with an error message: 'There was a problem accessing the Attendee services.'), and 'Room Search Results'. The 'Room Search Results' section shows a calendar grid for dates 5 through 11, with times 7 AM, 8, 9, 10, 11, 12 PM, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11. Below the grid is a table titled 'Rooms You Can Request' with columns for room name, capacity, and availability for each time slot. The table lists four rooms: 'SC 3rd FL. North Lob' (cap 6), 'SC 3rd FL. North Pati' (cap 30), 'SC 3rd FL. South Pati' (cap 60), and 'SC Atrium' (cap 200). Each room has a green '+' icon in the first column and 'Closed' in the last column.

You may use the green + symbols to select one or more rooms for your event. A pop-up box will appear asking you to verify your attendance. Confirm the number of attendees, and click "Add Room".

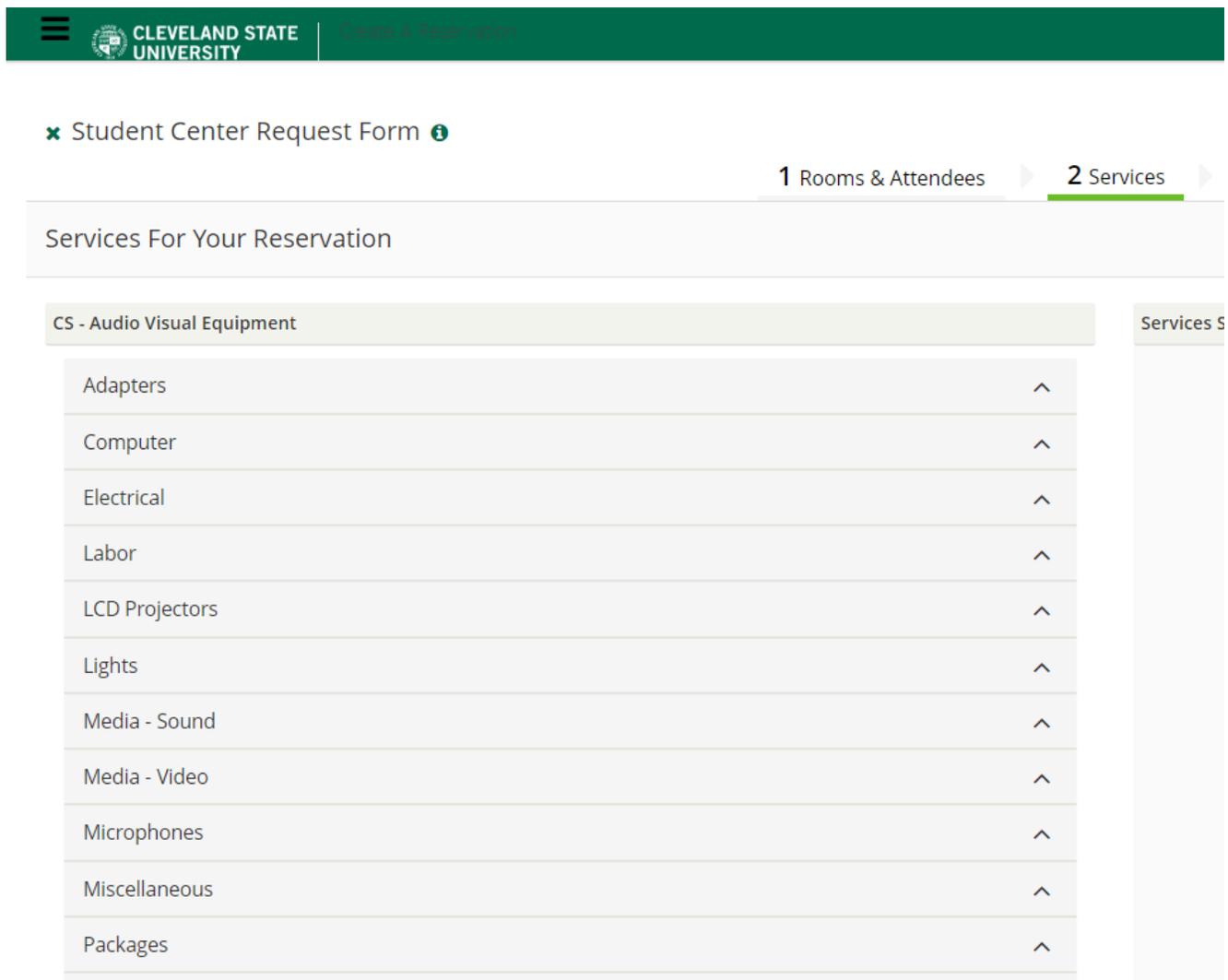
The screenshot shows a pop-up window titled 'Attendance & Setup Type'. The text inside says: 'To continue, please enter the number of attendees and desired setup type for this Room.' Below this, there is a field for 'Number of Attendees \*' with the value '250' entered. Underneath is a dropdown menu for 'Setup Type \*' with the following options: 'Banquet=Rounds with chairs' (highlighted in blue), and 'Lecture=Chairs only'. At the bottom of the pop-up are two buttons: 'Add Room' and 'Cancel'.

You can also change the date and/or time parameters if you need additional space for additional days/times. The list will auto-refresh with the new information.

Once you've selected your room(s), you may either click the "2. Services" tab, or click the "Next Step" button in the upper right corner.



To add services, first click the category that you want, then select the item. For instance, let's add tables to our request:



You must request all equipment and AV even if its built into the space or you may not have access to it for your event.

Click on the "LCD Projectors" tab under "CS – Audio Visual Equipment":

Services For Your Reservation

CS - Audio Visual Equipment		Service
Adapters	^	
Computer	^	
Electrical	^	
Labor	^	
LCD Projectors	∨	
LCD Projector - SC Ballroom		
Lights	^	
Media - Sound	^	
Media - Video	^	
Microphones	^	
Miscellaneous	^	

You'll see the field expand, to list all available table-types. Let's select LCD Projector-SC Ballroom – a pop-up window will appear. From here, you may list the quantity you'd like, as well as any special instructions. Then click "OK" to add. Repeat this process until you've added all services you'd like to request.

LCD Projector - SC Ballroom (serves 1) - \$160.00 with 25% Discount ✕

- 1 + (available inventory: 3)

Special Instructions

middle projector only

OK Cancel

Services you add will be listed on the right under "Services Summary":

Student Center Request Form

My Cart (1) [Create Reservation](#)

1 Rooms    2 Services    3 Reservation Details

Services For Your Reservation

[Next Step](#)

- CS - Audio Visual Equipment ?
- Adapters ^
- Computer ^
- Electrical ^
- Labor ^
- LCD Projectors v
- LCD Projector - SC Ballroom
- Lights ^

Services Summary		
-	1	LCD Projector - SC Ballroom middle projector only
		\$160.00 with 25% Discount

You may also add any set-up notes in the “Set-up notes” field at the bottom of the page. Once you’ve added your services and set-up notes, you may click the “3 Reservation Details” tab, or the “Next Step” button.

**NOTE:** not all request forms allow for services to be added. If this is the case, a message will appear indicating that services cannot be added to the request, and you may proceed to the next step, 3. Reservation Details.

Student Center Request Form

1 Rooms & Attendees    2 Services    3 Reservation Details

Reservation Details

Event Details

Event Name \*

Event Type \*

At this point, you may enter your event name, and event type. Verify/Select the applicable customer (department/organization), and verify/select either your name, or the event contact if you are submitting this request on someone else’s behalf. Once you select the 1<sup>st</sup> and 2<sup>nd</sup> contact (if needed), that person’s information will auto-populate:

You may attach a file (event program, flier, room diagram, etc.), and add an event description if you wish. Answer the questions listed on the form. Those marked with an asterisk\* are required.

Verify/enter your departmental account number, if prompted.

Click the box indicating, “I have read and agree to the terms and conditions”

Click the “Create Reservation” button to complete your request. You will see a pop-up indicating that your request was submitted, and will be processed soon.

## Request Changes to a Meeting/Event

If you need to request any changes to your meeting/event, click on “My Events” from the left side navigation pane.

The screenshot shows the Cleveland State University Reservations and Bookings interface. The left navigation pane includes options like HOME, CREATE A RESERVATION, MY EVENTS (circled in green), BROWSE, EVENTS, LOCATIONS, PEOPLE, and LINKS (CSU Catering). The main content area has tabs for RESERVATIONS and BOOKINGS. A search bar is present with a 'Search Reservations' button and an 'Include cancelled reservations' checkbox. Below the search bar are tabs for CURRENT and PAST. A table of reservations is displayed with columns: Name, First/Last Booking, Location, Department/Organization, Services, ID, and Status. One reservation is listed with Name 'Test', First/Last Booking 'Mon Dec 25, 2023 / Mon Dec 25, 2023 (single booking)', Location 'Student Center - SC Ballroom ABCD', Department/Organization 'Conference Services', Services checked, ID '359386', and Status 'Requested'.

A list of all future reservations will load. You may select from this list to make any edits/changes. (You may also select the “Past” tab to view previous events, or check the “Include Cancelled Reservations” box to view cancelled items. NOTE – you cannot alter a past or cancelled reservation.) Click the reservation you wish to edit.

The screenshot shows the 'My Events' page for a reservation titled 'This is a Test beginning Apr 1, 2023 (358225)'. The page has tabs for RESERVATION DETAILS, ADDITIONAL INFORMATION, and ATTACHMENTS. Under RESERVATION DETAILS, there is an 'Edit Reservation Details' link with a pencil icon. The reservation details are as follows:

Event Name	This is a Test
Event Type	University Events
Department/Organization	Conference Services
Requester Name	Lamiell, Kristine T

Below the details is a 'Bookings' section with tabs for CURRENT and PAST. There is an 'Include cancelled bookings' checkbox. A table of bookings is shown with columns: Edit, Remove, Date, Start Time, End Time, Time Zone, Location, Attendance, Setup Type, and Status. One booking is listed with Date 'Sat Apr 1, 2023', Start Time '11:00 AM', End Time '2:00 PM', Time Zone 'ET', Location 'Student Center - SC Ballroom ABCD', Attendance '250', Setup Type 'Banquet=Rounds with chairs', and Status 'Requested'. There is a 'New Booking' button in the top right of the bookings section.

There are various ways in which you can edit your reservation and/or booking(s):

If you need to change basic reservation details (name, cost center, contact information), select “Edit Reservation Details” from the top left (pencil icon) and make the applicable changes.

Under the “Reservation Tasks” heading on the left, you may:

- Add Services – this will allow you to add services/resources to your reservation
- Cancel Services – this will allow you to remove services/resources from your reservation
- Booking Tools – this will allow you to change the date and/or time of your booking(s)
- Cancel Reservation – this will allow you to cancel the entire reservation, and bookings within
- Send Invitation – this will open a Microsoft outlook calendar invite.
  - ***Be advised – if you update your reservation in EMS AFTER sending this invite, the invite will NOT auto-update.***

You can also edit your individual bookings under the “Bookings” heading:



## My Events / Test beginning Dec 25, 2023 (359386)

RESERVATION DETAILS

ADDITIONAL INFORMATION

ATTACHMENTS

[Edit Reservation Details](#)

Event Name

Event Type

Department/Organization

Requester Name

### Bookings

CURRENT

PAST

[Cancel Bookings](#) [Booking Tools](#)

Edit	Remove	Date ^	Start Time	End Time	Time
		Mon Dec 25, 2023	2:00 PM	3:00 PM	ET

[View Services](#) | [Manage Services](#)

- The “-” icon will allow you to cancel an individual booking
- “View Services” will allow you to see services/resources that are currently added/requested
- “Manage Services” will allow you to alter the quantity and/or add additional services/resources, as well as edit your set-up notes.

# Add a Booking to a Meeting/Event

If you'd like to add a booking to your current reservation, navigate to that reservation, and click the "New Booking" button on the right, underneath the "Bookings" section.

The screenshot shows the Cleveland State University reservation system interface. At the top, there is a green header with the university logo and name. Below the header, the breadcrumb trail reads "My Events / Test beginning Dec 25, 2023 (359386)". The main content area is divided into two sections: "RESERVATION DETAILS" and "Bookings".

The "RESERVATION DETAILS" section includes tabs for "RESERVATION DETAILS", "ADDITIONAL INFORMATION", and "ATTACHMENTS". Below these tabs is a form with the following fields:

- Event Name: Test
- Event Type: University Events
- Department/Organization: Conference Services
- Requester Name: [Empty]

The "Bookings" section has tabs for "CURRENT" and "PAST". There is a checkbox labeled "include cancelled bookings" which is currently unchecked. Below the tabs are two buttons: "Cancel Bookings" and "Booking Tools". A "New Booking" button is circled in green in the top right corner of the "Bookings" section.

Below the buttons is a table with the following columns: Edit, Remove, Date, Start Time, End Time, Time Zone, Location, Attendance, Setup Type, and Status. The table contains one row of data:

Edit	Remove	Date	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
		Mon Dec 25, 2023	2:00 PM	3:00 PM	ET	Student Center - SC Ballroom ABCD	100	Banquet=Round with chairs	Requested

At the bottom of the "Bookings" section, there are links for "View Services" and "Manage Services".

From there, you'll select the day, time and recurrence pattern (if applicable) in the same fashion you did previously. Click "Update Reservation" once you have chosen your room(s).

# Appendix A: Frequently Asked Questions

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**Q. I have submitted my request, and now I need to make a change (update the time, cancel the event, etc.)—how can I do this?**

A. Once you have submitted a request, you will be able to view your event, and make changes online up to two business days before the event. After that timeframe, you will need to contact the Department of Conference and Event Services (conferenceservices@csuohio.edu; 216.523.7203).

**Q. I am trying to request a space, but I am getting the message “First available booking date violation.” How can I request my event?**

A. Each request form has different time windows built in to not allow requests within 2-5 business days, due to approval times and/or scheduling concerns. Contact the Conference and Event Services office by phone or email, and we will be happy to schedule your event, if the space is available.

**Q. I am trying to find a room, but the room I want is not coming up, what do I do?**

A. EMS is set up to only show rooms that are available to request. Most likely, the room you’re looking for is unable to be requested, either through the form you’ve selected, or at all. For instance, you can only request **basic (no services/av required)** meeting room locations through the Basic Meeting Room Request Form. The Glasscock Student Center Ballroom would not be available through the Basic Meeting Room Request Form, and would need to be requested via the Student Center Request Form. The other item may be an issue with the Number of People you entered – EMS will filter out rooms that cannot accommodate a certain number of people. You’ll either need to change the number, or select a different room that can better accommodate your attendees.