EMS Desktop Client

Installation, Configuration, and User Guides

V43

April 2019

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Introduction

This document lists the steps you must take to install EMS or upgrade to a more current version of the software. If you are upgrading to a newer version of EMS, please encourage users at your facility to read the separate *What's New* document before they begin working with the new version of the software. Doing so will minimize the amount of time it takes them to get "up-to-speed" with the new release and help them benefit from new features and functions that they might not otherwise discover.

IMPORTANT: **All** EMS related components (Virtual EMS, Web Client, EMS for Outlook, EMS Kiosk, etc.) must be upgraded with this release. Please review the Important Considerations before Upgrading section.

IMPORTANT: A new product registration process has been implemented for this release. Primary Contacts can obtain the license file from the Support Center area on www.emssoftware.com. This license file is required to activate your EMS software and is required for new and existing customers.

IMPORTANT: Please see the *What's New* document for important information regarding the Web Client. Existing versions of the Web Client are **not** compatible with this release.

Customer Support

Unlimited toll-free customer support is available to EMS users who have a current Annual Service Agreement (ASA). If you are unable to resolve a problem or answer a question by reading the EMS documentation, contact us at:

Email:	**support@emssoftware.com**
Web:	**www.emssoftware.com**
Phone:	**(800) 288-4565**
Fax:	**(303) 796-7429**

Backing Up Your Data

Once you have installed EMS and begun defining your data, it is ***extremely*** important to back up your database every night. If your data is damaged and we determine the damage to be irreparable, your only alternative will be to restore from the most recent backup.

Hardware and Software Requirements

The following components must be installed/enabled on your server in order to run the EMS installation files:

- Windows Installer 4.5 must be installed.
- .NET Framework 3.5 must be installed and enabled.

A list of general EMS system requirements is maintained on our website.

Obtaining the Latest Release of EMS

The latest release of EMS can be downloaded from the online Support Center.

1. Go to www.emssoftware.com and enter your Email Address and Password in the Support Center area.

2. Click the Software downloads link.
3. Download the following files. (Required for both first time installations and upgrades.)

   - **EMS License** (**License.lic**) – License file required to activate your EMS software.
   - **EMS Server Install** (**EMS.ServerInstall.exe**) – File used to install or upgrade the EMS databases on your Microsoft SQL Server.
   - **EMS Client** (**EMSClient.msi**) – File used to install or upgrade the EMS desktop application.
   - **EMS Email Notification** (**EMSEmailNotificationSetup.msi**) – File used to install the EMS Email Notification service (an optional system component.) See Installing the EMS Email Notification Service.
   - **EMS Campus Auto Sync Service** (**EMSCampusAutoSyncSetup.msi**) **– EMS Campus only**. File used to install the optional EMS Campus Auto Sync Service (an optional system component.) See Installing the EMS Campus Auto Sync Service.

First Time Installation Instructions

The information in this section is for installing EMS for the first time at your facility. If you are already using an older version of EMS, please see the appropriate section later in this document.

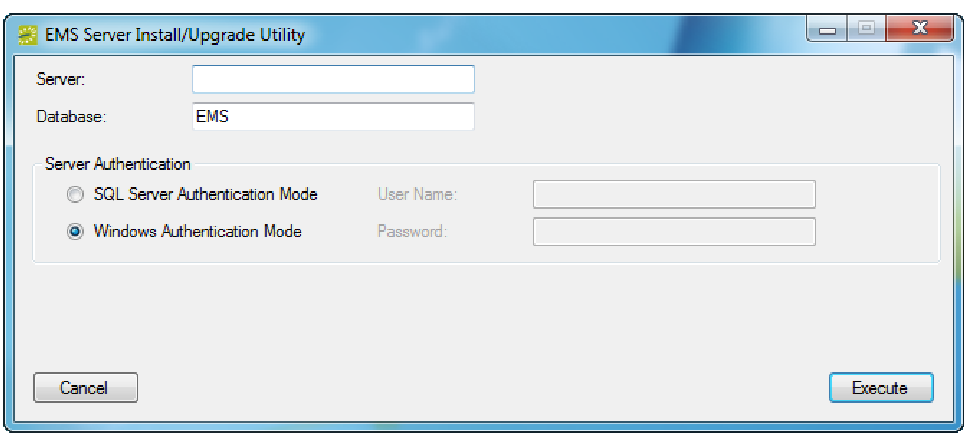
In order to install EMS, you must perform two operations. First, you must run **EMS.ServerInstall.exe** to create EMS databases on your database server. The second operation is to run the **EMSClient.msi** program on each of the client computers to which you want to install the EMS desktop application.

Installing the EMS Server Components

The server installation process will create two EMS databases on your MS SQL Server: An **EMS_Master** database that contains licensing information and a separate **EMS** database that will ultimately contain your reservations data.

Note: A Microsoft SQL Server SA level account will be required to execute the database installation process.

1. Verify that the prerequisite software has been installed.
2. Secure the **EMS.ServerInstall.exe** file.
3. Run **EMS.ServerInstall.exe** (This .exe can be run from any PC that has access to your database server.)



4. In the Server textbox, enter the name of the server running MS SQL Server.
5. In the Database textbox, enter the name for your EMS database. (It is recommended that you accept the default value of 'EMS'.)

6. In the Server Authentication area, specify your MS SQL Server authentication credentials. If SQL Server Authentication Mode is selected, you will be required to specify a User Name and Password.
7. Click the **Execute** button. A Create Database dialogue box will appear.
8. Click **Yes** to initiate the EMS database installation process.

   Note: The time spent on the "Upgrading database…" phase in the installation process is highly dependent on the size of your database. Please be patient.

9. Click **OK** when you receive the "Database Installed Successfully!" message.

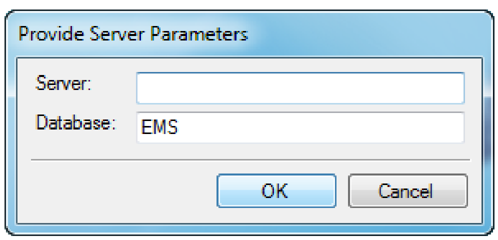
You have completed installing the server portion of EMS. Next you will install the software to client computers.

Note: For information on installing the optional Email Notification Service or the EMS Campus Auto Sync Service (EMS Campus only), please see Installing or Upgrading the EMS Email Notification Service and/or Installing or Upgrading the EMS Campus Auto Sync Service.

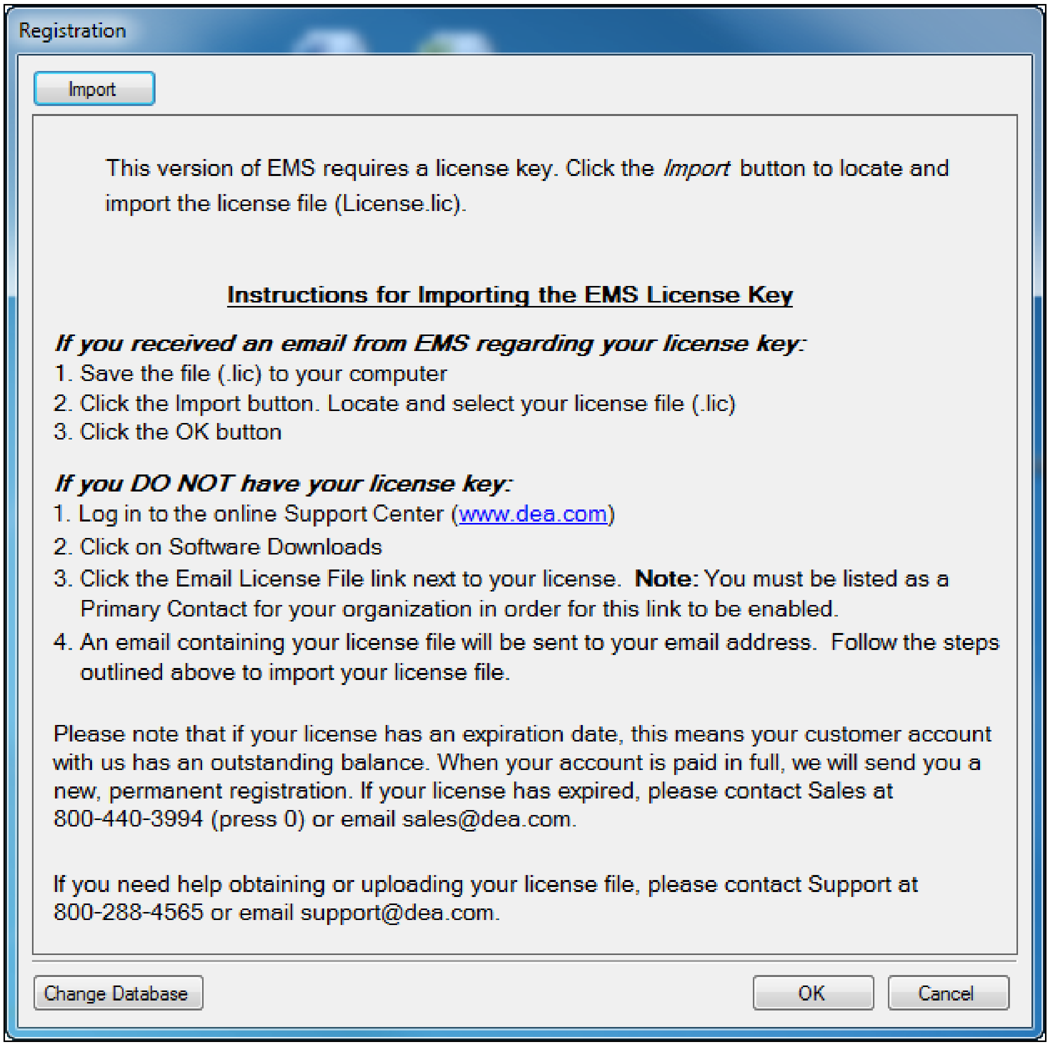
Installing to Client Computers

After your EMS databases have been created on your database server, you must install the client software on each computer that will access your EMS database.

1. Verify that the prerequisite software has been installed.
2. Secure the **EMSClient.msi**.
3. Run **EMSClient.msi** on the client workstation. Follow the on-screen prompts. It is recommended that you accept the defaults.
4. Start **EMS** from the shortcut located on your desktop.
5. In the Provide Server Parameters dialog box, enter the name of your EMS Server and Database.



6. Click **OK**.
7. The system displays a message asking you to import your registration information. Click **OK**.
8. The Registration screen appears. Follow the instructions outlined on the screen to import your EMS license key.



9. At the EMS log-in screen, type **admin** as both the User ID and the Password.
10. Click **OK**.
11. You are now ready to begin using the system. You can begin defining your data following the instructions in the *EMS Setup Guide* or you can install to additional client computers by repeating **steps 1-6** above. (Note: Your license key only needs to be imported once.)

Upgrade Instructions

In order to upgrade EMS, you must perform two operations. First, you must run **EMS.ServerInstall.exe** to upgrade the EMS databases on your database server.   The second operation is to run the **EMSClient.msi** program on each of the client computers that currently are running the EMS desktop application.

Note: If you are upgrading from a version of EMS Enterprise that was released prior to version 3.0, please contact our Customer Support department for information on upgrading to the latest release.

Note: If you are upgrading from EMS Lite or EMS Professional, please contact our Customer Support department for information on upgrading to the latest release.

Important Considerations before Upgrading

IMPORTANT: The following EMS components must be upgraded to the new platform.

- ✓ **Product Registration** - A new product registration process has been implemented for this release. Primary Contacts can obtain the license file from the Support Center area on **www.emssoftware.com.** This license file is required to activate your EMS software.
- ✓ **Virtual EMS –** Please see the *Virtual EMS Installation Instructions***.**
- ✓ **EMS Web Client –** Please see the *What's New* document for important information regarding the Web Client. Existing versions of the Web Client are **not** compatible with this release.
- ✓ **EMS Campus Planning Interface (EMS Campus only)** – Formerly known as the EMS Campus Web Client. Please see the *EMS Campus Planning Interface Installation Instructions*.
- ✓ **EMS Campus Web Service (EMS Campus only) –** If you are upgrading from EMS Campus 2.0, a new version of the EMS Campus Web Service (including the queries.xml and views.sql files) may be required. Please contact your Client Services Consultant to evaluate and discuss any potential impacts to your installation. Please see the *EMS Campus Web Service Installation Instructions and White Paper* for installation instructions.
- ✓ **EMS Email Notification Service –** Please see Installing or Upgrading the EMS Email Notification Service.
- ✓ **EMS Campus Auto Sync Service (EMS Campus only)** – Please see Installing or Upgrading the EMS Campus Auto Sync Service.
- ✓ **PAM Web Service** – Web service used by the optional Plan-a-Meeting and EMS for Outlook modules. Please see the *Plan-a-Meeting Installation Instructions*.
- ✓ **EMS for Outlook** –Optional module. Please see the *EMS for Outlook Installation Instructions*.
- ✓ **Custom Report(s)** – If a custom report was developed for you by DEA, please contact Customer Support to request a new Custom Report DLL that is compatible with this version. Five business days may be required to compile a new DLL, so please plan accordingly.
- ✓ **EMS Kiosk –** Optional module. Please see the *EMS Kiosk Installation Instructions***.**
- ✓ **Floor Plan Configuration Utility** – Web application used with the optional Floor Plan module. Please see the *Floor Plan Module Installation Instructions*.
- ✓ **EMS Room Diagramming Service** – Web service used by the optional Floor Plan module. Please see the *Floor Plan Module Installation Instructions*.
- ✓ **HR Toolkit** – Customers using the optional HR Toolkit to feed employee and web user data to EMS should contact their Client Services Consultant to evaluate and discuss any potential impacts to the interface.
- ✓ **FM Toolkit** – Customers using the optional FM Toolkit to feed facility data to EMS should contact their Client Services Consultant to evaluate and discuss any potential impacts to the interface.
- ✓ **EMS – Cisco TMS Interface** – Optional interface that feeds videoconferences booked in EMS to Cisco TMS. Please see the *EMS – Cisco TMS Interface Installation Instructions*.
- ✓ **EMS API** – Version 1.1.12 or newer required. Please see the *EMS API Reference Guide*.

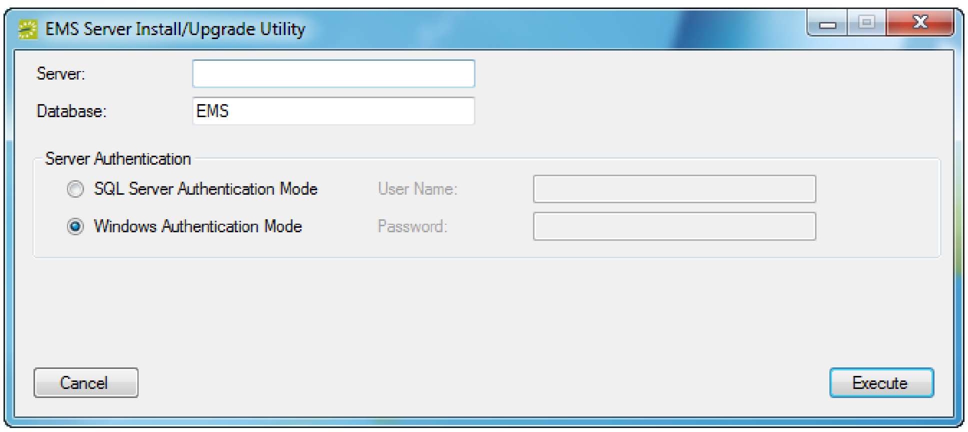
✓ **Video Display Interface** – Customers upgrading from EMS Enterprise 4.0 or below will be required to re-configure the Scheduled Task to automatically execute the export process. Please see the *EMS User Manual* for instructions.

Upgrading the EMS Server Components

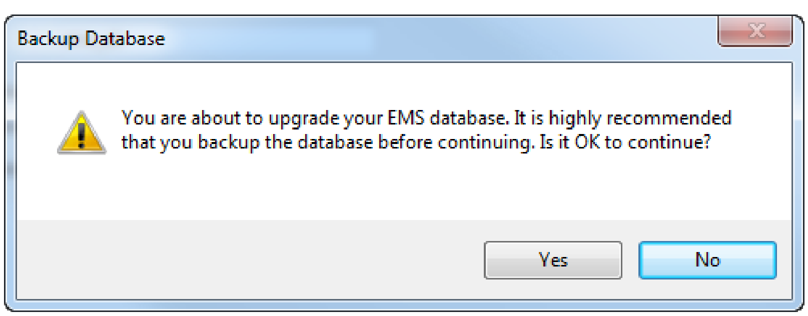
The server upgrade process will upgrade the EMS databases on your MS SQL Server. For customers upgrading from EMS Enterprise 4.x or below, your existing **EMSEnterprise_Master** database that contains licensing information will be replaced by a new **EMS_Master** database, and your existing **EMS** database will be upgraded to the current version.

Note: A Microsoft SQL Server SA level account will be required to execute the database upgrade process.

1. Review the Important Considerations before Upgrading section.
2. Verify that the prerequisite software is installed.
3. Secure the **EMS.ServerInstall.exe** file.
4. **IMPORTANT:** Using **SQL Server Management Studio**, back-up your existing EMS databases.
5. Run **EMS.ServerInstall.exe**. (This .exe can be run from any PC that has access to your database server.)



6. In the Server textbox, enter the name of the MS SQL Server.
7. In the Database textbox, enter the name for your EMS database that is to be upgraded.
8. In the Server Authentication area, specify your MS SQL Server authentication credentials. If SQL Server Authentication Mode is selected, you will be required to specify a User Name and Password.
9. Click the **Execute** button. A Backup Database dialogue box will appear.



10. Click **Yes** to acknowledge that you have backed-up your EMS databases and it is OK to continue.

You have completed the upgrade process for the server portion of EMS. Next you will upgrade client computers.

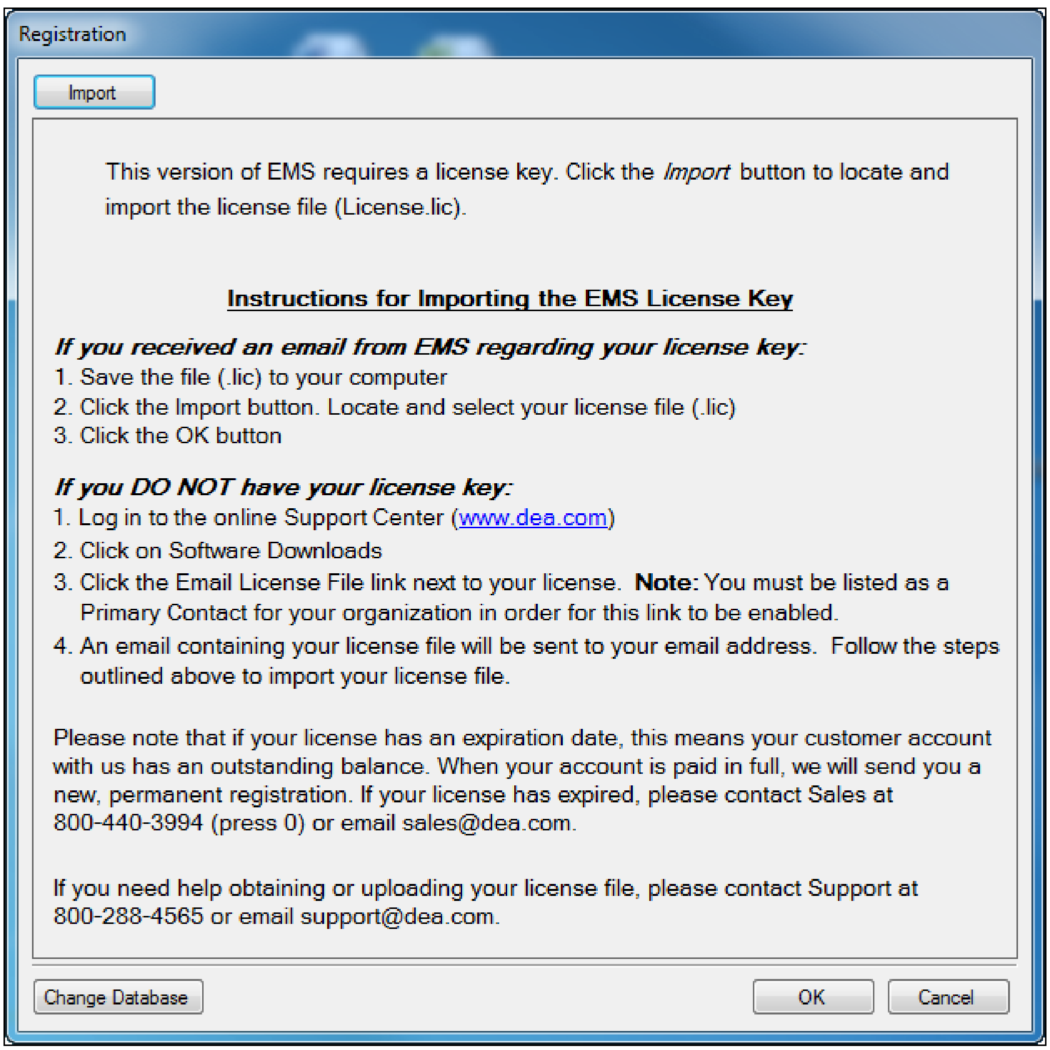
Note: For information on installing the optional Email Notification Service or the EMS Campus Auto Sync Service (EMS Campus only), please see [Installing or Upgrading the EMS Email Notification Service] and/or [Installing or Upgrading the EMS Campus Auto Sync Service].

Upgrading EMS Client Computers

To upgrade an EMS client computer, take the following steps:

Note: Existing versions of EMS must be manually uninstalled.

1. Verify that the prerequisite software has been installed.
2. Secure the **EMSClient.msi**.
3. Run **EMSClient.msi** on the client workstation. Follow the on-screen prompts. It is recommended that you accept the defaults.
4. Start **EMS** from the shortcut located on your desktop.
5. The system displays a message asking you to import your registration information. Click **OK**.
6. The Registration screen appears. Follow the instructions outlined on the screen to import your EMS license key.



7. At the EMS log-in screen, enter your User ID and Password.
8. Click **OK**.
9. Install to additional client computers by repeating **steps 1-4** above. (Note: Your license key only needs to be imported once.)

Installing or Upgrading the EMS Email Notification Service

EMS has built-in functionality that alerts users of certain changes in the database. With the optional EMS Email Notification Service users can also be notified via email. If email notification will not be used, there is no need to install the Email Notification Service. Standard notifications can still be generated and viewed by users who are logged into EMS.

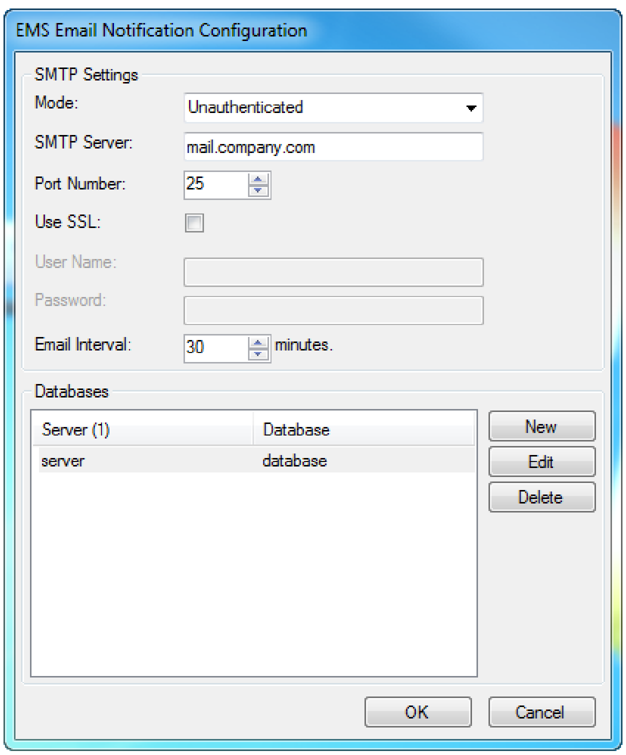
The EMS Email Notification Service must be installed on a computer that is connected to the network and is running 24 hours a day.

IMPORTANT: Existing versions of the EMS Email Notification Service must be manually uninstalled.

IMPORTANT: Install the EMS Email Notification Service on **one computer/server only**.

To install the EMS Email Notification Service:

1. Verify that the prerequisite software is installed.
2. Manually uninstall any existing versions of the EMS Email Notification Service.
3. Download the **EMSEmailNotificationSetup.msi** onto the server that will be running the service.
4. Double-click **EMSEmailNotificationSetup.msi**. Follow the on-screen prompts. It is recommended that you accept the defaults.
5. Within your Microsoft Windows Start menu, locate ***EMS Email Notification***. The EMS Email Notification Configuration screen will appear.



6. Review and complete/change the following settings:

- **Mode** – Type of authentication to the SMTP server.
- **SMTP Server –** SMTP server name or IP address.
- **Port Number –** SMTP port (default = 25)
- **Use SSL –** Check this option if your SMTP server runs under SSL.
- **User Name/Password** – Required if an authentication mode other than Unauthenticated is selected.
- **Email Interval –** The frequency with which the system will generate notification emails.

7. In the Databases section of the dialog box, you will see a sample database and server (named 'server' and 'database.') Select this entry, click **Edit**, and change the values to your EMS server and database name.

On the Database tab of the Notification Database dialog box, complete the following:

- **Server/Database** – EMS server and database name
- **EMS Authentication/Windows Authentication** – The method of authentication to this database.
- **Email From –** Email address that will be displayed in the From field of notification emails that are sent.
- **Enable Email Notification** – Activates email notifications.
- **Enable Group Notification** – Activates group notifications.
- **Enable No Show Notification (Workplace Only)** – Activates 'no show' notifications.
- **Enable Service Event Logging** – Activates Windows event logging.

Click the Service Order Settings tab and review/change the following:

- **Paper size** – The paper size for the PDF file that is emailed.
- **Highlight Days** – Number selected here determines the information that is highlighted on service order PDFs.
- **Show Pricing** – Check if service orders should display pricing.
- **Show Notes** – Check if service orders should display resource notes.
- **Show Special Instructions** – Check if service orders should display resource special instructions.

8. After making your entries, click **OK**.
9. Click **OK** again to save your EMS Email Notification Configuration settings.

Note: If any issues are encountered starting the service, please visit the EMS Knowledge Base in the online Support Center for a possible solution or call Customer Support.

The Email Notification Service is now enabled. See the *EMS Setup Guide* for information on defining Notification Rules.

Installing or Upgrading the EMS Campus Auto Sync Service (EMS Campus Only)

Functionality exists within EMS Campus that allows Domain Schedulers to manually process post-publish course changes made in your SIS to EMS. The EMS Campus Auto Sync Service automates this process.

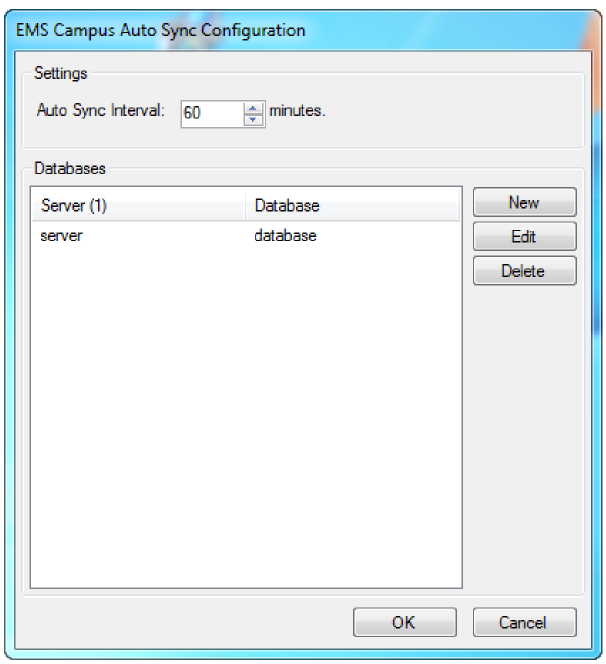
The EMS Campus Auto Sync Service must be installed on a computer/server that is connected to the network and is running 24 hours a day.

IMPORTANT: Existing versions of the EMS Campus Auto Sync Service must be manually uninstalled.

IMPORTANT: Install the EMS Campus Auto Sync Service on **one computer/server only**.

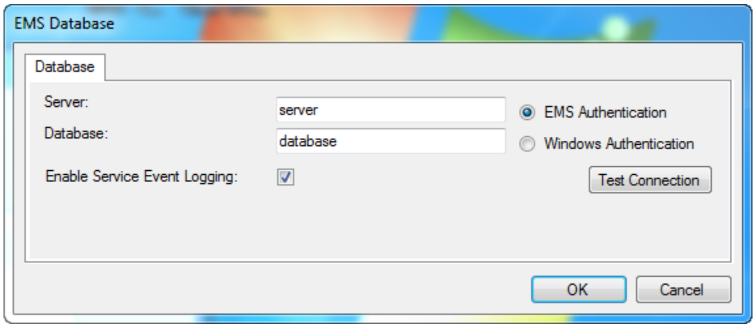
To install the EMS Campus Auto Sync Service:

1. Verify that the prerequisite software is installed.
2. Manually uninstall any existing versions of the EMS Campus Auto Sync Service.
3. Download the **EMSCampusAutoSyncSetup.msi** onto the server that will be running the service.
4. Double-click **EMSCampusAutoSyncSetup.msi**. Follow the on-screen prompts. It is recommended that you accept the defaults.
5. Within your Microsoft Windows Start menu, locate ***EMS Campus Auto Sync***. The EMS Campus Auto Sync Configuration screen will appear.



6. Set the **Auto Sync Interval**. DEA recommends setting this value to at least 30 minutes. It is very important that EMS Campus Auto Sync has plenty of time to synchronize with the SIS and process any changes.

7. In the Databases section of the dialog box, you will see a sample database and server (named 'server' and 'database.') Select this entry, click **Edit**, and change the values to your EMS server and database name.



On the Database tab of the Database dialog box, complete the following:

- **Server/Database** – EMS server and database name
- **EMS Authentication/Windows Authentication** – The method of authentication to this database.
- **Enable Service Event Logging** – Activates Windows event logging.

8. After making your entries, click **OK**.
9. Click **OK** again to save your EMS Campus Auto Sync Configuration settings.

   Note: If any issues are encountered starting the service, please visit the EMS Knowledge Base in the online Support Center for a possible solution or call Customer Support.

The EMS Campus Auto Sync Service is now enabled. See the **To automatically process courses post-publish section** in the *EMS User's Manual* and the **EMS System Parameters** section within the *EMS Setup Guide* for information on how to configure the auto sync feature.

Getting Started with EMS

EMS is user-friendly room scheduling software designed to manage the meetings and events that take place in your facility. Standard features, which you use to create, manage, and report on events, include the following:

- The Reservation Wizard room booking tool
- A graphical reservation book
- The Browser and month-at-a-glance Calendar Inquiry
- Numerous daily, sales, and statistical reports

This chapter covers the following topics:

- "Starting EMS" on page 27.
- "The EMS Window" on page 29.
- "An EMS Browser Window" on page 33.

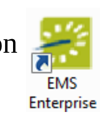
Starting EMS

After EMS has been installed on your desktop, a shortcut icon for the application is placed on your desktop. An option for the application is also available from your Start menu. You can double click the desktop icon to launch the EMS application, or you can select the option from your Start menu.

To start EMS

The following procedure is written from the perspective of EMS Enterprise; however, it is applicable for any EMS product (EMS Professional, EMS Campus, and so on).

1. Do one of the following:

    - On your desktop, double-click the EMS icon 

.

    - Open the Windows start menu, in the Search field, enter EMS and then select the EMS Enterprise option.

    If you are the first person to log in to the EMS application at your organization, a dialog box opens in which you enter the information for the login server and database that your application is accessing. (These are set up during implementation.) After you enter this information, the EMS Login dialog box opens.

Figure 1-1: EMS Login dialog box

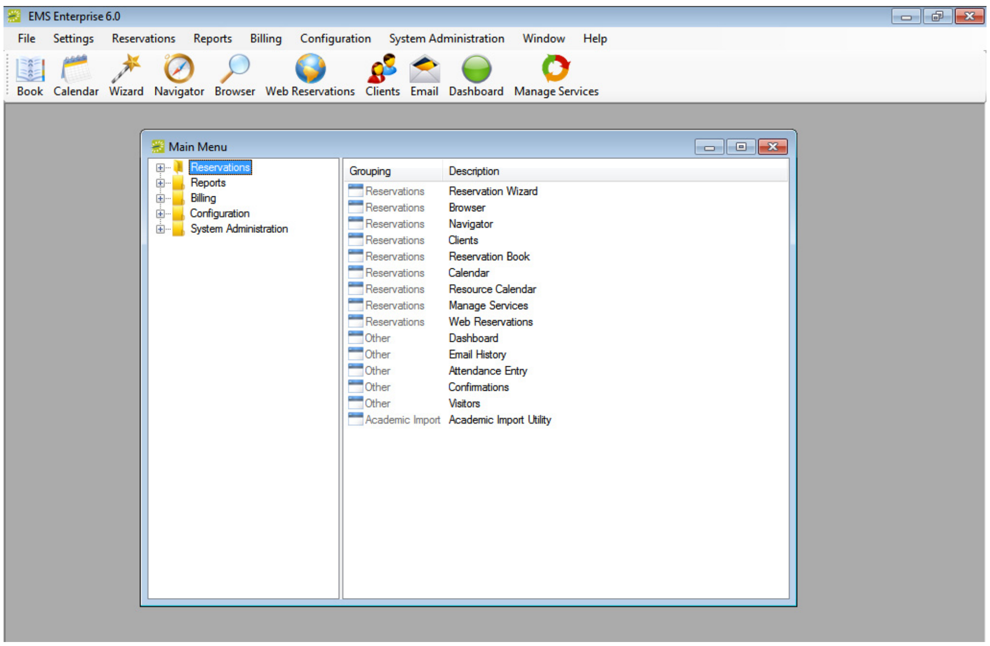
2. As the EMS administrator, enter “admin” in both the User ID and Password fields, and then click OK.

   If this is the first time that your EMS application has been accessed at your organization, a Registration dialog box opens. You must import the license file (License.lic) that was provided with your EMS software to register your application. See “Importing Registration Information” on page 313; otherwise, go to Step 3.

3. Click OK.

   The EMS Enterprise application opens. The main menu is open in the application.

Figure 1-2: EMS Enterprise main window with main menu



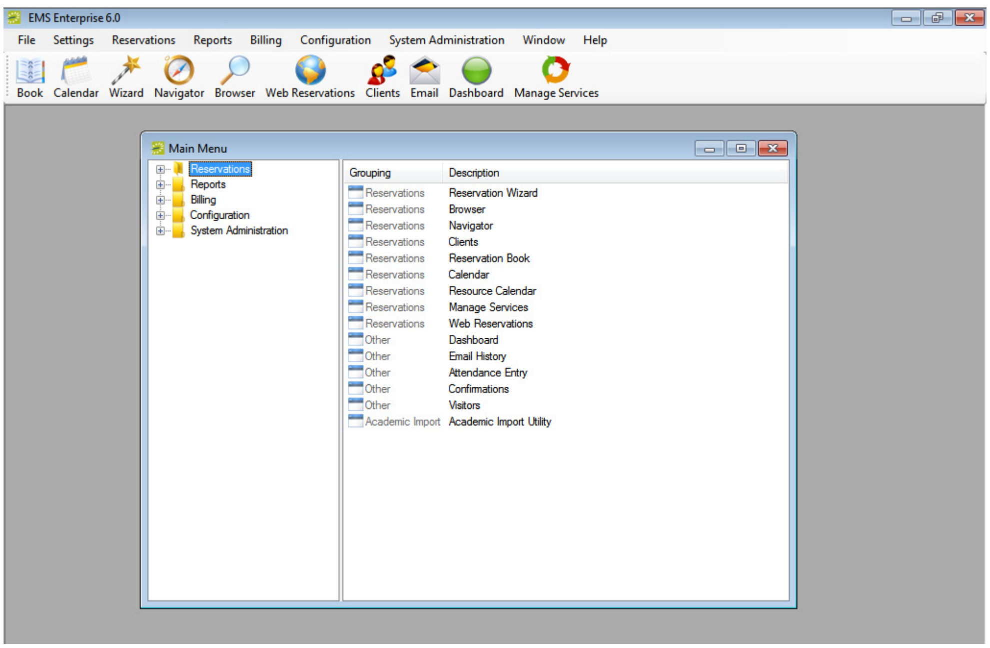
For security reasons, after you log in to EMS the first time using “admin” as both the username and password, at a minimum, DEA recommends that you change the account password. Ideally, you should create an entirely new administrator account with a new username and password. See “Configuring User Accounts” on page 329.

The EMS Window

The EMS main window is your starting point for the EMS application. The window provides quick access to all the EMS functions (Reservations, Reports, Configuration, and so on) and system tools. The EMS Main window has four major components:

- The title bar. See "Title bar."
- The menu bar. See "Menu bar" on page 30.
- The toolbar. See "Toolbar" on page 30.
- The main menu. See "Main menu" on page 31.

Figure 1-3: EMS main window with main menu

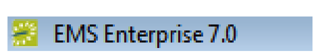


The following section is written from the perspective of EMS Enterprise; however, it is applicable for any EMS product (EMS Professional, EMS Campus, and so on).

Title bar

The name "EMS Enterprise" and the version number of the application appear in the title bar across the top of the EMS Enterprise main window.

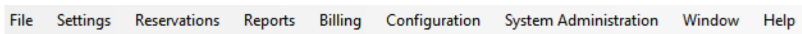
Figure 1-4: Title bar



Menu bar

The menu bar is set up in a standard Windows menu format with menu commands grouped into menus (File, Settings, Reservations, and so on) across the menu bar. Some of these menu commands are also available in the main menu.

Figure 1-5: Menu bar



Toolbar

The toolbar provides quick access to the most commonly used EMS functions. The toolbar buttons that are always displayed by default are the buttons for Book, Calendar, Wizard, Navigator, Browser, Web Reservations, Clients, Email, Dashboard, and Manage Services. Other buttons for other functions are also displayed by default depending on the version of EMS that you are running, for example, EMS Campus or EMS Workplace. Some of the functions that are available on the toolbar are also available from the main menu. You can customize the appearance of this toolbar to best suit your business needs.

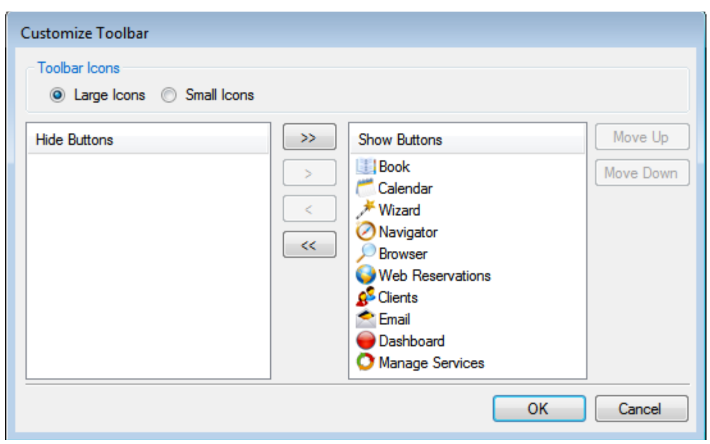
Figure 1-6: Toolbar

To customize the toolbar

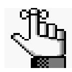
1. Right-click the toolbar and click Customize.

   The Customize Toolbar dialog box opens.

Figure 1-7: Customize Toolbar dialog box



2. Do one or more of the following:
    - To display the toolbar icons as large icons, select Large Icons; otherwise, click Small Icons.
    - To hide an icon from the toolbar display, in the Show Buttons panel, select an icon, or CTRL-click to select multiple icons, and then click the Hide button (<). Conversely, to show an icon on the toolbar display, in the Hide Buttons panel, select an icon, or CTRL-click to select multiple icons, and then click the Show button (>).



You can also move a toolbar icon between the Hide and Show panels by double-clicking the icon. To move all icons from one panel to another in a single step, you do not have to select any icons. Instead, click the appropriate Hide All button (<<) or Show All button (>>).

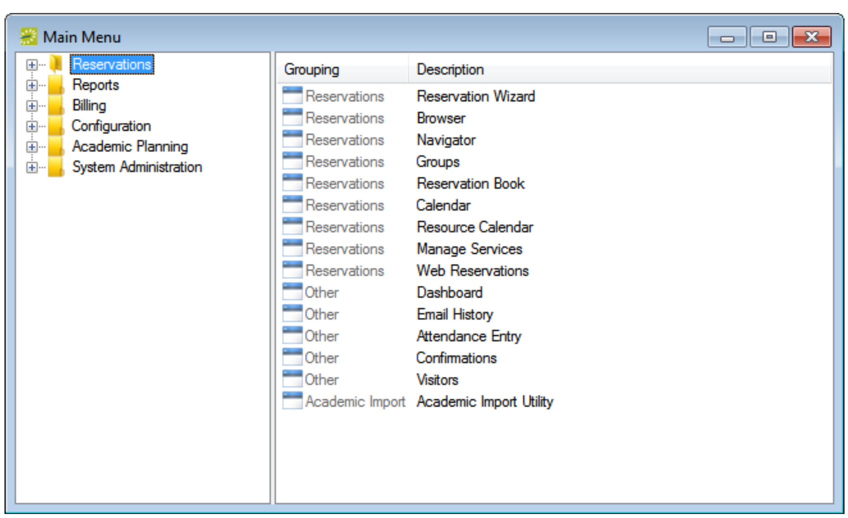
    - To change the order (from left to right) in which the icons are displayed on the toolbar, select the icon, and then click Move Up or Move Down as needed.
3. Click OK.

    The Customize Toolbar dialog box closes. The toolbar display is updated to reflect the changes that you made.

Main menu

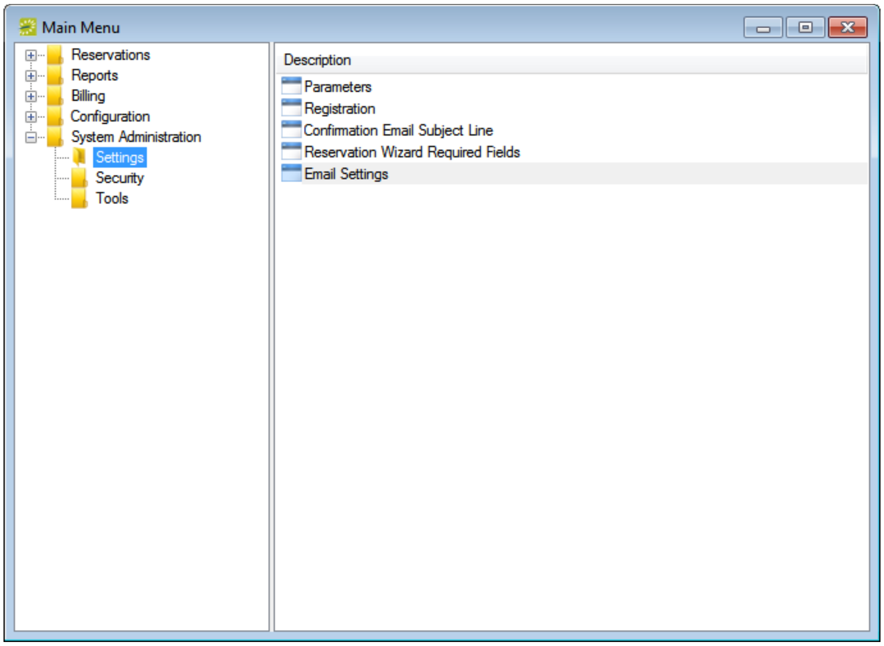
Every time you open EMS, the main menu opens in the EMS main window. You can access the primary EMS system functions—Reservations, Reports, Billing, Configuration, and System Administration—from the main menu.

Figure 1-8: EMS main menu



The main menu is arranged in a Windows Explorer-style folder structure. The top-level folders are the system functions of Reservations, Reports, Billing, Billing, Configuration, and System Administration. The available tasks for each top-level folder are further organized into subfolders. For example, to carry out a system administration task, you must first open the top-level System Administration folder, and then open the correct subfolder to view the list of available tasks.

Figure 1-9: Opening a System Administration subfolder



You can always close the main menu by clicking the Close button (x) in the upper right hand corner of the menu. To open the main menu again, on the EMS menu bar, click File > Show Main Menu.

An EMS Browser Window

Many EMS functional areas use a *Browser* window. For example, the Groups window, the Query Builder window, and the Service Order Management window are all EMS Browser windows. You use an EMS Browser window to search for data, add new data, and edit and/or delete existing data. For example, in the Groups Browser window, you can search for groups or contacts, add new groups or contacts, and edit or delete existing groups or contacts. Regardless of the EMS functional area, all EMS Browser windows have the following features in common:

- A click and drag feature that you can use to group data by a specific column, rearrange the order of the data columns, or change the width of a column. See "To group data by columns in an EMS Browser window" on page 34, "To rearrange the columns in an EMS Browser window" on page 34, and "To change the width of the columns in an EMS Browser window" on page 35.

This feature is always indicated by the option to drag and group by a column header at the top of an EMS Browser window. If a window/window pane does not display this option, then the window/window pane is not an EMS Browser window.

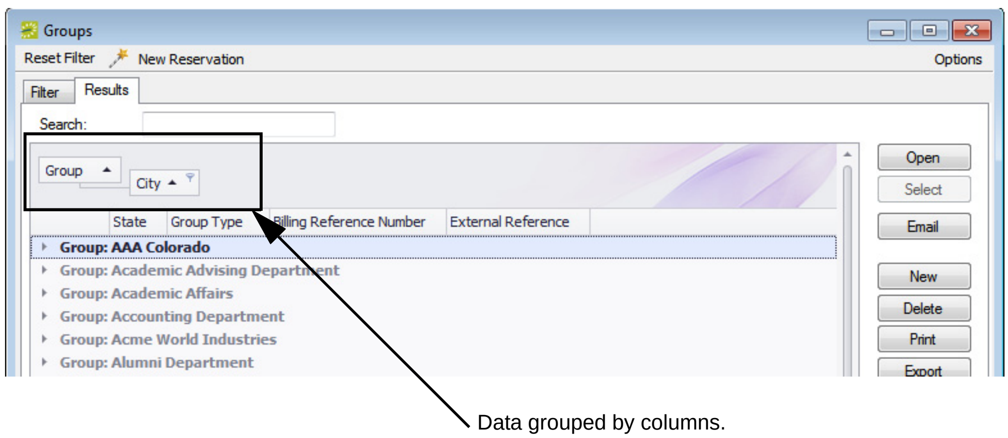
- A column context menu that has a multitude of options for sorting data, grouping data, sizing columns and so on. See "To use the context menu for data columns in an EMS Browser window" on page 35.
- A filtering feature that you can use to find and work with a subset of data in the window. See "To filter the data in an EMS Browser window" below.
- A column sorting feature that you can use to sort data by a specific column. See "To change the sort order of data in an EMS Browser window" on page 38.

The following examples are explained using the Groups window; however, the instructions are applicable for any Browser window in EMS.

To group data by columns in an EMS Browser window

In any browser window, you can drag a column header to the indicated location and group the data by the selected column. You can drag multiple column headers to the location. If you sort data by multiple columns, then the first column is the parent column. All other columns are placed as child columns, and the data is grouped accordingly in the browser window.

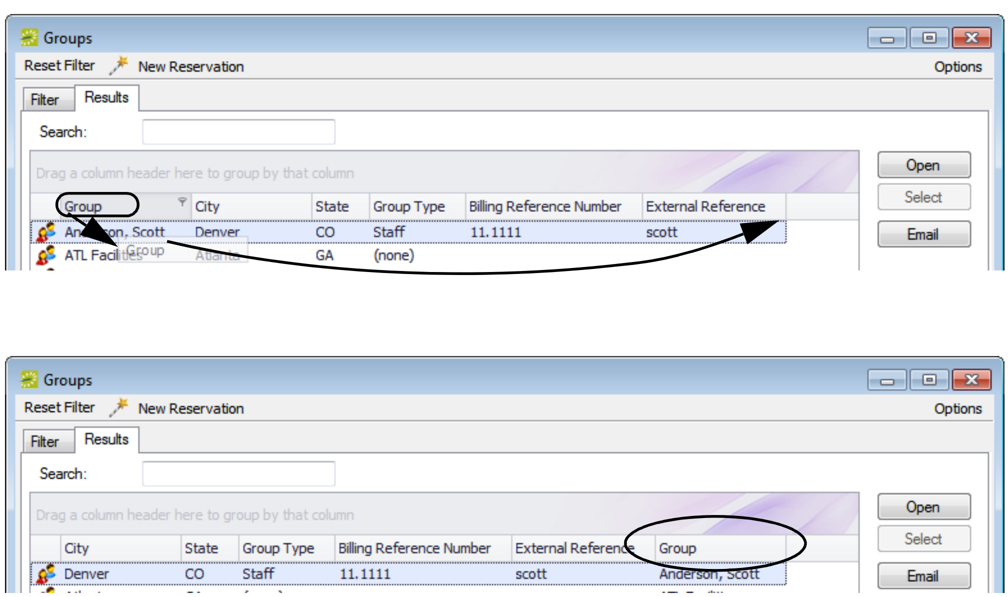
Figure 1-10: Grouping data by a column in an EMS Browser window



To rearrange the columns in an EMS Browser window

You can rearrange the column order by dragging a column to a new location using the column heading.

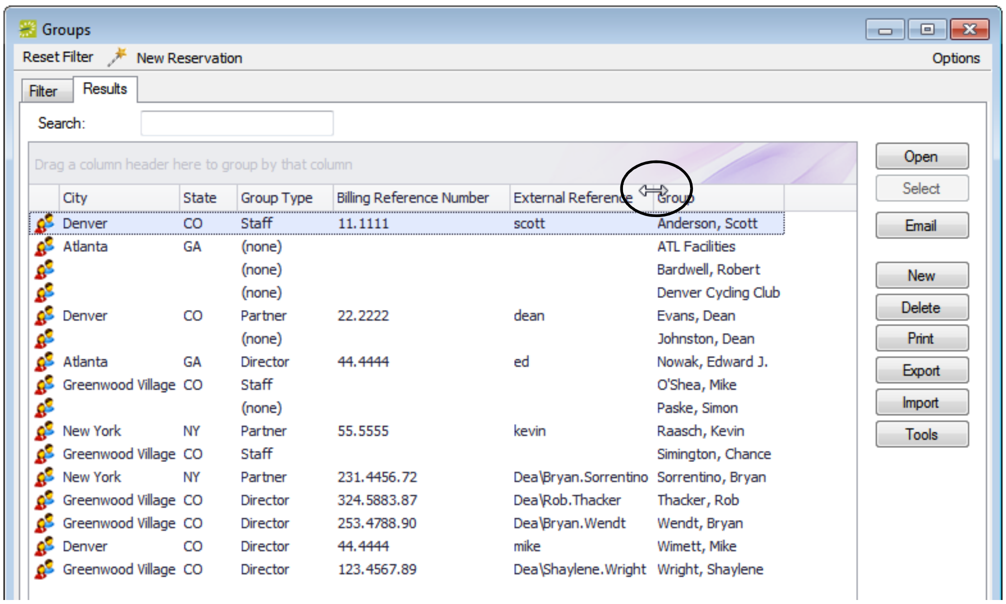
Figure 1-11: Rearranging columns in an EMS Browser window



To change the width of the columns in an EMS Browser window

You can change the width of a column by resting the mouse pointer on the right side of a column heading until the pointer changes to a double-headed arrow, and then dragging the boundary until the column is the width that you want.

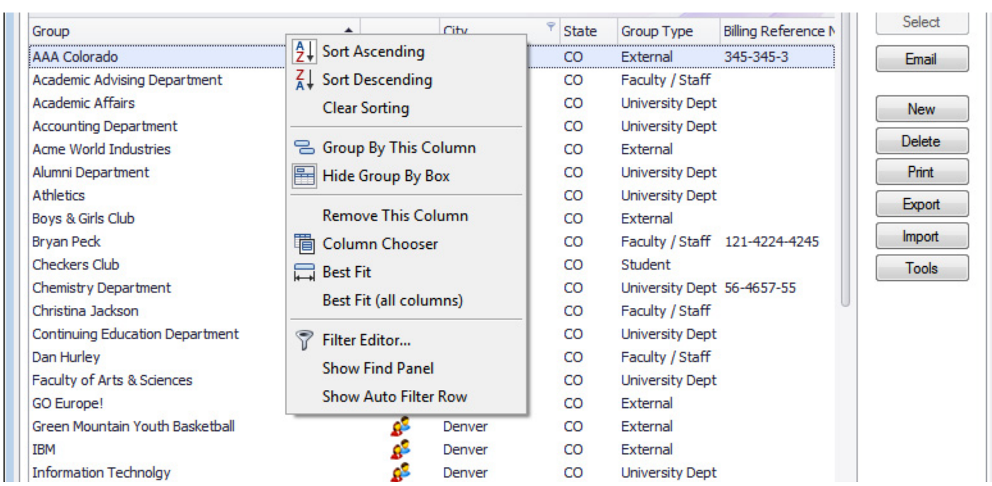
Figure 1-12: Changing the width of a column in an EMS Browser window



To use the context menu for data columns in an EMS Browser window

Right-click in any column in a browser window to open a context menu that has a multitude of options for sorting data, grouping data, sizing columns, and so on.

Figure 1-13: Context menu for a column in an EMS Browser window

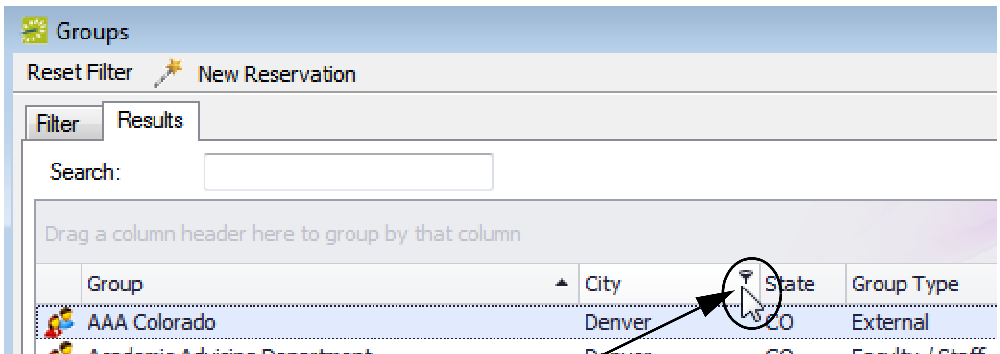


To filter the data in an EMS Browser window

1. Open a browser window, for example, the Groups window.
2. Place your cursor in the data column by which you want to filter the data. For example, to filter data based on the City for group records, place your cursor in the City column.

   A Filter icon is displayed in the column.

Figure 1-14: Filter icon displayed in a data column



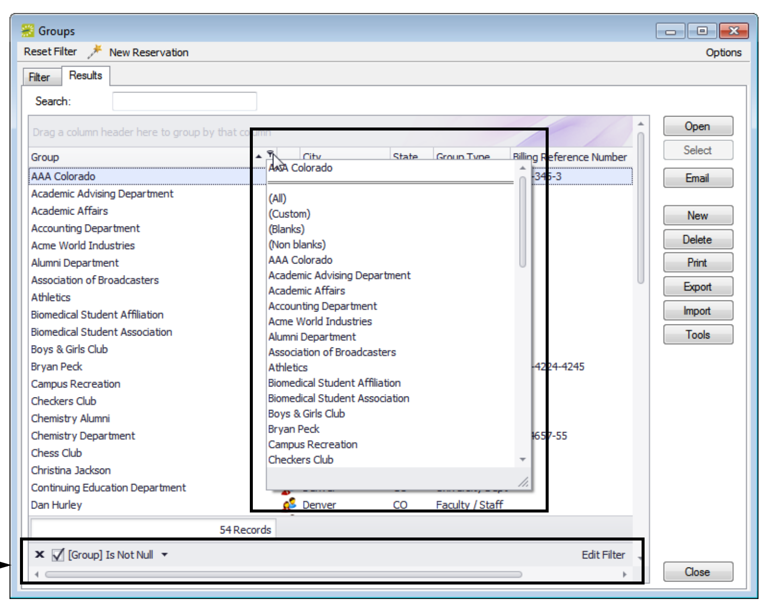
Filter icon

3. Click the Filter icon to open a list of filter options, and then select the appropriate option for creating the filter.

Any filter that you create is always displayed in the bottom left corner of the browser window.

Figure 1-15: Example of filtering options in a browser window

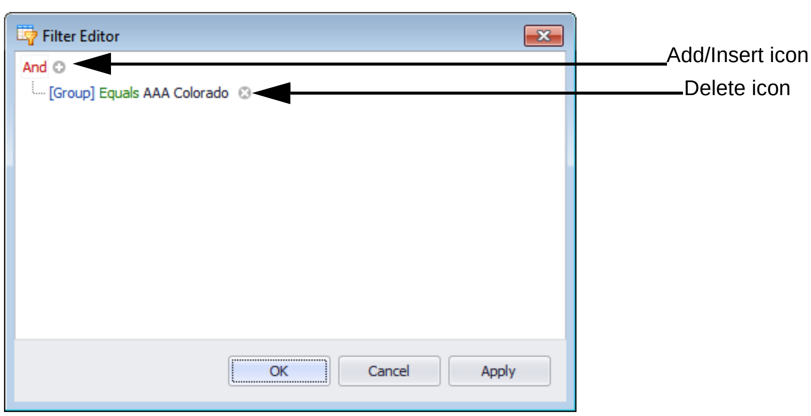
Filter



Option	Description
Custom	Opens the Custom AutoFilter dialog box in which you can construct a custom data filter.
Blanks	Filters data based on NULL (blank) data for a field. For example, if you click on Blanks in the City column in the Groups window, then all group records for which the City field has a NULL (blank) value are displayed in the Groups window.
Non blanks	Filters data based on Not Null (not blank) data for a field. For example, if you click Non blanks in the City column in the Groups window, then all group records for which the City field does *not* have a NULL (blank) value are displayed in the Groups window.
<Specific Data Value>	A Filter list also displays each unique value that has been entered for the field. Select a value on this list to filter the data by the value. For example, select “Denver” in the City column of the Groups window to display only those group records that have “Denver” specified as the group’s city.

4. Optionally, click Edit Filter in the lower right corner of the browser window to open the Filter Editor dialog box and edit the current filter.
    - To add a new condition to a filter, click the Add/Insert icon.
    - To remove a condition from a filter, click the Delete icon at the end of the filter.
    - To apply a new filter, click Apply.
    - To close the Edit Filter dialog box and return to the browser window, click OK.

Figure 1-16: Edit Filter dialog box



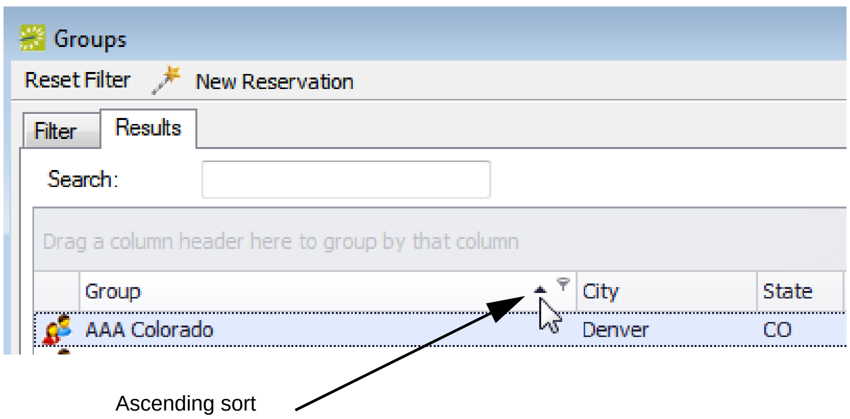
To change the sort order of data in an EMS Browser window

When a browser window first opens, data are sorted in ascending order based on the data in the *first* column of the window. For example, when the Groups window first opens, the group records are displayed on the Results tab alphabetically by Group name. To change the sort order of the data in a browser window:

1. Click once in any column header to display a Sort Order icon.

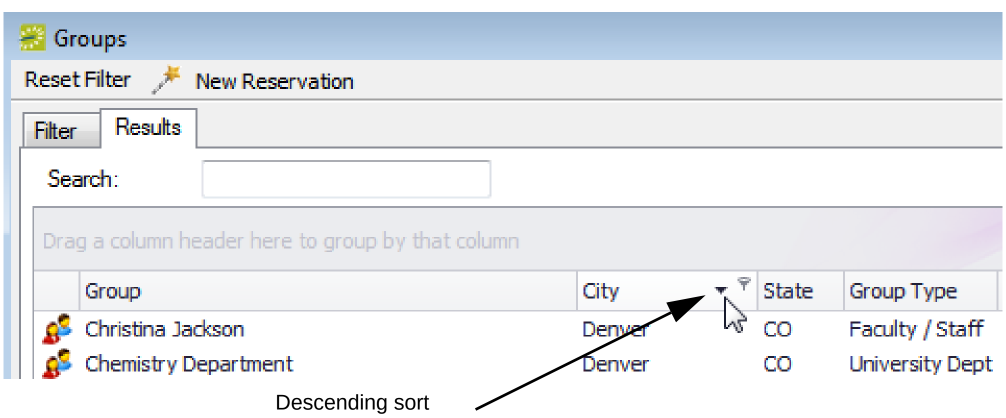
   The Sort Order icon is an "Up" arrow indicating that the data is sorted in ascending order.

Figure 1-17: Sorting by columns on the Groups window, Ascending sort



2. Click the Sort Order icon to sort the records in descending order by the data in the column.

Figure 1-18: Sorting by columns on the Groups window, Descending sort



3. Click the Sort Icon again to sort the records in ascending order.

Core Configuration - Other Data Types

Before you can use EMS to manage your organization’s events, you must configure core data items that are specific to your organization. For example, before you can make a reservation for a group, you must first configure the group. Likewise, before you can add a comment to the group, you must first configure comment types.

This chapter covers the following topics:

Event Types, Group Types, Reminder Types, Comment Types, Messages, Holidays, User Defined Fields, Reservation Sources, Cancel Reasons, Attachment Types, Word Merge documents, and Calendar Styles are collectively referred to as “Other” data types in EMS.

Overview of Data Configuration

You configure data for your EMS database in two major locations:

- Configuration area—You define *core* data items (facilities, resources, billing, and so on) in the Configuration area.
- System Administration area—You define *system administration* data items (global user settings, security, tools, and so on) in the System Administration area.

To be able to make reservations in EMS, at a minimum, you *must* configure buildings, rooms, statuses, and groups. By default, when you configure any data item, the item is configured as an *active* item, which means that it is available for use in the system. You can inactivate the vast majority of data items in the EMS database. When you inactivate a data item, it does not delete the item. All information about the item is retained for historical purposes; however, the item is no longer available for use in the system. For example, if you inactivate a room then the space is no longer available for use in either EMS or Virtual EMS (VEMS), but it remains in place anywhere it was used before being inactivated. If needed, you can delete a data item, but only if the item has not been used in some way in your EMS system. For example, you can delete a room only if no bookings or web requests reference the room. You can delete a resource only if no service order items reference the resource. Also, the procedure to edit existing data is identical to the procedure for configuring data with one difference—instead of clicking New in the <Data> window, you select the data that is being modified and then click Edit. *With the exception of groups,* this approach works for editing all data items in your EMS database.

The procedures for editing groups is discussed in detail in *,"Core Configuration - Groups and Contacts," on page 275.*

For any Core or System Administration data configuration window:

- On some of the configuration windows, if you click Print, a list of reports that you can generate and print for the applicable configuration item opens. On other configuration windows, a list of reports is not available. Instead, an onscreen report opens in a Print Preview window. This report simply lists the items you have configured. You can also print a hard copy of the report from this window. See Figure 2-1 on page 42.
- The Audit tab lists the date that the item was added to your EMS database and the name of the user who added the item. It also lists the date that the item was last modified in your EMS database and the name of the user who modified the item. See Figure 2-2 on page 42.

Figure 2-1: Example of a data configuration window with a Print button

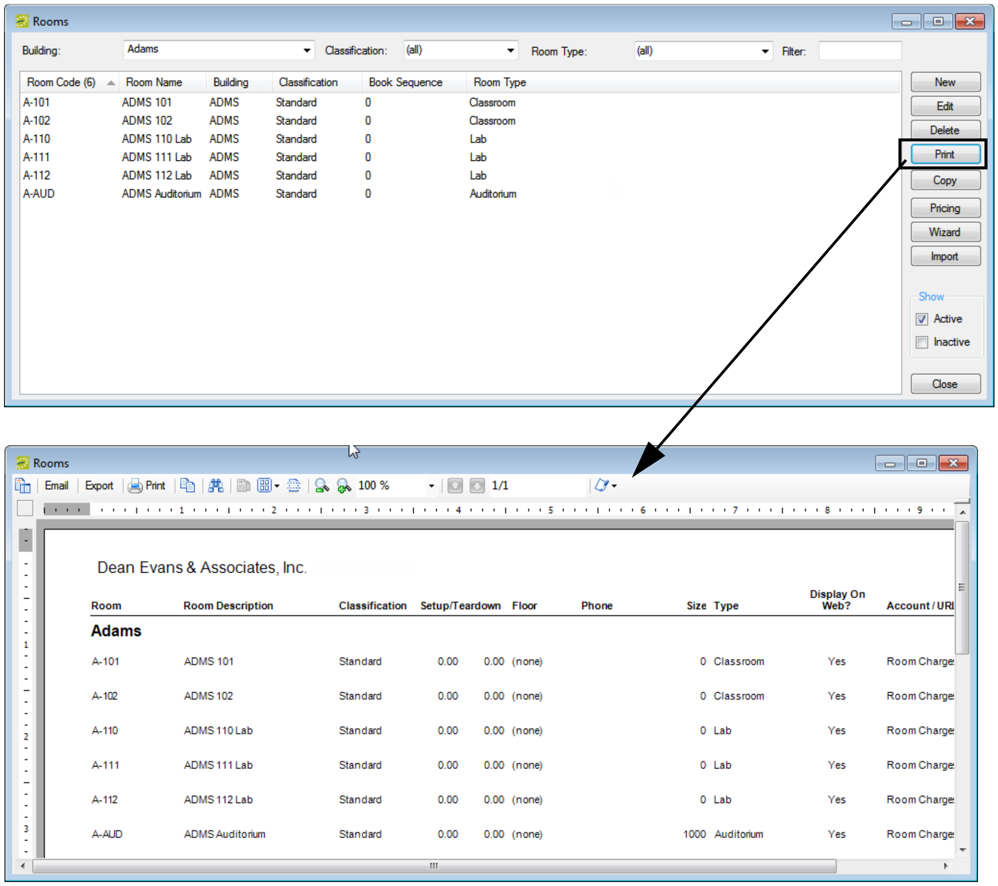
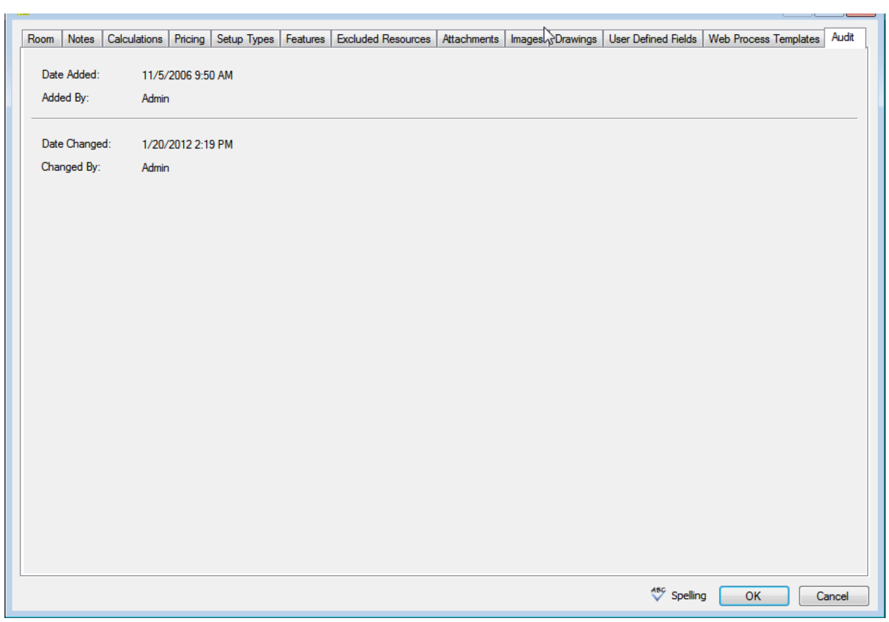


Figure 2-2: Example of a data configuration window with Audit tab



Configuring Event Types

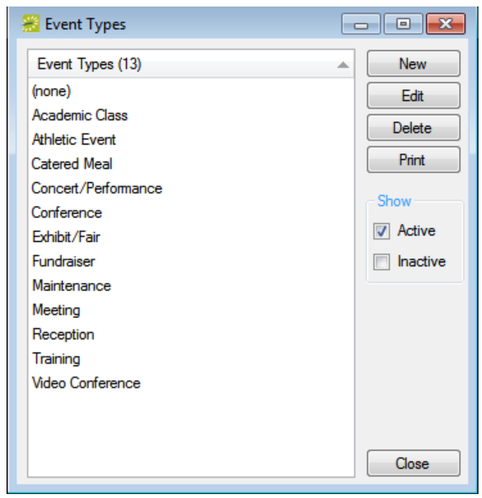
You can configure *event types*, which you use to classify or categorize the different events that your organization has. For example, you might configure lectures, meetings, and conferences, and so on as some of your event types.

To configure event types

1. On the EMS menu bar, click Configuration > Other > Event Types.

   The Event Types window opens. This window lists all the event types that are currently configured in your EMS database and that have a status of Active.

Figure 2-3: Event Types window

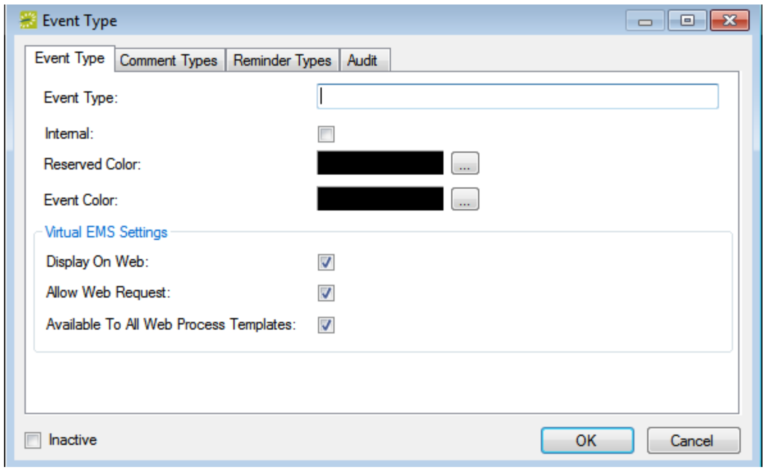


Optionally, to view all event types in your EMS database, regardless of status, under Show, click Inactive.

2. Click New.

   The Event Type dialog box opens. The Event Type tab is the active tab.

Figure 2-4: Event Type dialog box, Event Type tab



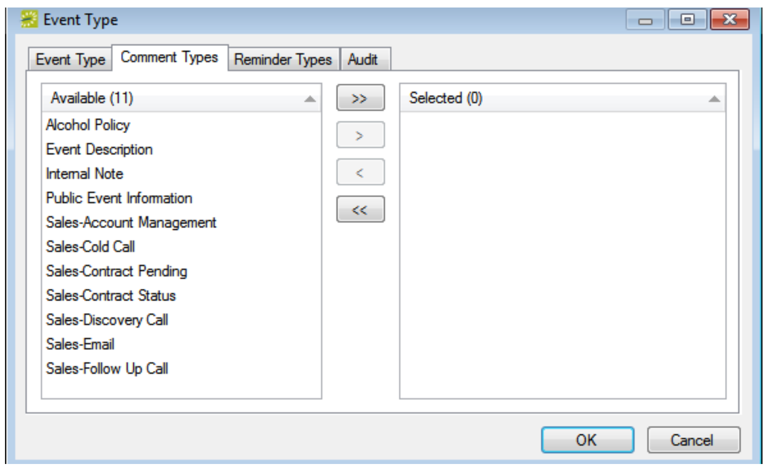
3. Enter the information for the new event type.

Field	Description
Event Type	The name or classification for the event. **Note:** The event type can be a maximum of 30 characters, including spaces.
Internal	Indicates that the event type is internal to your organization. **Note:** Used for internal reporting purposes only. The event type is not printed on external documents such as confirmations and invoices, and it is not hidden in any area of your EMS application.
Reserved Color	Select the color that is to be used in the Reservation Book to indicate when the reserved time extends past the event time.
Event Color	Select the color that is to be used in the Navigator and in the Reservation Book to indicate this type of event. **Note:** Lighter colors are a better choice so as not to obscure the reservation/booking name.
Virtual EMS Settings	
Display on the Web	Indicates that events of this type are to be displayed when a user browses for events in VEMS. **Note:** If an event is labeled with a type for which this option has been cleared, then the event is not displayed when a user browses for the event in VEMS.
Allow Web Request	Indicates that this event type is an available option in VEMS when requesting a room.
Available to All Web Process Templates	Select this option to assign this event type to all web process templates.

Field	Description
Inactive	Leave this option blank to add the event type as an active event type. Select this option to inactivate the event type.

4. Open the Comment Types tab, and on the Available list, select the comment type, or CTRL-click to select the multiple comments types that are to be automatically applied when you create a new reservation with this event type, and then click the Move button (>) to move the selected comment types to the Selected list.

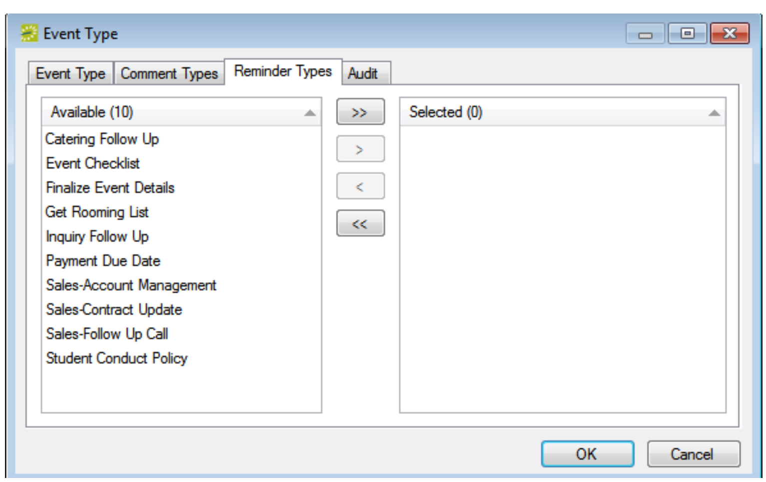
Figure 2-5: Event Type dialog box, Comment Types tab



If the appropriate comment type is not available, you can configure it. See *"Configuring Comment Types" on page 52.*

5. Open the Reminder Types tab, and on the Available list, select the reminder type, or CTRL-click to select the multiple reminder types that are to be automatically applied when you create a new reservation that uses this event type, and then click the Move button (>) to move the selected reminder types to the Selected list.

Figure 2-6: Event Type dialog box, Reminder Types tab



If the appropriate reminder type is not available, you can configure it. *See “Configuring Reminder Types” on page 49.*

6. Click OK.

   The Event Type dialog box closes. You return to the Event Types window with the newly configured event type automatically selected.

Configuring Group Types

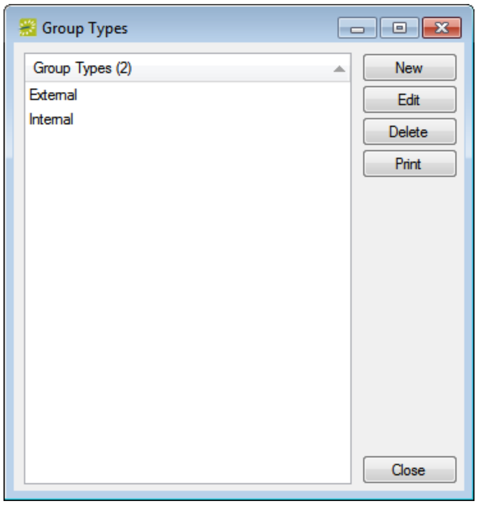
You can configure *group types*, which you use to classify or categorize the different groups that sponsor or hold events at your facilities. For example, if your organization is an academic organization, you might configure student groups, alumni groups, and so on for some of your group types.

To configure group types

1. On the EMS menu bar, click Configuration > Other > Group Types.

   The Group Types window opens. This window lists all the group types that are currently configured in your EMS database.

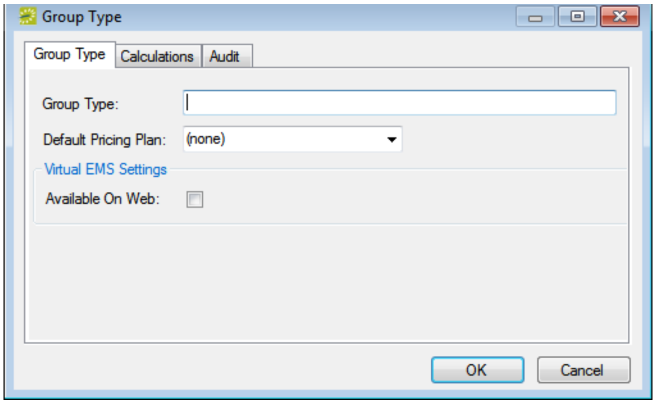
Figure 2-7: Group Types window



2. Click New.

   The Group Type dialog box opens. The Group Type tab is the active tab.

Figure 2-8: Group Type dialog box, Group Type tab

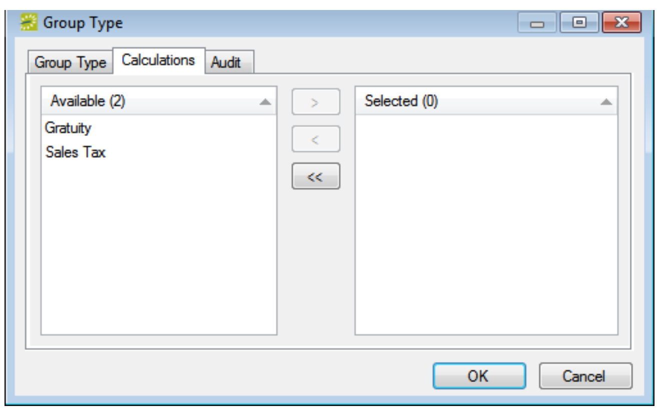


3. Enter the information for the new group type.

Field	Description
Group Type	The name or classification for the group type. **Note:** The group type can be a maximum of 50 characters, including spaces.
Default Pricing Plan	Select the default pricing plan that is to be applied when creating a new group. **Note:** If you select or edit a pricing plan for a group type, the information is not updated for existing groups of this group type. Instead, it applies only to new groups of this group type. **Note:** If the appropriate pricing plan is not available, you can configure it. See "Configuring Pricing Plans" on page 255.
Available on the Web	Select this option if VEMS users are to be able to filter events by this group type when they are browsing for events.

4. Optionally, open the Calculations tab and on the Available list, select the calculation, or CTRL-click to select the multiple calculations that are to always apply to this group type, and then click the Move button (>) to move the selected calculations to the Selected list.

Figure 2-9: Group Type dialog box, Calculations tab



If the appropriate calculation is not available, then you can configure it. See "Configuring Calculations" on page 258.

5. Click OK.

   The Group Type dialog box closes. You return to the Group Types window with the newly configured group type automatically selected.

Configuring Reminder Types

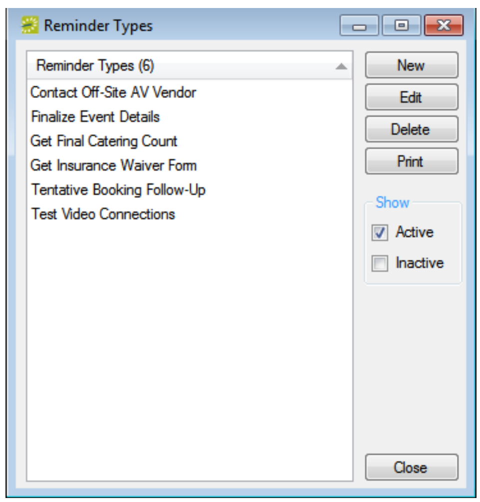
A *comment* is a text entry that explains or clarifies a reservation, a booking, a group, or a booking detail that is a service order. A *reminder* is a comment that has a due date associated with it. You can configure *reminder types*, which you use to classify or categorize the different reminders that are applicable for your organization's business needs. For example, if your organization requires a deposit before a tentative reservation can be confirmed, then you might configure a reminder type of "Deposit Due."

To configure a reminder type

1. On the EMS menu bar, click Configuration > Other > Reminder Types.

   The Reminder Types window opens. This window lists all the reminder types that are currently configured in your EMS database and that have a status of Active.

Figure 2-10: Reminder Types window

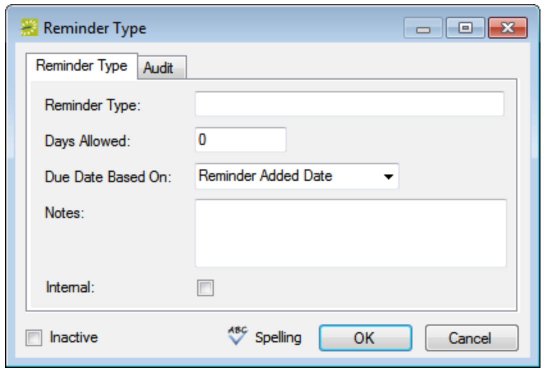


Optionally, to view all reminder types in your EMS database, regardless of status, under Show, click Inactive.

2. Click New.

   The Reminder Type dialog box opens.

Figure 2-11: Reminder Type dialog box



3. Enter the information for the new reminder type.

Field	Description
Reminder Type	The name or classification for the reminder. **Note:** The reminder type can be a maximum of 30 characters, including spaces.
Days Allowed	Enter a value, or leave the default value of zero to use the current day's date as the basis for calculating the due date for the reminder.
Due Date Based On	Used in conjunction with the value that is specified in the Days Allowed field. • Reminder Added Date—Indicates that the reminder is due within the specified number of days *after* the date on which the reminder was applied. • Event Date—If the reminder is attached to a booking or to a service order, then the reminder is due within the specified number of days *prior* to the booking date. If the reminder is attached to a reservation, then the reminder is due within the specified number of days *prior* to the *first* booking date in the reservation.
Notes	Text entry that further defines or explains the reminder type. For example, a reminder called "Final Count for Catering" might have a default note that provides the name and phone number for the contact at the catering company. **Note:** The text that you enter here is displayed by default when you apply the reminder, but you can always edit it or delete it if needed.
Internal	Indicates that the reminder type is internal to your organization. **Note:** Used for internal reporting purposes only. The reminder type is not printed on external documents such as confirmations and invoices, and it is not hidden in any area of your EMS application.
Inactive	Leave this option blank to add the reminder type as an active reminder type. Select this option to inactivate the reminder type.

4. Click OK.

   The Reminder Type dialog box closes. You return to the Reminder Types window with the newly configured reminder type automatically selected.

Configuring Comment Types

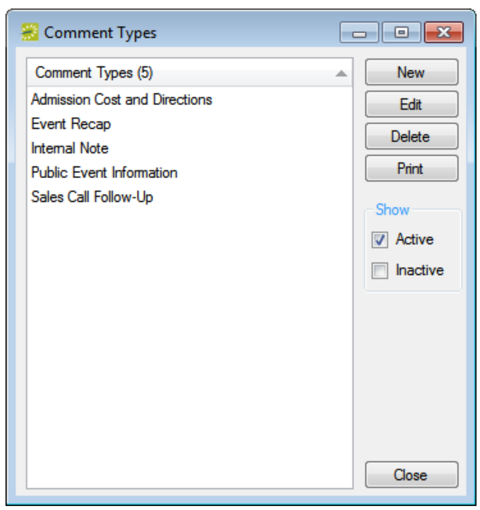
A *comment* is a text entry that explains or clarifies a reservation, a booking, a group, or a booking detail that is a service order. You can configure *comment types*, which you use to classify or categorize the different comments that are applicable for your organization's business needs. For example, if your organization's facilities are regularly scheduled for outside conferences, then applicable comment types could include Event Directions, Admission Cost and Requirements, Event Recap, and so on.

To configure comment types

1. On the EMS menu bar, click Configuration > Other > Comment Types.

   The Comment Types window opens. This window lists all the comment types that are currently configured in your EMS database and that have a status of Active.

Figure 2-12: Comment Types window

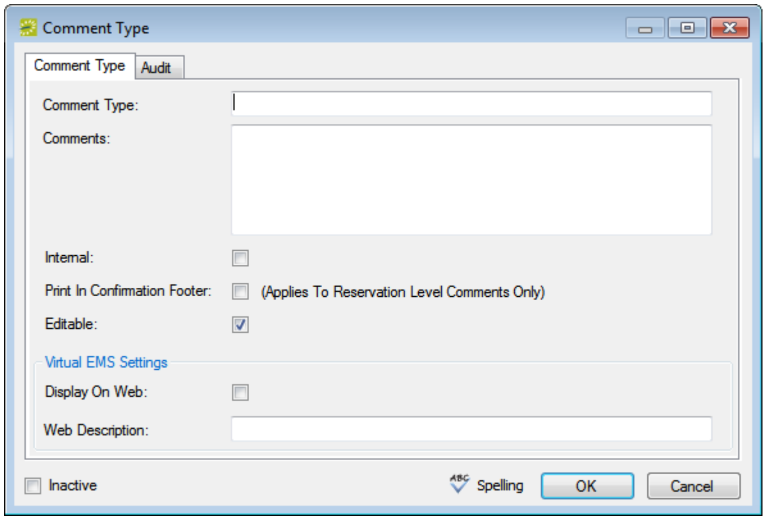


Optionally, to view all comment types in your EMS database, regardless of status, under Show, click Inactive.

2. Click New.

   The Comment Type dialog box opens.

Figure 2-13: Comment Type dialog box



3. Enter the information for the new comment type.

Field	Description
Comment Type	The name or classification for the comment type. **Note:** The comment type can be a maximum of 30 characters, including spaces.
Comments	Free form text that is appropriate for the selected comment type. **Note:** The information that you enter here is displayed by default when you apply the comment, but you can always edit it or delete it if needed.
Internal	Indicates that the comment type is internal to your organization. **Note:** Used for internal reporting purposes only. The comment type is not printed on external documents such as confirmations and invoices, and it is not hidden in any area of your EMS application.
Print in Confirmation Footer	Select this option if the comment type is to be printed in the footer of reservation-level confirmations.
Virtual EMS Settings	
Display on Web	Select this option if the comment is to be displayed in VEMS when it is attached to a reservation or booking.
Web Description	Provides an expanded description of the comment type in VEMS when users are browsing events.
Inactive	Leave this option blank to add the comment type as an active comment type. Select this option to inactivate the comment type.

4. Click OK.

   The Comment Type dialog box closes. You return to the Comment Types window with the newly configured comment type automatically selected.

Configuring Messages

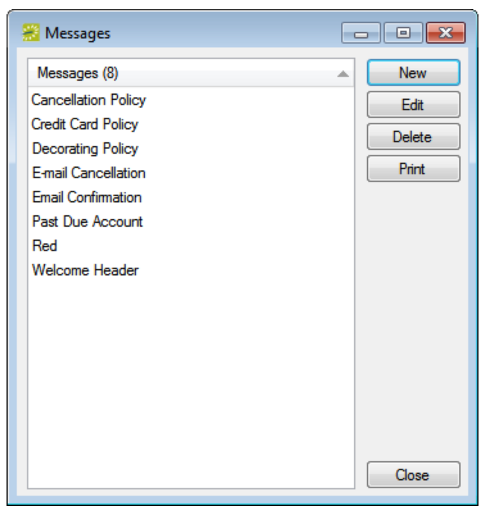
A *message* is a block of text that your users can add to the headers and footers of confirmations, emails, and invoices. One header message, one footer message, or both can be added. Messages can be used for a variety of purposes, such as providing a simple greeting to a group who is making a reservation, providing event instructions and contact information, and so on. For example, a Greeting message might be something such as “Thank you for reserving...” You can configure and store a variety of messages and then your users can select whichever is most appropriate for a given situation.

To configure messages

1. On the EMS menu bar, click Configuration > Other > Messages.

   The Messages window opens. This window lists all the messages that are currently configured in your EMS database.

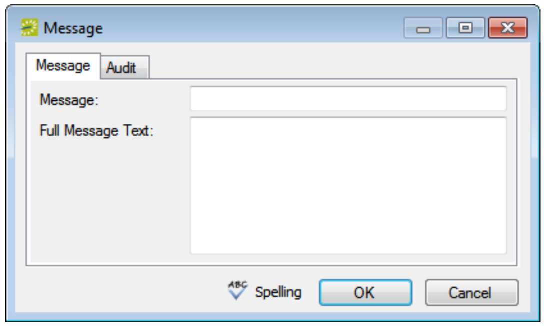
Figure 2-14: Messages window



2. Click New.

   The Message dialog box opens. The Message tab is the active tab.

Figure 2-15: Message dialog box, Message tab



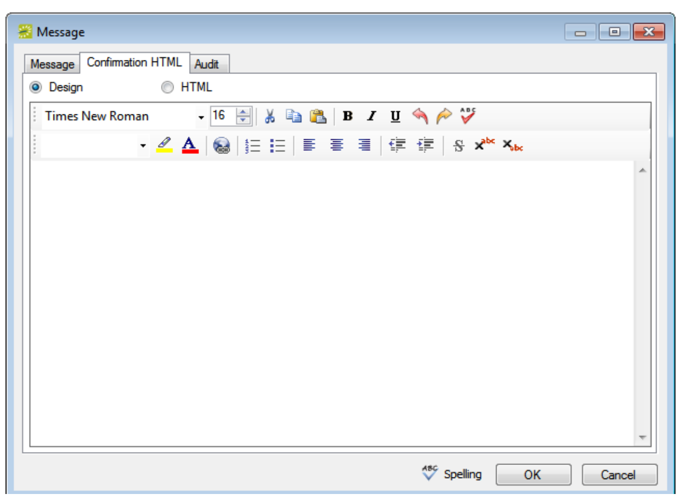
3. Enter the information for the new message.

Field	Description
Message	The name for the message. **Note:** The message name can be a maximum of 50 characters, including spaces.
Message Text	The unformatted message in its entirety.

4. Open the Confirmation HTML tab and do one of the following:

   - Design is selected by default. Use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the headers and footers.
   - Select HTML and enter the necessary HTML code to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the headers and footers.

Figure 2-16: Message dialog box, Confirmation HTML tab



5. Optionally, click Spelling to spell check the message before you save it.
6. Click OK.

   The Message dialog box closes. You return to the Messages window with the newly configured message automatically selected.

Configuring Holidays

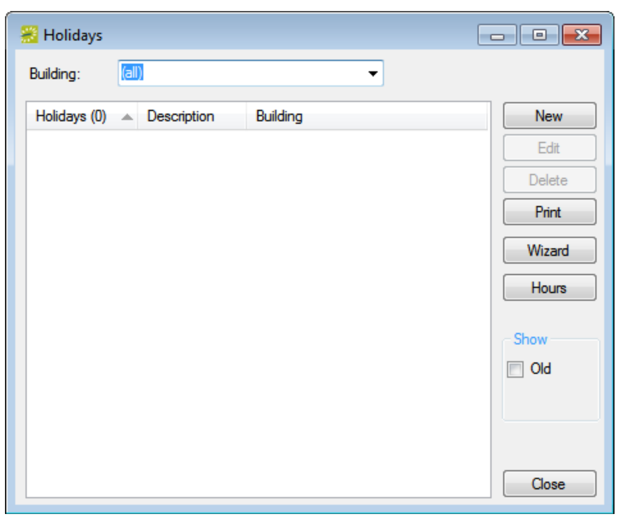
Holidays are days that have special significance for your organization, for example, New Year's Day, Spring Break, Staff Retreat, and so on. Holidays are displayed in various places throughout your EMS system. The holiday designation is for informational purposes only and unless you specifically close the date to your users, your users are not prevented from making reservations or booking rooms on a holiday. You must configure your organization's holidays each calendar year. EMS does not assume that a day that is a holiday for the current calendar year is also a holiday for the next calendar year. You can configure holidays on an individual basis, you can configure multiple holidays, or you can use a wizard to import a list of holidays in a single step. Optionally, after you configure or import a list of holidays, you can configure the hours for the buildings that are affected by the holiday. By default, buildings are configured to be "Open All Day." You can configure the hours for a building so that the building is open for only a specific time period on the holiday, or the building is closed for the entire holiday.

To configure holidays

1. On the EMS menu bar, click Configuration > Other > Holidays.

   The Holidays window opens. This window lists all the holidays that are currently configured for all buildings in your EMS database and that have a date greater than or equal to the current day's date.

Figure 2-17: Holidays window



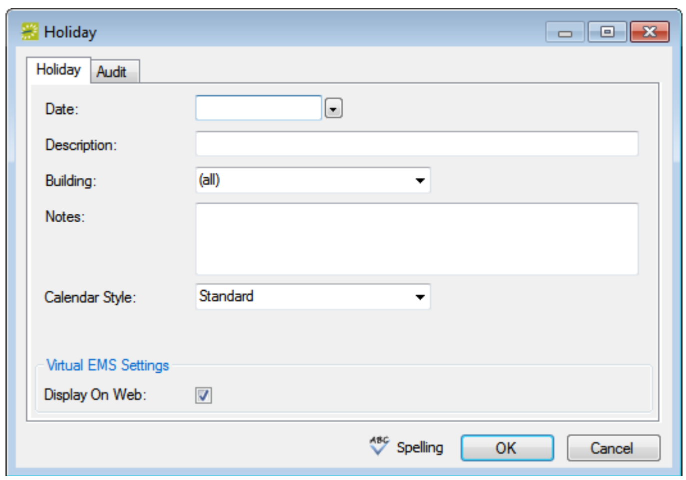
2. Optionally, do one or both of the following:
   - To view all holidays in your EMS database, regardless of date, under Show, click Old.
   - To view all holidays for a specific building, select the building on the Building dropdown list.
3. Continue to one of the following:
   - "To configure a single holiday" below.
   - "To configure multiple holidays" on page 60.
   - "To import a list of holidays" on page 63.

To configure a single holiday

1. Click New.

   The Holiday dialog box opens.

Figure 2-18: Holiday dialog box



2. Enter the information for the holiday.

Field	Description
Date	The date for the holiday.
Description	The description or name of the holiday. **Note:** The description can be a maximum of 50 characters, including spaces.
Building	Select the building to which the holiday applies. (The default value is all buildings.)
Notes	Any special notes or information about the holiday.

Field	Description
Calendar Style	Select the print characteristics for the holiday on the event schedule. **Note:** See "Configuring Calendar Styles" on page 79.
Virtual EMS Settings	
Display on Web	Clear this option if you do not want the holiday description to be displayed in VEMS.

3. Optionally, click Spelling to spell check the holiday description before you save it.
4. Click OK.

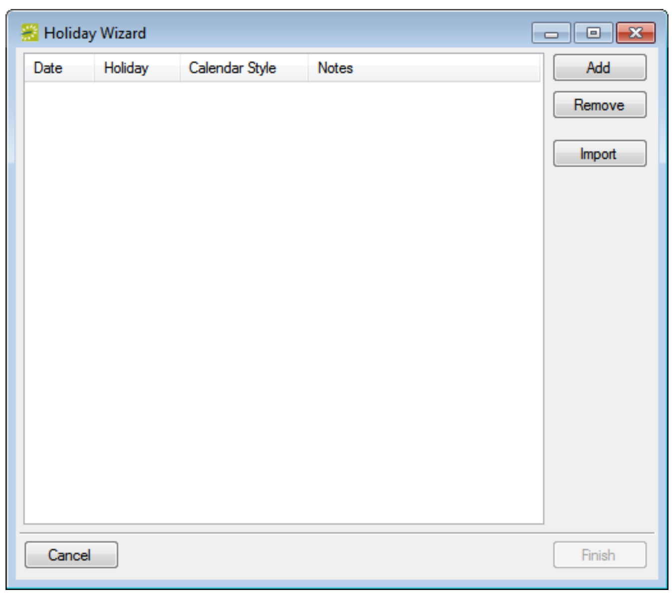
   The Holiday dialog box closes. You return to the Holidays window with the newly configured holiday automatically selected.
5. Optionally, continue to "To configure building hours for a holiday" on page 65.

To configure multiple holidays

1. Click Wizard.

   The Holiday Wizard opens.

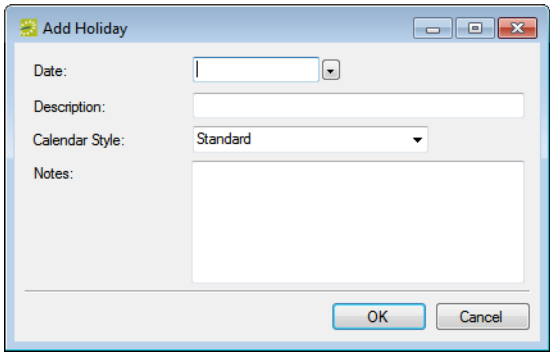
Figure 2-19: Holiday Wizard



2. Click Add.

   The Add Holiday dialog box opens.

Figure 2-20: Add Holiday dialog box



3. Enter the information for the holiday.

Field	Description
Date	The date for the holiday.
Description	The description or name of the holiday. **Note:** The description can be a maximum of 50 characters, including spaces.
Calendar Style	Select the print characteristics for the holiday on the event schedule. **Note:** See "Configuring Calendar Styles" on page 79.
Notes	Any special notes or information about the holiday.

4. Click OK.

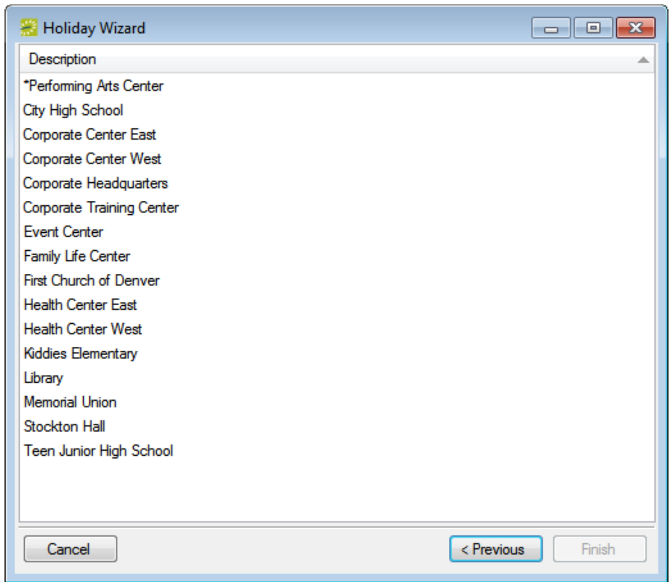
   The Add Holiday dialog box closes. You return to the Holiday Wizard window with the newly added holiday selected in the window.

5. Repeat Step 2 through Step 4 until you have added all the needed holidays.

6. Click Next.

   The Holiday Wizard window is updated with a list of all the buildings that are currently configured in your EMS database.

Figure 2-21: Holiday Wizard



7. Select the building, or CTRL-click to select the multiple buildings for which the holiday is to apply, and then click Finish.

   You return to the Holidays window with the newly configured holidays displayed in the window.

8. Optionally, continue to "To configure building hours for a holiday" on page 65.

To import a list of holidays

If you use the wizard to import a list of multiple holidays, you can set the values only for the holiday date, description, and notes. You cannot specify the calendar style, enter notes for the holiday, or indicate that the holiday is not to be displayed in VEMS. To configure any of the latter information for a holiday, you must edit the holiday.

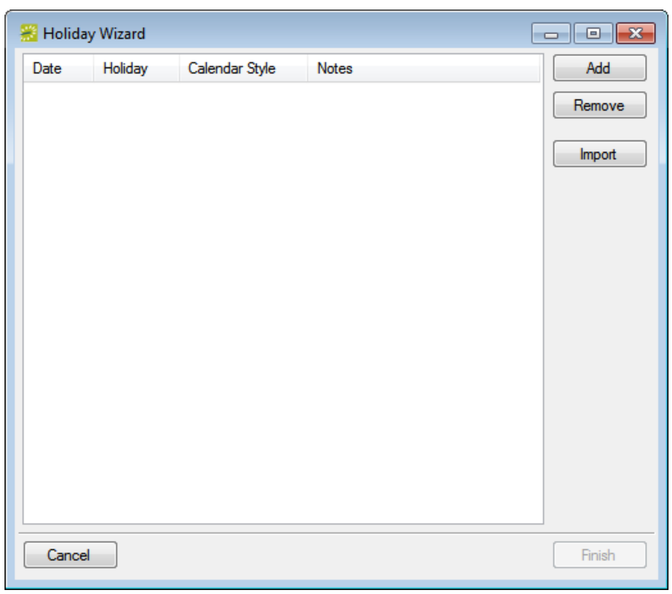
1. Create a tab-delimited file that contains the information (in the order listed) for the holidays that are being imported.
   - Date of holiday (Required. Format is mm-dd-yy.)
   - Description of holiday (Required. 50 characters maximum, including spaces.)
   - Notes (Optional. No maximum.)

Each holiday must be a separate line entry. To see the required format for the tab-delimited file, on the Holidays window, click Print > Import Format or *Appendix E, “Import File Specifications,” on page 539.*

2. Click Wizard.

   The Holiday Wizard opens.

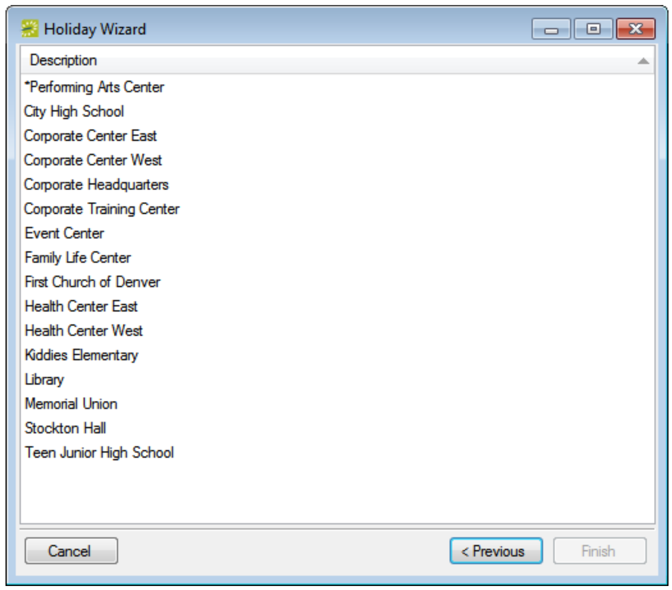
Figure 2-22: Holiday Wizard



3. Click Import, and in the Open File dialog box, browse to and select the tab-delimited text file that contains that holidays that you are importing, and then click Open.

   The Holiday Wizard window is updated with a list of all the buildings that are currently configured in your EMS database.

Figure 2-23: Holiday Wizard



4. Select the building, or CTRL-click to select the multiple buildings for which the holidays are to apply, and then click Finish.

   You return to the Holidays window with the newly imported holidays displayed in the window.

5. Optionally, select a newly imported holiday, and then do one or both of the following:

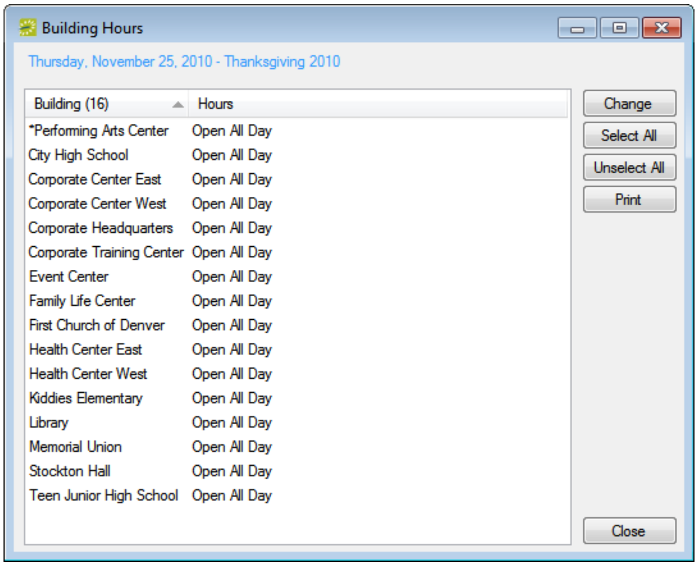
   - Click Edit to edit the Notes, Calendar Style, and/or VEMS Settings for the holiday.
   - Configure the building hours for the holiday. See “To configure building hours for a holiday” on page 65.

To configure building hours for a holiday

1. If you have not already done so, on the EMS menu bar, click Configuration > Other > Holiday to open the Holidays window.
2. Select a holiday, and then click Hours.

   The Building Hours window opens. The date and title of the holiday are displayed at the top of the window. A list of all the buildings for which the holiday applies as well as the hours of operation for each building are displayed in the window.

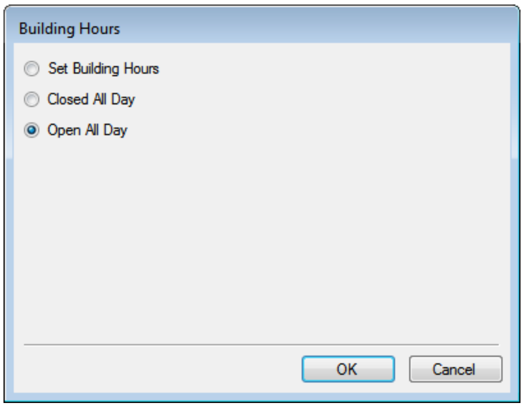
Figure 2-24: Building Hours window



3. Select the building, or CTRL-click to select the multiple buildings for which you are modifying the hours of operation, and then click Change.

   The Building Hours dialog box opens.

Figure 2-25: Building Hours dialog box



4. Select the appropriate option on the Building Hours dialog box.

Option	Description
Set Building Hours	Select this option to specify the time period (Open and Close) during which the building is to remain open for the holiday. Your EMS users can make reservations on this date in the selected buildings even if the events are scheduled outside the indicated time period. They merely receive a warning that the reservation time exceeds building hours. **Note:** VEMS users cannot make reservations outside of building hours.
Closed All Day	Select this option to close the building for the entire holiday period. When you select this option, then a Web Only option is displayed on the Building Hours dialog box. • If you do *not* select Web Only, then none of your users (EMS or VEMS) can make reservations on this date in the selected buildings. • If you do select Web Only, then your EMS users can make reservations on this date in the selected buildings; however, your VEMS users cannot.
Open All Day	The default value. Leave this option selected to have the building remain open for the entire holiday.

5. Click OK.

   The Building Hours dialog box closes. You return to the Building Hours window.

6. Repeat Step 3 through Step 5 until you have configured the building hours for all the buildings as needed.

7. Click Close.

   You return to the Holidays window.

Configuring User Defined Fields (UDFs)

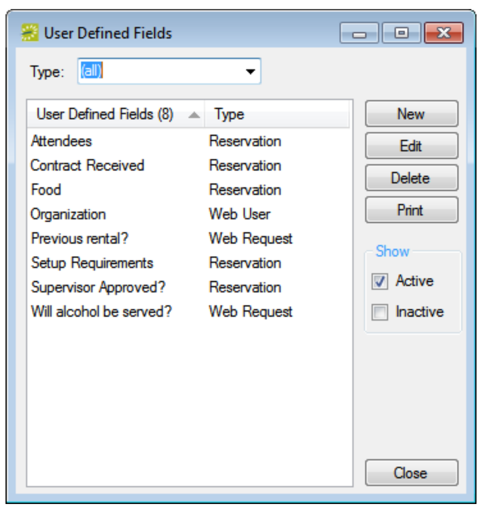
You can configure *user defined fields,* or *UDFs*, which are custom fields that store additional information or data for a building, a group, a group with a reservation, a reservation, a room, a service order, a web request, or a web user. For example, for a reservation, you might want to note the date that the contract for the event was received and if the event was approved by a supervisor. For a web request, you might want to inquire if alcohol will be served at the event. User defined fields are displayed on the User Defined Fields tab in the Reservation Wizard and on the User Defined Fields tab in the Navigator. If user defined fields have been completed for a reservation, then these fields can be displayed on any confirmations and invoices that are generated for the reservation.

To configure user defined fields

1. On the EMS menu bar, click Configuration > Other > User Defined Fields.

   The User Defined Fields window opens. This window lists all the user defined fields of any type that are currently configured in your EMS database and that have a status of Active.

Figure 2-26: User Defined Fields window



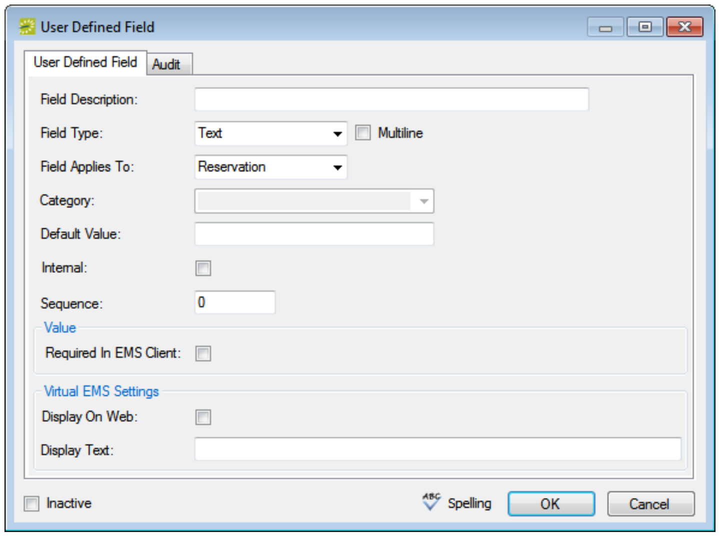
2. Optionally, do one or both of the following; otherwise, continue to Step 3.

   - To view inactive user defined fields in your EMS database, under Show, click Inactive.
   - To view only a specific type of user defined field, on the Type dropdown list, select a different type (Booking, Building, Group, Group/Reservation (which is a group for which a reservation has been made), Reservation, Room, Service Order, Web Request, or Web User).

3. Click New.

   The User Defined Field dialog box opens.

Figure 2-27: User Defined Field dialog box



4. Enter the information for the new user defined field.

Field	Description
Field Description	A name or description for the field. **Note:** The description can be a maximum of 30 characters, including spaces.
Field Type	Select the type of data that the field is to hold (Text, Date, List, or Numeric). **Note:** If you select Text, then an option for displaying a multi-line textbox in EMS and VEMS is available. If you select List, then an Items tab is displayed on the User Defined Field dialog box. You must define the items that are to be displayed in the list. (See Step 5 below.)
Field Applies To	Select the item to which the field applies. • Building or Room—Provides the ability to define custom building or room properties for reporting in Query Builder. • Course—EMS Campus only. • Group/Reservation—The UDF that is assigned to a group when a new reservation is created for the group.
Category	Available only if you select Service Order for Field Applies To. Select the service order category for which the field applies. **Note:** If the appropriate category is not available, you can configure it. See “Configuring Categories” on page 155.
Default Value	Optional field. You can enter a default value for the user defined field. This value is displayed in the field but a user can edit it if needed. **Note:** If you assign a default value to a UDF, then the UDF is always added to the item. For example, if you assign a default value to a UDF that applies to reservations, then the UDF is always added to any reservation that any user makes in your EMS system.

Field	Description
Internal	Indicates that the UDF is internal to your organization. **Note:** Used for internal reporting purposes only. The UDF is not printed on external documents such as confirmations and invoices, and it is not hidden in any area of your EMS application.
Sequence	If a booking, building, group, a group with a reservation, a reservation, a room, a service order, a web request, or a web user is to have multiple user defined fields, then specify the display order of these fields. Fields are ordered from lowest to highest sequence number, with the field with the lowest sequence number being displayed first. **Note:** If you leave the sequence set to the default value of zero for all fields, then by default, the fields are displayed alphabetically.
Value	
Required in EMS client	Select this option if a user must enter a value in the field when making a reservation in the EMS client.
Virtual EMS Settings	
Display on Web	Select this option if you want the user defined field to be displayed when users are making a reservation in VEMS.
Display Text	Enter the text that is to be displayed for the field in VEMS.
Inactive	Leave this option blank to add the user defined field an active field. Select this option to inactivate the field.

5. If you selected any field type other than List, go Step 6; otherwise, an Items tab is displayed on the dialog box. Open the Items tab, and for each list item for the UDF, do the following:

   - In the Sequence field, enter the sequence for the list item.

Items are ordered in a list from lowest to highest sequence number, with the item with the lowest sequence number being displayed first. If you set the sequence for all items to zero, then the items are displayed in the list alphabetically.

   - In the Description field, enter a name or description for the item.

The description can be a maximum of 50 characters, including spaces.

6. Optionally, click Spelling to spell check the user defined field before you save it.
7. Click OK.

   The User Defined Field dialog box closes. You return to the User Defined Fields window with the newly configured field automatically selected.

Configuring Reservation Sources

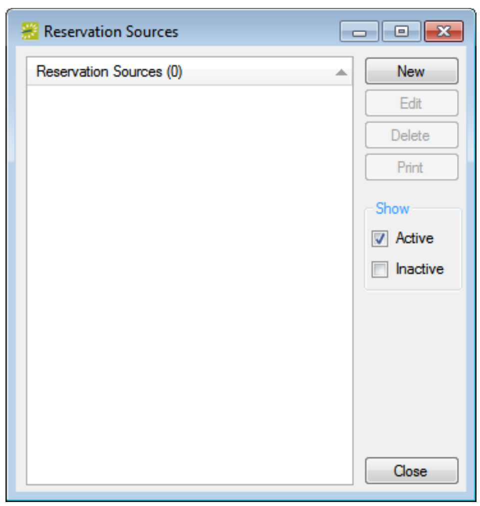
A *reservation source* indicates the origination of a reservation request, for example, walk-up, email, VEMS, and so on. You can specify a reservation source at the time that the reservation is being made in the Reservation Wizard, or at a later date. You can also specify the reservation source as part of the search criteria when searching for a reservation in the Browser. Configuring a reservation source simply consists of naming or describing the source.

To configure a reservation source

1. On the EMS menu bar, click Configuration > Other > Reservation Sources.

   The Reservation Sources window opens. This window lists all the reservations sources that are currently configured in your EMS database and that have a status of Active.

Figure 2-28: Reservation Sources window

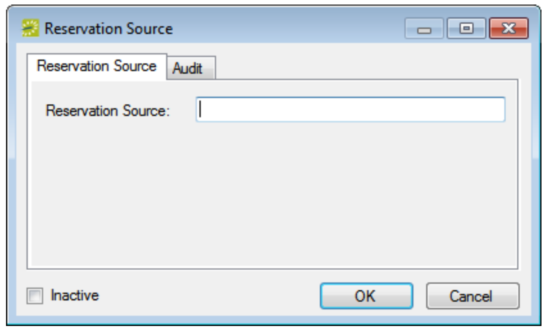


Optionally, to view all reservation sources in your EMS database, regardless of status, under Show, click Inactive.

2. Click New.

   The Reservation Source dialog box opens.

Figure 2-29: Reservation Source dialog box



3. In the Reservation Source field, enter a name or description for the new source, for example, Phoned In.

The reservation source can be a maximum of 50 characters, including spaces.

4. Leave Inactive blank to add the reservation source as an active source. Optionally, select Inactive to inactivate the source.

5. Click OK.

   The Reservation Source dialog box closes. You return to the Reservation Source window with the newly configured source automatically selected.

Configuring Cancel Reasons

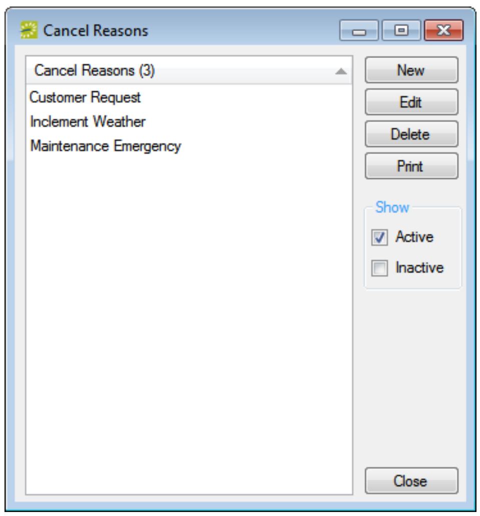
When you are canceling a reservation in your EMS system, you can indicate a reason for the cancellation. You can configure a cancel reason that is as simple as a single word or phrase (for example, Event Postponed, Other, Will Reschedule), or you can configure it so that the user who is canceling the reservation must enter additional information about the cancellation.

To configure a cancel reason

1. On the EMS menu bar, click Configuration > Other > Cancel Reasons.

   The Cancel Reasons window opens. This window lists all the cancel reasons that are currently configured in your EMS database and that have a status of Active.

Figure 2-30: Cancel Reasons window

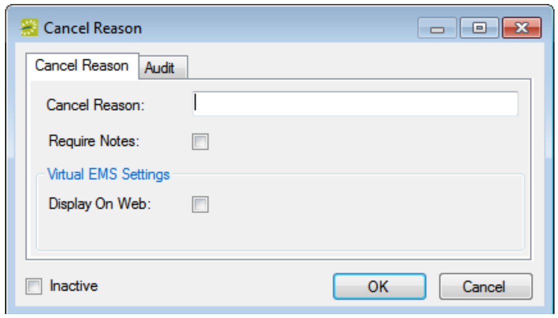


Optionally, to view all cancel reasons in your EMS database, regardless of status, under Show, click Inactive.

2. Click New.

   The Cancel Reason dialog box opens.

Figure 2-31: Cancel Reason dialog box



3. In the Cancel Reason field, enter a name or description for the new cancel reason, for example, Customer Postponed.

The cancel reason can be a maximum of 50 characters, including spaces.

4. Optionally, do one or more of the following:
   - If you want the user who is canceling the reservation to enter supporting information for this cancel reason, select Require Notes.
   - If you want the cancel reason to be listed as an option for a user who is canceling the event in VEMS, then select Display on Web.
   - By default, a cancel reason is added as an active reason. Select Inactive to inactivate the reason.
5. Click OK.

   The Cancel Reason dialog box closes. You return to the Cancel Reasons window with the newly added reason automatically selected.

Configuring Attachment Types

The term *attachment* is used to describe any file that you can add to or store on a reservation or booking. (Unlike a drawing, which is simply referenced, an attachment is actually stored in the EMS database with the reservation or booking record.) Attachments can be used for a variety of purposes, such as providing information about your company's alcohol policies, any special food concerns for the event's attendees, and so on. You can configure and store a variety of attachment types and then your users can select whichever type is most appropriate when working with attachments for a reservation or booking.

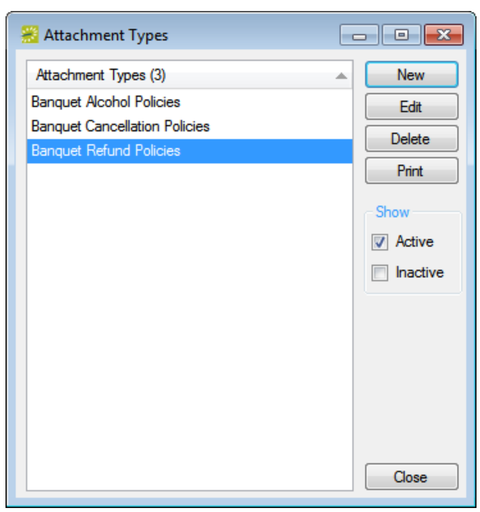
An attachment can also be a file that is saved with the room record or a group record. You do not specify an attachment type for a room record. For information about adding an attachment to a room record, see *"To add attachments to a room" on page 123.* *For information about adding an attachment to a group, see the EMS User's Manual.*

To configure an attachment type

1. On the EMS menu bar, click Configuration > Other > Attachment Type.

   The Attachment Types window opens. This window lists all the attachment types that are currently configured in your EMS database and that have a status of Active.

Figure 2-32: Attachment Types window

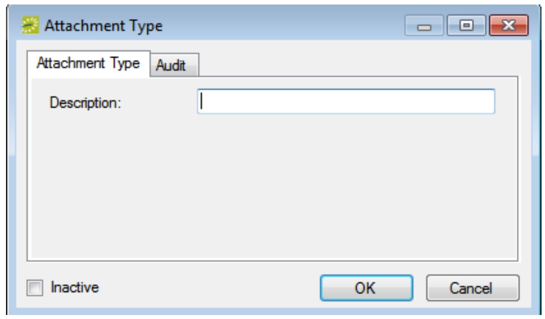


Optionally, to view all attachment types in your EMS database, regardless of status, under Show, click Inactive.

2. Click New.

   The Attachment Type box opens.

Figure 2-33: Attachment Type dialog box



3. In the Description field, enter a name or description for the new attachment type, for example, Alcohol Policy.

The description can be a maximum of 30 characters, including spaces.

4. By default, an attachment type is added as an active type. Select Inactive to inactivate the attachment type.

5. Click OK.

   The Attachment Type dialog box closes. You return to the Attachment Types window with the newly added attachment type automatically selected.

Configuring Word Merge Documents (Optional Module)

EMS provides options for producing pre-formatted documents that contain reservation information such as confirmations. Your organization, however, might have organization-specific information that must be included in these documents. Using the optional Word Merge module, you can configure *Word Merge documents* to produce confirmations, contracts, and so on that contain not only selected reservation information from EMS, but also, any information that is required by your organization. To configure a Word Merge document, you must first create the Word document and apply the appropriate tags to indicate the information in EMS that is to be pulled into the document. You can then add this document to your EMS database and use it to generate confirmations, contracts, and so on.

To create and tag the Word document

1. Create the necessary document in Microsoft Word.
2. Tag the text that is to be replaced with EMS field values accordingly. For example, if you want the Reservation Status in the Word document to be replaced with the EMS field value for Reservation Status, then any reference to Reservation Status in the Word document should be tagged as <<Reservation Status>>.

To view a complete list of the text that can be replaced in the Word document with EMS field values and the correct tags for this text, on the EMS menu bar, click Configuration > Other > Word Merge Documents, and on the Word Merge Documents window that opens, click Print > Word Merge Format. If you want to save this document for easier access and reference, then after opening the document, click Export on the document toolbar, and export the document as a Rich Text Format (.rtf) document to a location of your choosing. You can then use Microsoft Word to open the document at any time.

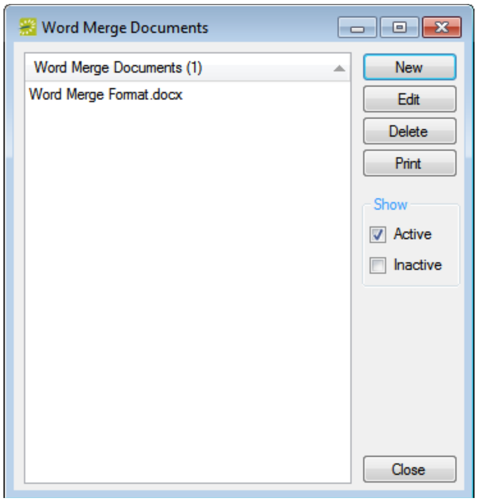
3. Continue to "To add the tagged Word document to your EMS database" on page 77.

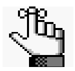
To add the tagged Word document to your EMS database

1. On the EMS menu bar, click Configuration > Other > Word Merge Documents.

   The Word Merge Documents window opens. This window lists all the Word Merge documents that are currently configured in your EMS database and that have a status of Active.

Figure 2-34: Word Merge Documents window



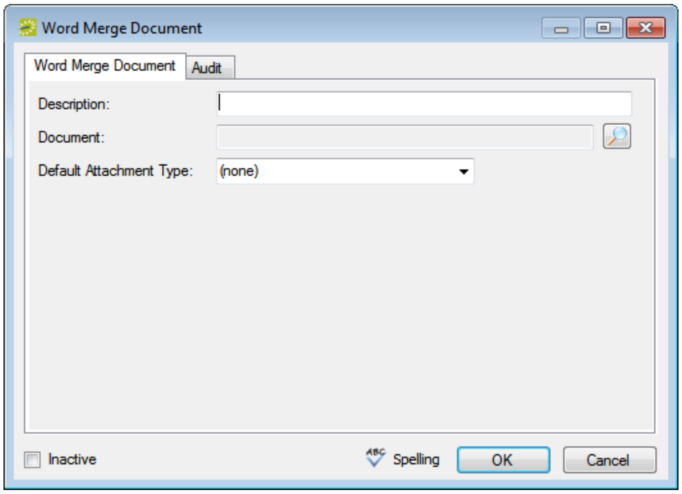


Optionally, to view all Word Merge documents in your EMS database regardless of status, under Show, click Inactive.

2. Click New.

   The Word Merge Document dialog box opens.

Figure 2-35: Word Merge Document dialog box



3. In the Description field, enter the name or description for the Word Merge document.

The description can be a maximum of 50 characters, including spaces.

4. Click the Search icon to open the Find Microsoft Word Document dialog box, and then browse to and select the Word document.

   The Find Microsoft Word Document dialog box closes. You remain on the Word Merge Document dialog box tab with an entry for the document displayed in the Document field.

5. Optionally, do one or more of the following:

   - Select a default attachment type for the document.

If the appropriate attachment type is not available, you can configure it. *See “Configuring Attachment Types” on page 74.*

   - Click Spelling to spell check the attachment notes before you save the document.
   - By default, a Word Merge document is added as an active document. Click Inactive to inactivate the document.

6. Click OK.

   The Word Merge Document dialog box closes. You return to the Word Merge Documents window with the newly configured document automatically selected.

Configuring Calendar Styles

You can configure *calendar styles*, which determine the font, font size, and color (for example, Arial, 9 pt., Black) that are used when event information is printed on the Event Schedule report and on the Event Calendar report.

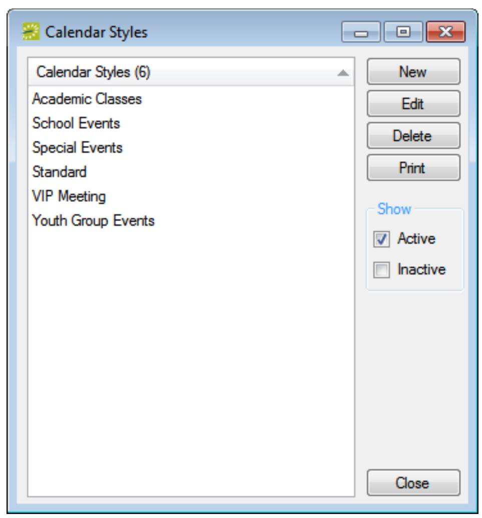
For both reports, you must select the Use Calendar Styles option on the Options tab. You set the calendar style that is to be used for an event when making the reservation for the event in the Reservation Wizard. See the EMS User's Manual.

To configure calendar styles

1. On the EMS menu bar, click Configuration > Other > Calendar Styles.

   The Calendar Styles window opens. This window lists all the calendar styles that are currently configured in your EMS database and that have a status of Active.

Figure 2-36: Calendar Styles window

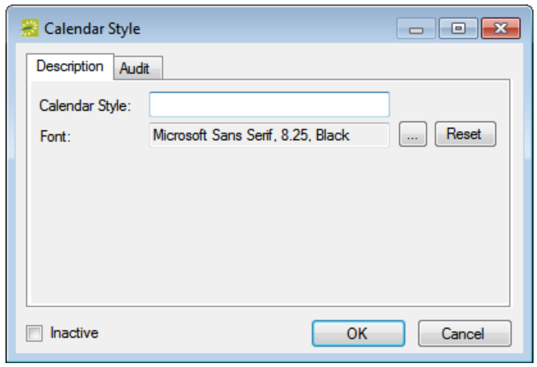


Optionally, to view all calendar styles in your EMS database, regardless of status, under Show, click Inactive.

2. Click New.

   The Calendar Style dialog box opens.

Figure 2-37: Calendar Style dialog box



3. Enter the information for the new calendar style.

   - In the Calendar Style field, enter name or description for the calendar style.

The calendar style can be a maximum of 50 characters, including spaces.

   - In the Font field, the default calendar style is listed. You can leave this value as is, or you can click the Browse button ... to open the Font dialog box, and specify the font, font size, and font color for the new calendar style.

To reset the font characteristics to their default values, click Reset.

4. Leave Inactive blank to add the calendar style as an active style. Optionally, select Inactive to inactive this calendar style.

5. Click OK.

   The Calendar Style dialog box closes. You return to the Calendar Styles window with the newly configured calendar style automatically selected.

Core Configuration - Facilities

Before you can use EMS to manage your organization’s events, you must configure core data items that are specific to your organization. For example, before you can reserve a room, you must first configure the room in EMS.

This chapter covers the following topics:

If your organization has purchased and installed EMS Campus, then you can synchronize data from your Student Information System (SIS) such as your campus buildings, rooms., and room types. As a result, before you carry out any configuration of your facilities data, see , “EMS Campus,” on page 461.

Configuring Floors

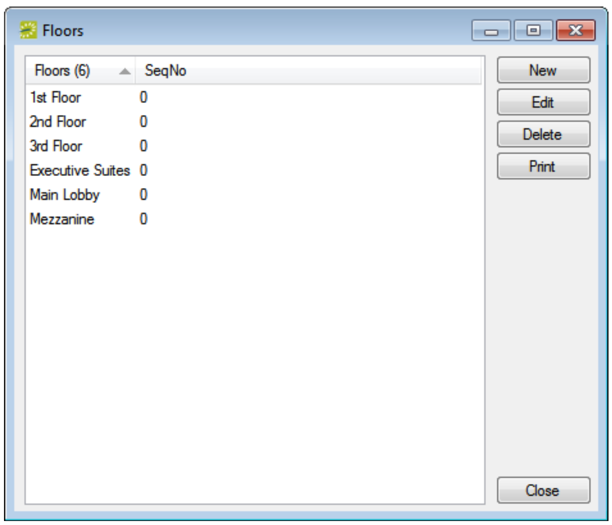
A *floor* is optional information when you are defining a room and when you are searching for a room. A room can be assigned to only a single floor. Example of floors include First Floor, Basement, and Garden Level. When you configure a floor, you must provide a floor name and a sequence.

To configure a floor

1. On the EMS menu bar, click Configuration > Facilities > Floors.

   The Floors window opens. The window displays all the floors that are currently configured in your EMS database.

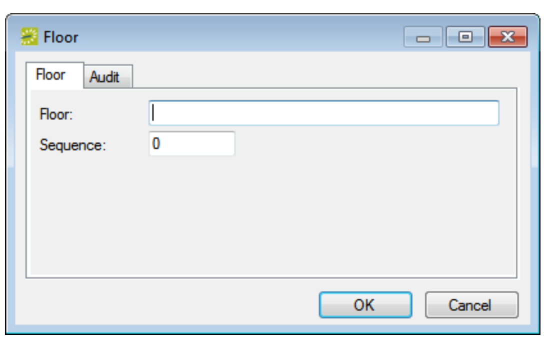
Figure 3-1: Floors window



2. Click New.

   The Floor dialog box opens.

Figure 3-2: Floor dialog box



3. In the Floor field, enter a name or description for the new floor.

The floor can be maximum of 50 characters, including spaces.

4. Optionally, in the Sequence field, enter a sequence for the new floor.

The sequence determines the order in which the floors are displayed in the Floor dropdown list. The lower the sequence number, the higher in the list that the floor is displayed. If the sequence is set to the default value of zero for all floors, then the floors are first sorted numerically, and then alphabetically, in the Floor dropdown list.

5. Click OK.

   The Floor dialog box closes. You return to the Floors window with the newly added floor automatically selected.

Configuring Features

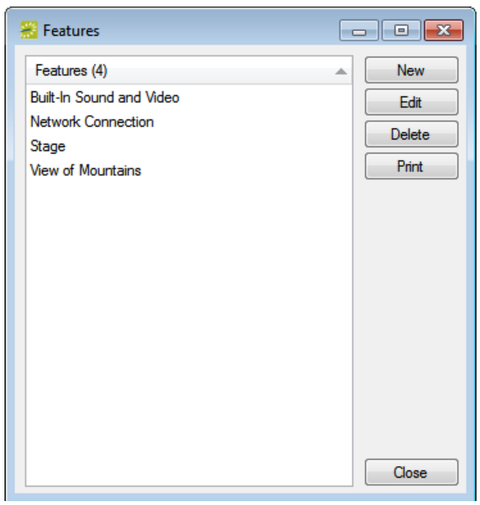
A *feature* is built-in or permanent attribute of a room, such as a network connection, a built-in plasma TV, window, and so on. Your users can use features as criteria when they are searching for a room. They can also filter the available rooms that can be reserved for an event by room features. After you configure the different room features for your organization, you must indicate which rooms have these features.

To configure features

1. On the EMS menu bar, click Configuration > Facilities > Features.

   The Features window opens. This window lists all the features that are currently configured in your EMS database.

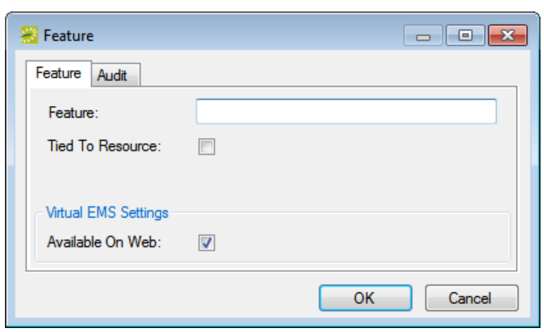
Figure 3-3: Features window



2. Click New.

   The Feature dialog box opens.

Figure 3-4: Feature dialog box



3. In the Feature field, enter name or description for the feature.

The feature can be a maximum of 50 characters, including spaces.

4. If this feature is a video conferencing feature, then select Tied to Resource; otherwise go to Step 5.

This option is available only in EMS Enterprise. It is not available in EMS Professional. See Appendix B, "Video Conferencing," on page 511 for detailed information about the additional configuration required to use the video conferencing feature.

5. If you want VEMS users to see this feature when they are searching for available space, leave Available on Web selected.
6. Click OK.

   The Feature dialog box closes. You return to the Features window with the newly configured feature automatically selected.

Configuring Setup Types

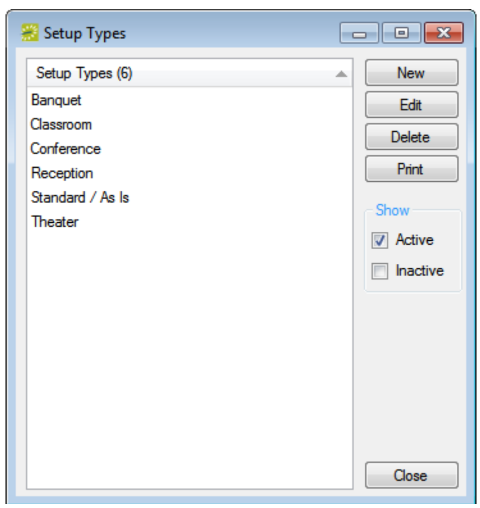
Setup type is the physical layout or arrangement of a room, for example, classroom, conference, theater-style, rounds of 6, as-is, and so on. Although configuring setup types is not required, setup type is used for defining the capacity for a room, which is helpful information for the staff at your organization who prepare rooms for an event. Also, when you configure a room, you can note, by setup type, the capacity for the room. When searching for available space, your users can use setup types and capacities to filter their search results.

To configure setup types

1. On the EMS menu bar, click Configuration > Facilities > Setup Types.

   The Setup Types window opens. This window lists all the setup types that are currently configured in your EMS database and that have a status of Active.

Figure 3-5: Setup Types window

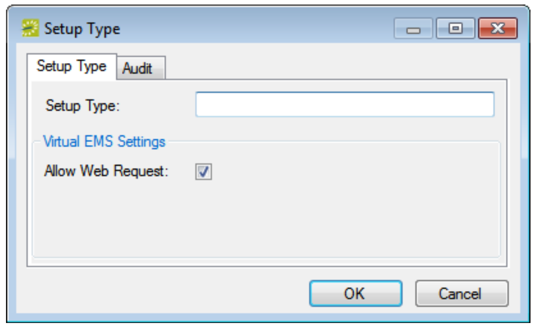


Optionally, to view all setup types in your EMS database, regardless of status, under Show, click Inactive.

2. Click New.

   The Setup Type dialog box opens.

Figure 3-6: Setup Type dialog box



3. In the Setup Type field, enter a name or description for the new setup type.

The setup type can be a maximum of 30 characters, including spaces.

4. If you want VEMS users to be able to see and request this setup type when they are searching for available space, leave Available on Web selected.
5. Leave Inactive blank to add the setup type as an active type. Optionally, select Inactive to inactive the setup type.
6. Click OK.

   The Setup Type dialog box closes. You return to the Setup Types window with the newly configured setup type automatically selected.

Configuring Room Types

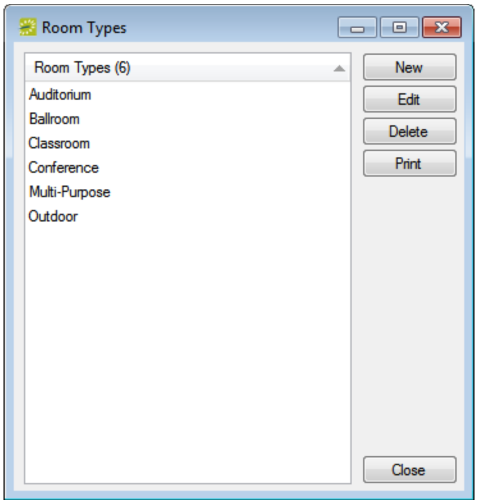
A *room type* is the class or category of the room, for example a meeting room, an auditorium, a workspace, a multi-purpose room, and so on. Your users can use the room types that you configure to filter results when searching for a specific type of room.

To configure room types

1. On the EMS menu bar, click Configuration > Facilities > Room Types.

   The Room Types window opens. This window lists all the room types that are currently configured in your EMS database.

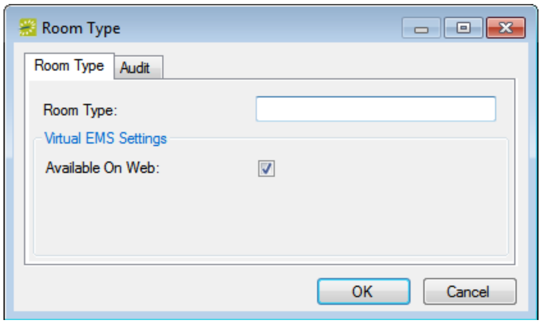
Figure 3-7: Room Types window



2. Click New.

   The Room Type dialog box opens.

Figure 3-8: Room Type dialog box



3. In the Room Type field, enter a name or description for the new room type.

The room type can be a maximum of 50 characters, including spaces.

4. If you want VEMS users to see this room type when they are searching for available space, leave Available on Web selected.
5. Click OK.

   The Room Type dialog box closes. You return to the Room Types window with the newly configured room type automatically selected.

Configuring Buildings

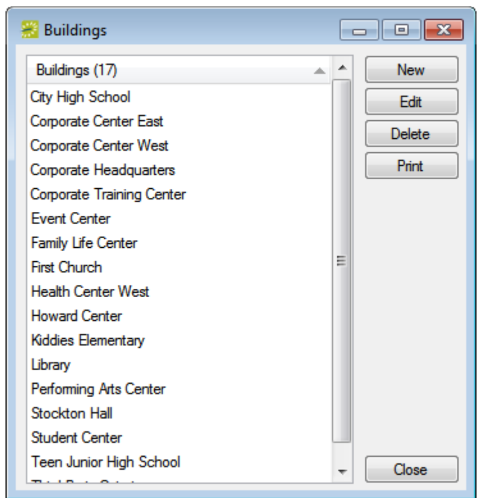
A *building* is a physical location that contains one or more spaces (rooms, open areas, and so on) that your users can reserve for an event. Buildings are one of the core data items that you must configure so that your users can make reservations in EMS.

To configure buildings

1. On the EMS menu bar, click Configuration > Facilities > Buildings.

   The Buildings window opens. This window lists all the buildings that are currently configured in your EMS database.

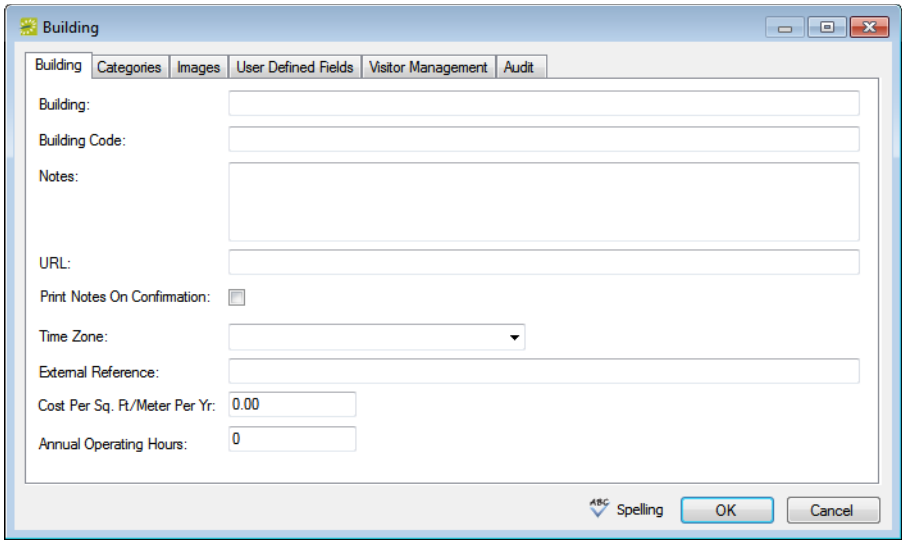
Figure 3-9: Buildings window



2. Click New.

   The Building dialog box opens. The Building tab is the active tab. See Figure 3-10 on page 92.

Figure 3-10: Building dialog box, Building tab



3. Enter the information as appropriate for the building. See:

   - "To enter the building summary information" on page 93.
   - "To assign categories to a building" on page 94.
   - "To associate an image with a building" on page 95.
   - "To set values for the user defined fields (UDFs)" on page 96.
   - "To specify the unregistered attendee/visitor information" on page 97.

4. Optionally, click Spelling to spell check the information for the building before you save it.

5. Click OK.

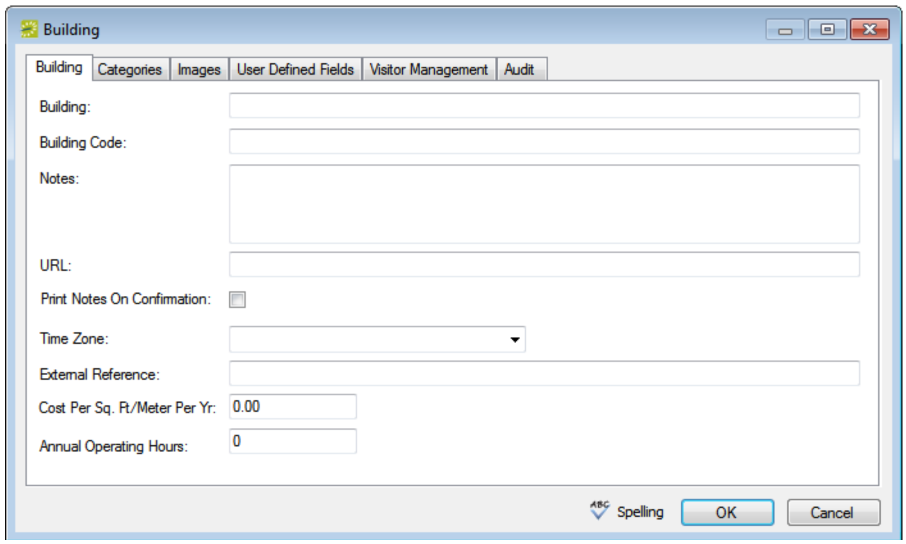
   The Building dialog box closes. You return to the Buildings window with the newly configured building automatically selected.

By default, when you configure a building, the building hours are set to Open All Day. To change these hours, see "Configuring Building Hours" on page 102.

To enter the building summary information

1. If needed, open the Building dialog box (see "To configure buildings" on page 91), and then open the Building tab.

Figure 3-11: Building dialog box, Building tab



2. Enter the information for the new building.

Only the building name, the building code, and the time zone are required fields. All other fields on all other tabs are optional and can be configured at a later date if needed.

Field	Description
Building	Required field. The name of the building. **Note:** The building name can be a maximum of 50 characters, including spaces.
Building Code	Required field. Abbreviated text that conveys the building name or description. For example, if a building is named the Conference Building, then a code for the building could be CONF. **Note:** The building code can be a maximum of 20 characters, including spaces.
Notes	Free form text that provides any additional information or description about the building.
URL	The URL (website address) for a web page that provides more information about the building (for example, MapQuest).
Print Notes on Confirmation	Include the building notes in any confirmations that are printed for events that are scheduled in the building.

Field	Description
Time Zone	Required field. Select the time zone in which the building resides. **Note:** If you are configuring buildings in EMS Enterprise, then you can select a unique time zone for each building. If you are configuring buildings in EMS Professional, then all buildings must belong to the same time zone.
Currency	Select the currency that is to be used for pricing all rooms in the building. **Note:** If the appropriate currency is not available, you can configure it. See “Configuring Currencies” on page 272.
External Reference	Links the building to an outside program, if needed.
Cost Per Sq. Ft./Meter Per Yr.	Building cost. Used on the Room Utilization report.
Annual Operating Hours	Total number of hours that the building is open during a calendar year. Used on the Room Utilization report.

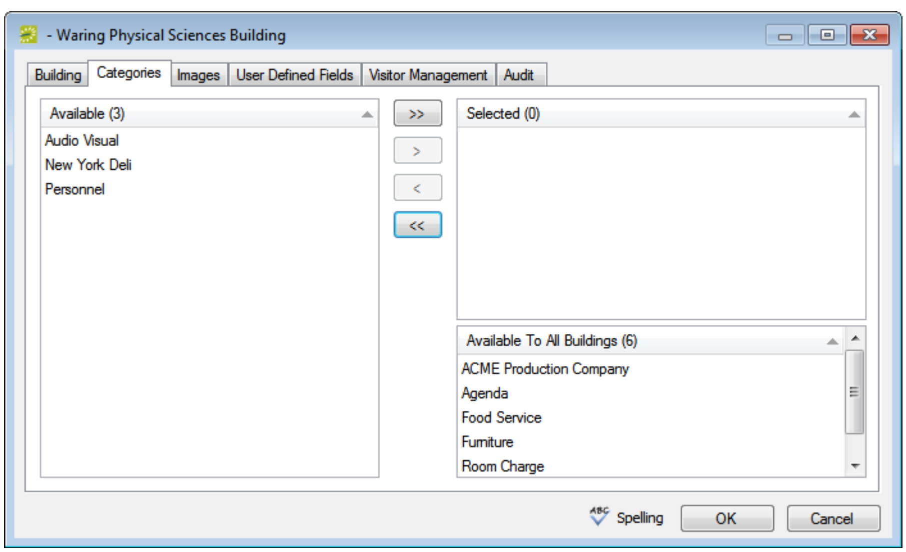
3. Continue with any other configuration for the building as needed; otherwise, click OK to close the Building dialog box and return to the Buildings window. The newly configured building is displayed in the window.

To assign categories to a building

You can restrict specific categories to specific buildings only in EMS Enterprise. All categories are available to all buildings in EMS Professional.

1. If needed, open the Building dialog box (see “To configure buildings” on page 91), and then open the Categories tab.

Figure 3-12: Building dialog box, Categories tab



2. On the Available list, select the category, or CTRL-click to select the multiple categories that are to be available for use in the building, and then click the Move button (>) to move the selected categories to the Selected list.

The Available to All Buildings list displays all the categories that are always available to all buildings and you cannot edit this list. You can also link buildings and categories when you are configuring categories. See *"Configuring Categories" on page 155.*

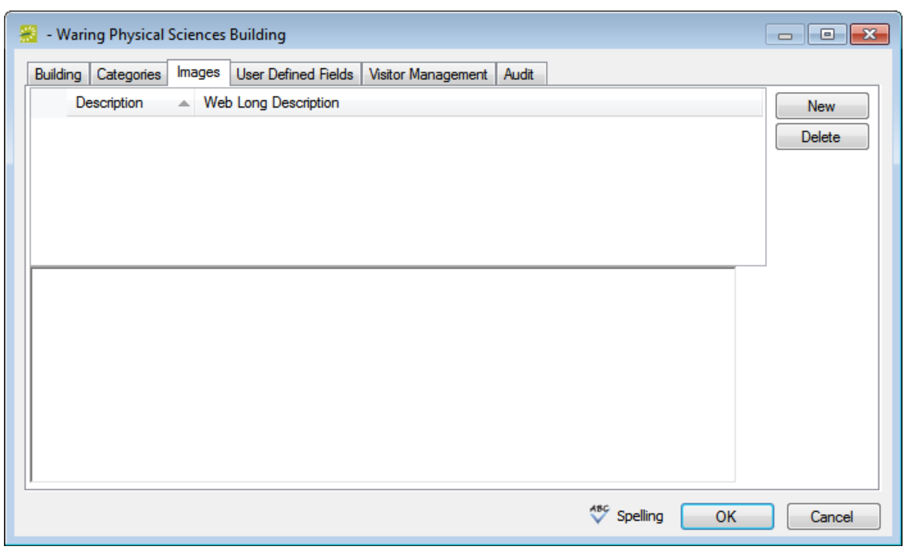
3. Continue with any other configuration for the building as needed; otherwise, click OK to close the Building dialog box and return to the Buildings window. The newly configured building is displayed in the window.

To associate an image with a building

Images are displayed as thumbnails in both EMS and VEMS when a user views details about a building. You can associate an image with a building if the image is in one of the following formats—.gif, .jpeg, .jpg, .bmp, .wmf, or .png and ideally, it should not be larger than 615 x 350 pixels. If you attach an image larger than this, you might not be able to view the image without scrolling.

1. If needed, open the Building dialog box (see "To configure buildings" on page 91), and then open the Images tab.

Figure 3-13: Building dialog box, Images tab



2. To have an image of the building displayed in EMS and VEMS when a user is viewing building details, click New to open the Find Image dialog box, and then browse to and select the image.

   The Find Image dialog box closes. You remain on the Images tab with an entry for the image displayed on the tab.

3. Optionally, click in the Web Long Description field and enter a description of the building.

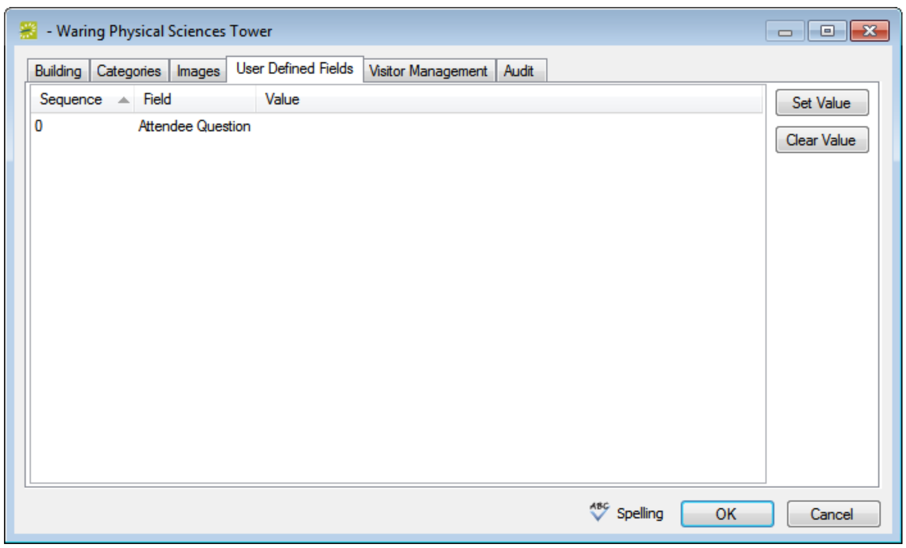
The value that you enter here defines the "long desc" attribute for web content accessibility.

4. Continue with any other configuration for the building as needed; otherwise, click OK to close the Building dialog box and return to the Buildings window. The newly configured building is displayed in the window.

To set values for the user defined fields (UDFs)

1. If needed, open the Building dialog box (see "To configure buildings" on page 91), and then open the UDFs tab.

Figure 3-14: Building dialog box, User Defined Fields tab



2. For each UDF that has been defined for the building, select the UDF, and then click the Set Value button to open a dialog box in which you can set the value for the UDF.

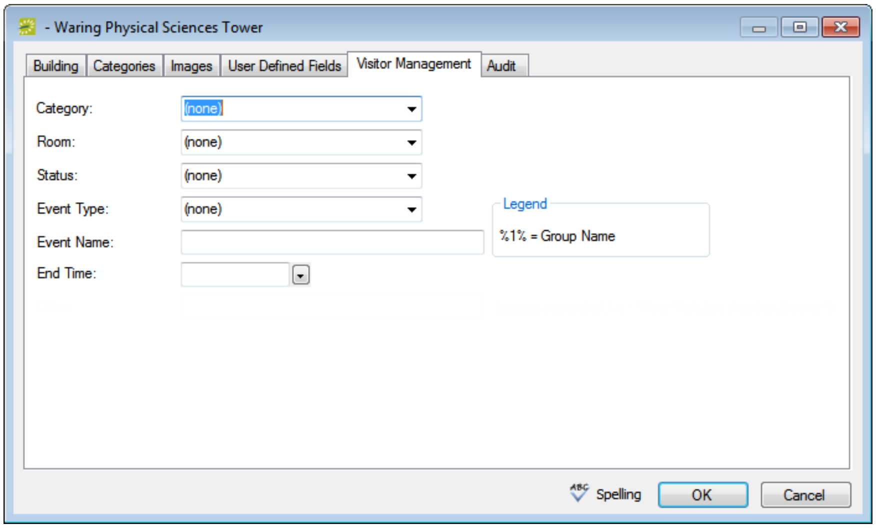
3. Continue with any other configuration for the building as needed; otherwise, click OK to close the Building dialog box and return to the Buildings window. The newly configured building is displayed in the window.

To specify the unregistered attendee/visitor information

The Visitor Management tab is displayed only if your organization has purchased and installed the optional Visitor Management module. The values that you specify on this tab are used when a new visitor record is created for an unregistered attendee/visitor. See the EMS User's Manual for detailed information about creating a record for an unregistered attendee/visitor.

1. If needed, open the Building dialog box (see "To configure buildings" on page 91), and then open the Visitor Management tab.

Figure 3-15: Building dialog box, Visitor Management tab



2. Enter the information for the new unregistered visitor/attendee.

Option	Description
Category	Select an Attendee type category. **Note:** If the Attendees category is not available, you can configure it. See "Configuring Categories" on page 155.
Room	The Override room that is booked for the unregistered visitor's/attendee's reservation. **Note:** Typically, you would want to book an Override room named something such as Other Space, Unregistered Space, or so on. If the appropriate room is not available, you can configure it. See "Configuring Rooms" on page 109.
Status	The status that is used for an unregistered visitor's/attendee's reservation. **Note:** If the appropriate status is not available, you can configure it. See "Configuring Statuses" on page 164.

Option	Description
Event Type	The event type that is used for the unregistered visitor’s/attendee’s reservation. **Note:** Typically, you would want to use an event type named something such as Unregistered Visitor, Unregistered Attendee or so on. If the appropriate event type is not available, you can configure it. See “Configuring Event Types” on page 43.
Event Name	The event name that is used for the unregistered visitor’s/attendee’s reservation. **Note:** You can include the variable for Group Name (the name of the group that the visitor/attendee is seeing) in the subject line as described in the Legend. For example, “Unregistered Visitor for%1%” would result in “Unregistered Visitor for Academic Affairs” being displayed in the subject line.
End Time	The booking for the unregistered visitor/attendee is created from the current time until the end time that you specify.

3. Continue with any other configuration for the building as needed; otherwise, click OK to close the Building dialog box and return to the Buildings window. The newly configured building is displayed in the window.

Configuring Areas

An *area* is a particular region of indefinite boundary that is used to group buildings, for example, Southeast Region, Campus Wide, Training Sites, and so on. You can use an area as search criteria in EMS and VEMS, in reporting, and so on. When you configure an area, you must specify the buildings that are to be included in the area.

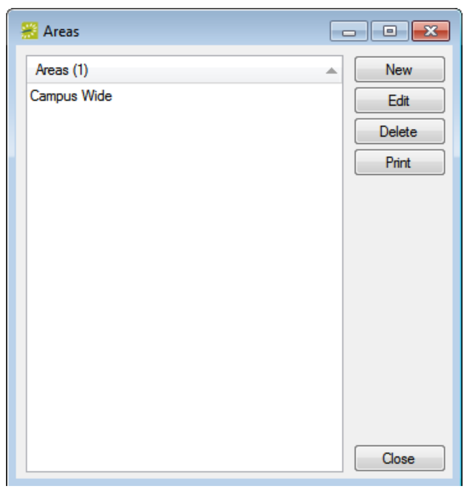
You can configure areas only in EMS Enterprise. You cannot configure areas in EMS Professional.

To configure an area

1. On the EMS menu bar, click Configuration > Facilities > Areas.

   The Areas window opens. This window lists all the areas that are currently configured in your EMS database.

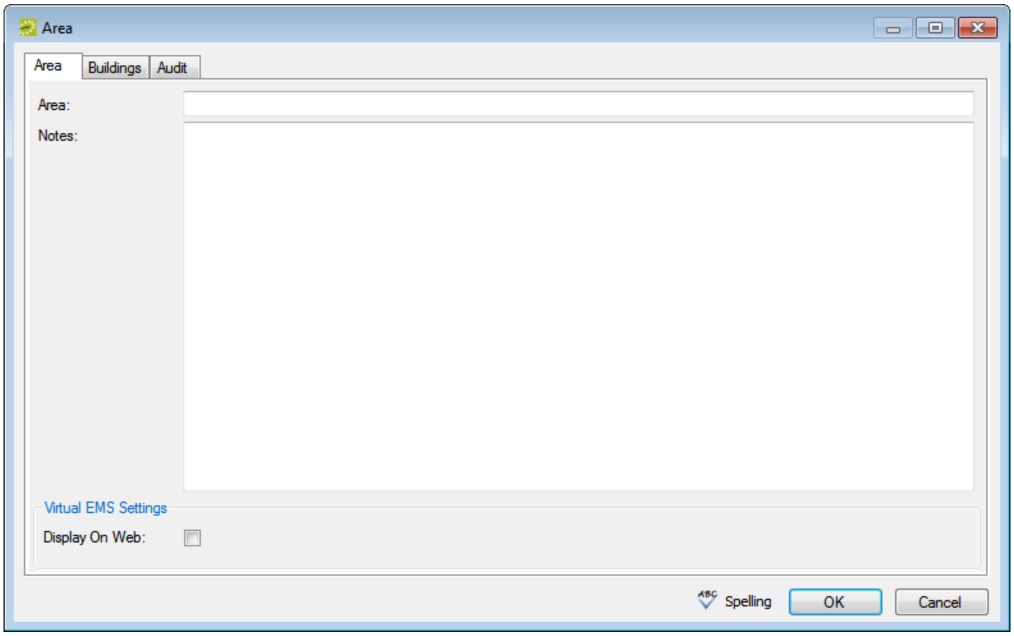
Figure 3-16: Areas window



2. Click New.

   The Area dialog box opens. The Area tab is the active tab. See Figure 3-17 on page 100.

Figure 3-17: Area dialog box, Area tab

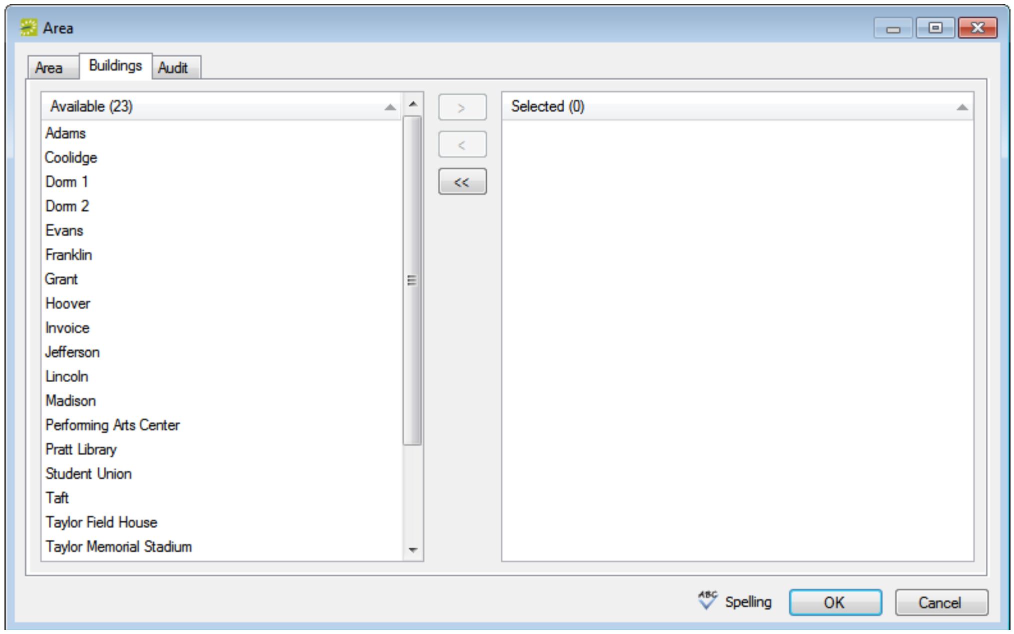


3. In the Area field, enter a name or description for the new area, for example, Southeast Region.

The area can be a maximum of 50 characters, including spaces.

4. Optionally, do one or both of the following:
   - In the Notes field, enter additional information that is pertinent for the area.
   - For VEMS users to be able to see and filter by this area, select Display on Web.
5. Open the Buildings tab, and on the Available list, select the building, or CTRL-click to select the multiple buildings that are to be included in the area, and then click the Move button (>) to move the selected buildings to the Selected list. See Figure 3-18 on page 101.

Figure 3-18: Area dialog box, Buildings tab



6. Optionally, click Spelling to spell check the area description before you save the area.
7. Click OK.

   The Area dialog box closes. You return to the Areas window with the newly configured area automatically selected.

Configuring Building Hours

By default, when you configure a building, the building hours are set to Open All Day, which means that the building is open 24 hours a day, 7 days a week, 365 days a year. If needed, you can configure the hours for a building so that a building is open only for a specified time period on a particular date or for a given date range. You can also configure the hours so that a building is closed all day. You can configure the hours for a building for a single date, or you can configure the hours for multiple dates in a single step.

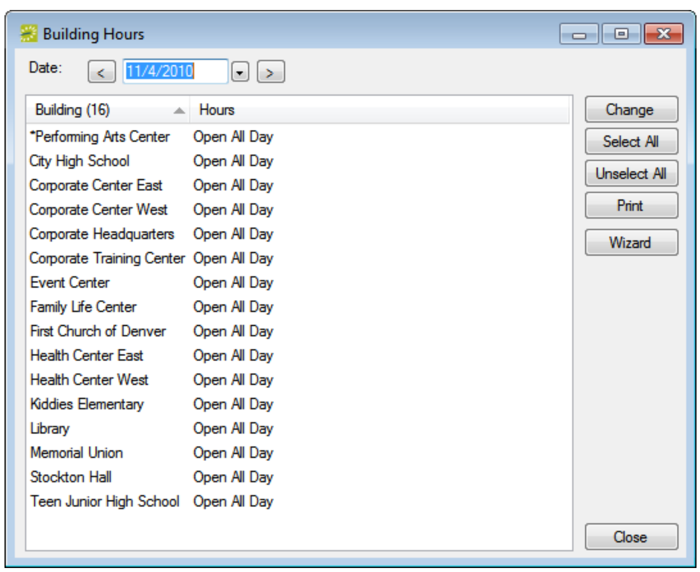
In the EMS client, configured building hours do not prevent a user from scheduling events outside these hours. A user is merely warned that the event is being scheduled outside normal operating hours. In VEMS, users cannot schedule events outside the configured building hours. Setup and teardown hours must also fall within the configured building hours for an event that is scheduled in VEMS.

To configure building hours for a single date

1. On the EMS menu bar, click Configuration > Facilities > Building Hours.

   The Building Hours window opens. This window lists all the buildings and their operating hours that are configured in your EMS database.

Figure 3-19: Building Hours window



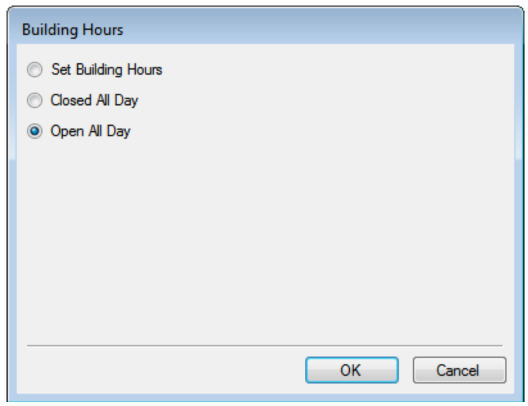
2. In the Date field, leave the default value of the current day's date, or select a different date.

3. Select the building, or CTRL-click to select the multiple buildings for which you are changing the hours, and then click Change.

If you select multiple buildings, then the Building Hours dialog box reflects the hours for the building that is last in the list of selected buildings.

The Building Hours dialog box opens.

Figure 3-20: Building Hours dialog box



4. Set the new hours for the buildings as appropriate.

Option	Description
Set Building Hours	Select this option to specify the time period (Open and Close) during which the building is to remain open for the date. Your EMS users can make reservations on this date in the selected buildings even if the events are scheduled outside the indicated time period. They merely receive a warning that the reservation time exceeds building hours. **Note:** VEMS users cannot make reservations outside of building hours.
Closed All Day	Select this option to close the building for the entire day. When you select this option, then a Web Only option is displayed on the Building Hours dialog box. • If you do *not* select Web Only, then none of your users (EMS or VEMS) can make reservations on this date in the selected buildings. • If you do you select Web Only, then your EMS users can make reservations on this date in the selected buildings; however, your VEMS users cannot.
Open All Day	The default value. Leave this option selected to have the building remain open for the entire holiday.

5. Click OK.

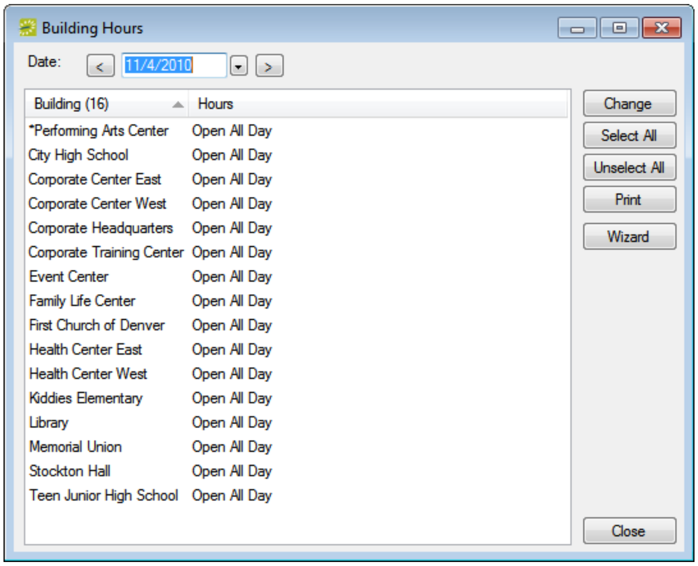
The Building Hours dialog box closes. You return to the Building Hours window.

To configure building hours for multiple dates

1. On the EMS menu bar, click Configuration > Facilities > Building Hours.

   The Building Hours window opens. This window lists all the buildings and their operating hours that are configured in your EMS database.

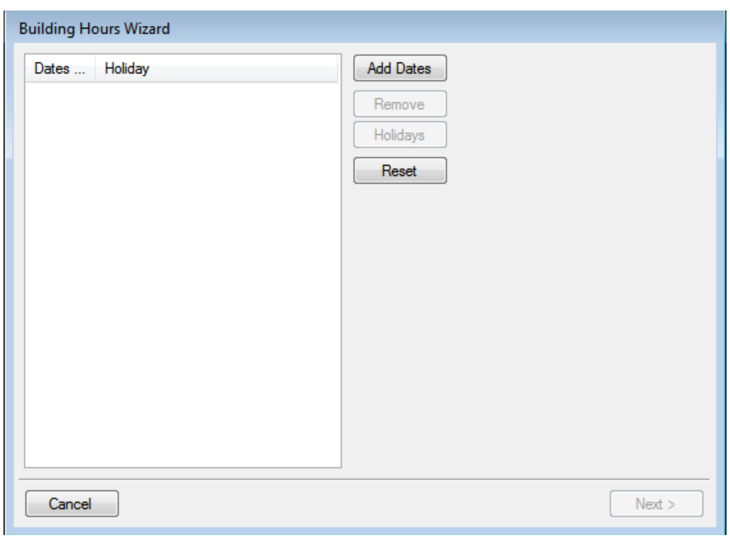
Figure 3-21: Building Hours window



2. Click Wizard.

   The Building Hours Wizard opens.

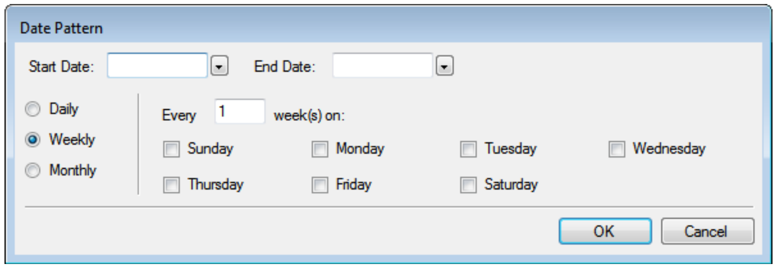
Figure 3-22: Building Hours Wizard



3. Click Add Dates.

   The Date Pattern dialog box opens.

Figure 3-23: Date Pattern dialog box



4. Enter the appropriate date pattern, and then click OK. (Both the Start Date and End Date are required values.)

   The Date Pattern dialog box closes. You return to the Building Hours Wizard. The dates that meet the pattern that you specified are displayed in the Building Hours Wizard. If any of the dates that meet the pattern are holidays, then the name of the holiday is displayed next to the date.

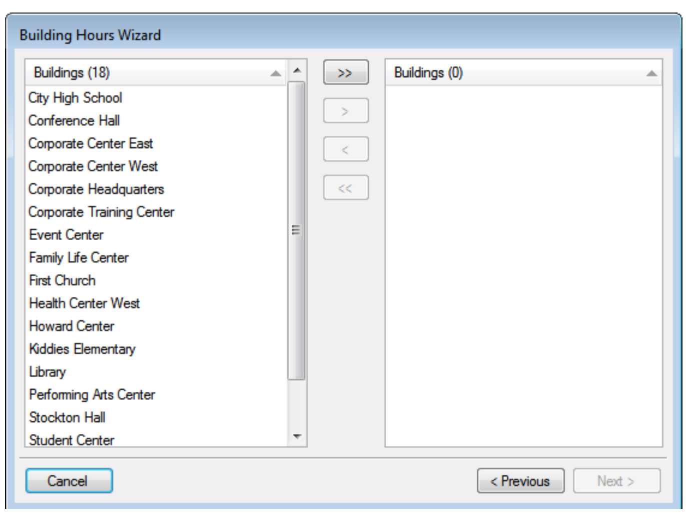
5. Optionally, do one or both of the following:

   - To view information about a date that is marked as a holiday, select the date, and then click Holidays.
   - To remove any dates from the list, select the date, or CTRL-click to select multiple dates, and then click Remove.

6. Click Next.

   The Building Hours Wizard is updated with a list of all the buildings that have been configured in your EMS database.

Figure 3-24: Building Hours Wizard with a list of configured buildings



7. Select the building, or CTRL-click to select the multiple buildings for which you are configuring the hours, and then click the Move button (>) to move the buildings to the Selected list.
8. Click Next.

   The Building Hours Wizard is updated with options for configuring the building hours for the selected buildings.
9. Set the new hours for the buildings as appropriate.

Option	Description
Set Building Hours	Select this option to specify the time period (Open and Close) during which the building is to remain open for the date. Your EMS users can make reservations on this date in the selected buildings even if the events are scheduled outside the indicated time period. They merely receive a warning that the reservation time exceeds building hours. **Note:** VEMS users cannot make reservations outside of building hours.
Closed All Day	Select this option to close the building for the entire day. When you select this option, then a Web Only option is displayed on the Building Hours dialog box. • If you do *not* select Web Only, then none of your users (EMS or VEMS) can make reservations on this date in the selected buildings. • If you do you select Web Only, then your EMS users can make reservations on this date in the selected buildings; however, your VEMS users cannot.
Open All Day	The default value. Leave this option selected to have the building remain open for the entire holiday.

10. Click Finish.

   The Building Hours Wizard closes. You return to the Building Hours window.

Overview of Configuring Rooms

A *room* is a physical location that you reserve for an event. You can configure any physical location or space (meeting room, athletic field, lobby, and so on) as a room. The following list is an example of how you might configure rooms for your organization:

- Grand Ballroom
- Conference Room A
- Harris Hall Room 200
- South Soccer Field

EMS uses three classifications of rooms—a standard room, a combination (or "combo") room, and an override room.

Your organization might use a different term to identify the spaces or locations that are booked for reservations at your facilities. If you want to change the term from "room" to your organization-specific term throughout your EMS system (menus, window and dialog box titles, confirmation headings, and so on), you must change the values for the Room Title Plural and Room Title Singular parameters. See *Appendix A, "System Parameters," on page 491.*

Room classifications

A *standard* room is any physical space that can be booked at your facility. You can use standard rooms as components when you configure a *combination* room. You can configure a combination room from two or more standard rooms, or you can configure it based on a logical relationship among multiple rooms. For example, if your organization is a student union, it might have a space that is designated as the Grand Ballroom, which is actually made of three standard rooms—Ballroom A, Ballroom B, and Ballroom C—and you can literally combine or divide these rooms using movable partitions. In another example, you could configure a combination room that is called the West End and this room includes all rooms in the West End of a given building, whether the rooms are contiguous.

To configure a combination room, you must first configure the component rooms as standard rooms. You can then configure the combination room and indicate that its components are the previously defined standard rooms. Consider the ballroom example cited above: First, define the standard rooms—Ballroom A, Ballroom B, and Ballroom C. You then configure a room called the Grand Ballroom, give it a classification of "combo room" and indicate that it is made up of three standard rooms—Ballroom A, Ballroom B, and Ballroom C. If you want, you can also configure subsets of the Grand Ballroom, such as Ballroom AB, Ballroom AC, and Ballroom BC. As a result, when the Grand Ballroom is scheduled for an event, the three standard rooms—Ballroom A, Ballroom B, and Ballroom C—are unavailable in EMS. Conversely, if you schedule one of the three standard rooms, for example, Ballroom A, then the Grand Ballroom, Ballroom AB, and Ballroom AC, are unavailable in EMS. Table 3-1 summarizes this example.

Table 3-1: Example of standard rooms and combo rooms

Room	Classification	Components	Comments
Ballroom A	Standard	N/A	Available for booking only if Ballroom AB, Ballroom AC, or the Grand Ballroom are not already booked.
Ballroom B	Standard	N/A	Available for booking only if Ballroom AB, Ballroom BC, or the Grand Ballroom are not already booked.
Ballroom C	Standard	N/A	Available for booking only if Ballroom BC, Ballroom AC, or the Grand Ballroom are not already booked.
Ballroom AB	Combo	Ballroom A, Ballroom B	Available for booking only if Ballroom A, Ballroom B, or the Grand Ballroom are not already booked.
Ballroom AC	Combo	Ballroom A, Ballroom C	Available for booking only if Ballroom A, Ballroom C, or the Grand Ballroom are not already booked.
Ballroom BC	Combo	Ballroom B, Ballroom C	Available for booking only if Ballroom B, Ballroom C, or the Grand Ballroom are not already booked.
Grand Ballroom	Combo	Ballroom A, Ballroom B, Ballroom C	Available for booking only if none of the standard rooms or none of the subset ballrooms are not already booked.

An *override* room is used to book an event in a space that is not managed in EMS. When you configure an override room, you not only name it in a manner that indicates that the room is an override room (for example, “Override Area”), but also, you classify the room as “Override Description.” When a user is searching for a specific room in the Reservation Wizard, and selects the option of “Override Area,” a Location field is enabled in which they must enter the specific location of this override room. By using an override room, the user can schedule a meeting (for example, Dr. Wilson’s Research Group meeting) without having “Dr. Wilson’s Office” configured as a room in EMS.

Events that are scheduled in rooms that are classified as “Override Description” are displayed in Daily reports as taking place in the location name specified, in the building in which the room is configured. Sales and Statistical reports simply report on the use of a room as you defined it, for example as “Override Area.”

Configuring Rooms

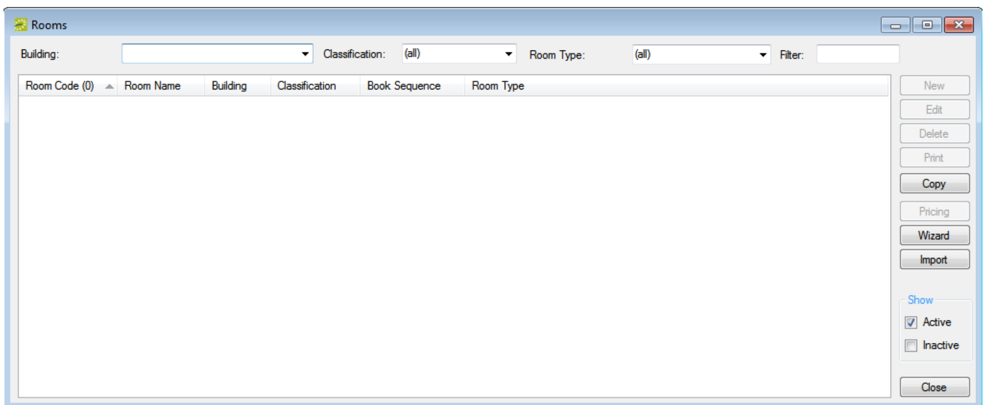
You can configure one room at a time, or if multiple *standard* rooms are to have the same configuration (room type, setup hours, teardown hours, features, and setup types), then you can use the Room Configuration Wizard to configure these attributes for all these rooms at the same time. You can also specify the pricing for a room at the time that you are configuring the room, or you can price it at a later date. Optionally, if you want to first confirm that a room has not already been configured, then you can search for the room.

To search for a room

1. On the EMS menu bar, click Configuration > Facilities > Rooms.

   The Rooms window opens.

Figure 3-25: Rooms window



2. Enter any combination of the following search criteria:

   - On the Building dropdown list, select one of the following—(all) buildings, a specific building, a specific area, or a specific view.
   - On the Classification dropdown list, leave the default value of (all), or select a specific room classification.
   - On the Room Type dropdown list, leave the default value of (all), or select a specific room type.
   - Under Show, select one or both room statuses.

   As you select your search criteria, the list of rooms that meet the search criteria is dynamically updated.

3. Optionally, to further filter the displayed search results based on the Room Name, in the Filter field, enter a search string.

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*The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of **mee** returns **Mee**ting room, but not Science Meeting room.*

To configure one room at a time

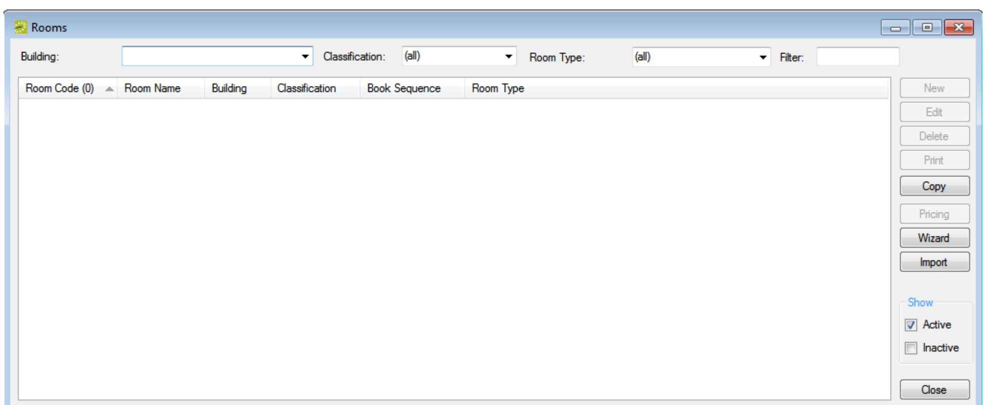
To configure one room at a time, at a minimum, you must specify the room code, the room name, the room classification, and the building that contains the room. All other information is optional, and you can configure it at a later date if needed.

Optionally, if you want to first confirm that a room has not already been configured, then you can search for the room. See “To search for a room” on page 109.

1. On the EMS menu bar, click Configuration > Facilities > Rooms.

   The Rooms window opens.

Figure 3-26: Rooms window



2. On the Building dropdown list, select one of the following to add the room to—(all) buildings, a specific building, a specific area, or a specific view.

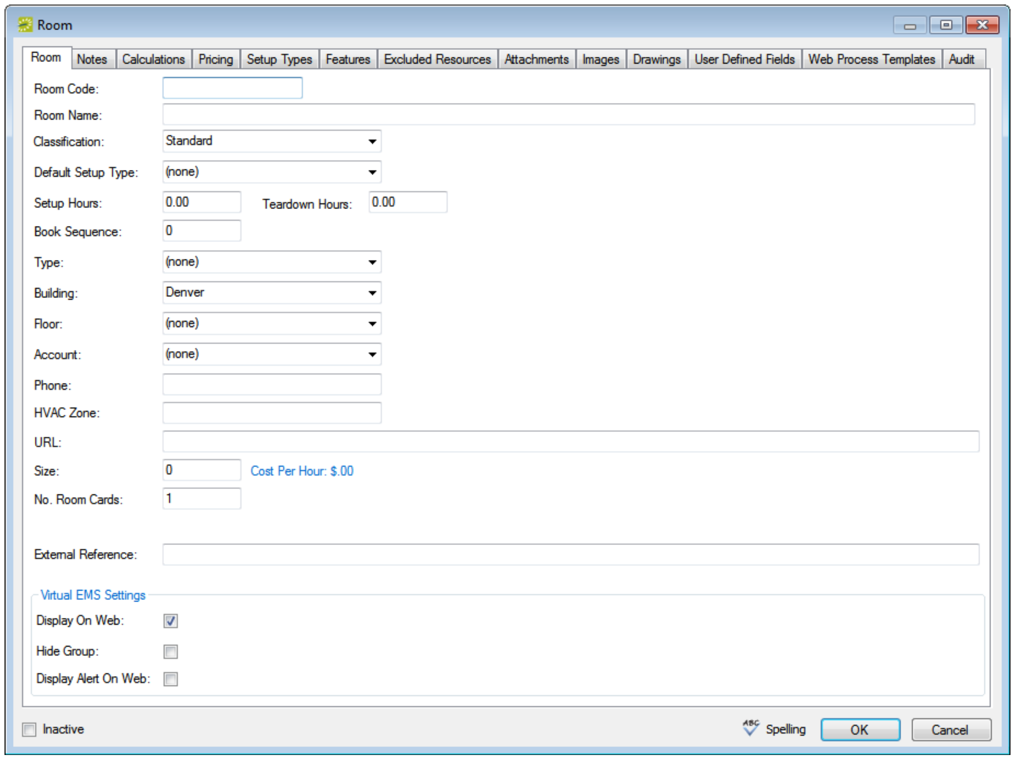
If the appropriate building, area, or view is not available, you can configure it. See “Configuring Room Types” on page 89, “Configuring Areas” on page 99, or “Configuring Public Views” on page 144.

The remainder of this procedure describes how to configure a room “from scratch.” You can also configure a room by copying an existing room. Search for and select the room that you are copying, click Copy, and then go to Step 4.

3. Click New.

   The Room dialog box opens. The Room tab is the active tab.

Figure 3-27: Room dialog box, Room tab



4. Enter the information for the new room.

Field	Description
Room Code	Required field. Abbreviated text that conveys the room name or description. For example, if a room is named Conference Room 100, then a code for the room could be CONF100. **Note:** The room code can be a maximum of 20 characters, including spaces.
Room Name	Required field. The name of the room. **Note:** The room name can be a maximum of 50 characters, including spaces.
Classification	Select the appropriate classification for the room. See "Room classifications" on page 107 for detailed information.
Default Setup Type	Leave the default as (none), or select a setup type from the list. **Note:** A user can override this value when reserving the room, or when editing the event. If the appropriate setup type is not available, you can configure it. See "Configuring Setup Types" on page 87.

Field	Description
Setup Hours Teardown Hours	These settings establish the default setup and teardown hours for the room, which are automatically added to the beginning and end of the event time that the user specifies in the Reservation Wizard or in VEMS. A user can override these default values in the Reservation Wizard.
Book Sequence	This value determines the order in which the rooms are listed in the Reservation Wizard for a standard or best fit room search and in the Reservation Book as well. Enter a zero for the first room that is to be listed. Rooms are ordered from lowest to highest sequence number, with the room with the lowest sequence number being displayed first. **Note:** If you leave the book sequence set to the default value of zero for all rooms, then rooms that are sorted first numerically by room code, and then alphabetically by room code.
Type	Room type. Leave the default as (none), or select a room type from the list. **Note:** If the appropriate room type is not available, you can configure it. See “Configuring Room Types” on page 89.
Building	Required field. If you selected a single building in Step 2, then this field is automatically populated but you can select a different building if needed. If you selected (all) buildings in Step 2, then you must select a building.
Account	Enter the internal account that should be credited with the room rental revenue. **Note:** If the appropriate account is not available, you can configure it. See “Configuring Accounts” on page 263.
Phone	The phone number for the room.
HVAC Zone	Optional field that is used for integrating EMS with an HVAC system.
URL	The URL (website address) for a web page that provides more information about the room (for example, MapQuest).
Size	Typically used to enter the square footage of the room.
No. of Room Cards	Indicates how many copies of the Room Cards report should be printed for this room when the report is run. (Typically, you want one copy for each entry door). If you do not want a room card to print, enter a zero.
Academic	Available only in EMS Campus. Set an “academic” property on the room.
External Reference	Links the room to an outside program, if needed.
Virtual EMS Settings	
Display on the Web	Leave this option selected if events that are scheduled in the room are to be displayed in VEMS.
Hide Group	Select this option to hide the name of the group that booked an event in the room in the Browse Event tooltip.
Display Alert on Web	Select this option to display any alerts that have been configured for the room when a VEMS user schedules an event in the room.
Inactive	Leave this option blank to add the room as an active room. Select this option to inactivate the room.

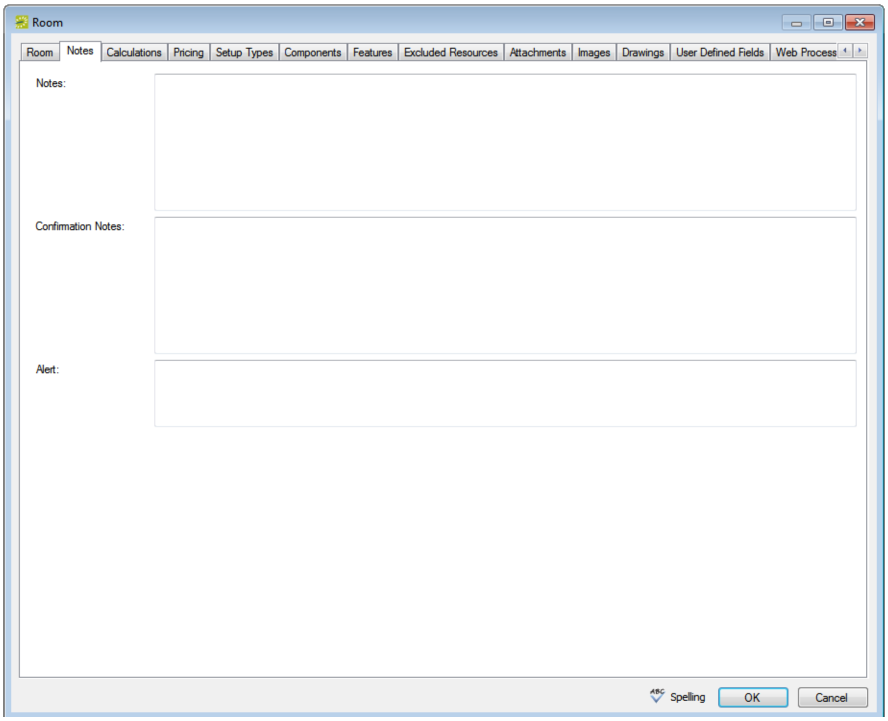
5. If the room is a Combo room, then you must at least continue to “To specify the components for a combination room” on page 120; otherwise, optionally, continue to one or more of the following for the room.
   - “To enter notes or alerts for a room” on page 115.
   - “To configure the calculations for a room” on page 116.
   - “To configure the pricing for a room” on page 117.
   - “To specify the setup types for the room” on page 119.
   - “To specify the features for a room” on page 121.
   - “To specify the excluded resources for a room” on page 122.
   - “To add attachments to a room” on page 123.
   - “To associate an image with a room” on page 124.
   - “To attach drawings to a room” on page 125.
   - “To set values for the user defined fields (UDFs)” on page 126.
   - “To assign the room to web process templates” on page 127.
6. Optionally, click Spelling to spell check the information that you entered for the room before you save the room.
7. Click OK.

   The Room dialog box closes and you return to the Rooms window. The newly configured room is displayed in the window.

To enter notes or alerts for a room

1. If needed, open the Room dialog box (see “To configure one room at a time” on page 110), and then open the Notes tab.

Figure 3-28: Room dialog box, Notes tab



2. Enter one or more of the following for the room:

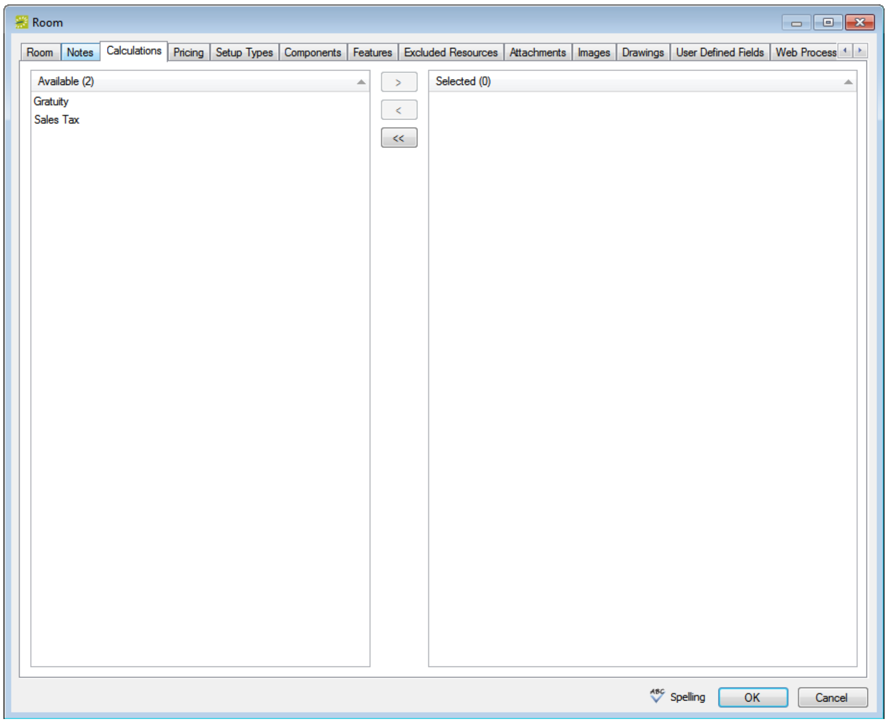
Option	Description
Notes	Free form text that provides any additional information or description about the room. **Note:** These notes are *not* included in confirmations that are printed for events that are scheduled in the room. See “Confirmation Notes” below.
Confirmation Notes	These notes are included in any confirmations that are printed for events that are scheduled in the room.
Alert	Free form text that provides any additional information or description about the room. This text is displayed when an EMS user schedules an event in the room, and if Display Alert on Web is selected for the room, when a VEMS user schedules an event in the room as well.

3. Continue with any other optional configuration for the room as needed; otherwise, click OK to close the Room dialog box and return to the Rooms window. The newly configured room is displayed in the window.

To configure the calculations for a room

1. If needed, open the Room dialog box (see "To configure one room at a time" on page 110), and then open the Calculations tab.

Figure 3-29: Room dialog box, Calculations tab



2. On the Available list, select the calculation, or CTRL-click to select the multiple calculations that are to always apply to this room, and then click the Move button (>) to move the selected calculations to the Selected list.

If the appropriate calculation is not available, you can configure it. See "Configuring Calculations" on page 258.

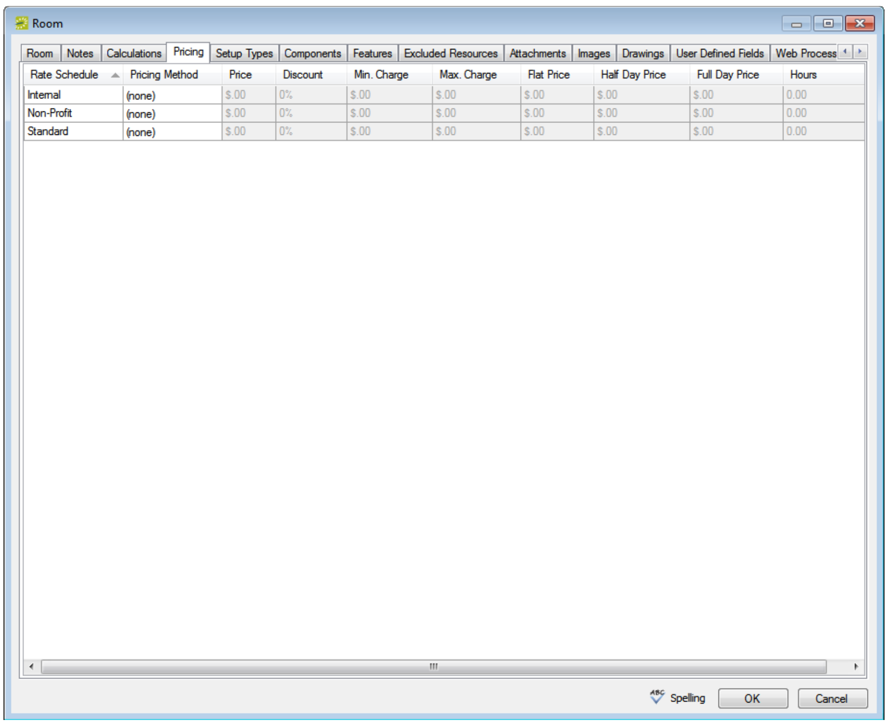
3. Continue with any other optional configuration for the room as needed; otherwise, click OK to close the Room dialog box and return to the Rooms window. The newly configured room is displayed in the window.

To configure the pricing for a room

You can also configure the room price on the Edit Pricing window (see "Configuring Room Pricing on the Edit Pricing window" on page 137) or when you are configuring rate schedules (see "Configuring Rate Schedules" on page 247).

1. If needed, open the Room dialog box (see "To configure one room at a time" on page 110), and then open the Pricing tab.

Figure 3-30: Room dialog box, Pricing tab



2. For each rate schedule, select the Pricing method, which determines the cost for reserving the room.

If the appropriate rate schedule is not available, then you can configure it. See "Configuring Rate Schedules" on page 247.

Pricing Method	Description
Half Day/Full Day (Event Time)	The total number of hours for the event is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the event is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the room. If the total number of hours for the event is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the room.

Pricing Method	Description
Half Day/Full Day (Reserved Time)	The total number of hours for the reservation (event time and reserved time) is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the reservation is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the room. If the total number of hours for the reservation is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the room.
Hourly (Event Time)	The price that is indicated in the Price column is multiplied by the event time (in hours) for the booking. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Reserved Time)	The price that is indicated in the Price column is multiplied by the reserved time (in hours) for the booking. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Specific)	The price that is indicated in the Price column is multiplied by the number of hours indicated when adding a room to a booking.
Unit	The price that is indicated in the Price column is applied to the room, regardless of the event time or reserved time for the booking.

3. After you select a pricing method, click in the appropriate fields to select the currently displayed amount, and then edit the amount as needed.

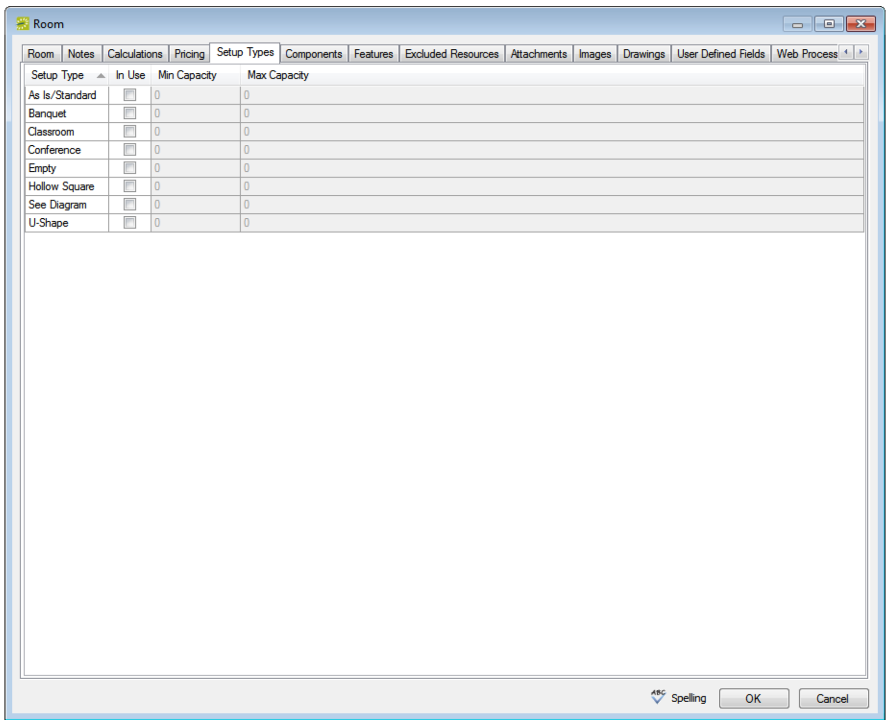
Field	Description
Price	The dollar amount that is used in calculating the room price for a booking. If the pricing method is Unit, then this value is applied in total to a room, regardless of the event time or reserved time for the booking.
Discount	You can use a discount with any pricing method. If you specify a discount for a room, then the actual price, the discount percentage, and the discounted amount are all displayed on confirmations and invoices.
Min. Charge Max. Charge	Used in conjunction with the Hourly pricing methods. If you specify a minimum charge for a room, then the system compares this value to the calculated hourly rate and applies the greater of the two charges. Likewise, if you specify a maximum charge for a room, then the system compares this value to the calculated hourly rate and applies the lesser of the two charges.
Flat Price	A room price that remains constant regardless of the total number of hours booked for a room. Used in conjunction with Hourly (Event Time) and Hourly (Reserved Time).
Half Day Price	The dollar amount that is used in calculating the room price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).
Full Day Price	The dollar amount that is used in calculating the room price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).
Hours	Multiplier used in calculating the room price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).

4. Continue with any other optional configuration for the room as needed; otherwise, click OK to close the Room dialog box and return to the Rooms window. The newly configured room is displayed in the window.

To specify the setup types for the room

1. If needed, open the Room dialog box (see "To configure one room at a time" on page 110), and then open the Setup Types tab.

Figure 3-31: Room dialog box, Setup Types tab



2. For each setup type that is applicable for the room, select In Use, and then click in the Min Capacity and/or Max. Capacity fields and enter the minimum capacity, maximum capacity, or both for the setup type.

If the appropriate setup type is not available, you can configure it. See "Configuring Setup Types" on page 87.

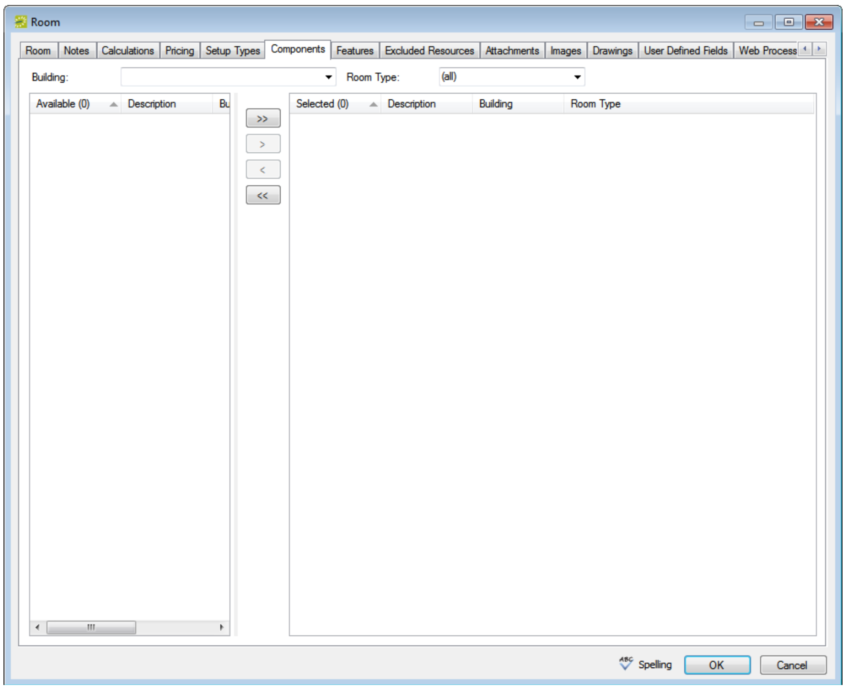
3. Continue with any other optional configuration for the room as needed; otherwise, click OK to close the Room dialog box and return to the Rooms window. The newly configured room is displayed in the window.

To specify the components for a combination room

This tab is available only if you selected Combo for the room classification.

1. If needed, open the Room dialog box (see "To configure one room at a time" on page 110), and then open the Components tab.

Figure 3-32: Room dialog box, Components tab



2. Do one or both of the following:
   - On the Building dropdown list, select one of the following—(all) buildings, a specific building, a specific area, or a specific view.

If the appropriate building, area, or view is not available, you can configure it. See "Configuring Buildings" on page 91, "Configuring Areas" on page 99, or "Configuring Public Views" on page 144.

   - On the Room Type dropdown list, leave the default value of (all), or select a specific room type.

If the appropriate room type is not available, you can configure it. See "Configuring Room Types" on page 89.

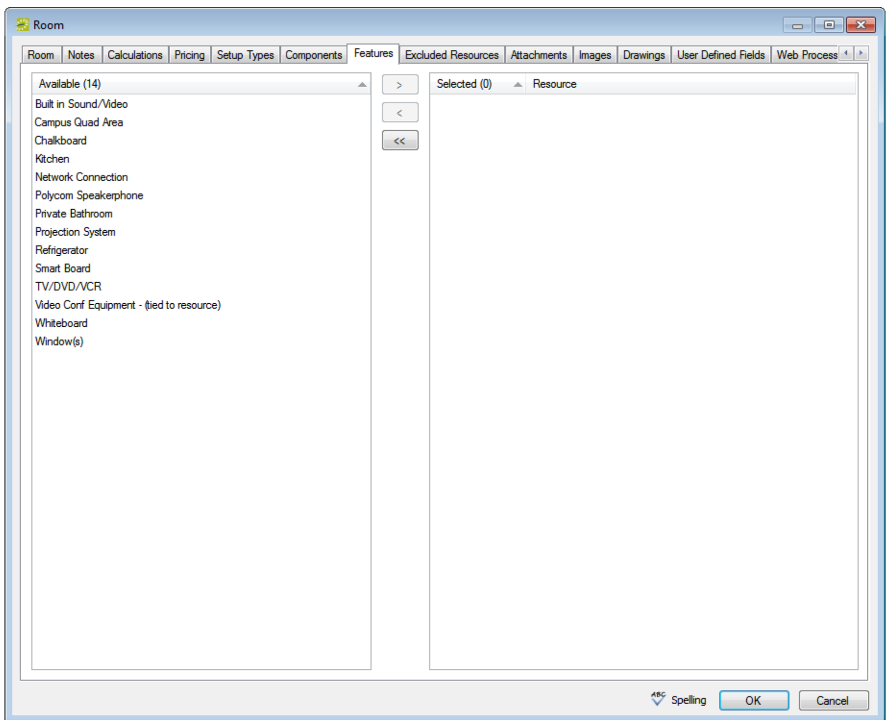
As you select your search criteria, the list of rooms that meet the search criteria is dynamically updated.

3. On the Available list, CTRL-click to select the multiple standard rooms that are to make up the Combo room, and then click the Move button (>) to move the selected rooms to the Selected list.
4. Continue with any other optional configuration for the room as needed; otherwise, click OK to close the Room dialog box and return to the Rooms window. The newly configured room is displayed in the window.

To specify the features for a room

1. If needed, open the Room dialog box (see "To configure one room at a time" on page 110), and then open the Features tab.

Figure 3-33: Room dialog box, Features tab



2. On the Available list, select the feature, or CTRL-click to select the multiple features that the room has, and then click the Move button (>) to move the selected features to the Selected list.

If the appropriate feature is not available, you can configure it. See "Configuring Features" on page 85.

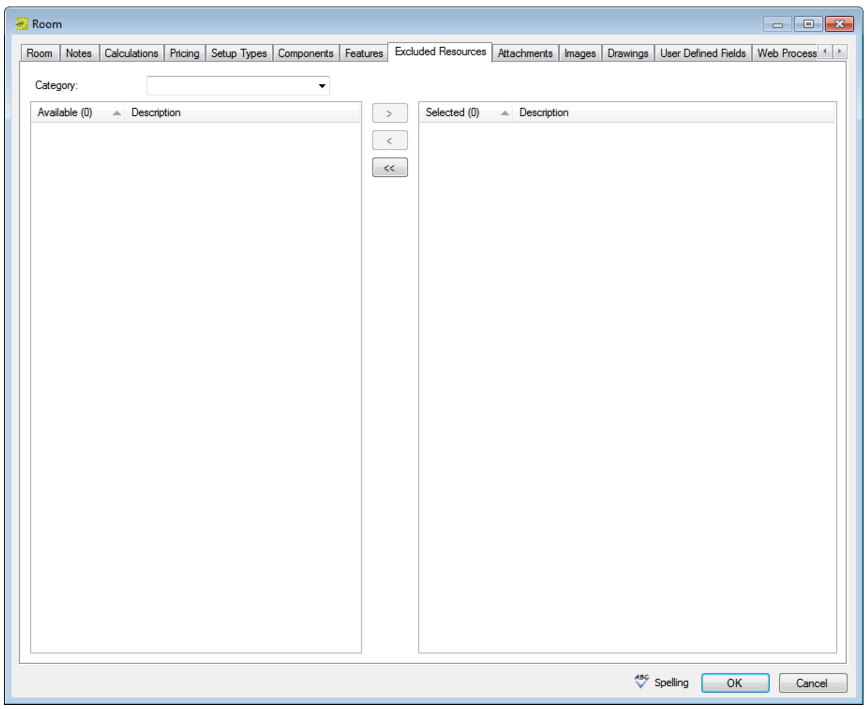
3. Continue with any other optional configuration for the room as needed; otherwise, click OK to close the Room dialog box and return to the Rooms window. The newly configured room is displayed in the window.

To specify the excluded resources for a room

VEMS users are prohibited from selecting a resource that has been excluded from a particular room. EMS client users receive just a warning, but they can still select the resources for the room.

1. If needed, open the Room dialog box (see "To configure one room at a time" on page 110), and then open the Excluded Resources tab.

Figure 3-34: Room dialog box, Excluded Resources tab



2. On the Category dropdown list, select the category that contains the resources that are to be excluded from the room.

   The resources for the selected category are displayed in the Available list.

If the appropriate category and/or resource is not available, then you can configure it. See "Configuring Categories" on page 155 and "Configuring Resources for a Category" on page 206.

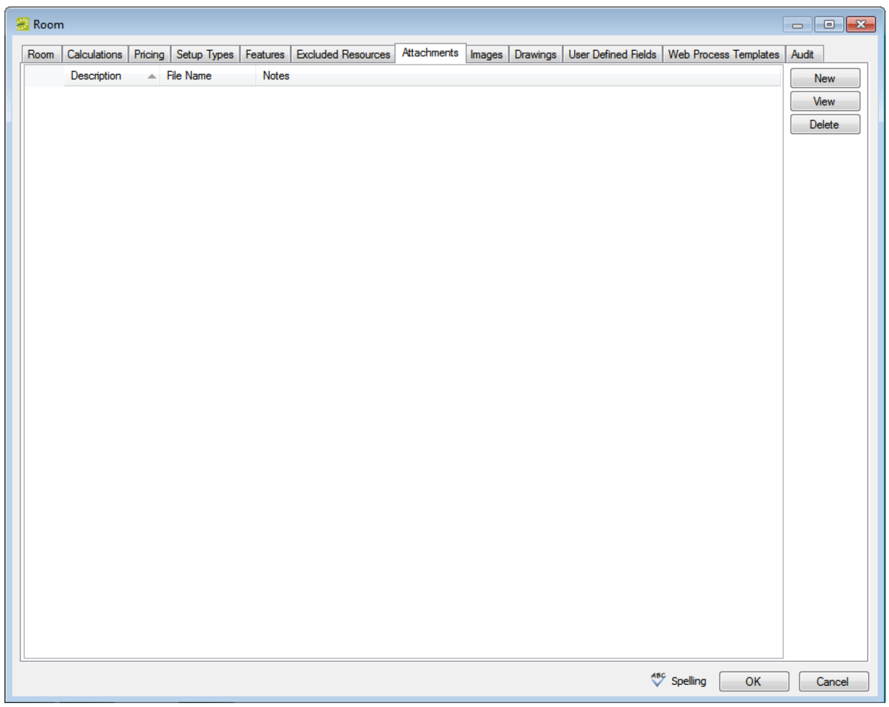
3. Select the resource, or CTRL-click to select the multiple resources that are to be excluded from the room, and then click the Move button (>) to move the resources to the Selected list.
4. Continue with any other optional configuration for the room as needed; otherwise, click OK to close the Room dialog box and return to the Rooms window. The newly configured room is displayed in the window.

To add attachments to a room

An attachment is a file that is saved with the room record. For example, you might want to add an attachment to a room record that details any special considerations about the room setup. EMS users can see the attachments when they are viewing details about the room.

1. If needed, open the Room dialog box (see “To configure one room at a time” on page 110), and then open the Attachments tab.

Figure 3-35: Room dialog box, Attachments tab



2. Click New to open the Find Attachment dialog box, and then browse to and select the attachment.

   The Find Attachment dialog box closes. You remain on the Attachments tab with an entry for the attachment displayed on the tab.

3. Optionally, do one or more of the following:

   - In the Notes field, enter a description and/or additional information about the attachment.
   - Click Spelling to spell check the attachment notes before you save the room.
   - Optionally, to view an attachment, select the attachment, and then click View.

Your EMS client must have the appropriate program installed to view the attachment. For example, to view a Microsoft Excel spreadsheet, you must have Microsoft Excel installed on your EMS client.

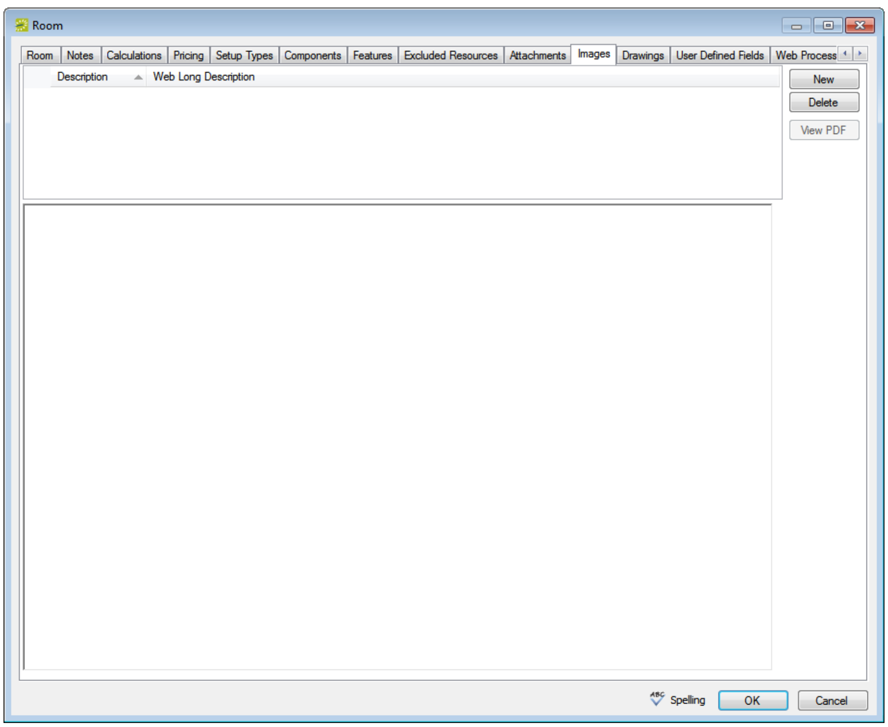
4. Continue with any other optional configuration for the room as needed; otherwise, click OK to close the Room dialog box and return to the Rooms window. The newly configured room is displayed in the window.

To associate an image with a room

Images are displayed as thumbnails in both EMS and VEMS when a user views details about a room. You can associate an image with a room if the image is in one of the following formats—.gif, .jpeg, .jpg, .bmp, .wmf, .pdf or .png and ideally, it should not be larger than 615 x 350 pixels. If you attach an image larger than this, you might not be able to view the image without scrolling.

1. If needed, open the Room dialog box (see “To configure one room at a time” on page 110), and then open the Images tab.

Figure 3-36: Room dialog box, Images tab



2. Click New to open the Find Image dialog box, and then browse to and select the image.

   The Find Image dialog box closes. You remain on the Images tab with an entry for the image displayed on the tab.

3. Optionally, click in the Web Long Description field and enter a description of the image.

The value that you enter here defines the “long desc” attribute for web content accessibility.

4. Continue with any other optional configuration for the room as needed; otherwise, click OK to close the Room dialog box and return to the Rooms window. The newly configured room is displayed in the window.

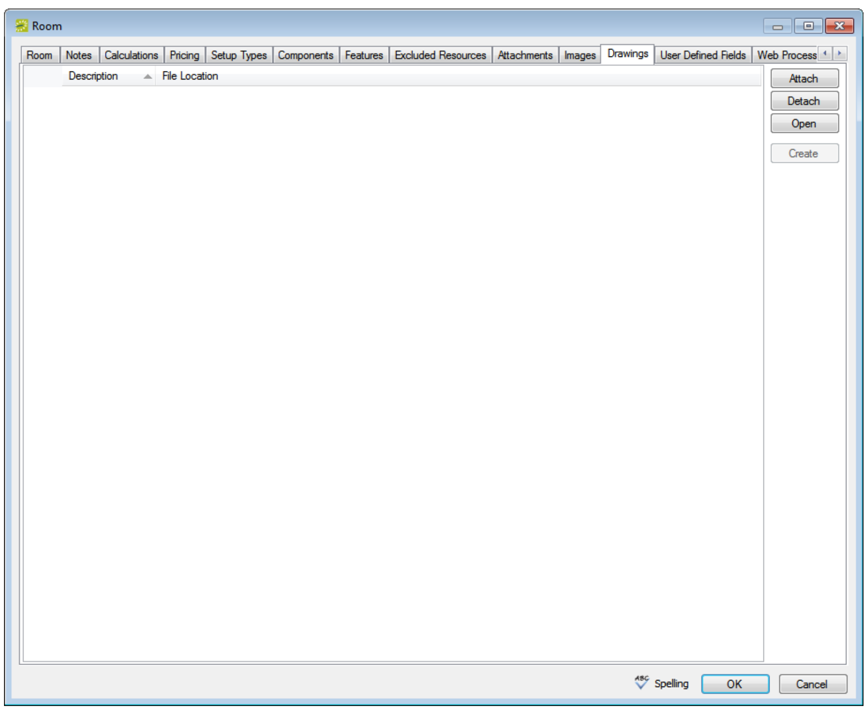
To attach drawings to a room

The term *drawing* is used to describe a file (text-based or image file) that is stored on your organization’s network that you can reference in a booking. Typically, a drawing is a setup diagram of the booking room.

If the drawing is an image file, and you want your users to be able to view the image in EMS and VEMS when making a reservation, then you should associate the image with the room on the Images tab.

1. If needed, open the Room dialog box (see “To configure one room at a time” on page 110), and then open the Drawings tab.

Figure 3-37: Room dialog box, Drawings tab



2. Click Attach to open the Find Drawing dialog box, and then browse to and select the drawing

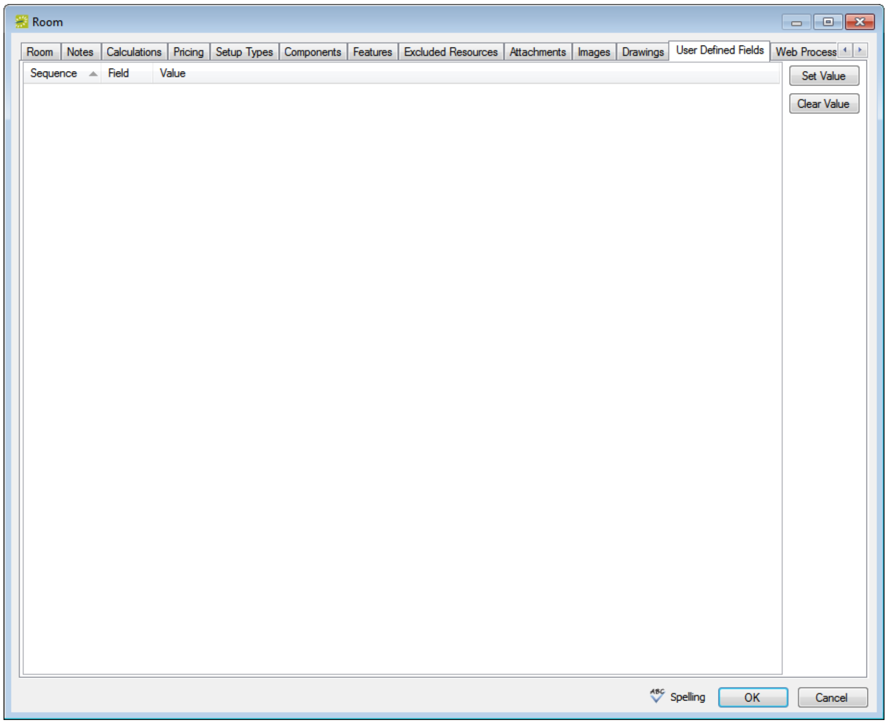
   The Find Drawing dialog box closes. You remain on the Drawing tabs with an entry for the drawing displayed on the tab.

3. Continue with any other optional configuration for the room as needed; otherwise, click OK to close the Room dialog box and return to the Rooms window. The newly configured room is displayed in the window.

To set values for the user defined fields (UDFs)

1. If needed, open the Room dialog box (see “To configure one room at a time” on page 110), and then open the User Defined Fields tab.

Figure 3-38: Room dialog box, User Defined Fields tab

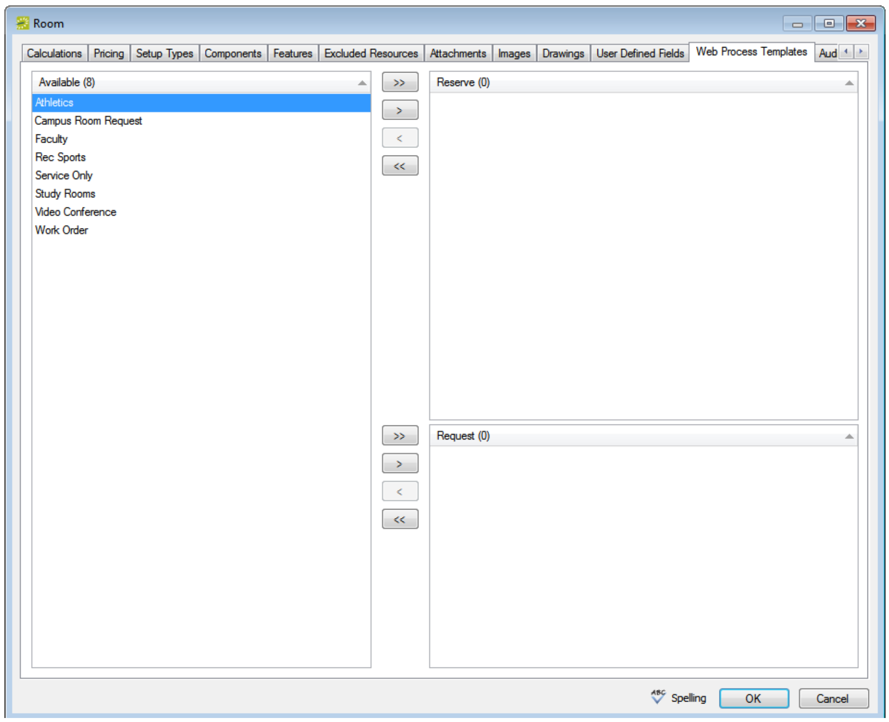


2. For each UDF that has been defined for the room, select the UDF, and then click the Set Value button to open a dialog box in which you can set the value for the UDF.
3. Continue with any other optional configuration for the room as needed; otherwise, click OK to close the Room dialog box and return to the Rooms window. The newly configured room is displayed in the window.

To assign the room to web process templates

1. If needed, open the Room dialog box (see “To configure one room at a time” on page 110), and then open the Web Process Template tab.

Figure 3-39: Room dialog box, Web Process Template tab



2. On the Available list, select the web process template, or CTRL-click to select the multiple templates for which the attached users can book the room, and then click the Move button (>) to move the selected templates to the correct Selected list.
   - Move templates for which the attached users can reserve the room without approval (booked into the Reserve status in VEMS) into the Reserve pane.
   - Move templates for which the attached users must get approval to reserve the room (booked into the Request status in VEMS) into the Request pane.
3. Continue with any other optional configuration for the room as needed; otherwise, click OK to close the Room dialog box and return to the Rooms window. The newly configured room is displayed in the window.

To use the Room Configuration Wizard

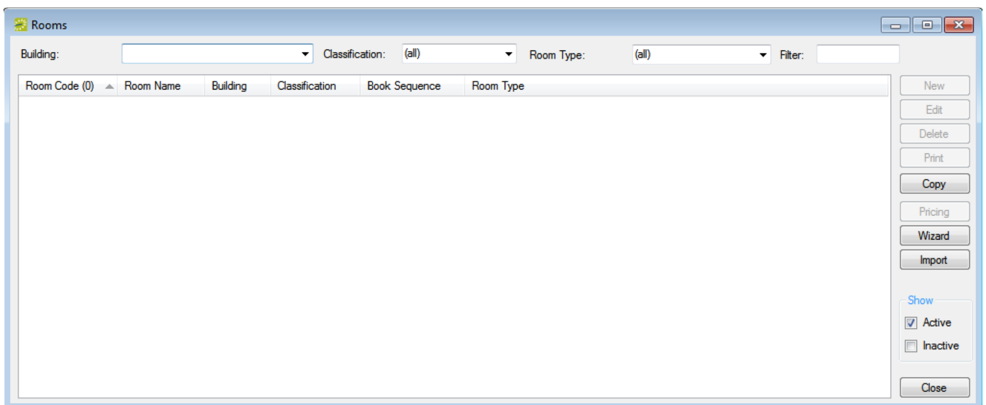
You use the Room Configuration Wizard to configure multiple standard rooms that have the following properties in common—room type, setup hours, teardown hours, features, and setup types.

Optionally, if you want to first confirm that a room has not already been configured, then you can search for the room. See *"To search for a room" on page 109.*

1. On the EMS menu bar, click Configuration > Facilities > Rooms.

   The Rooms window opens.

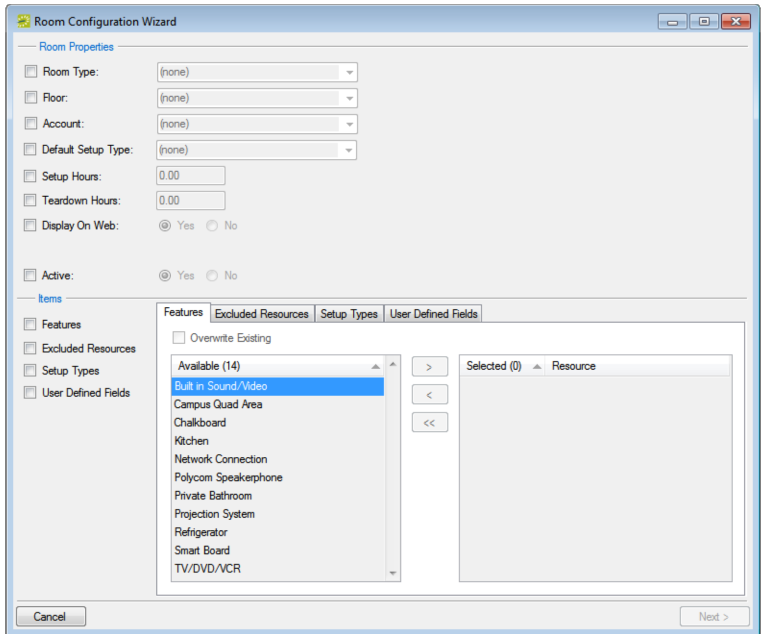
Figure 3-40: Rooms window



2. Click Wizard.

   The Room Configuration Wizard opens. The Features tab (in the Items pane) is opened by default. See Figure 3-41 on page 129.

Figure 3-41: Room Configuration Wizard



3. Select the common properties for all the rooms that you are configuring and enter the appropriate values.

Option	Comment
Room Type	If the appropriate room type is not available, you can configure it. See "Configuring Room Types" on page 89.
Floor	If the appropriate floor is not available, you can configure it. See "Configuring Floors" on page 83.
Account	If the appropriate account is not available, you can configure it. See "Configuring Accounts" on page 263.
Default Setup Type	If the appropriate setup type is not available, you can configure it. See "Configuring Setup Types" on page 87. **Note:** A user can override this value when reserving the room, or when editing the event.
Setup Hours Teardown Hours	These settings establish the default setup and teardown hours for the room, which are automatically added to the beginning and end of the event time that user specifies in the Reservation Wizard or in VEMS. A user can override these default values in the Reservation Wizard.

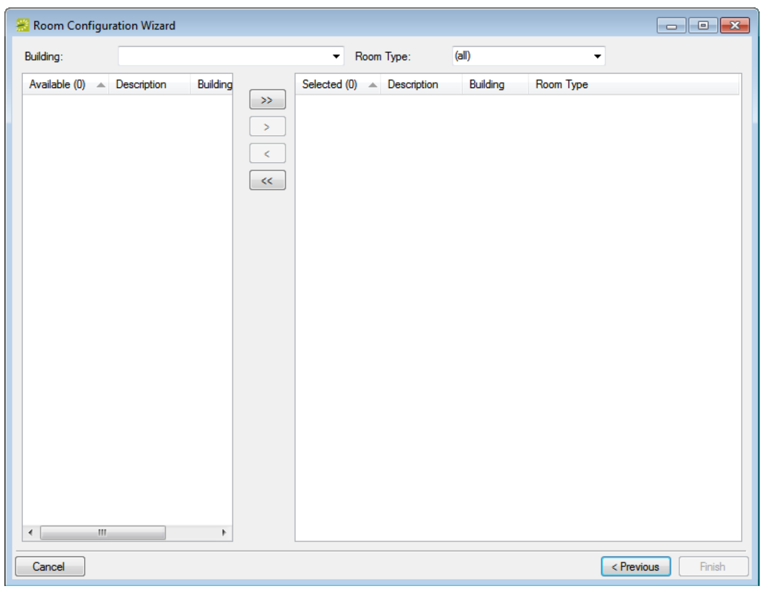
If you are configuring a room in EMS Campus, then Academic Space is also a common property that you can configure.

4. If the events that are scheduled in the room are to be displayed in VEMS, select Display on the Web.

5. If these rooms are to be active rooms (available immediately for booking events), then select Active. (Yes is selected by default). Otherwise, select No.
6. Optionally, continue to one or more of the following; otherwise, continue to Step 7.
   - "To configure common features for multiple rooms" on page 131.
   - "To configure common excluded resources for multiple rooms" on page 132.
   - "To configure common setup types for multiple rooms" on page 133.
   - "To configure common UDFs for multiple rooms" on page 134.
7. Click Next.

   The Room Configuration Wizard is updated with options for searching for the rooms that are to be configured.

Figure 3-42: Rooms Configuration Wizard



8. Enter any combination of the following search criteria:
   - On the Building dropdown list, select one of the following—(all) buildings, a specific building, a specific area, or a specific view.

If the appropriate building, area, or view is not available, you can configure it. See "Configuring Buildings" on page 91, "Configuring Areas" on page 99, or "Configuring Public Views" on page 144.

   - On the Room Type dropdown list, select a specific room type.

If the appropriate room type is not available, you can configure it. See "Configuring Room Types" on page 89.

9. On the Available list, select the room or CTRL-click to select the multiple rooms that are to be configured, and then click the Move button (>) to move the selected rooms to the Selected list.

10. Click Finish.

    The Room Configuration Wizard closes. A message opens indicating that the room properties were set successfully.

11. Click OK.

    The message closes. You return to the Rooms window. The newly configured rooms are displayed in the window.

To configure common features for multiple rooms

1. If all the rooms are to have the same features, then under Items, select Features.

2. On the Available list, select the feature, or CTRL-click to select the multiple features that the rooms are to have.

If the appropriate features are not available, you can configure them. See “Configuring Features” on page 85.

3. If any of the rooms that you select for configuration have existing features and you want to drop these existing features and apply only the new features, select Overwrite Existing; otherwise, the new features are simply appended to the list of existing features.

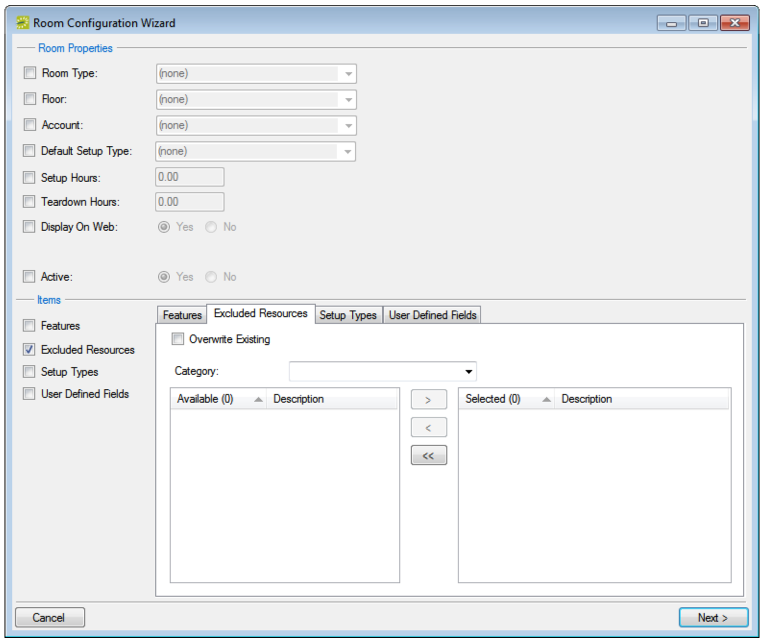
4. Continue with any other optional configuration for the room as needed; otherwise, click Next to continue in the Room Configuration wizard. See Step 7 of “To use the Room Configuration Wizard” on page 128.

To configure common excluded resources for multiple rooms

1. Under Items, select Excluded Resources.

   The Excluded Resources tab opens.

Figure 3-43: Room Configuration Wizard, Excluded Resources tab



2. Select the category that contains the resources that are to be excluded.

   The category's resources are displayed in the Available list.

If the appropriate categories are not available, you can configure them. See *"Configuring Categories" on page 155.*

3. On the Available list, select the resource, or CTRL-click to select the multiple resources that are to be excluded from the rooms.

If the appropriate resources are not available, you can configure them. See *"Configuring Resources for a Category" on page 206.*

4. If any of the rooms that you select for configuration have existing resources and you want to drop these existing resources and apply only the new resources, select Overwrite Existing; otherwise, the new resources are simply appended to the list of existing resources.

5. Click the Move button (>) to move the selected resources to the Selected list.

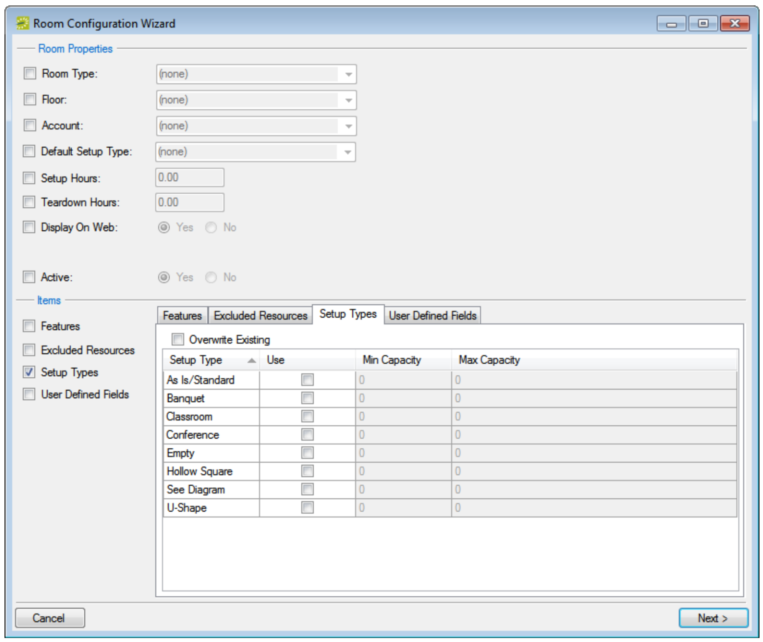
6. Continue with any other optional configuration for the room as needed; otherwise, click Next to continue in the Room Configuration wizard. See Step 7 of "To use the Room Configuration Wizard" on page 128.

To configure common setup types for multiple rooms

1. Under Items, select Setup Types.

   The Setup Types tab opens.

Figure 3-44: Room Configuration Wizard, Setup Types tab



2. If any of the rooms that you select for configuration have existing setup types and you want to drop these existing setup types and apply only the new setup types, select Overwrite Existing; otherwise, the new setup types are simply appended to the list of existing setup types.

3. For each applicable setup type, select In Use, and then click in the Min. Capacity and/or Max. Capacity field and enter the minimum capacity, maximum capacity, or both for the setup type.

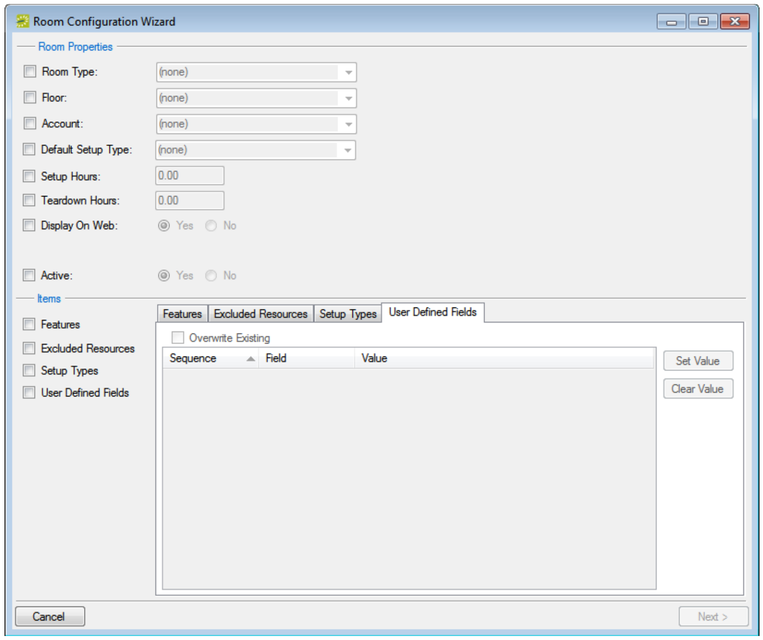
4. Continue with any other optional configuration for the room as needed; otherwise, click Next to continue in the Room Configuration Wizard. See Step 7 of "To use the Room Configuration Wizard" on page 128.

To configure common UDFs for multiple rooms

1. Click User Defined Fields.

   The User Defined Fields tab opens. All the UDFs that have a type of Room are displayed on the tab.

Figure 3-45: Room Configuration Wizard, User Defined Fields tab



2. If any of the rooms that you select for configuration have existing UDFs with set values and you want to drop these existing values and apply only the new values, select Overwrite Existing; otherwise, the new values are simply appended to the list of existing values.

3. For each UDF that you are configuring for the room, do the following:
   - Select the UDF.
   - Click Set Value to open a Value dialog box.
   - Enter the value for the UDF in the Value field, and then click OK to close the dialog box and return to the User Defined Fields tab.

4. Continue with any other optional configuration for the room as needed; otherwise, click Next to continue in the Room Configuration Wizard. See Step 7 of "To use the Room Configuration Wizard" on page 128.

Importing Rooms

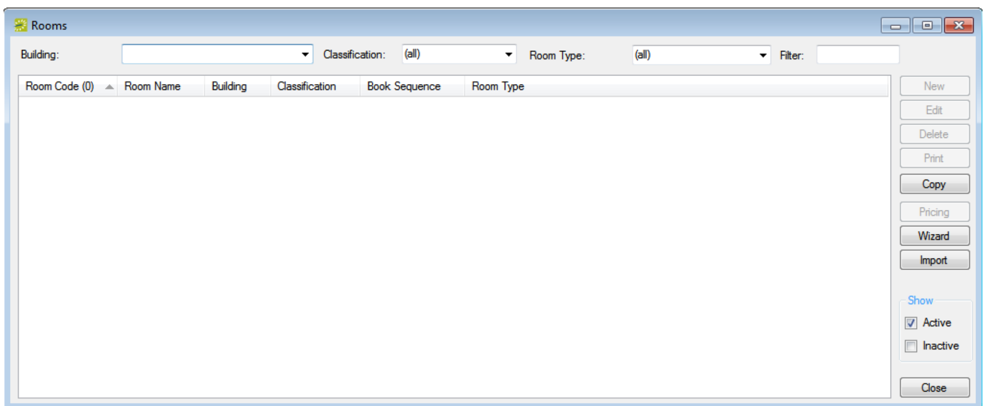
You can import rooms from a tab-delimited file into a building, area, or view that you select. (See Appendix E, “Import File Specifications,” on page 539 for the room import file specifications.) After you import rooms, you must edit the configuration (setup type, features, images, and so on) for each room.

To import rooms

1. On the EMS menu bar, click Configuration > Facilities > Rooms.

   The Rooms window opens.

Figure 3-46: Rooms window



2. On the Building dropdown list, select a specific building, a specific area, or a specific view to import the rooms into.

If the appropriate building, area, or view is not available, you can configure it. See “Configuring Buildings” on page 91, “Configuring Areas” on page 99, or “Configuring Public Views” on page 144.

3. Click Import.

   A dialog box opens, indicating the number of rooms that you are about to import, and asking you if you want to continue.

4. Click Yes.

   A message opens indicating that the import was successful.

5. Click OK to close the message and return to the Rooms window.

6. For each room that was imported, select the room on the Rooms window, and then click Edit to open the Room in the Room dialog box.

7. Edit the room configuration as needed. See “To configure one room at a time” on page 110.

Configuring Room Pricing on the Edit Pricing window

You can configure the pricing for a room on the Pricing tab of the Room dialog box, or you can configure the room, and then configure the pricing for it at a later date on the Edit Pricing window.

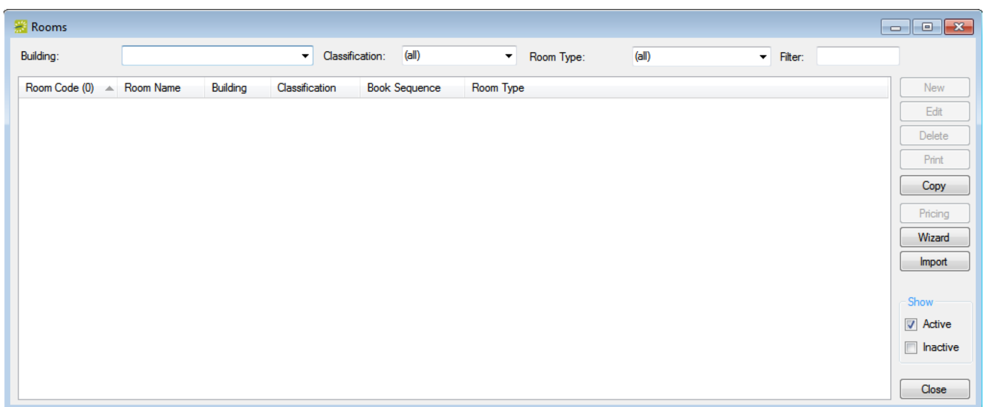
You can also configure the room price at the time that you are configuring the room on the Room dialog box (see *"To configure the pricing for a room" on page 117**), or at the time that you are configuring rate schedules (see* *"Configuring Rate Schedules" on page 247**).*

To configure room pricing on the Edit Pricing window

1. On the EMS menu bar, click Configuration > Facilities > Rooms.

   The Rooms window opens.

Figure 3-47: Rooms window

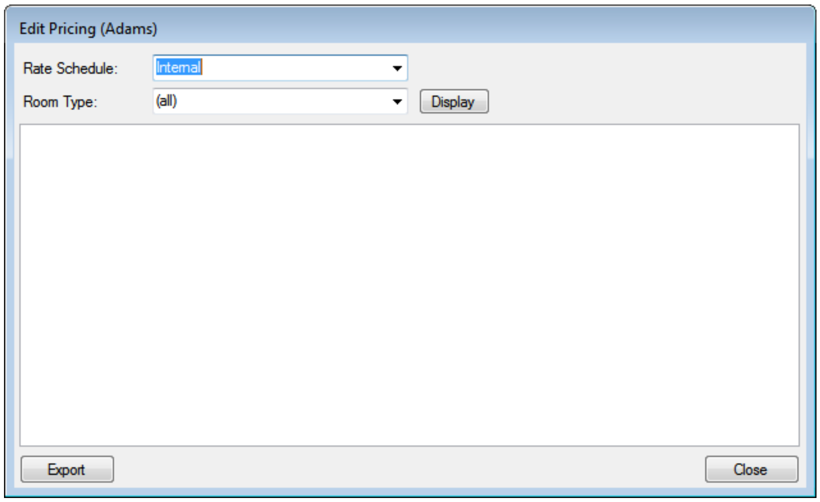


2. On the Building dropdown list, select the building, area, or view that contains the rooms that you are pricing.

3. Click Pricing.

   The Edit Pricing window opens.

Figure 3-48: Edit Pricing window



4. On the Rate Schedule dropdown list, select the rate schedule for which you are pricing the rooms.

If the appropriate rate schedule is not available, you can configure it. See “Configuring Rate Schedules” on page 247.

5. Do one of the following:
   - Leave the Room Type set to the default value of (all), and then click Display to display a list of all *active* rooms for all room types that have been configured in your EMS database.
   - On the Room Type dropdown list, select a specific room type, and then click Display to display a list of all *active* rooms for the selected room type.
6. For each room, select the pricing method, which determines the cost for reserving the room.

Pricing Method	Description
Half Day/Full Day (Event Time)	The total number of hours for the event is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the event is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the room. If the total number of hours for the event is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the room.

Pricing Method	Description
Half Day/Full Day (Reserved Time)	The total number of hours for the reservation (event time and reserved time) is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the reservation is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the room. If the total number of hours for the reservation is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the room.
Hourly (Event Time)	The price that is indicated in the Price column is multiplied by the event time (in hours) for the booking. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Reserved Time)	The price that is indicated in the Price column is multiplied by the reserved time (in hours) for the booking. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Service Time)	The price that is indicated in the Price column is multiplied by the reserved time (in hours) for the service (resource). This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Specific)	The price that is indicated in the Price column is multiplied by the number of hours indicated when adding the room to a booking.
Unit	The price that is indicated in the Price column is applied to the room, regardless of the event time or reserved time for the booking.

7. After you select a pricing method, click in the appropriate fields to select the currently displayed amount, and then edit the amount as needed.

Field	Description
Price	The dollar amount that is used in calculating the room price for a booking. If the pricing method is Unit, then this value is applied in total to a room, regardless of the event time or reserved time for the booking.
Discount	You can use a discount with any pricing method. If you specify a discount for a room, then the actual price, the discount percentage, and the discounted amount are displayed on confirmations and invoices.
Min. Charge Max. Charge	The values that are indicated in these columns are used in conjunction with the Hourly pricing methods. If you specify a minimum charge for a room, then the system compares this value to the calculated hourly rate and applies the greater of the two charges. Likewise, if you specify a maximum charge for a room, then the system compares this value to the calculated hourly rate and applies the lesser of the two charges.
Flat Price	A resource price that remains constant regardless of the total number of hours booked for the room. Used in conjunction with Hourly (Event Time) and Hourly (Reserved Time).
Half Day Price	The dollar amount that is used in calculating the room price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/ Full Day (Reservation Time).

Field	Description
Full Day Price	The dollar amount that is used in calculating the room price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/ Full Day (Reservation Time).
Hours	Multiplier used in calculating the room price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).

8. Repeat Step 4 through Step 7 for each rate schedule and/or grouping as needed.
9. Click Close.

   The Edit Pricing window closes. The pricing information is saved for the room.

Exporting Pricing Information for a Room

You can export *any* pricing information that you configure for a room on a per rate schedule basis on the Edit Pricing window. The information is exported to a Microsoft Excel file.

You do not need Microsoft Excel on your EMS client to export the information to the file; however, you must have Microsoft Excel on your EMS client to view the file.

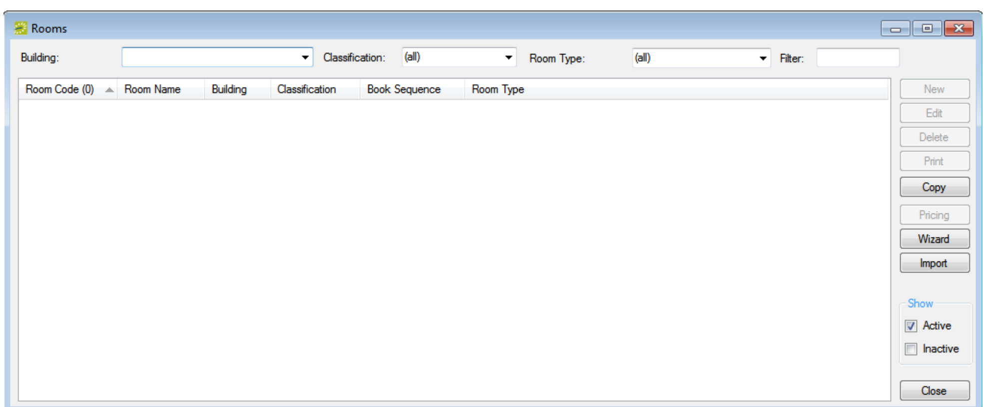
You can also export pricing information for a room at the time that you are configuring rate schedules. See *"Exporting Pricing Information for Billable Items (Rooms or Resources)" on page 252.*

To export pricing information for a room

1. On the EMS menu bar, click Configuration > Facilities > Rooms.

   The Rooms window opens.

Figure 3-49: Rooms window

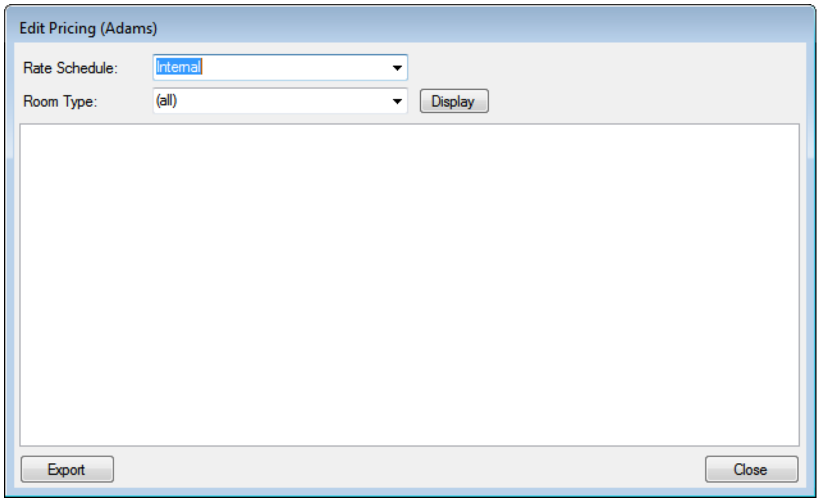


2. On the Building dropdown list, select the building, area, or view that contains the rooms that you are pricing.

3. Click Pricing.

   The Edit Pricing window opens.

Figure 3-50: Edit Pricing window



4. On the Rate Schedule dropdown list, select the rate schedule for which you are exporting the room pricing information.
5. Do one of the following:
   - Leave the Room Type set to the default value of (all), and then click Display to display a list of all *active* rooms for all room types that have been configured in your EMS database.
   - On the Room Type dropdown list, select a specific room type, and then click Display to display a list of all *active* rooms for the selected room type.
6. Click Export.

   A Save As dialog box opens. The export file is named Pricing.xls by default.
7. Optionally, edit the name of the export file, and then save the file to a location of your choice.

   An Export Report message opens indicating that the export was successful and asks you if you want to preview the exported file.
8. Do one of the following:
   - Click Yes to open the export file in Microsoft Excel. After viewing the file, you can close it to return to the Edit Pricing window.
   - Click No to close the message and return to the Edit Pricing window.
9. Repeat Step 5 through Step 8 for each rate schedule and/or grouping for which you are exporting the information.

10. After you have exported all the necessary pricing information for a room, click Close.

    The Edit Pricing window closes. The Rooms window remains opens.

Configuring Public Views

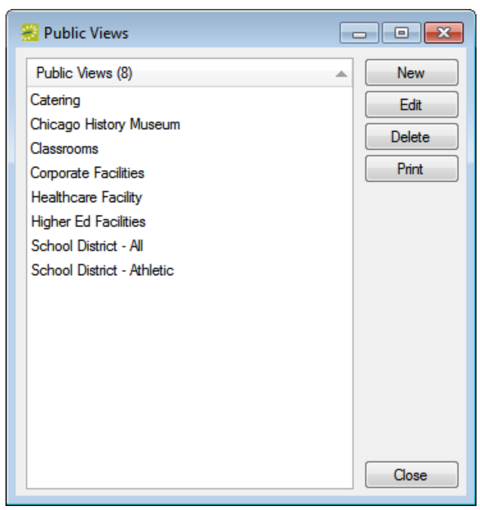
A *public view*, or simply a *view*, is a grouping of specific rooms that you configure. You use views to organize rooms within one building or across multiple buildings in a manner that makes sense for your organization. For example, you might create a view that includes only the training rooms across all your locations, or you might create a view to manage heavily used conference rooms within a building. A room can be part of multiple views. A user can select a view for changing the information that is displayed in the Reservation Book or for searching for rooms in the Reservation Wizard. A view can also be particularly useful for running reports.

To configure public views

1. On the EMS menu bar, click Configuration > Facilities > Public Views.

   The Public Views window opens. This window lists all the views that are currently configured in your EMS database.

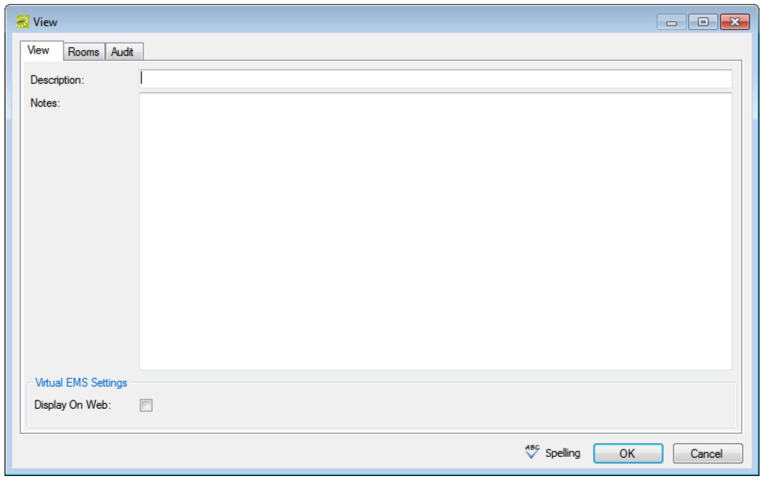
Figure 3-51: Public Views window



2. Click New.

   The View dialog box opens. The View tab is the active tab.

Figure 3-52: View dialog box, View tab

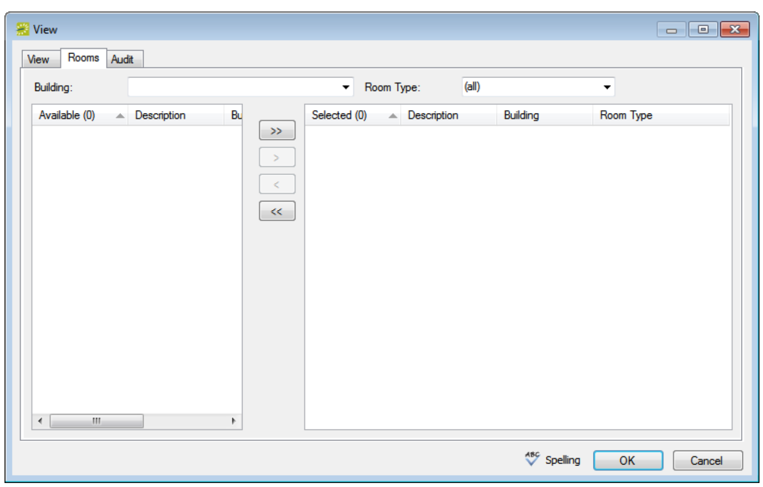


3. In the Description field, enter a name or description for the new view.

The description can be a maximum of 50 characters, including spaces.

4. Optionally, do one or both of the following:
   - In the Notes field, enter any other pertinent information about the view.
   - If VEMS users are to have read-only access to the view, select Display on Web.
5. Open the Rooms tab.

Figure 3-53: View dialog box, Rooms tab



6. Enter any combination of the following search criteria:

   - On the Building dropdown list, select one of the following—(all) buildings, a specific building, a specific area, or a specific view.

If the appropriate building, area, or view is not available, you can configure it. See “Configuring Buildings” on page 91, “Configuring Areas” on page 99, or “Configuring Public Views” on page 144.

   - On the Room Type dropdown list, select a specific room type.

If the appropriate room type is not available, you can configure it. See “Configuring Room Types” on page 89.

7. On the Available list, select the room, or CTRL-click to select the multiple rooms that are to make up the view, and then click the Move button (>) to move the selected rooms to the Selected list.
8. Optionally, click Spelling to spell check the view description before you save the view.
9. Click OK.

   The View dialog box closes. You return to the Public Views window. The newly configured view is displayed in the window.

Configuring Floor Plans

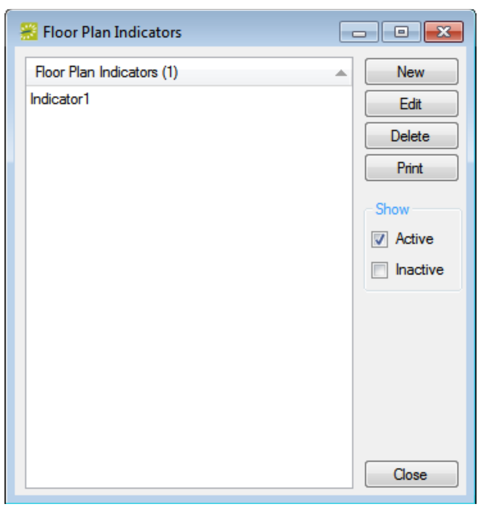
The Floor Plan Configuration module is an optional, add-on module which allows users to view available rooms and book a space directly from a floor plan in VEMS or the EMS Kiosk. Configuring floor plans to use in the Floor Plan module is a three step process. First you must configure the *floor plan indicators*, which are the images that are used indicate whether a room is available or unavailable for a floor plan. For example, you might use something as simple as a green square to indicate that a room on a floor is available and a red square to indicate that a room on a floor is unavailable. Second, you must configure a floor plan diagram for each floor of each building for which a floor plan applies. A *floor plan diagram* is a drawing, or outline, usually to scale, that shows the relationships between rooms, spaces, and other physical features for one floor of a building. Third, you must use the Floor Plan Configuration utility to map your floor plan indicators to specific rooms on your floor plan diagram. The actual availability of each reservable space ultimately determines the indicator (available or unavailable) that is displayed on a floor plan in VEMS or EMS Kiosk.

To configure the floor plan indicators

1. On the EMS menu bar, click Configuration > Facilities > Floor Plan Indicators.

   The Floor Plan Indicators window opens. This window lists all the indicator sets that are currently configured in your EMS database and that have a status of Active.

Figure 3-54: Floor Plan Indicators window

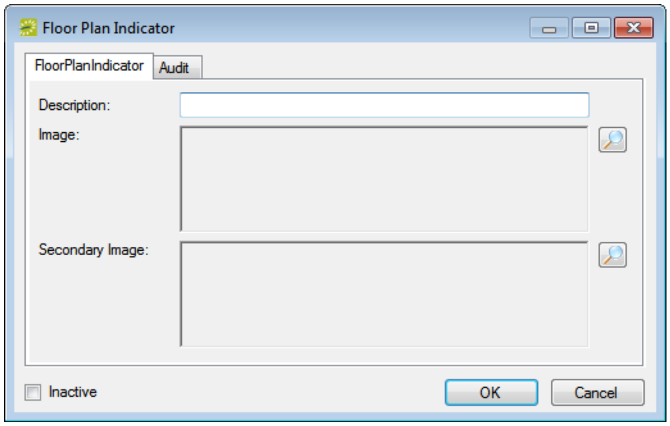


Optionally, to view all indicator sets in your EMS database, regardless of status, under Show, click Inactive.

2. Click New.

   The Floor Plan Indicator dialog box opens.

Figure 3-55: Floor Plan Indicator dialog box



3. In the Description field, enter a name or description for the new floor plan indicators.

The description can be a maximum of 50 characters, including spaces. You can name indicators something as simply as Indicator Set 1, or if you are using different indicators for different floor plans in different buildings, you could identify them by building, for example, Memorial Student Union indicators, Fifth Floor Conference Room indicators, and so on.

4. Next to the Image field, click the Search icon to open the Find Image dialog box, and then browse to and select the image that is to be used for the *available* indicator.

5. Next to the Secondary Image field, click the Search icon to open the Find Image dialog box, and then browse to and select the image that is to be used for the *unavailable* indicator.

The image must be in one of the following formats—.gif, .jpeg, .jpg, .bmp, .wmf, or .png.

6. By default, the floor plan indicators are added as an active set. Optionally, select Inactive to inactivate the set.

7. Click OK.

   The Floor Plan Indicator dialog box closes. You return to the Floor Plan Indicators window with the newly configured indicator set automatically selected.

8. Continue to “To configure a floor plan diagram” on page 149.

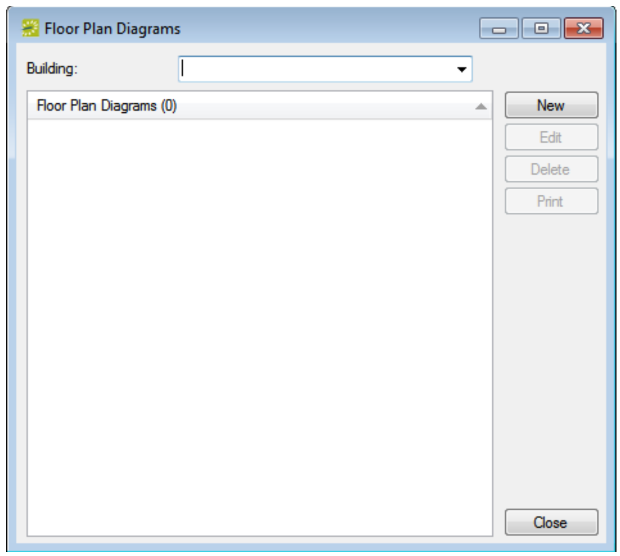
To configure a floor plan diagram

You must configure one floor plan diagram for each floor that is to be available for booking in VEMS and the EMS Kiosk.

1. On the EMS menu bar, click Configuration > Facilities > Floor Plan Diagrams.

   A blank Floor Plan Diagrams window opens.

Figure 3-56: Floor Plan Diagrams window

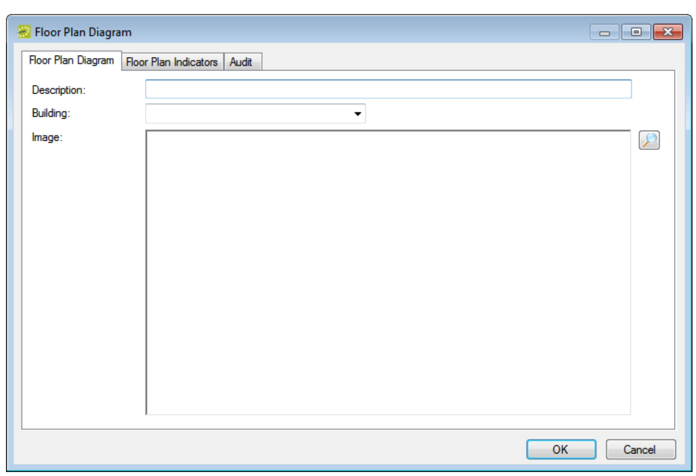


2. Optionally, in the Building dropdown list, select (all), or select a specific building to display a list of floor plans for all buildings or for the selected building in the window.

3. Click New.

   The Floor Plan Diagram dialog box opens. The Floor Plan Diagram tab is the active tab.

Figure 3-57: Floor Plan Diagram dialog box, Floor Plan Diagram tab



4. In the Description field, enter a name or description for the new floor plan diagram.

The description can be a maximum of 50 characters, including spaces.

5. On the Building dropdown list, select the building for which you are configuring the floor plan diagram.

6. Next to the Image field, click the Search icon to open the Find Image dialog box, and then browse to and select the image of the floor plan diagram.

The image must be in one of the following formats—.gif, .jpeg, .jpg, .bmp, .wmf, or .png. The optimal image size is 1024 x 768.

7. Open the Floor Plan Indicators tab, and on the Available list, select the floor plan indicator, or CTRL-click to select the multiple floor plan indicators that are to be used for this diagram, and then click the Move (>) button to move the selected indicators to the Selected list.

8. Click OK.

   The Floor Plan Diagram dialog box closes. You return to the Floor Plan Diagrams window with the newly configured floor plan diagram automatically selected.

9. Continue to “To map a floor plan” below.

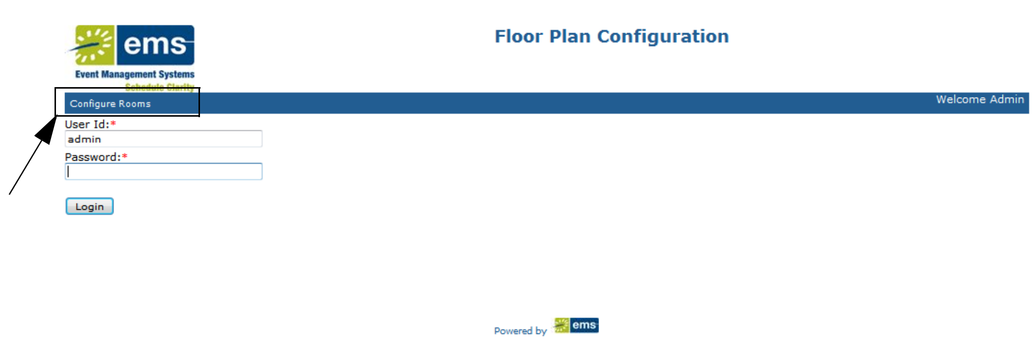
To map a floor plan

1. Log in to the Floor Plan Configuration module using your EMS username and password.

If needed, contact your EMS administrator for the correct URL.

After you successfully log in to the Floor Plan Configuration module, the Configure Rooms option is displayed *above* the Login fields on the main window.

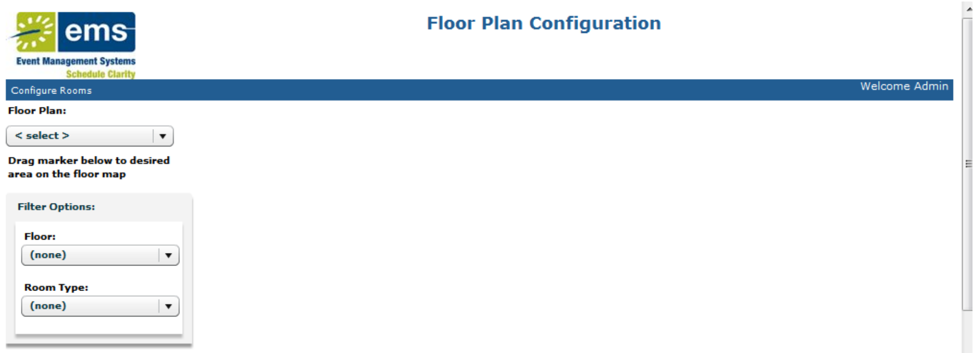
Figure 3-58: Floor Plan Configuration module, main window with Configure Rooms option



2. Click Configure Rooms.

   The Configure Rooms page opens.

Figure 3-59: Floor Plan Configuration module, Configure Rooms page



3. On the Floor Plan dropdown list, select a floor plan diagram.

   The available indicators that are associated with the floor plan diagram are displayed below the selected diagram.

4. Drag an available indicator and place it as needed to indicate where a room (reservable space) is located on the floor.

5. Repeat Step 4 until you have identified all the reservable spaces that are located on the floor.

6. For each indicator, do the following:

   - Click on the indicator to open a Room Details dialog box.
   - On the Rooms dropdown list, select the room for the indicator, and then click Save.

To filter the list of available rooms, under Filter Options, select a specific floor and/or room type. An indicator is not saved to a floor plan diagram until you select a room for it.

7. Close the Floor Plan Configuration module.

Core Configuration - Administration

Before you can use EMS to manage your organization's events, you must configure core data items that are specific to your organization. For example, before you can add resources (equipment, catering information, and so on) to a booking, you must first configure the categories for these resources.

This chapter covers the following topics:

Configuring Categories

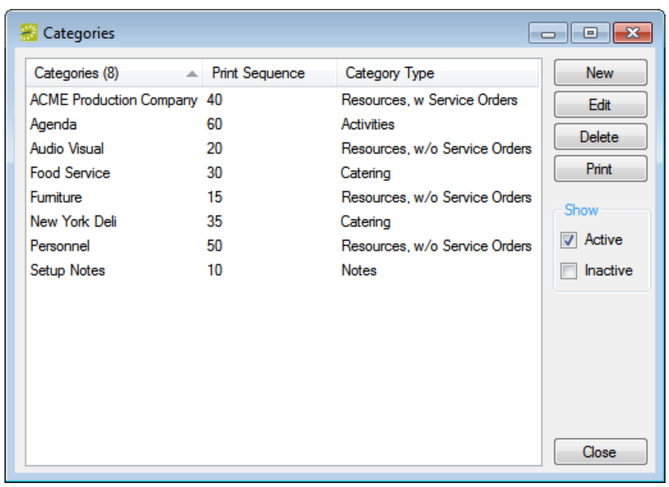
Categories (also called *booking details*) are the activities, attendees, notes, services, and room charges that you can add to a booking. For example, your organization can create a category called A/V Equipment that contains resources such as flip charts, projectors, and so on. Although you can use categories to track setup notes, meeting attendees, and activities for a booking, you do not configure resources for these categories. You need to configure categories only for services. Configuring a category is a two step process. First, you must create the category. Second, after you create the category, you must define its resources.

To configure categories

1. On the EMS menu bar, click Configuration > Administration > Categories.

   The Categories window opens. This window lists all the categories and their types that are currently configured in your EMS database and that have a status of Active.

Figure 4-1: Categories window

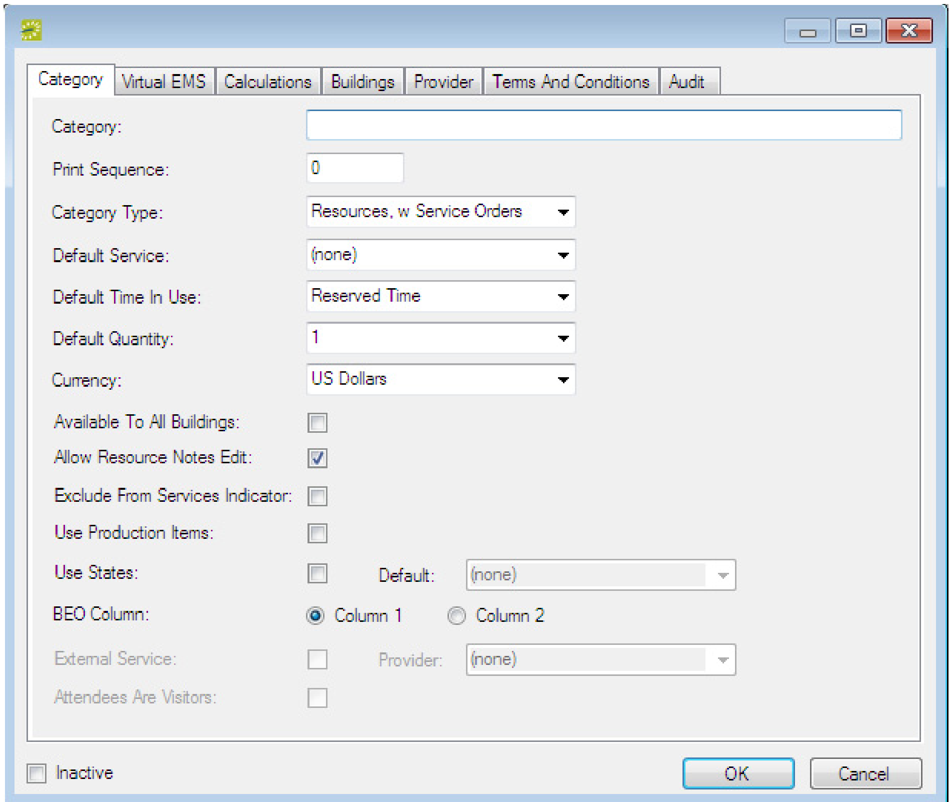


Optionally, to view all categories in your EMS database, regardless of status, under Show, click Inactive.

2. Click New.

   The Category dialog box opens. The Category tab is the active tab. See Figure 4-2 on page 156.

Figure 4-2: Category dialog box, Category tab



3. Enter the information for the new category.

Field	Description
Category	The name or description for the category, for example, A/V Equipment or Furniture. **Note:** The category can be a maximum of 30 characters, including spaces.
Print Sequence	If items from multiple categories have been reserved for an event, then the Print Sequence determines the order in which this information is printed on the confirmation. Categories are ordered from lowest to highest sequence number, with the category with the lowest sequence number being displayed first. **Note:** If you leave the print sequence set to the default value of zero for all items, then by default, the items are displayed alphabetically.

Field	Description
Category Type	Select a category type that is appropriate for the new category. Typically, the determining factor is how the category is to be used. • Activities—Agenda-type entries that describe what is to occur during an event, for example: 8:30 a.m. - 9:00 a.m., Registration; 9:00 a.m. - 10:00 a.m, Keynote Speaker, and so on. • Attendees—Individuals who are attending an event. You can use this category for attendees such as VIPs or guest speakers, or to serve as an attendee checklist for smaller meetings. • Notes—A free-form block of text that is used to enter clarifying or miscellaneous information about the event. For example, your users can use this booking detail to describe room setup for an event such as “Set room temp. at 70 degrees one hour prior to event” or “Please unlock doors at 7 a.m.” • Resources, w/o Service Orders—Resources that are assigned to a booking from a Resources, w/o Service Orders category are assigned for the entire event time. Typically used to manage Audio/ Visual Equipment and Furniture categories. • Resources, w Service Orders—Similar to Resources, w/o Service Orders categories with one exception—you must indicate the specific time that the items that are assigned to a booking from this category are needed. The end result is one or multiple service orders with specific services times before, during or after the event. • Catering—Used to manage catering categories. Provides capability similar to the Resources, w Service Order category in addition to the catering specific fields of Estimated Count, Guaranteed Count, and Actual Count.
Default Service	Services are defined at the resource level. (See “Configuring Resources for a Category” on page 206.) After you define your resources and services, then you can edit this category if needed and define a default service.
Default Time in Use	Available only if Catering, Resources, w Service Orders, or Resources, w/o Service Orders is selected as the Category Type. Indicates the time that the items in the selected category should be in use—for the Reserved Time or for the Event Time.
Default Quantity	Depending the category that was selected, one or more of the following options are available: • 1 • Setup Count • Estimated Count
Currency	Select the currency that is to be used for pricing all the resources in the category. **Note:** If the appropriate currency is not available, you can configure it. See “Configuring Currencies” on page 272.
Available to All Buildings	Select this option if resources from this category are to be available to all buildings. **Note:** If you do not select this option, then on the Buildings tab, you must specify the buildings for which resources from this category are to be available.

Field	Description
Allow Resources Notes Edit	If selected, EMS users can edit the Notes field for the resource.
Exclude from Services Indicator	In various EMS locations (the Reservation Book, the Navigator, the Edit Booking form, and so on) EMS provides an indication that services exist for a booking. Select this option to exclude a category from displaying as a service on the booking.
Use Production Items	Select this option to define production items for the category. **Note:** Production items are defined at the resource level. See "Configuring Resources for a Category" on page 206.
Use States	Select this option if you want to define process phases, or states, for the category, for example, "Assigned," "Out for Delivery," "Delivered," and so on. **Note:** After you define your states, then you can edit this category if needed and specify a default state.
BEO Column	Indicates in which column the category is to be displayed when the Banquet Event Order report is printed in its standard two column format. Select Column 1 to display the category in the left column. Select Column 2 to display the category in the right column. See the *EMS User's Manual* for details about the BEO report.
External Service	Select this option if the provider of the resources for this category is external to your organization, and then select the provider on the Provider dropdown list. **Note:** Available only for a Category Type of Notes and if the EMS system parameter "Show External Service Orders on Categories" is set to "Yes." See "EMS System Parameters" on page 492. **Note:** If the appropriate service provider is not available, contact support@emssoftware.com for assistance in configuring the provider.
Attendees are Visitors	Select this option to automatically mark all attendees who are added to a booking as a Visitor. (The Visitor option is automatically selected on the Attendee dialog box.)

4. Open the Virtual EMS tab and enter the appropriate VEMS information.

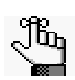
Field	Description
Display on Web	If selected, VEMS users can view this category if it has been added as a booking detail to one of their bookings.
Expand Groupings	If selected, the resource items for a grouping are displayed immediately when a VEMS user makes a reservation. If cleared, only the grouping is displayed and a user must expand the grouping to view the resource items.
Use Specific Cutoff Time	Indicates how far in advance of a booking a VEMS user can add, edit, or cancel this category. For example, if you select the Cutoff Time/Number of Days option, and you specify 11:00 a.m. and one day, then VEMS users cannot assign, edit, or cancel categories or resources after 11:00 a.m. on the day before the event.

Field	Description
Cutoff Hours	Available only if you do not select the Use Specific Cutoff Time option. With this option, the restriction is imposed based on the number of hours before the event occurs rather than time of day.
Default Quantity	The default quantity (either 1, Attendance, or Blank) that is automatically filled in by the system when a VEMS user selects an item.
Available at Checkout	Select this option if this category is to be displayed on the “checkout” page (the last page in the Room Request process) in VEMS.
Prompt for Billing Reference Prompt for PO Number	Select this option if VEMS users are to be prompted to enter a billing reference and/or PO number when they select a resource from the category.
Allow Add On Weekend	Select this option to allow a VEMS user to add a service order to a weekend booking.
Sequence	Determines the order in which the category is displayed in a list of categories in VEMS. Categories are ordered from lowest to highest sequence number, with the category with the lowest sequence number being displayed first. **Note:** If you leave the sequence set to the default value of zero for all categories, then by default, the categories are displayed alphabetically.
Minimum Amount	The minimum purchase amount that is required for a user to submit a new service order in VEMS for this category.
Inactive	Leave this option blank to add the category as an active category. Select this option to inactivate the category.

5. If you did *not* select Available to All Buildings then go to Step 6; otherwise, open the Buildings tab, and on the Available list, select the building, or CTRL-click to select the multiple buildings for which the category is to be available, and then click the Move button (>) to move the selected buildings to the Selected list.

6. Optionally, do one or more of the following:

    - Open the Calculations tab and on the Available list, select the calculation, or CTRL-click to select the multiple calculations that are to always apply to this category, and then click the Move button (>) to move the selected calculations to the Selected list.



These calculations apply to all new resources that are added to the category. If the appropriate calculations are not available, you can configure them. See “Configuring Calculations” on page 258. You can also define calculations at the resource item level. See “Configuring Resources for a Category” on page 206.

- Open the Provider tab and enter the contact information for the provider of the items or services in the category.

Select International to drop the State and Zip fields for an international provider. None of the provider information is displayed or printed anywhere outside of EMS.

- Open the Terms and Conditions tab and format a Terms and Conditions message that is displayed in VEMS when a VEMS user selects the category.

Design is selected by default. Use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want; otherwise, you can select HTML and enter the necessary HTML code to format the message.

7. If you did *not* select Use States, go to Step 8; otherwise, open the States tab, and then do the following:
   - In the Description field, enter a name or description for each state or phase that is to be used for managing this category.

The description can be a maximum of 50 characters, including spaces.

- Optionally, to define a color for each state, select the state, and then click Set Color to open the Select Color dialog box and select a color for the state.

After you have defined the states for a category, you can select a default state on the Category tab. See "Use States" on page 158.

8. Click OK.

   The Category dialog box closes. You return to the Categories window with the newly added category automatically selected. You can now define the resource items for the categories. See "Configuring Resources for a Category" on page 206.

Configuring Departments

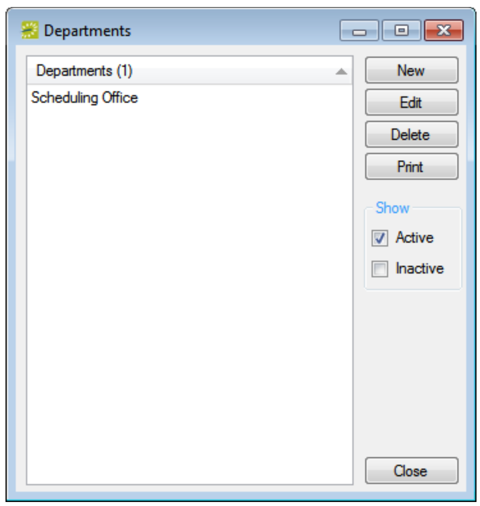
A *department* is a specialized functional area within an organization or a division, such as accounting, marketing, conference services, event planning, catering services, and so on. All financial transactions in EMS are batched by department. Groups and customers make payments to one or more departments for the events that they schedule at your organization's facilities. As the EMS administrator, you must configure the departments for your organization.

To configure departments

1. On the EMS menu bar, click Configuration > Administration > Departments.

   The Departments window opens. The window displays all departments that are currently configured in your EMS database and that have a status of Active.

Figure 4-3: Departments window

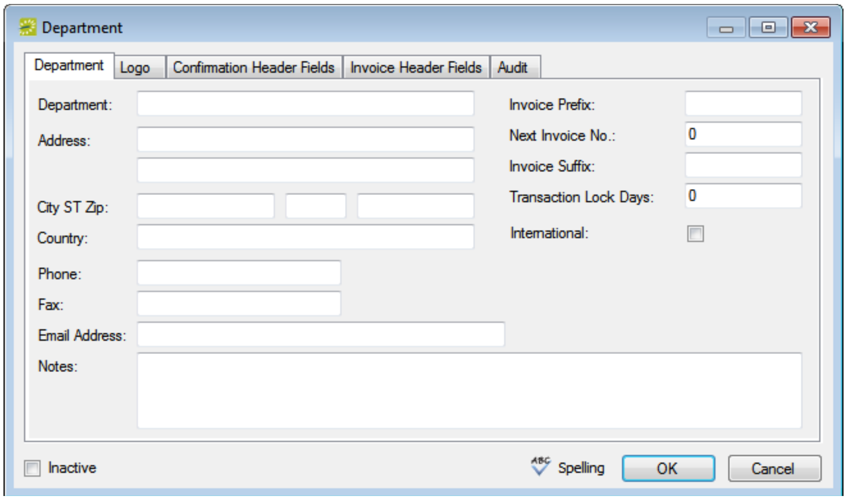


Optionally, to view all departments in your EMS database, regardless of status, under Show, click Inactive.

2. Click New.

   The Department dialog box opens. The Department tab is the active tab. See Figure 4-4 on page 162.

Figure 4-4: Department dialog box, Department tab



3. Enter the information for the new department.

Field	Description
Department	The name of the department. **Note:** The department can be a maximum of 50 characters, including spaces.
Address City ST Zip	The address for the department.
Country	The country for the department.
Phone Fax	The phone and fax number for the department.
International	Select this option to drop the State and Zip fields for an international department.
Note: The name, address, phone, and fax that you define here are printed at the top of confirmations and invoices.	
Email Address	The email address for the department.
Notes	Any descriptive or clarifying information that is pertinent for the department.
Invoice Prefix Invoice Suffix	Not required for the first department that you configure. Required if multiple departments have been configured. This information clarifies which department generated an invoice.
Next Invoice No.	Required field. The value must be a number between 1 and 999999. The invoice number entered here is the number of the *first* invoice that is generated by a user in the department. This number is automatically incremented by one each time a user in the department generates an invoice.

Field	Description
Transaction Lock Days	The number of days after a transaction is generated that it can still be modified. For example, if the field is set to 30, an invoice generated by this department can be voided only within 30 days of its creation.
Inactive	Leave this option blank to add the department as an active department. Select this option to inactivate the department.

4. Optionally, do one or more of the following:
   - Open the Logo tab and do the following:
     - In the Description field, enter a name or description for the logo that is to be printed on the confirmations and invoices generated by the department.

The description can be a maximum of 50 characters, including spaces.

     - Click Browse to browse to open the Find Logo dialog box, and then browse to and select the logo.

The logo must be one of the following file types—.gif, .jpg, .jpeg, .bmp, .wmf, and .png. By default, the logo is printed at the top left of confirmations and invoices. You can select Align Right to align the logo at the top right instead of the top left.

   - Open the Confirmation Header Fields tab, and on the Available list, select the field, or CTRL-click to select the multiple fields that are to be included in the header of every confirmation that is generated by the department.
   - Open the Invoice Header Fields tab, and on the Available list, select the field, or CTRL-click to select the multiple fields that are to be included in the header of every invoice that is generated by the department.
   - Click Spelling to spell check the information that you entered before you save it.
5. Click OK.

   The Department dialog box closes. You return to the Departments window with the newly configured department automatically selected.

Configuring Statuses

A *status* indicates the likelihood that a booking will occur. You can apply a status to both bookings and reservations, but only booking-level statuses affects room availability. Every booking must have a status. Examples of statuses include “Confirmed,” “Tentative,” “Wait List,” and “Canceled.” A status is one of four core data items that you must configure so that your users can make reservations. You can configure as many statuses as you need and give them any names you want; however, you must always assign one of the four following *status types* to a status:

- Book Space
- Wait
- Info Only
- Cancel

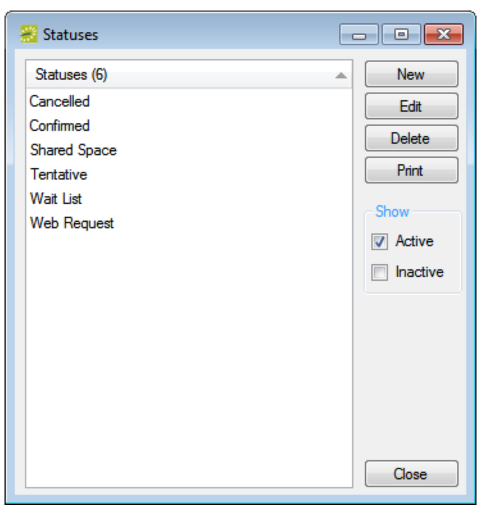
The name that you assign to a status is just a convenient label that assists you in managing your organization’s business. The status type is what is actually used by EMS to determine if a room must be taken out of inventory.

To configure statuses

1. On the EMS menu bar, click Configuration > Administration > Statuses.

   The Statuses window opens. This window lists all the statuses that are currently configured in your EMS database and that have a status of Active.

Figure 4-5: Statuses window

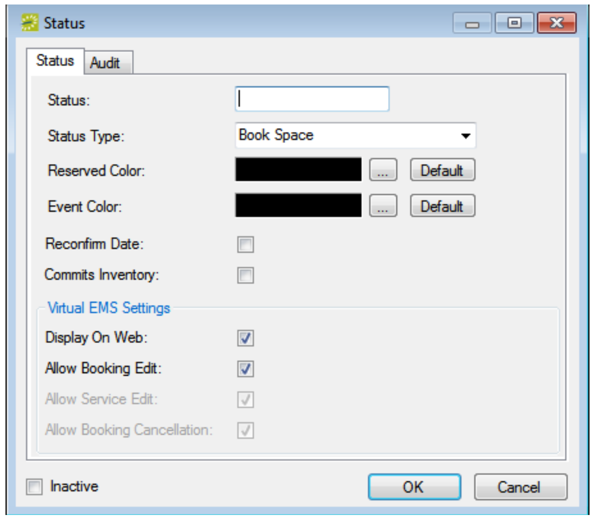


Optionally, to view all statuses in your EMS database, regardless of status, under Show, click Inactive.

2. Click New.

   The Status dialog box opens.

Figure 4-6: Status dialog box



3. Enter the information for the new status.

Field	Description
Status	The name of the status. **Note:** The status can be a maximum of 30 characters, including spaces.
Status Type	Required. You must select one of the following four values: • Book Space—The room is taken out of inventory and cannot be reserved by another booking. (The system prevents the space from being double-booked.) • Cancel—Booking information is retained, but the room is released back into inventory. • Info Only—Booking information is retained, but the space is not taken out of inventory. • Wait—Booking information is retained in case the space becomes available prior to the event date. Wait bookings show up on the Wait List Report and in the Dashboard. **Note:** If you are configuring a conflict status, then it must Status Type Info Only or Wait.
Reserved Color	The color that is used by this status in the Reservation Book to indicate *reserved* time. When the reserved time extends before or after event time, thin bars of this color extend out from the beginning and/or end of the event. To use the system default colors, click Default.

Field	Description
Event Color	The color for events of this status in the Navigator and Reservation Book. To use the system default colors, click Default. **Note:** Lighter colors are the better colors to use for events because they make it easier to read the event name in the Reservation Book, which is in black text.
Reconfirm Date	Select this option if you want the system to require a reconfirm date when a reservation is made in EMS. When a user gives a booking a status that requires a reconfirm date, the system displays an additional field, prompting the user to enter the date. You can identify bookings with a reconfirm date in the Dashboard.
Commits Inventory	Select this option if the status should remove resources from inventory. **Note:** Typically, you would select this option for a status with a Book Space type whereas you would *not* select this option for a status with a Cancel type.
Inactive	Leave this option blank to add the status as an active status. Select this option to inactivate the status.
Virtual EMS Settings	
Display on Web	Select this option to display the event details for bookings with this status in VEMS.
Allow Booking Edit	Select this option to allow the editing of bookings with this status in VEMS.
Allow Service Edit	Select this option to allow the editing of services for bookings with this status in VEMS.
Allow Booking Cancellation	Select this option to allow the canceling of bookings with this status in VEMS.

4. Click OK.

   The Status dialog box closes. You return to the Statuses window with the newly configured status automatically selected.

Configuring Notification Rules

Notification rules determine which EMS users are notified via email when certain additions or modifications are made in the EMS database. You can configure notification rules for the creation or modification of a booking or service order, a modification to a VIP event, the creation of new web user account, or the selection of a specific value for a UDF. These rules are based on rooms, statuses, event types, group types, and/or categories. For a notification to be generated, all the criteria that you specified must be met. Typically, notifications are an internal function for reservationists and service providers, but when you are configuring a notification rule, you can specify the email address for whomever you think is appropriate to receive an email notification. (Users do not receive notifications of their own actions. They receive notifications only for actions carried out by other users.) The determination of the time frame during which a notification should be generated is affected by three Notification system parameters—Exclude Building Closures on Notifications, Exclude Weekends on Notifications, and Ignore Building Closure/Weekend Notification Settings Beyond xx Days. (See Appendix A, “System Parameters,” on page 491.)

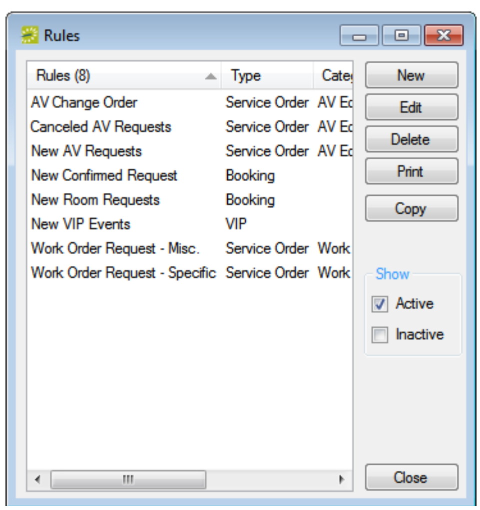
For email notifications to be sent, the EMS Email Notification Service must be installed and configured. Refer to the EMS Installation instructions for details.

To configure notification rules

1. On the EMS menu bar, click Configuration > Administration > Notification Rules.

   The Rules window opens. This window lists all the notification rules that are currently configured in your EMS database and that have a status of Active.

Figure 4-7: Rules window



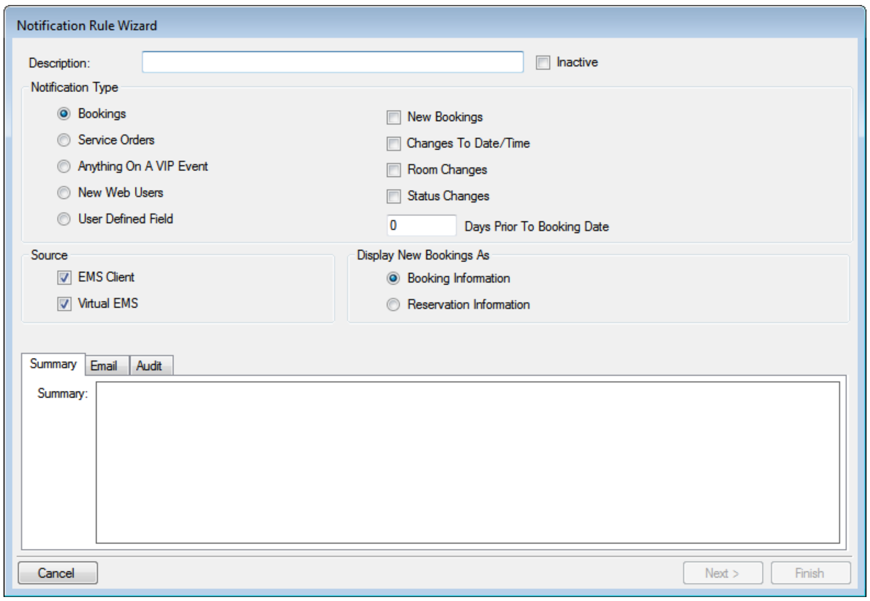
Optionally, to view all notification rules in your EMS database, regardless of status, under Show, click Inactive.

The remainder of this procedure describes how to configure an email notification rule "from scratch." You can also configure an email notification rule by copying an existing rule. Select the notification rule that you want to copy, click Copy, and then go to Step 3.

2. Click New.

   The Notification Rule Wizard opens.

Figure 4-8: Notification Rule Wizard



3. In the Description field, enter a name or description for the new notification.

The description can be a maximum of 50 characters, including spaces.

4. Leave Inactive blank to add the notification rule as an active rule. Optionally, select Inactive to inactivate the notification rule.

5. Select the notification type.

   The type that you select determines the options that are available. See the table on the next page.

<table>
<tr><th>Notification Type</th><th>Description</th></tr>
<tr><td>Bookings</td><td>
• Indicate if the notification must be generated for one or more or all the following—New Bookings, Changes to Date/Time (for an existing booking), Room Changes (for an existing booking), and/or Status Changes (for existing bookings).
• In the Days Prior to Booking Date field, enter a value for the timeframe during which a booking action (a new or modified booking) results in a notification being generated.
• For Display New Booking As, indicate whether the notification is to be displayed in the form of Booking Information or Reservation Information. For example, for new reservations that contain multiple bookings (recurring meetings), if Booking Information is selected, then a notification is displayed for every individual booking. If Reservation Information is selected, then a single notification is displayed for the entire reservation.
• For Source, indicate whether additions and/or modifications from the EMS Client, VEMS, or both are to trigger a notification.
</td></tr>
<tr><td>Service Orders</td><td>
• On the Category dropdown list, select the category for which the service order notification is to be generated.
Note: It the appropriate category is not available, you can configure it. See “Configuring Categories” on page 155.
• Indicate if the notification must be generated for one or more or all the following—New Service Orders, Changes to Service Orders, and/or Deletion/Cancellation of Service Orders.
• In the Days Prior to Booking Date field, enter a value for the timeframe during which a booking action (a new or modified service order for the booking) results in a notification being generated.
• For Source, indicate whether additions and/or modifications from the EMS Client, VEMS, or both are to trigger a notification.
</td></tr>
<tr><td colspan="2">Note: The Bookings options that are displayed in this table are applicable only for EMS Enterprise. In EMS Professional, only one global Booking notification can be configured at any time in your EMS database and the option is available only if a Booking notification is not currently configured in your EMS database. Also, the Service Order options that are displayed are applicable only for EMS Enterprise. In EMS Professional, only one service order notification per category can be configured at any time in your EMS database.</td></tr>
<tr><td>Anything on a VIP Event</td><td>No additional settings are required for this type of notification.</td></tr>
<tr><td>New Web Users</td><td>Select this option to trigger a notification from EMS and/or VEMS when a new web user account is created.</td></tr>
</table>

Notification Type	Description
User Defined Field	• On the Type dropdown list, select the UDF type for which the notification is to be generated—Booking, Group/Reservation, Reservation, or Service Order. **Note:** If the appropriate UDF is not available, you can configure it. See “Configuring User Defined Fields (UDFs)” on page 67. • Select the specific UDF for which the notification is to be generated. (The available UDFs have a field type of List. UDFs with other field types are not displayed on the User Defined Field dropdown list.) • Select the UDF value for which the notification is to be generated. • In the Days Prior to Booking Date field, enter a value for the timeframe during which a booking action (the indicated value is selected for the UDF that is associated with the booking) results in a notification being generated.

6. If you selected New Web Users, then go to Step 7; otherwise, optionally, open the Email tab at the bottom of the wizard, and do the following:

   - In the Email From field, enter the Email From address for the notification and/or a subject line for the notification.

If you leave the Email From field blank, then the Email From address that was defined during the installation and configuration of the EMS Email Notification Service is used. If you selected New Web User as the notification type, then the Email From Field is automatically populated with EMS Client, and/or Virtual EMS depending on the sources that you selected.

Variables pull in selected data from the event for which the notification is being emailed. You can include variables in the subject line as described in the Legend. For example,%2% is the code for the group name, so “Notification for %2%” would result in “Notification for Academic Affairs” being displayed in the subject line. By default, email notifications for booking-level notifications also display the actual booking date in the subject line of the email.

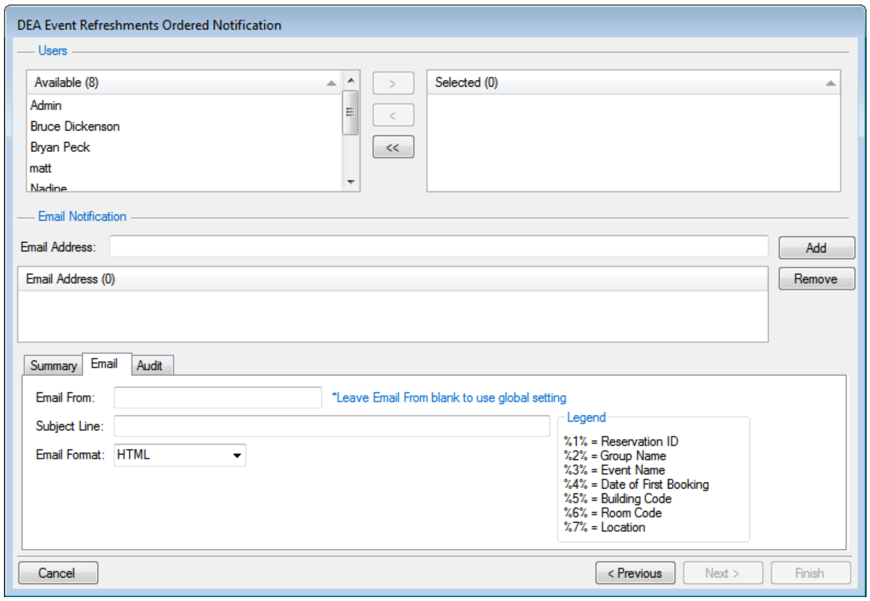
   - Select the format for the email—HTML (the default value), or Plain Text.

From this point forward, the Summary tab displays the notification rule as you continue to configure it. You can open the Summary tab at any time to view the notification rule as you are configuring it.

7. Click Next.

   The Users/Email Notifications window opens.

Figure 4-9: Notification Rule Wizard, Users/Email Notifications window



8. Do one or more of the following:

   - On the Available list, select the EMS user, or CTRL-click to select the multiple users who are to receive the email notification, and then click the Move button (>) to move the selected users to the Selected list.

If the appropriate user is not available, you can configure it. See "Configuring User Accounts" on page 329.

   - In the Email Address field, for each user and/or group that is to receive the email notification, enter the appropriate email address, and then click Add.
   - Leave the Email Address field blank, and then click Add to open the Select Names dialog box in which you can search for and add the necessary email addresses from your Groups/Contacts lists, your Global Address List, or your Outlook address book.

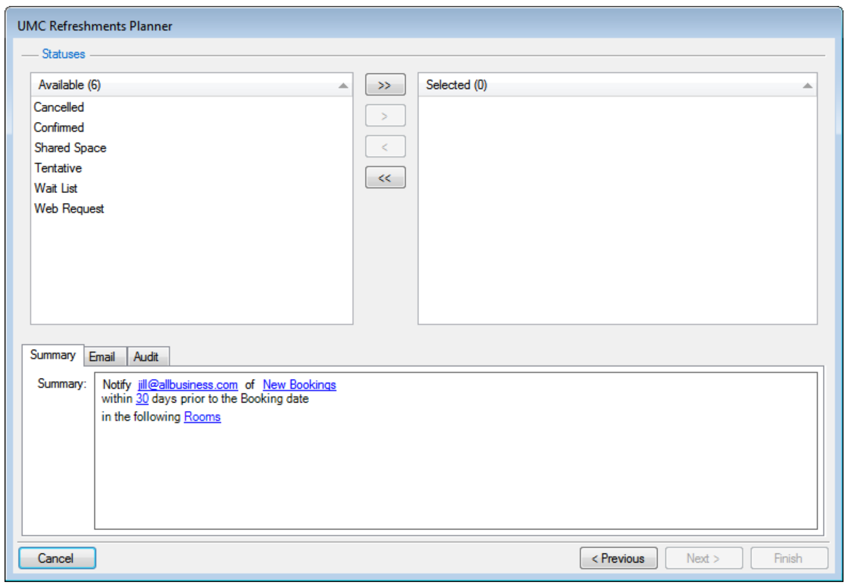
*To search for all addresses, leave the Search field blank, and then click Display. To search for a specific address, enter a search string. The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of **Campus** returns **Campus** Recreation, but not North Campus.*

If the correct group and/or contact is not available, you can configure it. See *"Configuring Groups" on page 277* and *"Configuring Contacts" on page 295.*

9. If you selected New Web Users, then go to Step 16; otherwise, click Next.

   The Rooms window opens.

Figure 4-10: Notification Rule Wizard, Rooms window



10. To search for the rooms for which the notification is to apply, do the following:

    - On the Building dropdown list, select one of the following—(all) buildings, a specific building, a specific area, or a specific view.

If the appropriate building, area, or view is not available, you can configure it. See *"Configuring Buildings" on page 91*, *"Configuring Areas" on page 99*, *and/or "Configuring Public Views" on page 144.*

    - On the Room Type dropdown list, leave the default value of (all), or select a specific room type.

If the appropriate room type is not available, you can configure it. See *"Configuring Room Types" on page 89.*

    - Optionally, to search for both active and inactive rooms, select Show Inactive.

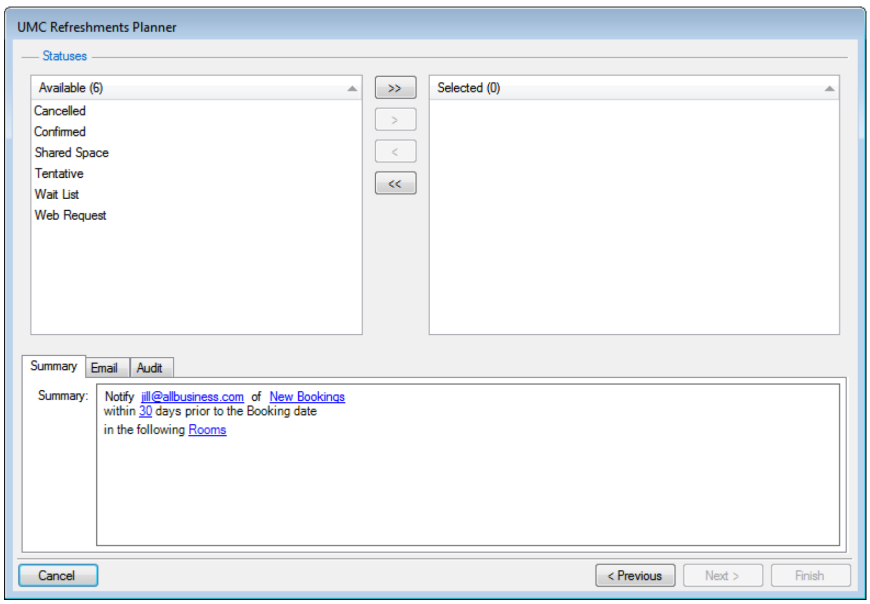
11. On the Available list, select the room, or CTRL-click to select the multiple rooms, and then click the Move button (>) to move the selected rooms to the Selected list.

If the appropriate room is not available, you can configure it. See *"Configuring Room Types" on page 89.*

12. Click Next.

    The Statuses window opens.

Figure 4-11: Notification Rule Wizard, Statuses window



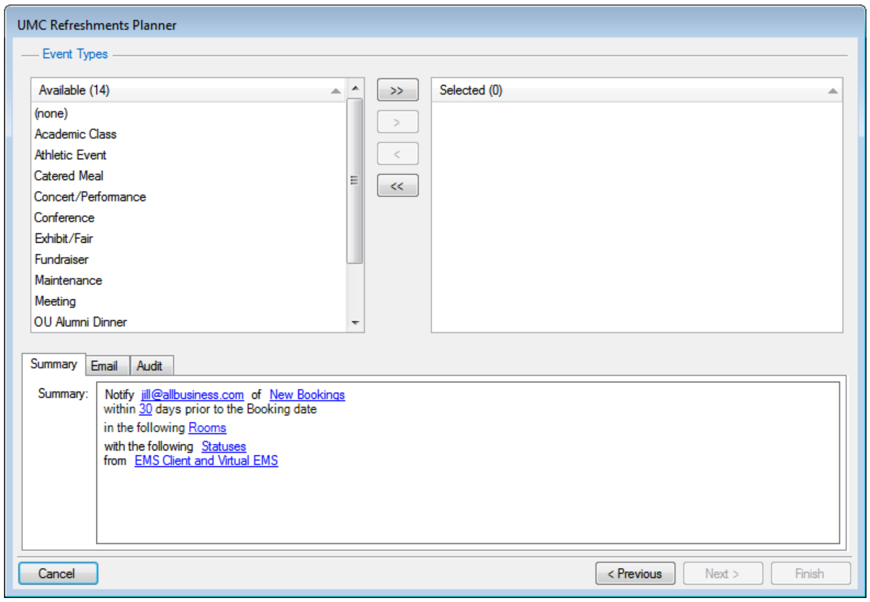
13. On the Available list, select the booking status, or CTRL-click to select the multiple statuses for which the notification is to apply, and then click the Move button (>) to move the selected statuses to the Selected list.

If the appropriate status is not available, you can configure it. See *"Configuring Statuses" on page 164.*

14. Click Next.

    The Event Types window opens.

Figure 4-12: Notification Rule Wizard, Event Types window



15. On the Available list, select the event type, or CTRL-click to select the multiple event types for which the notification is to apply, and then click the Move button (>) to move the selected event types to the Selected list.

If the appropriate event type is not available, you can configure it. See *"Configuring Event Types" on page 43.*

16. Click Finish.

    The Notification Rule Wizard closes. You return to the Rules window with the newly configured notification rule automatically selected.

Configuring Group Notification Rules

Group notification rules determine the conditions under which groups that are holding events at your facility are reminded through an email notification about their events. You configure group notifications based on rooms, statuses, event types, group types, and/or categories. A group notification is generated only if all the criteria that you specified is met. For example, if you specify Room 100, Confirmed status *with* catering, then a Confirmed meeting in Room 100 *without* a catering service order does *not* result in a notification being generated. Group notification emails contain a summary of the group's events. For example, if a group has a weekly Friday meeting (a booking) that continues for several months, and you define a group notification rule with a monthly frequency, then the group receives a notification email once a month that lists all the Friday meetings for the month.

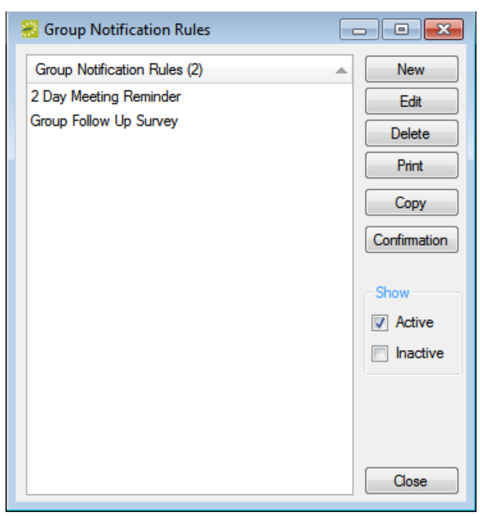
You can configure multiple group notifications in EMS Enterprise. You can configure only a single group notification in EMS Professional. For notification emails to be sent, the EMS Email Notification Service must be installed and configured. Refer to the EMS Installation instructions for details.

To configure a group notification

1. On the EMS menu bar, click Configuration > Administration > Group Notification Rules.

   The Group Notification Rules window opens. This window lists all the group notification rules that are currently configured in your EMS database and that have a status of Active.

Figure 4-13: Group Notification Rules window



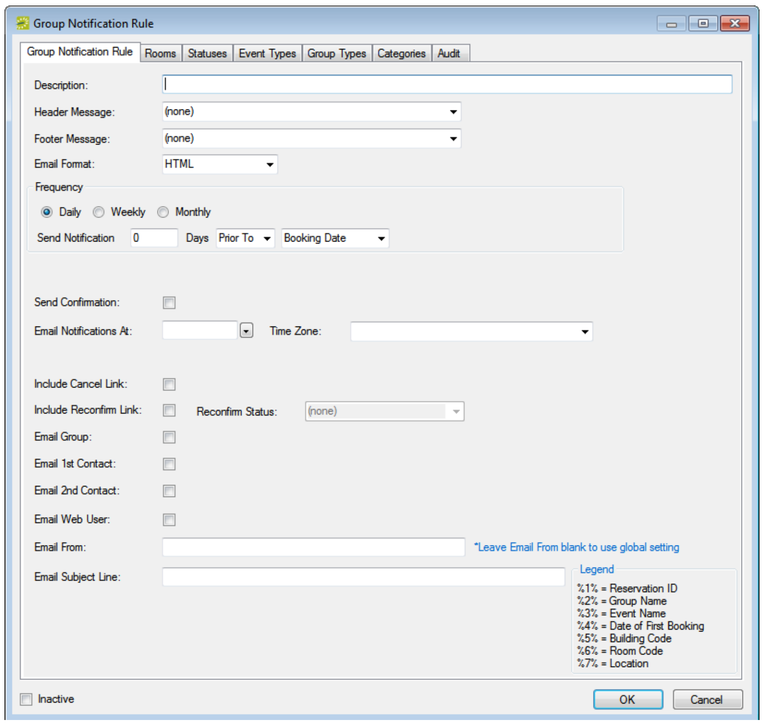
Optionally, to view all group email notification rules in your EMS database, regardless of status, under Show, click Inactive.

The remainder of this procedure describes how to configure a group email notification rule “from scratch.” You can also configure a group email notification rule by copying an existing rule. Select the notification rule that you want to copy, click Copy, and then go to Step 3.

2. Click New.

   The Group Notification Rule dialog box opens. The Group Notification Rule tab is the active tab.

Figure 4-14: Group Notification Rule dialog box, Group Notification Rule tab



3. Enter the information for the new group notification rule.

Option	Description
Description	The name or description for the group notification rule. **Note:** The description can be a maximum of 50 characters, including spaces.
Header Message Footer Message	Select a header and/or footer message that is to be displayed on every notification that is sent to the group. **Note:** If the appropriate message is not available, you can configure it. See “Configuring Messages” on page 55.
Email Format	Select the format (HTML or Plain Text) for the email.

Option	Description
Frequency	Select the frequency with which the notification is to be sent. • Daily—You must indicate how many days prior to/after the Booking Date/ Last Booking Date that the notification is to be sent. • Weekly—You must select the day on which the notification is to be sent and for which bookings. (For example, every Friday for bookings that start on the following Monday). • Monthly—You must indicate how many days prior to the end of the month that the notification is to be sent.
Multiple Bookings Only	Available only in EMS Workplace. Select this option to notify users if they have multiple bookings on a particular day.
Send Confirmation	Select this option to attach a full detailed confirmation to the group email; otherwise, leave this option blank to have the group email contain only a simple listing of bookings. **Note:** The contents of the full confirmation email are determined by the confirmation settings that you specify. See "To specify the confirmation settings for a group notification email" on page 180.
Email Notification At/ Time Zone	Select the time of day (based on the time zone) at which the email notification is to be sent.
Include Cancel Link	Available only if Send Confirmation is not selected. Provides a link in the notification email so that a user can cancel the booking directly from the notification email.
Include Reconfirm Link/Reconfirm Status	Available only if Send Confirmation is not selected. Provides a link in the notification email so that a user can reconfirm the booking directly from the notification email. If you select this option, then you must also select a Reconfirm Status that is to be applied to the booking. **Note:** If the appropriate status is not available, you can configure it. See "Configuring Statuses" on page 164.
Email Group Email 1st Contact Email 2nd Contact Email Web User	Select the appropriate options to indicate to whom the group notification is to be sent. **Note:** If the appropriate group, contact, and/or web user is not available, you can configure it. See "Configuring Groups" on page 277, "Configuring Contacts" on page 295, and/or "Configuring Web Users" on page 419.
Email From	Enter the email address that is to be displayed in the Email From field for the group notification. **Note:** If you leave the Email From field blank, then the Email From address that was defined during the installation and configuration of the EMS Email Notification Service is used.
Email Subject Line	Enter the text that is to be displayed in the email subject line. Variables pull in selected data from the event for which the notification is being emailed. You can include variables as described in the Legend. For example,%2% is the code for the group name, so "Notification for %2%" would result in "Notification for Consumer Electronics Association" being displayed in the subject line. By default, email notifications for booking-level notifications also display the actual booking date (and not just the first booking date of the reservation) in the subject line of the email.

Option	Description
Inactive	Leave this option blank to add a group email notification rule as an active rule. Select this option to Inactivate the group notification rule.

4. Do one or more or all the following to set the criteria that triggers the generation of the notification:

   - Open the Rooms tab and do the following to search for the rooms for which the notification is to apply:

     - On the Building dropdown list, select one of the following—(all) buildings, a specific building, a specific area, or a specific view.

If the appropriate building, area, or view is not available, you can configure it. See “Configuring Buildings” on page 91, “Configuring Areas” on page 99, or “Configuring Public Views” on page 144.

     - On the Room Type dropdown list, leave the default value of (all), or select a specific room type.

If the appropriate room type is not available, you can configure it. See “Configuring Room Types” on page 89.

     - On the Available list, select the room, or CTRL-click to select multiple rooms, and then click the Move button (>) to move the selected rooms to the Selected list.

If the appropriate room is not available, you can configure it. See “Configuring Rooms” on page 109.

   - Open the Statuses tab, and on the Available list, select the status, or CTRL-click to select the multiple statuses, and then click the Move button (>) to move the selected statuses to the Selected list.

If the appropriate status is not available, you can configure it. See “Configuring Statuses” on page 164.

   - Open the Event Types tab, and on the Available list, select the event type, or CTRL-click to select multiple event types, and then click the Move button (>) to move the selected event types to the Selected list.

If the appropriate event type is not available, you can configure it. See “Configuring Event Types” on page 43.

- Open the Group Types tab, and on the Available list, select the group type, or CTRL-click to select multiple group types, and then click the Move button (>) to move the selected group types to the Selected list.

If the appropriate group type is not available, you can configure it. See *"Configuring Group Types" on page 47.*

- Open the Categories tab, and on the Available list, select the category, or CTRL-click to select multiple categories, and then click the Move button (>) to move the selected categories to the Selected list.

If the appropriate category is not available, you can configure it. See *"Configuring Categories" on page 155.*

5. Click OK.

   The Group Notification Rule dialog box closes. You return to the Group Notification Rules window with the newly configured notification rule automatically selected.

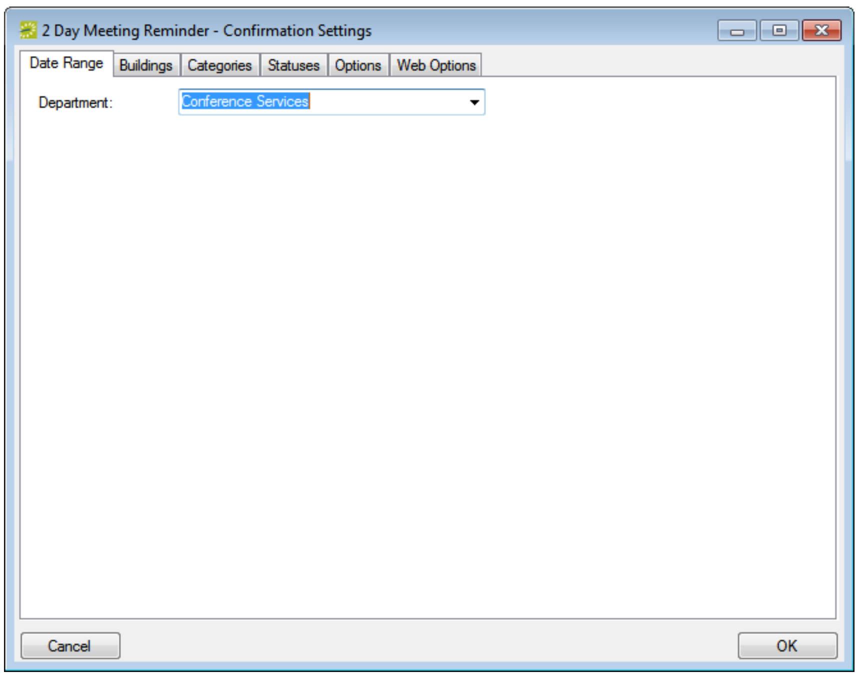
6. If you selected Send Confirmation for the notification rule, then continue to "To specify the confirmation settings for a group notification email" on page 180.

To specify the confirmation settings for a group notification email

1. If you have not already done so, on the EMS menu bar, click Configuration > Administration > Group Notification Rules to open the Group Notification Rules window.
2. Select the rule for which you are specifying the confirmation settings, and then click Confirmation.

   The Confirmation Settings dialog box opens. The Date Range tab is the active tab.

Figure 4-15: Confirmation Settings dialog box



3. Specify the settings for the confirmation.

At a minimum, you must specify buildings and statuses. All other information is optional.

Field	Description
Date Range tab—The department name that appears at the top of a printed confirmation.	
Buildings tab—Select the specific buildings, areas, and/or views that are to be included in the confirmation. **Note:** If the appropriate building, area, and/or views is not available, you can configure it. See “Configuring Buildings” on page 91, “Configuring Areas” on page 99, and/or “Configuring Public Views” on page 144.	

Field	Description
Categories tab—Select the specific booking details that are to be included in the confirmation. **Note:** If the appropriate category is not available, you can configure it. See “Configuring Categories” on page 155.	
Statuses tab—Select the specific statuses that are to be included in the confirmation. **Note:** If the appropriate status is not available, you can configure it. See “Configuring Statuses” on page 164.	
Options tab—Format settings for a printed confirmation.	
Confirmation Title	Appears bold and centered at the top of the confirmation.
Header Message Footer Message	Pre-configured blocks of text that appear in the header and footer of the confirmation. **Note:** If the appropriate message is not available, you can configure it. See “Configuring Messages” on page 55.
Paper Size	The size of the paper on which the confirmation is printed. Values are Letter, Legal, and A4.
Print Comments	Include the reservation’s comments in the printed confirmation.
Print Reminders	Include the reservation’s reminders in the printed confirmation.
Print Cancel Reasons	Include reasons for cancellation in the printed confirmation.
Print User Defined Fields	Include user defined fields and their values in the printed confirmation.
Suppress Reserved Time	Hide the reserved time for the booking and show only the event time.
Suppress Location	Hide the location for the reservation.
Suppress Pricing	Do not show the reservation’s room charges or resource charges in the printed confirmation.
Suppress Logo	Do not show your organization’s logo in the printed confirmation.
Suppress Item Notes	Do not show resource notes for any booking items in the printed confirmation.
Suppress Item Special Instructions	Do not show special instructions for any booking items in the printed confirmation.
Limit Bookings to Those With Details in Selected Categories	Show only those bookings in the printed confirmation that contain details for the categories that are selected on the Categories tab.
Web Options	
Display Web Link	Select this option to include a link (URL) to the reservation in VEMS.
Web Link Message	The message that is to be included with the link.

4. Click OK.

   The Confirmation Settings dialog box closes. You return to the Group Notification Rules window with the notification rule still selected.

Configuring No Show Notification Rules (EMS Workplace Only)

You can manually manage your No Show process using the Check-in Status tool, or you can automate the process by configuring No Show Notification Rules. You configure No Show Notification rules based on rooms, statuses, event types, and/or group types. When you configure a No Show Notification rule, you can configure it so that not only are the bookings for a group automatically canceled or “no-showed,” but also, so that an email is automatically generated and sent to the group indicating that their bookings have been “no-showed.” For group bookings to be no-showed and/or an email generated and sent to the group, all the criteria you specified must be met. For example, if you specify Room 100, Confirmed status, Analyst group type, then a Confirmed meeting for a Partner group type in Room 100 does not result in a notification being generated.

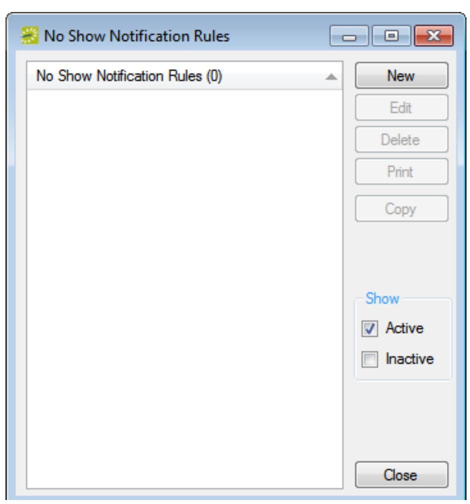
For notification emails to be sent, the EMS Email Notification Service must be installed and configured. Refer to the EMS Installation instructions for details.

To configure No Show notification rules

1. On the EMS menu bar, click Configuration > Administration > No Show Notification Rules.

   The No Show Notification Rules window opens. This window lists all the No Show notification rules that are currently configured in your EMS database and that have a status of Active.

Figure 4-16: No Show Notification Rules window



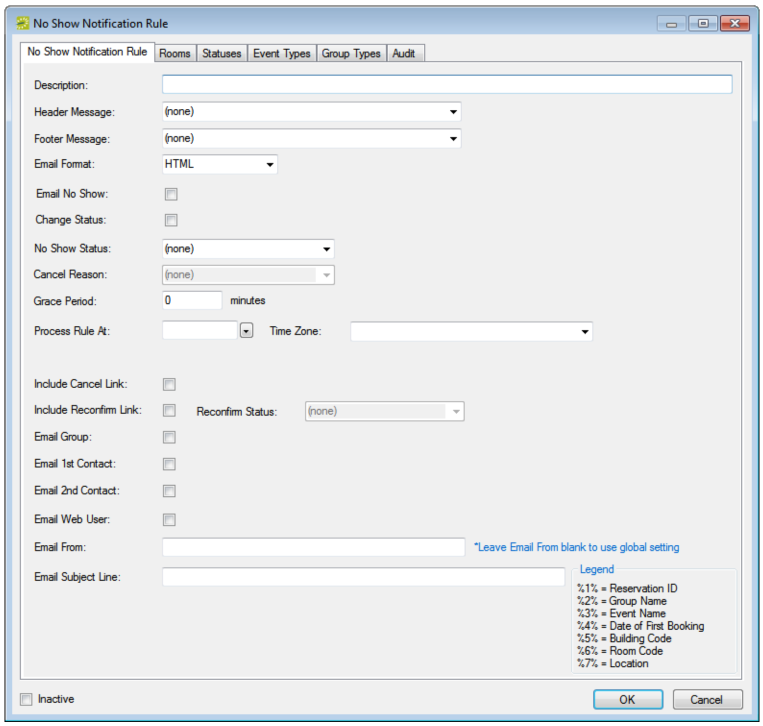
Optionally, to view all No Show notification rules in your EMS database, regardless of status, under Show, click Inactive.

The remainder of this procedure describes how to configure a No Show notification rule "from scratch." You can also configure a No Show notification rule by copying an existing rule. Select the notification rule that you want to copy, click Copy, and then go to Step 3.

2. Click New.

   The No Show Notification Rule dialog box opens. The No Show Notification Rule tab is the active tab.

Figure 4-17: No Show Notification Rule dialog box, No Show Notification Rule tab



3. Enter the information for the new No Show Notification rule.

Option	Description
Description	The name or the description for the notification rule. **Note:** The description can be a maximum of 50 characters, including spaces.
Header Message Footer Message	Select a header and/or footer message that is to be displayed on every No Show notification that is sent to the group. **Note:** If the appropriate message is not available, you can configure it. See "Configuring Messages" on page 55.
Email Format	Select the format (HTML or Plain Text) of the email notification that is to be sent to the group.
Email No Show	Select this option to email the group members who are to be "no-showed."

Option	Description
Change Status	Select this option if the group's bookings are to be changed to the status selected on the No Show Status dropdown list. **Note:** If the appropriate status is not available, you can configure it. See "Configuring Statuses" on page 164.
No Show Status	The status to which the group's bookings are changed if the group "no-shows."
Cancel Reason	Available only if the No Show Status is a Cancel Status type. Select a reason for cancelling the "no-show" group. **Note:** If the appropriate cancel reason is not available, you can configure it. See "Configuring Cancel Reasons" on page 72.
Grace Period	Specify the number of minutes that a group can be late for their booking before any action is taken. For instance, if the Grace Period is set to 30 minutes and the Process Rule At is set to 9:30 AM, only groups that have not checked into bookings with a reserved start time of 9:00 AM or earlier receive an email and/or are no-showed.
Process Rules At Time Zone	Indicate the time of day and the time zone which determine when the No Show rules are processed.
Include Cancel Link	Available only if Change Status is not selected. Provides a link in the notification email so that a user can cancel the booking directly from the notification email.
Include Reconfirm Link/ Reconfirm Status	Available only if Change Status is not selected. Provides a link in the notification email so that a user can reconfirm the booking directly from the notification email. Optionally, if you select this option, you can also select a Reconfirm Status that is to be applied to the booking. **Note:** If the appropriate status is not available, you can configure it. See "Configuring Statuses" on page 164.
Email Group Email 1st Contact Email 2nd Contact Email Web User	Select the appropriate options to indicate to whom the group notification is to be sent. **Note:** If the appropriate group, contact, and/or web user is not available, you can configure it. See "Configuring Groups" on page 277, "Configuring Contacts" on page 295, and/or "Configuring Web Users" on page 419.
Email From	Enter the email address that is to be displayed in the Email From field for the group notification. **Note:** If you leave the Email From field blank, then the Email From address that was defined during the installation and configuration of the EMS Email Notification Service is used.
Email Subject Line	Enter the text that is to be displayed in the email subject line. Variables pull in selected data from the event for which the notification is being emailed. You can include variables as described in the Legend. For example,%2% is the code for the group name, so "Notification for %2%" would result in "Notification for Consumer Electronics Association" being displayed in the subject line.

4. Do one or more or all the following to set the criteria that triggers the generation of the notification:

    - Open the Rooms tab and do the following to search for the rooms for which the notification is to apply:

        - On the Building dropdown list, select one of the following—(all) buildings, a specific building, a specific area, or a specific view.

If the appropriate building, area, or view is not available, you can configure it. *See “Configuring Buildings” on page 91, “Configuring Areas” on page 99, and/or “Configuring Public Views” on page 144.*

- On the Room Type dropdown list, leave the default value of (all), or select a specific room type.

If the appropriate room type is not available, you can configure it. *See “Configuring Room Types” on page 89.*

- On the Available list, select the room, or CTRL-click to select multiple rooms, and then click the Move button (>) to move the selected rooms to the Selected list.

If the appropriate room is not available, you can configure it. *See “Configuring Rooms” on page 109.*

- Open the Statuses tab, and on the Available list, select the status, or CTRL-click to select the multiple statuses, and then click the Move button (>) to move the selected statuses to the Selected list.

If the appropriate status is not available, you can configure it. *See “Configuring Statuses” on page 164.*

- Open the Event Types tab, and on the Available list, select the event type, or CTRL-click to select the multiple event types, and then click the Move button (>) to move the selected event types to the Selected list.

If the appropriate event type is not available, you can configure it. *See “Configuring Event Types” on page 43.*

- Open the Group Types tab, and on the Available list, select the group type, or CTRL-click to select multiple group types, and then click the Move button (>) to move the selected group types to the Selected list.

If the appropriate group type is not available, you can configure it. *See “Configuring Group Types” on page 47.*

5. Click OK.

   The No Show Notification Rule dialog box closes. You return to the No Show Notification Rules window with the newly configured notification rule automatically selected.

Configuring Room Card Formats

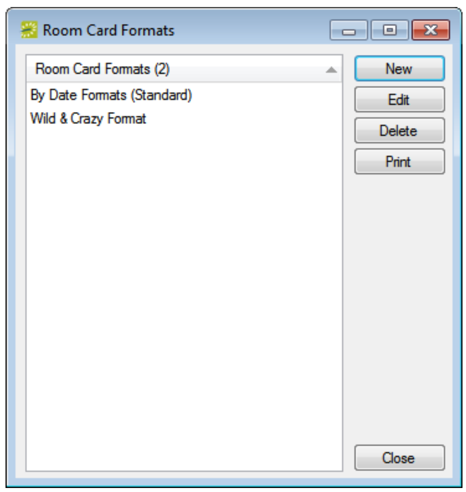
A *room card format* is a user-configured layout that can be selected in lieu of the default By Date formats (By Date or By Date (Landscape)) when printing the Room Cards report.

To configure room card formats

1. On the EMS menu bar, click Configuration > Administration > Room Card Formats.

   The Room Card Formats window opens. This window lists all the Room Card formats that are currently configured in your EMS database. The two default By Date formats are displayed as a single entry (By Date Formats (Standard)).

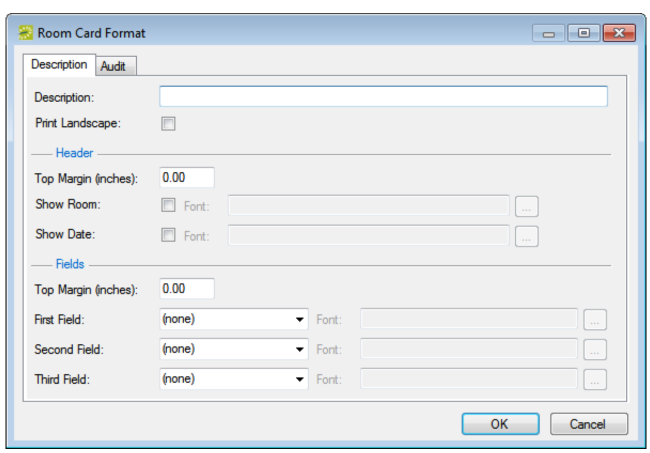
Figure 4-18: Room Card Formats window



2. Click New.

   The Room Card Format dialog box opens.

Figure 4-19: Room Card Format dialog box



3. Enter the information for the new room card format.

Field	Description
Description	The name or description for the room card format. **Note:** The description can be a maximum of 30 characters, including spaces.
Print Landscape	Select this option if the Room Card report is to be printed in a landscape orientation; otherwise, the report is printed in a portrait orientation.
Header	• Top Margin (inches)—Specify a top margin for the report in inches. • Show Room—If the name of the event room is to be printed on the report, select this option, and then on the Font dropdown list, select the font in which the name is to be printed. • Show Date—If the date of the event is to be printed on the report, select this option, and then on the Font dropdown list, select the font in which the date is to be printed.
Fields	• Top Margin (inches)—Specify the top margin in inches between the room and/or date field and the first field in the report. • First Field/Second Field/Third Field—Specify the fields that are to be displayed on the report as well as the font in which the fields are to be displayed.

4. Click OK.

   The Room Card Format dialog box closes. You return to the Room Card Formats window with the newly configured room card format automatically selected.

Configuring Calendar Formats

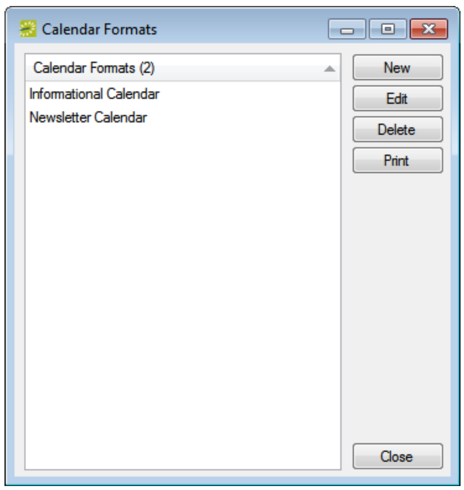
You can configure *calendar formats*, which determine the data items that are printed for an event on the Event Calendar report, for example, Group, Event Time, and Event Location.

To configure calendar formats

1. On the EMS menu bar, click Configuration > Administration > Calendar Formats.

   The Calendar Formats window opens. This window lists all the calendar formats that are currently configured in your EMS database.

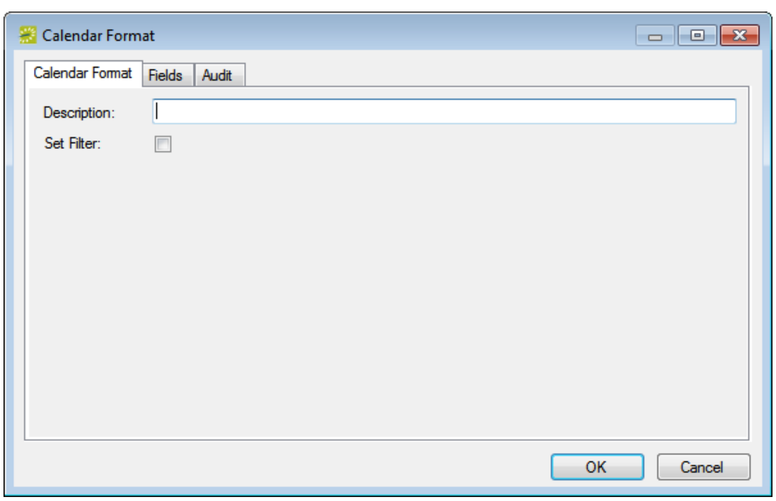
Figure 4-20: Calendar Formats window



2. Click New.

   The Calendar Format dialog box opens. The Calendar Format tab is the active tab.

Figure 4-21: Calendar Format dialog box, Calendar Format tab

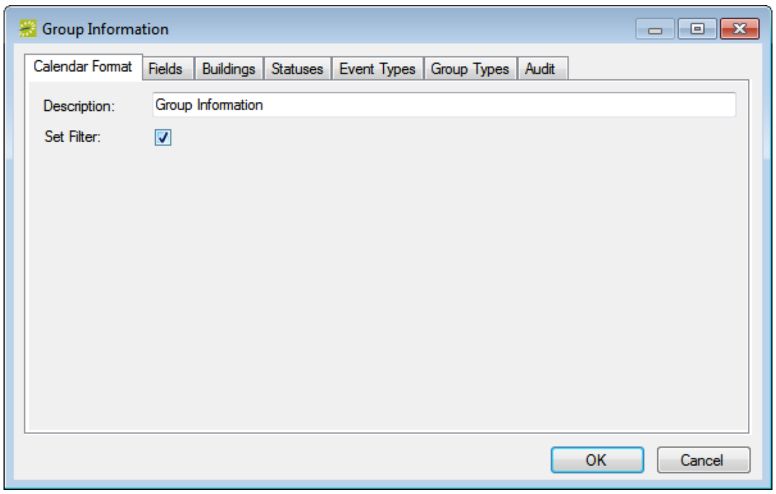


3. In the Description field, enter a name or description for the new calendar format.

The description can be a maximum of 30 characters, including spaces.

4. Optionally, to filter events so that the information for only those events that meet one or more filter criteria are printed on the Event Calendar report, select Set Filter to open four additional tabs—Building, Statuses, Event Types, and Group Types—and then do the following:

Figure 4-22: Calendar Format dialog box with Set Filter selected



- Open the Buildings tab, and on the Available list, select the building, area or view, or CTRL-click to select multiple buildings, areas, and/or views, and then click the Move button (>) to move the selected statuses to the Selected list.

If the appropriate building, area, and/or view is not available, you can configure it. See “Configuring Buildings” on page 91, “Configuring Areas” on page 99, and/or “Configuring Public Views” on page 144.

- Open the Statuses tab, and on the Available list, select the status, or CTRL-click to select multiple statuses, and then click the Move button (>) to move the selected statuses to the Selected list.

If the appropriate status is not available, you can configure it. See “Configuring Statuses” on page 164.

- Open the Event Types tab, and on the Available list, select the event type, or CTRL-click to select multiple event types, and then click the Move button (>) to move the selected event types to the Selected list.

If the appropriate event type is not available, you can configure it. See *"Configuring Event Types" on page 43.*

- Open the Group Types tab, and on the Available list, select the group type, or CTRL-click to select multiple group types, and then click the Move button (>) to move the selected group types to the Selected list.

If the appropriate group type is not available, you can configure it. See *"Configuring Group Types" on page 47.*

5. Open the Fields tab, and on the Available list, select the field, or CTRL-click to select the multiple fields that are to make up the calendar format, and then click the Move button (>) to move the selected fields to the Selected list.

The information is printed in the order in which the fields are listed from top to bottom in the Selected list. If needed, select a field and change its order by clicking Move Up or Move Down.

6. Click OK.

   The Calendar Format dialog box closes. You return to the Calendar Formats window, with the newly configured calendar format automatically selected.

Configuring Reservation Wizard Templates

You configure *reservation wizard templates* to simplify the reservation making process for your users. A reservation wizard template sets the default values for many of the fields in the Reservation Wizard. For example, you could configure a video conference reservation wizard template such that the default values for status, room type, event name, and event type are all set to “Video Conference.”

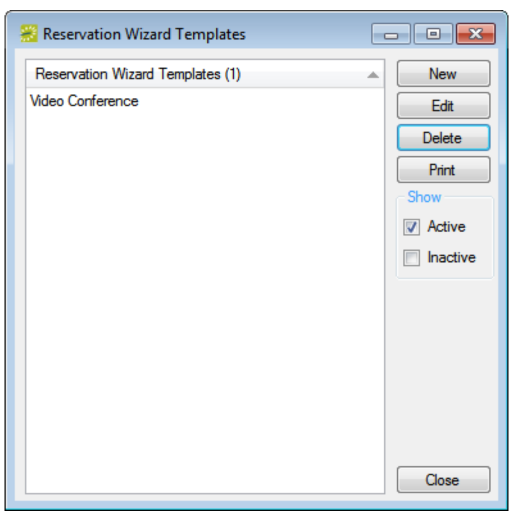
Your users can always override any default values that are set in the Reservation Wizard when they use a reservation wizard template.

To configure a reservation wizard template

1. On the EMS Workplace menu bar, click Configuration > Administration > Reservation Wizard Templates.

   The Reservation Wizard Templates window opens. This window lists all the reservation wizard templates that are currently configured in your EMS database and that have a status of Active.

Figure 4-23: Reservation Wizard Templates window

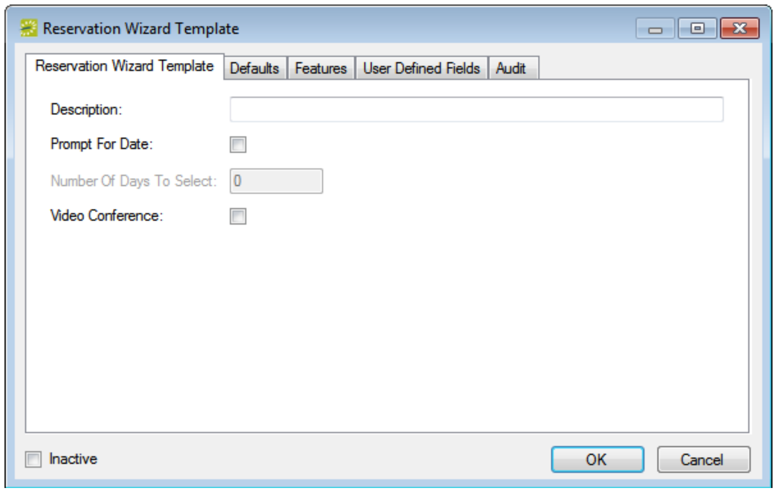


Optionally, to view all reservation wizard templates in your EMS database, regardless of status, under Show, click Inactive.

2. Click New.

   The Reservation Wizard Template dialog box opens. The Reservation Wizard Template tab is the active tab.

Figure 4-24: Reservation Wizard Template dialog box, Reservation Wizard tab



3. Enter the summary information for the new reservation wizard template.

The only required information is the template description. All other information on all tabs is optional and can be added at a later date when needed.

Field	Description
Description	Required field. The name or description of the reservation wizard template. **Note:** The description can be a maximum of 50 characters, including spaces.
Prompt for Date Number of Days to Select	Select this option if a reservationist/user is to be prompted with a start date for the reservation in the Reservation Wizard, and then in the Number of Days to Select field, enter the number of days that are to be automatically selected in the Reservation Wizard after the reservationist/user enters a start date for the event.
Video Conference	Select this option to apply the Video Conference option as a default field on the last page of the Reservation Wizard when this template is used. **Note:** This option is not available in EMS Professional.

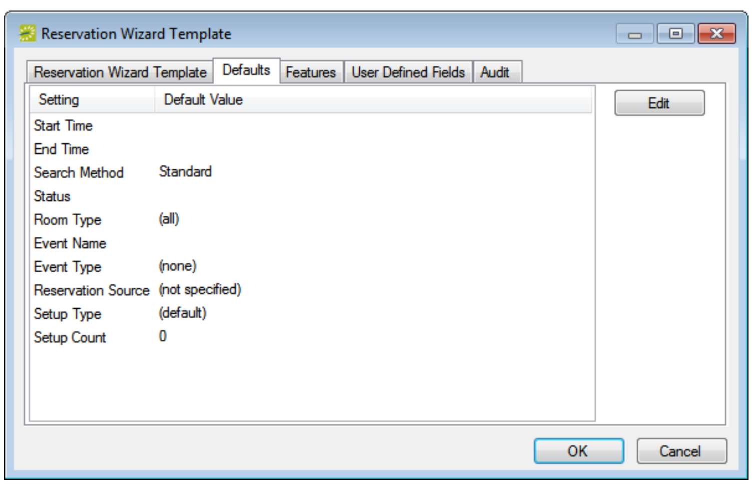
4. Optionally, continue to one or more or all of the following; otherwise, go to Step 5.
   - "To set the default event values for a reservation wizard template" below.
   - "To select the default room features for a reservation wizard template" on page 195.
   - "To select the default user defined fields for a reservation wizard template" on page 196.
5. Click OK to close the Reservation Wizard Template dialog box and return to the Reservation Wizard Templates window with the newly configured template automatically selected.

For information about creating a reservation using a reservation wizard template, see the EMS User's Manual.

To set the default event values for a reservation wizard template

1. If needed, open the Reservation Wizard Template dialog box for the reservation wizard template that you are configuring. (See "To configure a reservation wizard template" on page 192.)
2. Open the Defaults tab, and do the following for each reservation variable for which you want to specify a default value:
   - Select the variable, and then click edit to open a Set Default Value dialog box.
   - Enter the default value for the variable, and then click OK to close the Set Default Value dialog box and return to the Defaults tab.

Figure 4-25: Reservation Wizard Template dialog box, Defaults tab



3. Continue with any other optional configuration for the template as needed; otherwise, click OK to close the Reservation Wizard Template dialog box and return to the Reservation Wizard Templates window with the newly configured template automatically selected.

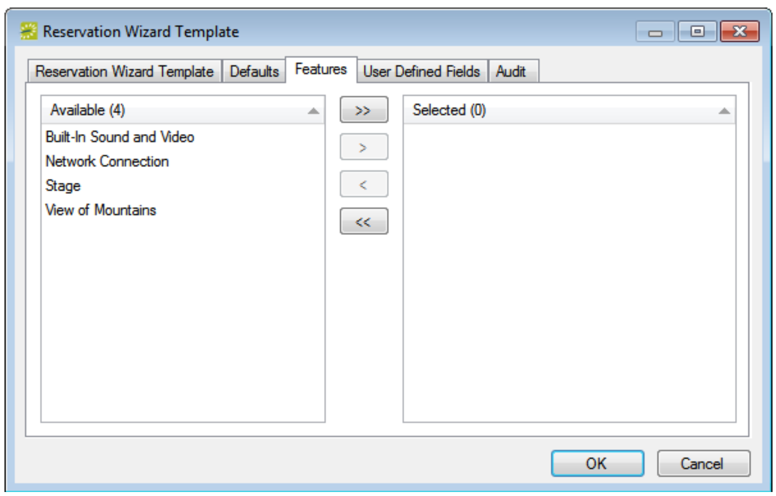
To select the default room features for a reservation wizard template

A *feature* is built-in or permanent attribute of a room, such as a network connection, a built-in plasma TV, window, and so on. You can configure a reservation wizard template so that the initial list of rooms that are available to a user who is making a reservation using the template is limited to only those rooms with these default features.

1. If needed, open the Reservation Wizard Template dialog box for the reservation wizard template that you are configuring. (See “To configure a reservation wizard template” on page 192.)

2. Open the Features tab, and on the Available list, select the feature, or CTRL-click to select the multiple features that the rooms are to have, and then click the Move button (>) to move the selected features to the Selected list.

Figure 4-26: Reservation Wizard Template dialog box, Features tab



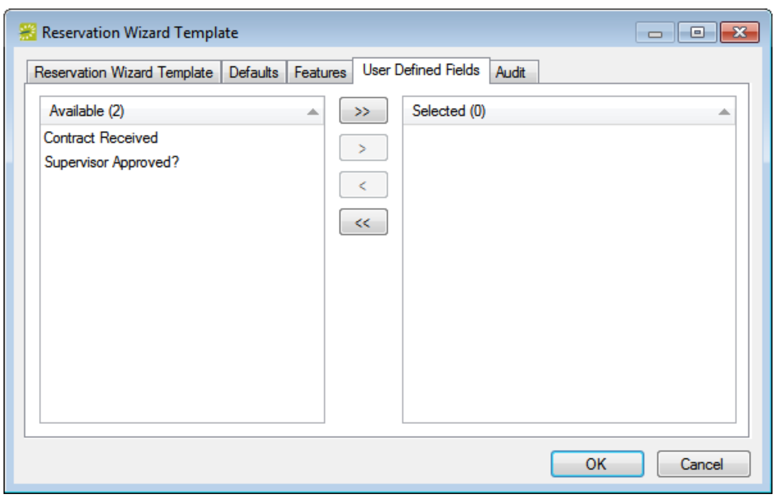
3. Continue with any other optional configuration for the template as needed; otherwise, click OK to close the Reservation Wizard Template dialog box and return to the Reservation Wizard Templates window with the newly configured template automatically selected.

To select the default user defined fields for a reservation wizard template

User defined fields, or *UDFs*, are custom fields that store additional information or data for a a reservation. For example, for a reservation, you might want to note the date that the contract for the event was received and if the event was approved by a supervisor. You can select the default user defined fields that are to always apply to a reservation wizard template. These fields are displayed on the User Defined Fields tab in the Reservation Wizard.

1. If needed, open the Reservation Wizard Template dialog box for the reservation wizard template that you are configuring. (See "To configure a reservation wizard template" on page 192.)
2. Open the User Defined Fields tab, and on the Available list, select the UDF, or CTRL-click to select the multiple UDFs that are to always apply to the template, and then click the Move button (>) to move the selected fields to the Selected list.

Figure 4-27: Reservation Wizard Template dialog box, Features tab



3. Continue with any other optional configuration for the template as needed; otherwise, click OK to close the Reservation Wizard Template dialog box and return to the Reservation Wizard Templates window with the newly configured template automatically selected.

Core Configuration - Resources

Before you can use EMS to manage your organization’s events, you must configure core data items that are specific to your organization. For example, before you can configure production items for a resource, you must first configure the resource.

This chapter covers the following topics:

Overview of Configuring Resources

Resources (also called *booking detail items*) are the individual items or services that your users can reserve for an event. Resources are grouped by category. For example, a furniture category might contain tables and chairs as the resources. Within a category, you can organize resources by *groupings*. For example, you might configure Beverages, Entrees, and Desserts groupings for a Food Service category. The Beverage grouping might contain resources such as soda and coffee, the Entrees grouping might contain resources such as fish and beef, and so on. You can configure a resource “from scratch,” or you can copy an existing resource, and then edit the configuration as needed. You can also import resources for a category from a tab-delimited file. If you are configuring resources for either a Catering category or Resources, w Service Order category, the *first* time that you configure resources for the category, you must configure at least one default *service*. A service indicates how the resource is to be used or offered. For example, Delivery and Setup, Cleanup, Plated, Buffet, and so on are possible services for a resource in a Catering category.

You can combine a list of related resources into a *package* to facilitate the process of adding multiple resources to a booking. Instead of making multiple repeated selections, a user can simply select a single resource package. For example, an Instructor A/V package might include a laser pointer, a mobile microphone, and a flip chart. You can set the price for a package to be the sum total of the prices of the individual resources that make up the package, or you can set a completely different price for the package, for example, if you want to discount the package.

You use *production items* to define the quantity of components that make up a single resource. For example, a resource called Box Lunch has the following description—a box lunch contains a sandwich, a bag of chips, two cookies, and bottled water. The productions items for the Box Lunch resource therefore are the sandwich (quantity =1), chips (quantity =1), cookie (quantity = 2), and bottled water (quantity =1). This means that if an order for 20 boxed lunches is placed, then the kitchen would need to produce 20 sandwiches, 20 bags of chips, 40 cookies, and 20 bottled waters. To further define the areas of the kitchen that produce each item, you can define *production areas*. For example, the Delicatessen area might produce the sandwich, chips, and bottled water, and the Bakery area might produce the cookies.

After you configure a resource for a category, you can also define *selections* and *selection items* for the resource. A *selection* is used when you offer choices with a resource. For example, a resource named Catered Breakfast might have the following description—Catered breakfast includes the choice of one standard entree, two sides, and assorted mini-muffins, juice, and coffee. The standard entree selection might include the selection items of french toast, pancakes, or scrambled eggs. The side selection might include the selection items of bacon, sausage, and sliced fruit. If selection items have been defined for a resource, then an EMS user or a VEMS user *must* make a selection for the resource.

Configuring Services for a Category

When your users are adding details to a booking, if they select a Catering or Resource, w/ Service Order category, they must specify a *service*. A service indicates how the resource is to be used or offered. For example, Delivery and Setup, Cleanup, Plated, Buffet, and so on are possible services for a resource in a Catering category. If you are configuring resources for either Catering category or Resources, w/ Service Order category, the first time that you configure resources for the category, you must configure at least one default service. You can also configure additional services for a category.

To configure a service for a category

1. On the EMS menu bar, click Configuration > Resources.

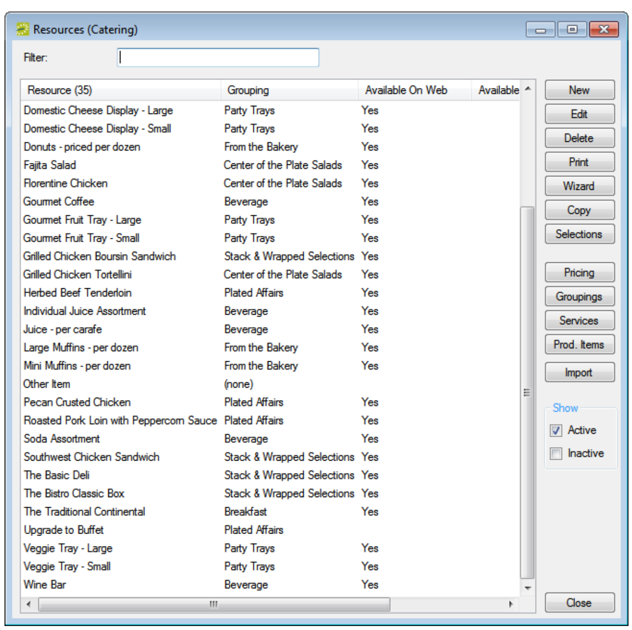
   A list of all the categories that are currently configured in your EMS database *and* for which you can configure resources opens.

If the appropriate category is not available, you can configure it. See *"Overview of Configuring Resources" on page 199.*

2. Select the category for which you are configuring the service type.

   The Resources window opens. This window lists all the resources that are currently configured in your EMS database for the selected category and that have a status of Active.

Figure 5-1: Example of a Resources window



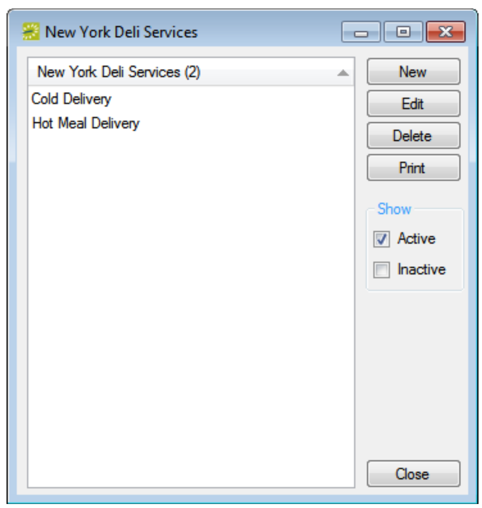
3. Optionally, do one or both of the following:
   - To view all resources for the category in your EMS database, regardless of status, under Show, click Inactive.
   - To filter the displayed resources based on the Resource name, in the Filter field, enter a search string.

The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of ***Cold*** *returns* ***Cold*** *Boxed Lunches, but not Sandwiches (Cold).*

4. Click Services.

   The Services window opens. This window lists all the services that are currently configured for the resource in your EMS database and that have a status of Active.

Figure 5-2: Services window

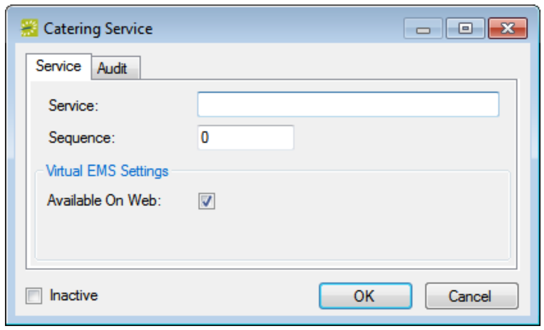


Optionally, to view all services in your EMS database, regardless of status, under Show, click Inactive.

5. Click New.

   The Service dialog box opens.

Figure 5-3: Service dialog box



6. Enter the information for the new service type.

Field	Description
Service	The description or name for the service. **Note:** The service can be a maximum of 30 characters, including spaces.
Sequence	Enter a number that determines the order in which the service is displayed in a list with other services. Services are ordered from lowest to highest sequence number, with the service with the lowest sequence number being displayed first. **Note:** If you leave the sequence set to the default value of zero for all services, then by default, the services are displayed alphabetically.
Available On Web	If this service is to be an available option for VEMS users who select this category, leave Available on Web selected.
Inactive	Leave this option blank to add the service as an active service. Select this option to inactivate the service.

7. Click OK.

   The Services dialog box closes. You return to the Services window with the newly configured service automatically selected.

8. Click OK.

   The Services window closes. The Resources window remains opens.

9. Optionally, continue to one or both of the following:

   - “Configuring Groupings for a Resource” on page 203.
   - “Configuring Resources for a Category” on page 206.

Configuring Groupings for a Resource

Within a category, you can organize resources by *groupings*. For example, you might configure Beverages, Entrees, and Desserts groupings for a Food Service category. The Beverage grouping might contain resources such as soda and coffee, the Entrees grouping might contain resources such as fish and beef, and so on. You can configure groupings for a category at the time that you are configuring resources for the category, or you can carry out the configuration as a separate activity.

To configure groupings for a category

1. On the EMS menu bar, click Configuration > Resources.

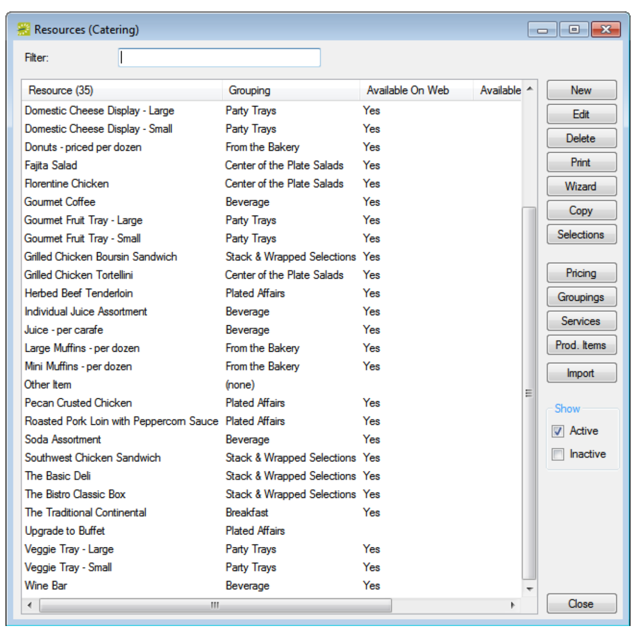
   A list of all the categories that are currently configured in your EMS database *and* for which you can configure resources opens.

If the appropriate category is not available, you can configure it. See *"Overview of Configuring Resources" on page 199.*

2. Select the category for which you are configuring the grouping.

   The Resources window opens. This window lists all the resources that are currently configured in your EMS database for the selected category and that have a status of Active.

Figure 5-4: Example of a Resources window



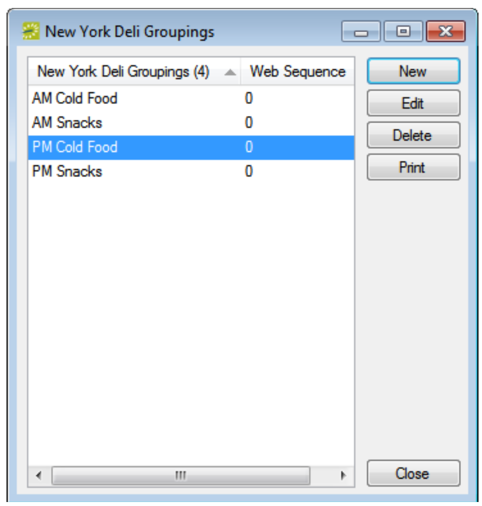
3. Optionally, do one or both of the following:
   - To view all resources for the category in your EMS database, regardless of status, under Show, click Inactive.
   - To filter the displayed resources based on the Resource name, in the Filter field, enter a search string.
4. Click Groupings.

---

*The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of **Cold** returns **Cold** Boxed Lunches, but not Sandwiches (Cold).*

The Groupings window opens. This window lists all the groupings that are currently configured in your EMS database for the selected category.

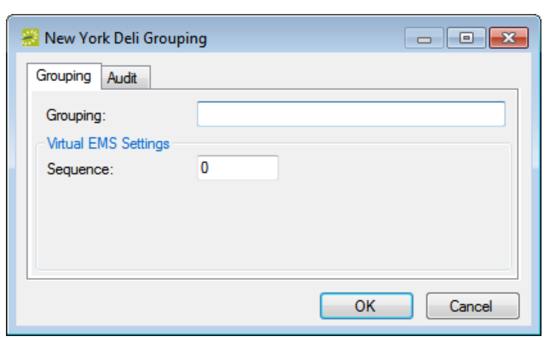
Figure 5-5: Groupings window



5. Click New.

   The Grouping dialog box opens.

Figure 5-6: Grouping dialog box



6. In the Grouping field, enter a name or description for the new grouping.

The grouping can be a maximum of 50 characters, including spaces.

7. In the Sequence field, enter a number that determines the order in which the groupings are displayed in VEMS.

Groupings are ordered from lowest to highest sequence number, with the grouping with the lowest sequence number being displayed first. If you leave the sequence set to the default value of zero for all groupings, then by default, the groupings are displayed alphabetically.

8. Click OK.

   The Grouping dialog box closes. You return to the Grouping window with the newly configured grouping automatically selected.

9. Click Close.

   The Grouping dialog box closes. The Resources dialog box remains open.

10. Optionally, continue to "Configuring Resources for a Category" on page 206.

Configuring Resources for a Category

Resources (also called *booking detail items*) are the individual items or services that your users can reserve for an event. Resources are grouped by category. For example, a furniture category might contain tables and chairs as the resources. Although you can use categories to track setup notes, meeting attendees, and activities for a booking, you do not configure resources for these categories. You must configure resources only for service categories.

To configure resources for a category

1. On the EMS menu bar, click Configuration > Resources.

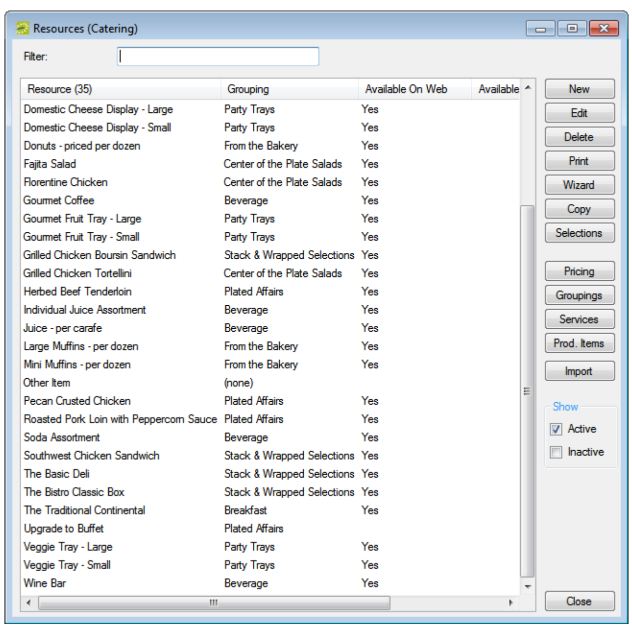
   A list of all the categories that are currently configured in your EMS database *and* for which you can configure resources opens.

If the appropriate category is not available, you can configure it. See *"Overview of Configuring Resources" on page 199.*

2. Select the category for which you are configuring the resources.

   The Resources window opens. This window lists all the resources that are currently configured in your EMS database for the selected category and that have a status of Active.

Figure 5-7: Example of a Resources window



3. Optionally, do one or both of the following:
    - To view all resources for the category in your EMS database, regardless of status, under Show, click Inactive.
    - To filter the displayed resources based on the Resource name, in the Filter field, enter a search string.

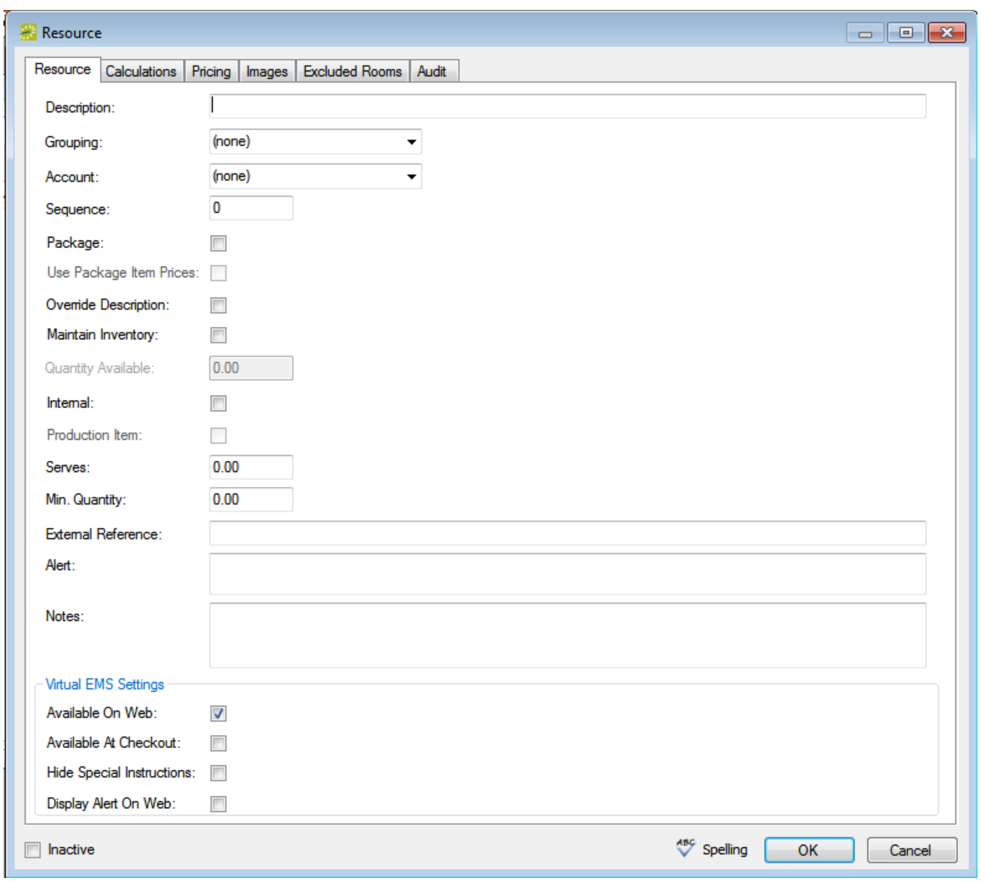
The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of ***Cold*** *returns* ***Cold*** *Boxed Lunches, but not Sandwiches (Cold).*

The remainder of this procedure describes how to configure a resource "from scratch." You can also configure a resource by copying an existing resource. Select the resource that you want to copy, click Copy, and then continue to *Step 5* *of this procedure.*

4. On the Resources dialog box, click New.

    The Resource dialog box opens. The Resource tab is the active tab.

Figure 5-8: Resource dialog box, Resource tab



5. Enter the information for the new resource.

Field	Description
Description	The name or description of the resource. **Note:** The description can be a maximum of 50 characters, including spaces. Resource items are displayed alphabetically in EMS. As a result, when you are configuring a group of similar items, you might want to start the name of each with a common feature. For example, if you have black, white, and blue linens, a good way to name them would be “Linens, black,” “Linens, white,” and so on.
Grouping	If needed, select a grouping. **Note:** If no groupings are available, or if the appropriate grouping is not available, you can always configure a grouping, and then edit the resource at a later date to place it in a grouping. See “Configuring Groupings for a Resource” on page 203.
Account	Select the internal account which is to receive the revenue from the use of the resource. **Note:** If the appropriate account is not available, you can configure it. See “Configuring Accounts” on page 263.
Sequence	Enter a number that determines the order in which the resource is displayed in a list with other resources in either EMS or VEMS. Resources are ordered from lowest to highest sequence number, with the resource with the lowest sequence number being displayed first. **Note:** If you leave the sequence set to the default value of zero for all resources, then by default, the resources are displayed alphabetically.
Package	Select this option if the resource is to be a package. **Note:** A package is a collection of related resources. See “To create a package for a resource” on page 217.
Use Package Item Prices	Available only if Package is selected. Select this option if the package price is to be the sum total of the prices for the individual resources that make up the package; otherwise, you can define a different price for the package on the Pricing tab.
Override Description	Select this option to allow your EMS users to edit the resource description when they are adding the resource to a booking. **Note:** A common use for this feature is to configure a resource called “Other” for each of your resource categories which users can rename to whatever non-inventory item is needed when they select it.
Maintain Inventory	Select this option if you have a limited number of this item and you want EMS to notify your users if they attempt to overbook it.
Quantity Available	Available only if you select Maintain Inventory. Enter the number of resource items of this type that your organization has in its inventory.
External Reference	Links the resource to an outside program if needed.
Internal	Indicates that the resource is internal to your organization. **Note:** Used for internal reporting purposes only. The resource is not printed on external documents such as confirmations and invoices, and it is not hidden in any area of your EMS application.

Field	Description
Production Item	Available only if the category to which you are adding the resource has been designated as using production items. (See "Overview of Configuring Resources" on page 199.) Select this option if this resource item is to be a production item.
Serves	The number of users that can be served by the resource. For example, one lunch buffet might serve ten people.
Min. Quantity	The minimum quantity required when selecting the resource.
Alert	Enter a message that is to be displayed when a user adds the resource to a booking in the EMS client.
Notes	Any other additional information that is pertinent to the item itself, the use of the item, and so on. Notes displayed in EMS and VEMS are printed on confirmations and the Setup Worksheet report.
Virtual EMS Settings	
Available on the Web	To have this resource be an available option for VEMS users who select this category, leave Available on Web selected. **Note:** Not available if Override Description is selected.
Available at Checkout	Select this option if you want this resource to be displayed on the "checkout" page (the last page in the Room Request process) in VEMS. **Note:** Not available if Available on the Web is *not* selected.
Hide Special Instructions	Do not show any special instructions for the resource in VEMS.
Display Alert on Web	If an alert has been configured for the resource, then display this alert when a user adds this resource to a booking in VEMS.

6. Optionally, click Spelling to spell check the information that you entered for the resource before you save it.
7. Optionally, continue to one or more of the following for the resource; otherwise, click OK to close the Resource dialog box and return to the Resources window. The newly configured resource is automatically selected in the window.
    - "To assign the calculations to a resource at the resource level" on page 210.
    - "To configure the pricing for a resource" on page 211.
    - "To associate an image with a resource" on page 213.
    - "To view and edit the production items for a resource" on page 214.
    - "To specify the excluded rooms for a resource" on page 216.
    - "To create a package for a resource" on page 217.

8. After you have configured the resource:

   - If this is the first time that you have configured resources for the category, and the category is Catering or Resources, w Service Orders, you must also configure at least one default service type. See "Configuring Services for a Category" on page 200.

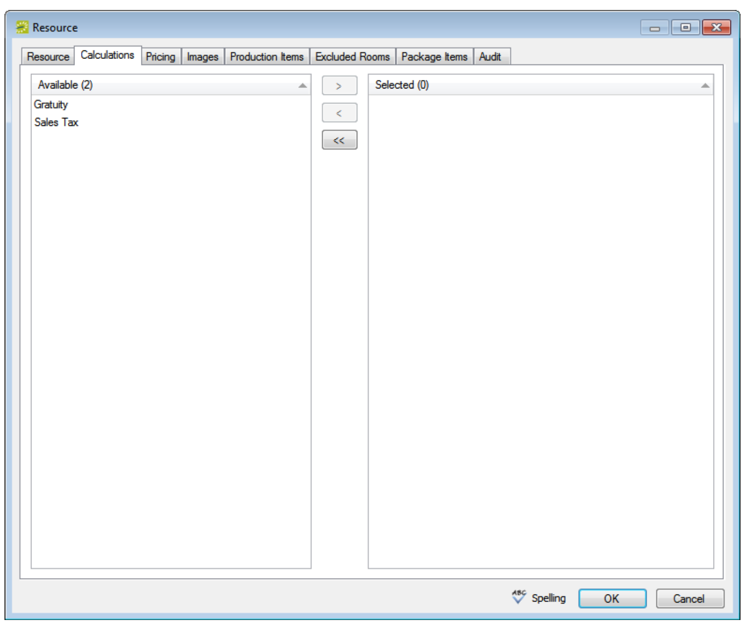
   - You can define production items for the resource and/or define selections for the resource. See "Defining Production Areas and Production Items for a Resource" on page 225 and "Defining Resource Selections and Selection Items" on page 230.

To assign the calculations to a resource at the resource level

1. If needed, open the Resource dialog box (see "To configure resources for a category" on page 206), and then open the Calculations tab.

Remember, you can also assign calculations at the category level as well. (See "Overview of Configuring Resources" on page 199.) If you have already assigned calculations to a resource's category, then these calculations are automatically applied to new resources for the category. These calculations are displayed in the Selected list after you click OK and save the resource.

Figure 5-9: Resource dialog box, Calculations tab



2. On the Available list, select the calculation, or CTRL-click to select the multiple calculations that are to apply to this resource, and then click the Move button (>) to move the selected calculations to the Selected list.

If the appropriate calculation is not available, you can configure it. See "Configuring Calculations" on page 258.

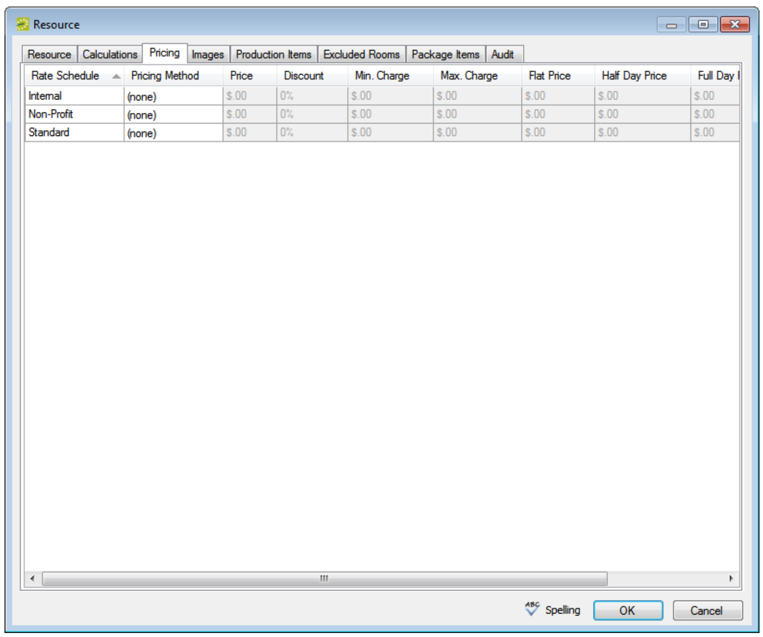
3. Continue with any other optional configuration for the resource as needed; otherwise, click OK to close the Resource dialog box and return to the Resources window. The newly configured resource is automatically selected in the window.

To configure the pricing for a resource

You can also configure the resource price on the Edit Pricing window (see “Configuring the Pricing for a Resource on the Edit Pricing window” on page 234) or when you are configuring rate schedules (see “Configuring Rate Schedules” on page 247).

1. If needed, open the Resource dialog box (see “To configure resources for a category” on page 206), and then open the Pricing tab.

Figure 5-10: Resource dialog box, Pricing tab



2. For each rate schedule, select the pricing method, which determines the cost for reserving the resource. (See the table on the next page.)

If the appropriate rate schedule is not available, you can configure it. See “Configuring Rate Schedules” on page 247.

Pricing Method	Description
Half Day/Full Day (Event Time)	The total number of hours for the event is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the event is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the resource. If the total number of hours for the event is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the resource.
Half Day/Full Day (Reserved Time)	The total number of hours for the reservation (event time and reserved time) is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the reservation is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the resource. If the total number of hours for the reservation is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the resource.
Hourly (Event Time)	The price that is indicated in the Price column is multiplied by the event time (in hours) for the booking. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Reserved Time)	The price that is indicated in the Price column is multiplied by the reserved time (in hours) for the booking. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Service Time)	The price that is indicated in the Price column is multiplied by the reserved time (in hours) for the service (resource). This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Specific)	The price that is indicated in the Price column is multiplied by the number of hours indicated when adding the resource to a booking.
Unit	The price that is indicated in the Price column is applied to the resource, regardless of the event time or reserved time for the booking.

3. After you select a pricing method, click in the appropriate fields to select the currently displayed amount, and edit the amount as needed.

Field	Description
Price	The dollar amount that is used in calculating the resource price for a booking. If the pricing method is Unit, then this value is applied in total to a resource, regardless of the event time or reserved time for the booking.
Discount	You can use a discount with any pricing method. If you specify a discount for a resource, then the actual price, the discount percentage, and the discounted amount are displayed on confirmations and invoices.
Min. Charge Max. Charge	The values that are indicated in these columns are used in conjunction with the Hourly pricing methods. If you specify a minimum charge for a resource, then the system compares this value to the calculated hourly rate and applies the greater of the two charges. Likewise, if you specify a maximum charge for a resource, then the system compares this value to the calculated hourly rate and applies the lesser of the two charges.

Field	Description
Flat Price	A resource price that remains constant regardless of the total number of hours booked for the resource. Used in conjunction with Hourly (Event Time) and Hourly (Reserved Time).
Half Day Price	The dollar amount that is used in calculating the resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).
Full Day Price	The dollar amount that is used in calculating the resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).
Hours	Multiplier used in calculating the resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).

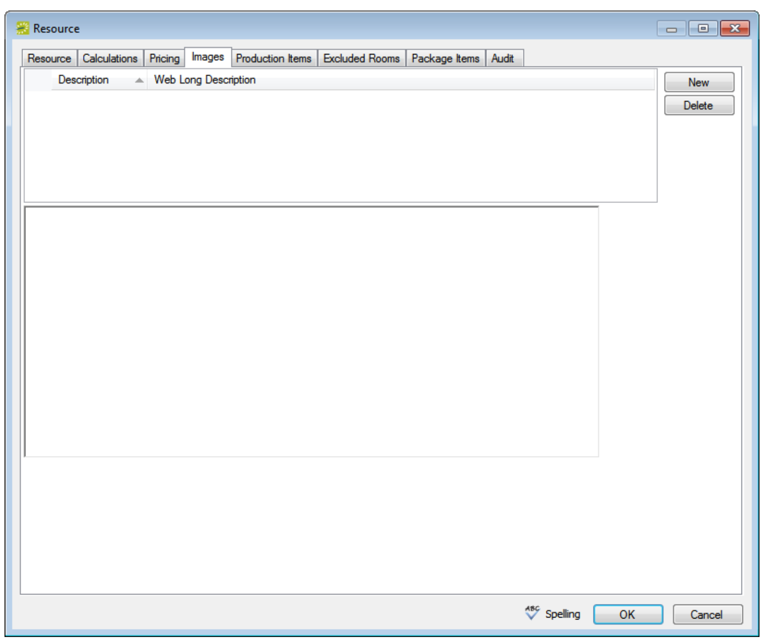
4. Continue with any other optional configuration for the resource as needed; otherwise, click OK to close the Resource dialog box and return to the Resources window. The newly configured resource is automatically selected in the window.

To associate an image with a resource

You can associate an image with a resource if the image is in one of the following formats—.gif, .jpeg, .jpg, .bmp, .wmf, or .png and ideally, it should not be larger than 615 x 350 pixels. If you attach an image larger than this, you might not be able to view the image without scrolling. Any images that you associate with the resource are displayed only in VEMS. They are not displayed in the EMS client.

1. If needed, open the Resource dialog box (see “To configure resources for a category” on page 206), and then open the Images tab.

Figure 5-11: Resource dialog box, Images tab



2. To have an image of the resource displayed in the VEMS interface, click New to open the Find Image dialog box, and then browse to and select the image.

   The Find Image dialog box closes. You remain on the Images tab with an entry for the image displayed on the tab.

3. Optionally, after selecting the image, click in the Web Long Description field and enter a description of the resource.

The value that you enter here defines the "long desc" attribute for web content accessibility.

4. Continue with any other optional configuration for the resource as needed; otherwise, click OK to close the Resource dialog box and return to the Resources window. The newly configured resource is automatically selected in the window.

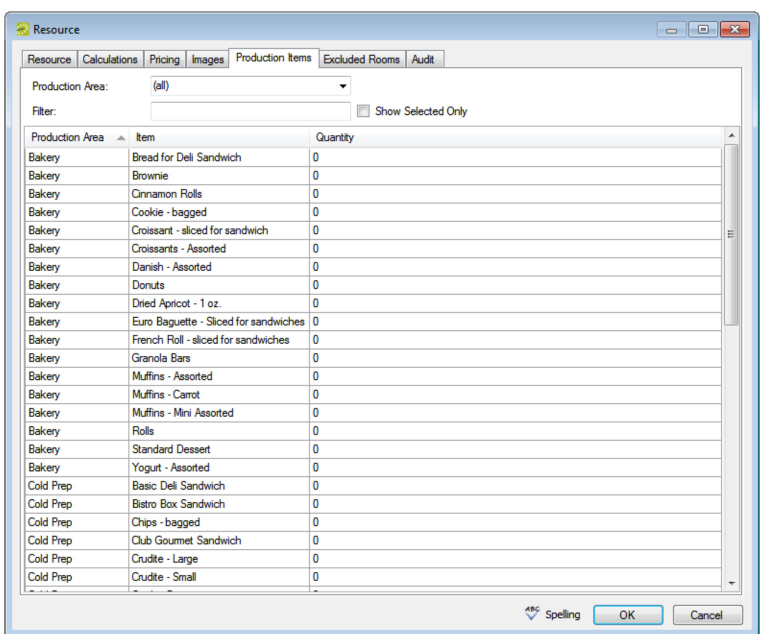
To view and edit the production items for a resource

The Production Items tab lists *all* the production items that have been defined in your EMS database. (See "To define production areas and production items for a resource" on page 225.)

The Production Items tab is available only if you did not select Production Item on the Resource tab when you are configuring the resource.

1. If needed, open the Resource dialog box (see "To configure resources for a category" on page 206), and then open the Production Items tab.

Figure 5-12: Resource dialog box, Production Items tab



2. Optionally, do one or more of the following to filter the production items that are displayed:

    - Select a production area. (The default value is (all)).
    - To filter the displayed production items based on the Item name, in the Filter field, enter a search string.

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*The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of **Cold** returns **Cold** Boxed Lunches, but not Sandwiches (Cold).*

    - Select Show Selected Only.

Only those production items that have previously been selected for the resource are displayed.

3. Select a production item and change the quantity for the item.

If you do not want a production item to be assigned to the resource, make sure that the quantity for the item is set to zero.

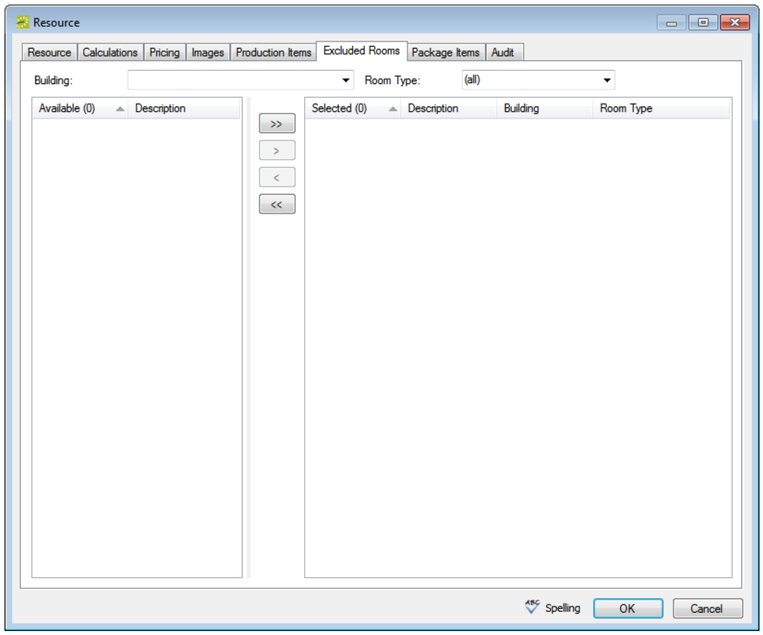
4. Continue with any other optional configuration for the resource as needed; otherwise, click OK to close the Resource dialog box and return to the Resources window. The newly configured resource is automatically selected in the window.

To specify the excluded rooms for a resource

Excluded rooms are those rooms for which the resource is not to be available.

1. If needed, open the Resource dialog box (see “To configure resources for a category” on page 206), and then open the Excluded Rooms tab.

Figure 5-13: Resource dialog box, Excluded Rooms tab

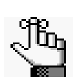


2. Select the search criteria by which to search for the excluded rooms.

   - On the Building dropdown list, select one of the following—(all) buildings, a specific building, a specific area, or a specific view.

If the appropriate building, area, or view is not available, you can configure it. See “Configuring Buildings” on page 91, “Configuring Areas” on page 99, and/or “Configuring Public Views” on page 144.

   - On the Room Type dropdown list, leave the default value of (all), or select a specific room type.



If the appropriate room type is not available, you can configure it. See “Configuring Room Types” on page 89.

3. On the Available list, select the room, or CTRL-click to select the multiple rooms from which the resource item is to be excluded, and then click the Move button (>) to move the selected rooms to the Selected list.

4. Continue with any other optional configuration for the resource as needed; otherwise, click OK to close the Resource dialog box and return to the Resources window. The newly configured resource is automatically selected in the window.

To create a package for a resource

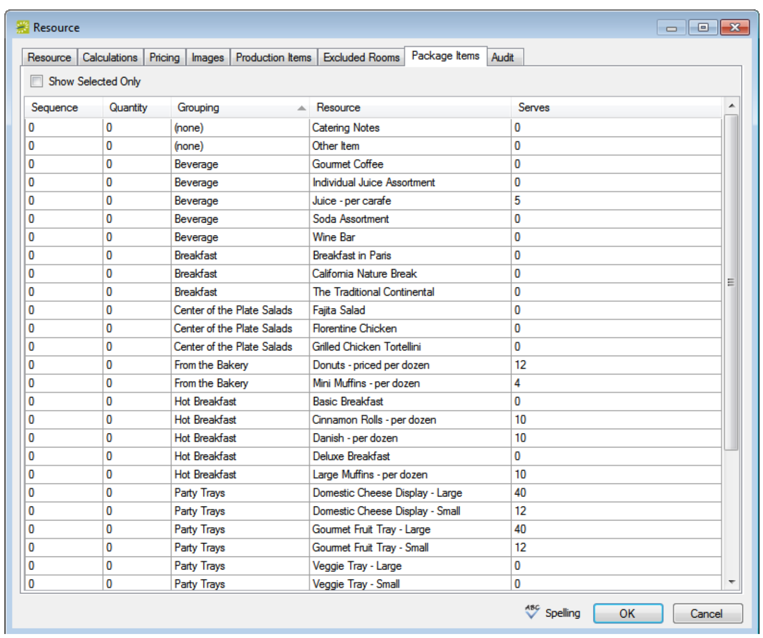
You can combine a list of related resources into a *package* to facilitate the process of adding multiple resources to a booking. Instead of making multiple repeated selections, a user can simply select a single resource package. For example, an Instructor A/V package might include a laser pointer, a mobile microphone, and a flip chart. You select the items for a resource package on the Package Items tab of the Resource dialog box. You can set the price for a package to be the sum total of the individual resources that make up the package, or you can set an independent price for the package.

The Package Items tab is available only if you select Package on the Resource tab when you are configuring the resource.

1. If needed, open the Resource dialog box (see "To configure resources for a category" on page 206), and then open the Packaged Items tab.

   The tab displays all the resources that have been configured for the selected category.

Figure 5-14: Resource dialog box, Package Items tab



2. Optionally, to filter the display, click Show Selected Only.

   Only those resource items that have previously been selected to be part of the resource package are displayed.

3. For each resource item that is to be included in the package, double-click in the Quantity field, and then enter the appropriate quantity for the resource item.

4. Continue with any other optional configuration for the resource as needed; otherwise, click OK to close the Resource dialog box and return to the Resources window. The newly configured resource is automatically selected in the window.

Importing Resources for a Category

You can import resources for a category from a tab-delimited file. (See Appendix E, "Import File Specifications," on page 539 for the import file specifications.) After you import the resources, you can edit their configurations as necessary.

To import resources for a category

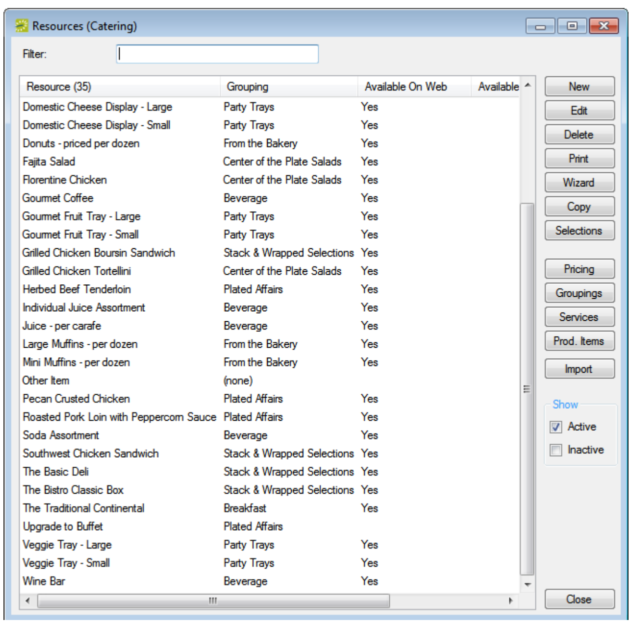
1. On the EMS menu bar, click Configuration > Resources.

   A list of all the categories that are currently configured in your EMS database *and* for which you can configure resources opens.

2. Select the category for which you are importing the resources.

   The Resources window opens. This window lists all the resources that are currently configured in your EMS database for the selected category and that have a status of Active.

Figure 5-15: Example of a Resources window



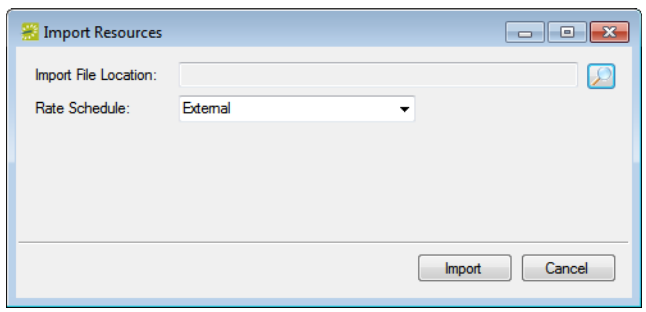
3. Optionally, do one or both of the following:
   - To view all resources for the category in your EMS database, regardless of status, under Show, click Inactive.
   - To filter the displayed resources based on the Resource name, in the Filter field, enter a search string.

The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of ***Cold*** *returns* ***Cold*** *Boxed Lunches, but not Sandwiches (Cold).*

4. Click Import.

   The Import Resources dialog box opens.

Figure 5-16: Import Resources dialog box



5. Click the Search icon to open the Find Resource Import File dialog, and then browse to and select the resource file that is to be imported.
6. On the Rate Schedule dropdown list, select the rate schedule that applies to the resource. (See “Rate schedules” on page 243.)
7. Click Import.

   A dialog box opens, indicating the number of resources that you are about to import, and asking you if you want to continue.
8. Click Yes.

   A message opens indicating that the import was successful.
9. Click OK to close the message and return to the Resources window.

Configuring Multiple Resources (Resource Configuration Wizard)

When you configure resources for a category, you have the option of configuring a single resource at a time through the Resources window, or you can use the Resource Configuration Wizard to configure multiple resources. You typically use the Resource Configuration Wizard to configure multiple resources that have common properties such as the grouping, the account, and the VEMS settings. Instead of configuring these resources individually with these same properties, you can use the Resource Configuration Wizard to configure these resources in a single step.

To configure multiple resources

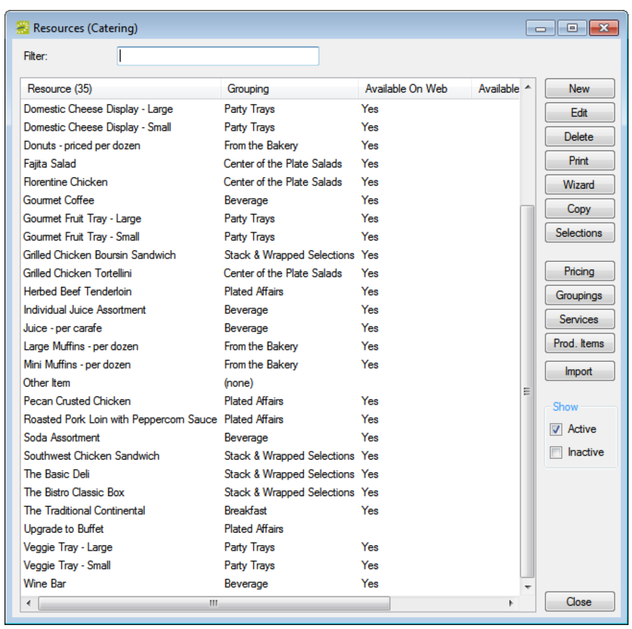
1. On the EMS menu bar, click Configuration > Resources.

   A list of all the categories that are currently configured in your EMS database *and* for which you can configure resources opens.

2. Select the category for which you are configuring the resources.

   The Resources window opens. This window lists all the resources that are currently configured in your EMS database for the selected category and that have a status of Active.

Figure 5-17: Example of a Resources window



3. Optionally, do one or both of the following:

   - To view all resources for the category in your EMS database, regardless of status, under Show, click Inactive.
   - To filter the displayed resources based on the Resource name, in the Filter field, enter a search string.

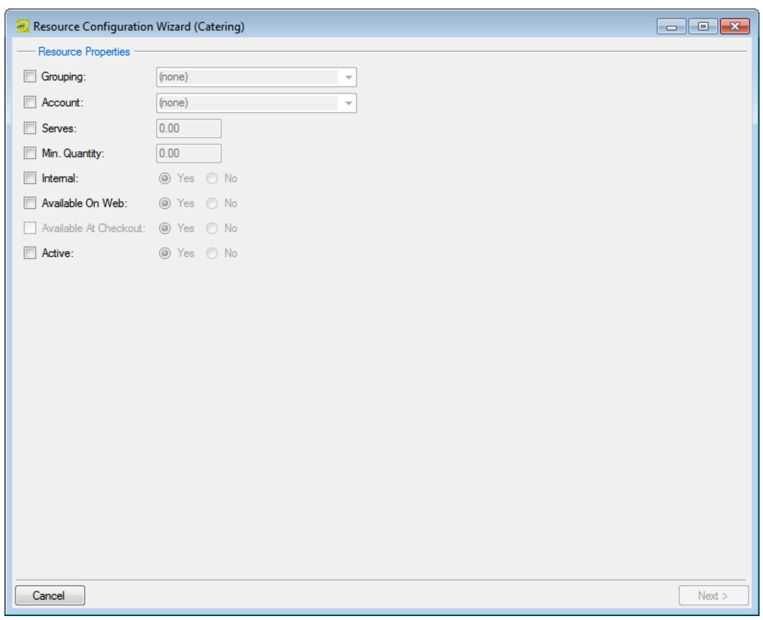
---

*The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of **Cold** returns **Cold** Boxed Lunches, but not Sandwiches (Cold).*

4. Click Wizard.

   The Resource Configuration Wizard opens.

Figure 5-18: Resource Configuration Wizard



5. Configure the properties as needed for the new resources.

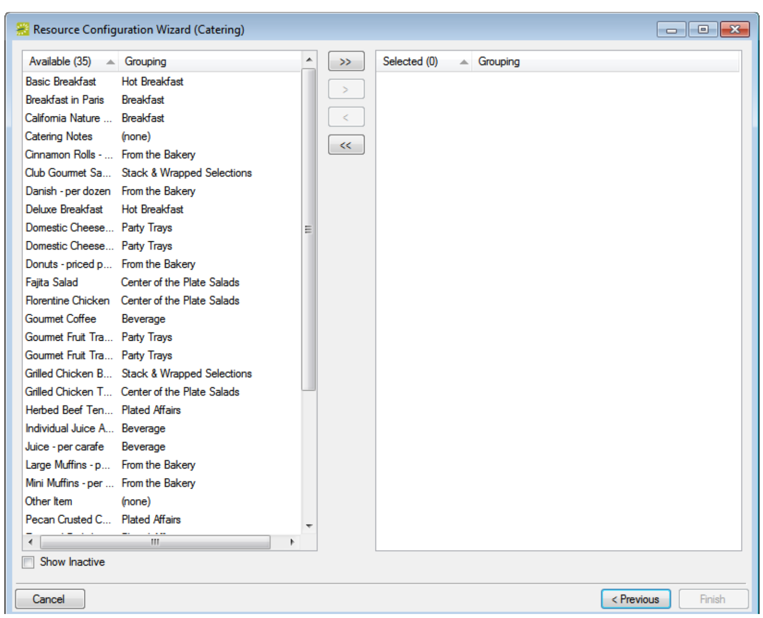
Field	Description
Grouping	Select the grouping for the resources. **Note:** If the appropriate grouping is not available, you can configure it. See "Configuring Groupings for a Resource" on page 203.
Account	Select the internal account which is to receive the revenue from the use of the resource. **Note:** If the appropriate account is not available, you can configure it. See "Configuring Accounts" on page 263.

Field	Description
Serves	The number of users that can be served by the resource. For example, one lunch buffet might serve ten people.
Min. Quantity	The minimum quantity of the resource that a user must order.
Internal	Select this option and leave Yes selected to indicate that the resource is internal to your organization. **Note:** Used for internal reporting purposes only. The resource is not printed on external documents such as confirmations and invoices, and it is not hidden in any area of your EMS application.
Available on the Web	If these resources must be available for VEMS users who select this category, select this option, and then leave Yes selected. To remove these resources as an option for VEMS, select No. **Note:** Not available if Override Description is selected.
Available at Checkout	If these resources are to be displayed on the “checkout” page (the last page in the Room Request process) in VEMS, then select this option, and then leave Yes selected. Tor remove these resources from the “checkout” page, select No. **Note:** Not available if Available on the Web is *not* selected.
Active	To add the resources as active resources to the EMS database, select this option, and then leave Yes selected. To inactivate these resources, select No.

6. Click Next.

   The second page of the Resource Configuration Wizard opens. All the resources that are currently configured in your EMS database for the selected category and that have a status of Active are displayed on the page.

Figure 5-19: Resource Configuration Wizard, Second page



Optionally, to show all resources for the category that are in your EMS database regardless of status, under Show, click Inactive.

7. On the Available list, select the resource, or CTRL-click to select the multiple resources that you are configuring with these properties, and then click the Move button (>) to move the selected resources to the Selected list.
8. Click Finish.

   A message opens indicating that the resource properties were set successfully.
9. Click OK.

   The message and the Resource Configuration Wizard close.

You must configure the other properties for the resources, such as the pricing, individually. See “Configuring Resources for a Category” on page 206.

Defining Production Areas and Production Items for a Resource

You use *production items* to define the quantity of components that make up a resource. For example, a resource called Box Lunch contains the following productions items—sandwich (quantity =1), chips (quantity =1), cookie (quantity = 2), and bottled water (quantity =1). If an order for 20 boxed lunches is placed, then the kitchen must produce 20 sandwiches, 20 bags of chips, 40 cookies, and 20 bottled waters. To identify the areas of the kitchen that produce each item, you can define *production areas*. For example, the Delicatessen area might produce the sandwich, chips, and bottled water, and the Bakery area might produce the cookies. If a category has been defined as using production items, then at the time that you are configuring a resource for the category, you can define the resource as a production item, or you can manually define resources as production items for the category at a later date.

To define production areas and production items for a resource

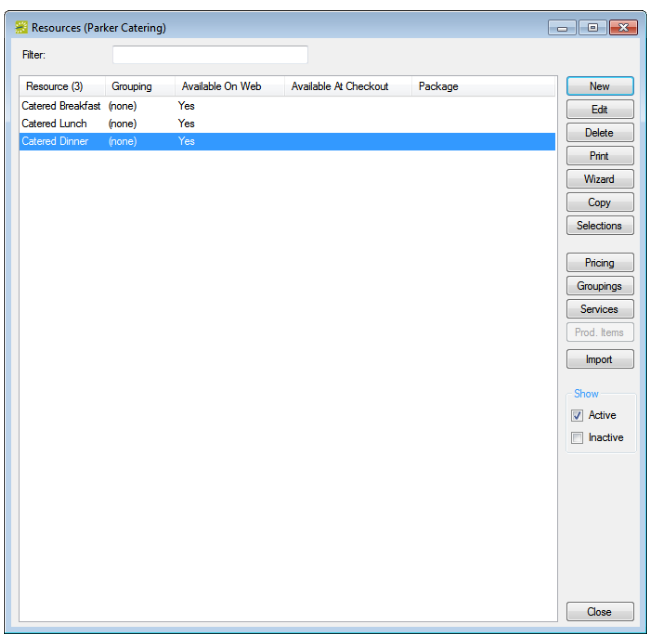
1. On the EMS menu bar, click Configuration > Resources.

   A list of all the categories that are currently configured in your EMS database *and* for which you can configure resources opens.

2. Select the category for which you are configuring the resources.

   The Resources window opens. This window lists all the resources that are currently configured in your EMS database for the selected category and that have a status of Active.

Figure 5-20: Example of a Resources window

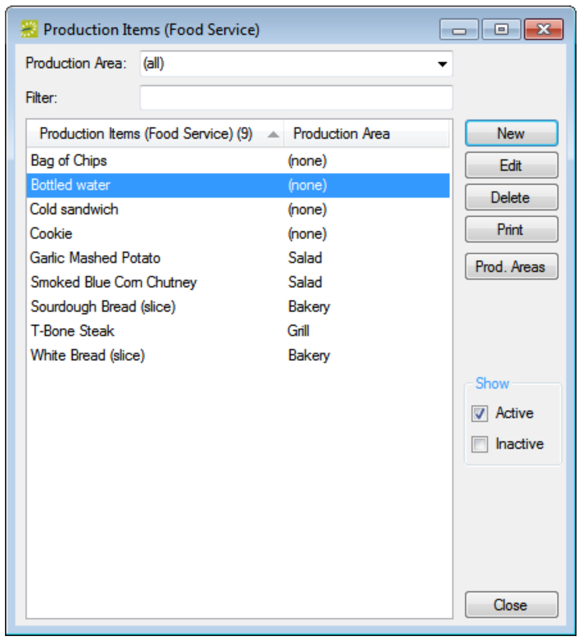


Optionally, to view all resources that have been configured for a category, regardless of status, under Show, click Inactive.

3. Click Prod. Items.

   The Production Item window opens. This dialog box displays all the production items that have been defined *for a category* and that have a status of Active.

Figure 5-21: Production Items window



4. Optionally, do one or more of the following:

   - To filter the displayed production items based on the Production Area, on the Production Area dropdown list, select an area.
   - To view all production items that have been defined for the category regardless of status, under Show, click Inactive.
   - To filter the displayed production items based on the item name, in the Filter field, enter a search string.

The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of ***Cold*** *returns* ***Cold*** *Boxed Lunches, but not Sandwiches (Cold).*

5. Continue to one of the following:

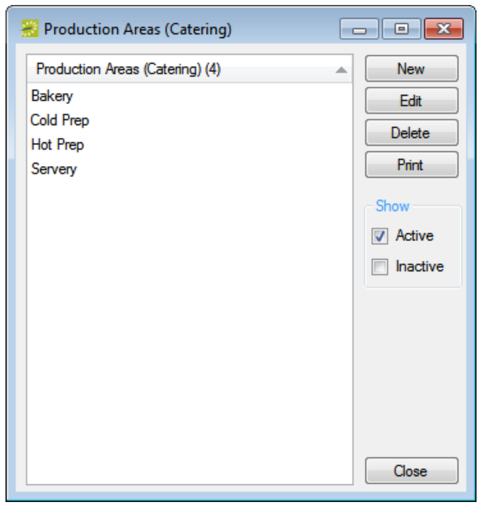
   - "To define a new production area for a resource" on page 227.
   - "To define new production items for a resource" on page 228.

To define a new production area for a resource

1. Click Prod. Areas.

   The Production Areas window opens. This window lists all the production areas that have been configured for the selected *category* and that have a status of Active.

Figure 5-22: Production Areas window

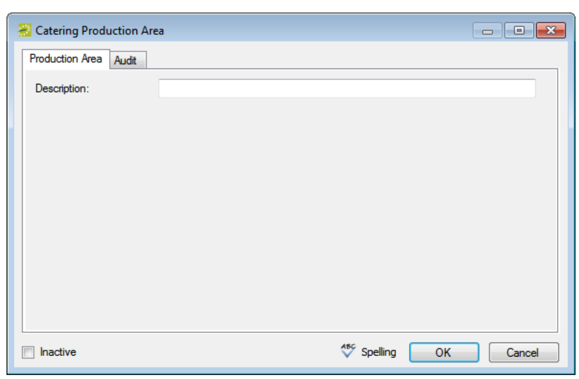


Optionally, to show all production areas for the category that are in your EMS database regardless of status, under Show, click Inactive.

2. Click New.

   The Production Area dialog box opens.

Figure 5-23: Production Area dialog box



3. Enter a description or name for the production area.

The description can be a maximum of 50 characters, including spaces.

4. Leave Inactive blank to add the production area as an active area. Select Inactivate to inactivate the production area.
5. Optionally, click Spelling to spell check the description before you save the production area.
6. Click OK.

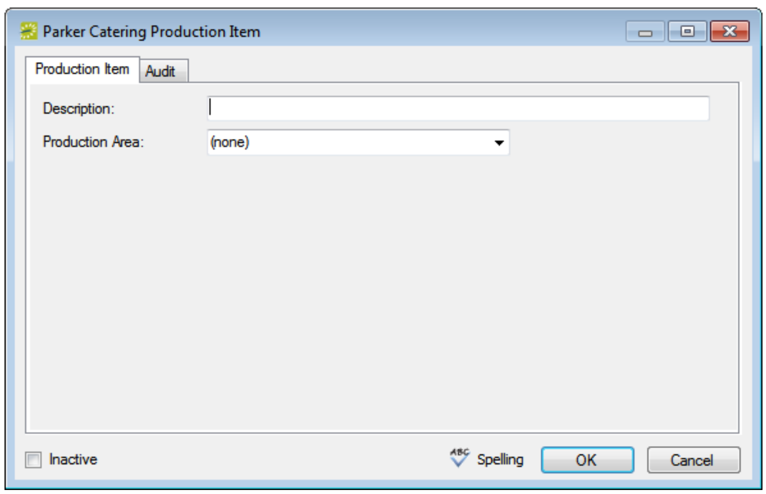
   The Production Area dialog box closes. You return to the Production Areas window with the newly configured production area automatically selected.

To define new production items for a resource

1. On the Production Items window, click New.

   The Production Item dialog box opens.

Figure 5-24: Production Item dialog box



2. In the Description field, enter description or name for the production item.

The description can be a maximum of 50 characters, including spaces.

3. Optionally, on the Production Area dropdown list, select a production area for the item.
4. Click OK.

   You return to the Production Items window with the newly configured production item automatically selected.
5. Click Close on the Production Items window to close the window and return to the Resources window.

6. On the Resources window, select the resource for which you are configuring the production items, and then click Edit.

   The Resource dialog box opens.

7. Open the Production Items tab for the resource, and for each appropriate production item, enter the quantity.

8. Click OK to close the Resource dialog box and save the resource with its production items.

Defining Resource Selections and Selection Items

After you configure a resource for a category, you can define *selections* and *selection items* for the resource. A *selection* is used when you offer choices with a resource. For example, a resource named Catered Breakfast might have the following description—Catered breakfast includes the choice of one standard entree, two sides, and assorted mini-muffins, juice, and coffee. The selection of standard entree might include the selection items of french toast, pancakes, or scrambled eggs. The side selection items might include bacon, sausage, and sliced fruit. If selection items have been defined for a resource, then an EMS user or a VEMS user *must* make a selection for the resource.

To define resource selections and selection items

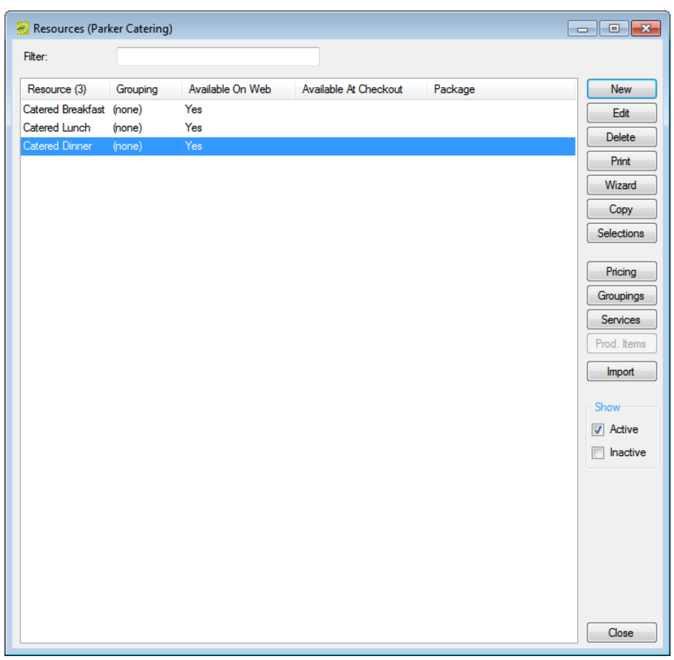
1. On the EMS menu bar, click Configuration > Resources.

   A list of all the categories that are currently configured in your EMS database *and* for which you can configure resources opens.

2. Select the category for which you are configuring the resources.

   The Resources window opens. This window lists all the resources that are currently configured in your EMS database for the selected category and that have a status of Active.

Figure 5-25: Example of a Resources window



3. Optionally, do one or both of the following:
   - To view all resources for the category in your EMS database, regardless of status, under Show, click Inactive.
   - To filter the displayed resources based on the Resource name, in the Filter field, enter a search string.

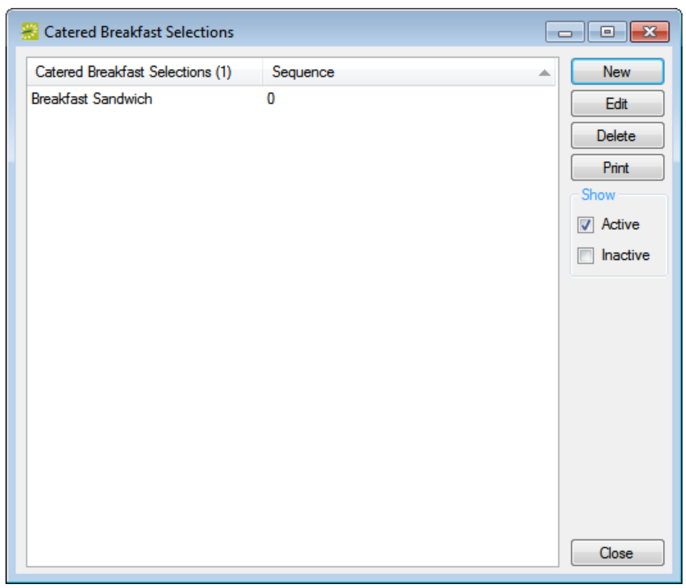
---

*The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of **Cold** returns **Cold** Boxed Lunches, but not Sandwiches (Cold).*

4. Select the resource for which you are configuring the selections, and then click Selections.

   The Selections window opens. This window lists all the selections that have been configured for the selected resource and that have a status of Active.

Figure 5-26: Selections window

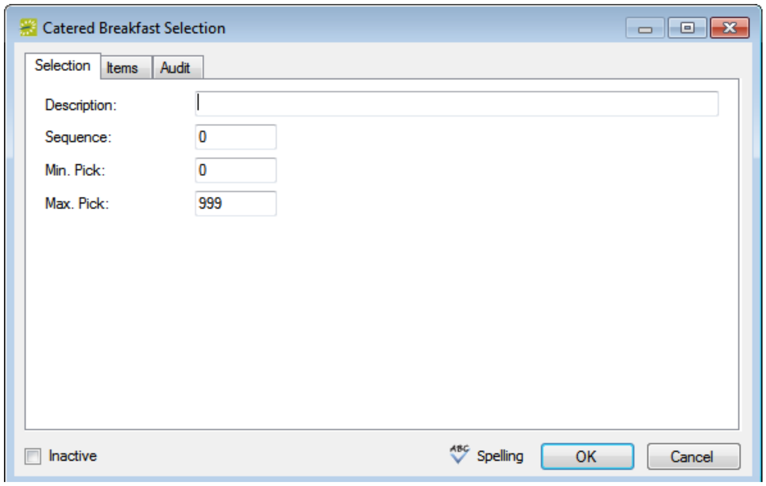


Optionally, to show all selections for the resource, regardless of status, under Show, click Inactive.

5. Click New.

   The Selection dialog box opens. The Selection tab is the active tab.

Figure 5-27: Selection dialog box, Selection tab



6. In the Description field, enter a description or name for the selection, for example, Breakfast Entrees.

The description can be a maximum of 255 characters, including spaces.

7. Optionally, do one or more or all the following:

   - In the Sequence field, enter a number that determines the order in which the selection is displayed in a list with other selections.

Selections are ordered from lowest to highest sequence number, with the selection with the lowest sequence number being displayed first. If you leave the sequence set to the default value of zero for all selections, then by default, the selections are displayed alphabetically.

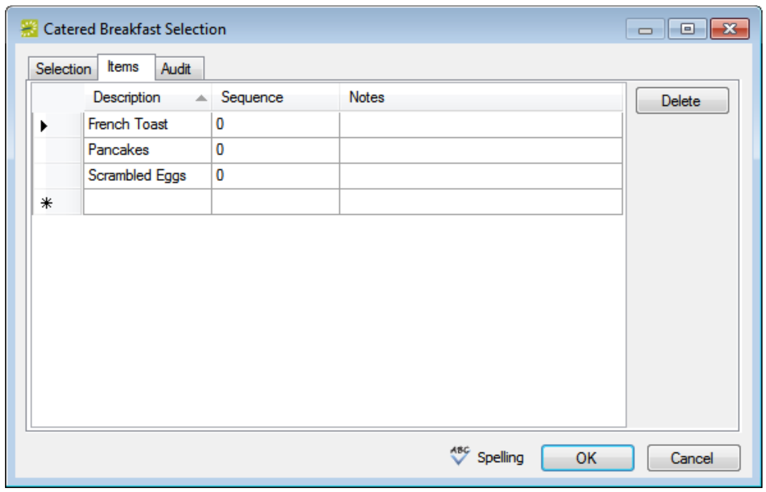
   - In the Min Pick field, enter the minimum number of selection items that a user is required to pick.
   - In the Max Pick field, enter the maximum number of selections items that a user is allowed to pick.

The maximum pick must be less than or equal to the number of selection items that are configured for the selection.

8. Open the Items tab, and in the Description field, enter a description or name for each selection item.

The description can be a maximum of 255 characters, including spaces.

Figure 5-28: Selection dialog box, Items tab



9. Optionally, for each selection item, do one or both of the following:
   - In the Sequence field, enter a number to sort the selection items on the tab.

   Selection items are ordered from lowest to highest sequence number, with the selection item with the lowest sequence number being displayed first. If you leave the sequence set to the default value of zero for all selection items, then by default, the selection items are displayed alphabetically.

   - In the Notes field, enter any optional information that is pertinent for the item.
10. Click OK.

    You return to the Selections window with the newly configured resource selection automatically selected.

Configuring the Pricing for a Resource on the Edit Pricing window

You can configure the pricing for a resource on the Pricing tab of the Resource dialog box, or you can configure the resource, and then configure the pricing for it at a later date on the Edit Pricing window.

You can also configure the resource price at the time that you are configuring the resource on the Resource dialog box (see *"To configure the pricing for a resource" on page 211**), or at the time that you are configuring rate schedules (see* *"Configuring Rate Schedules" on page 247**).*

To configure the pricing for a resource from the Edit Pricing window

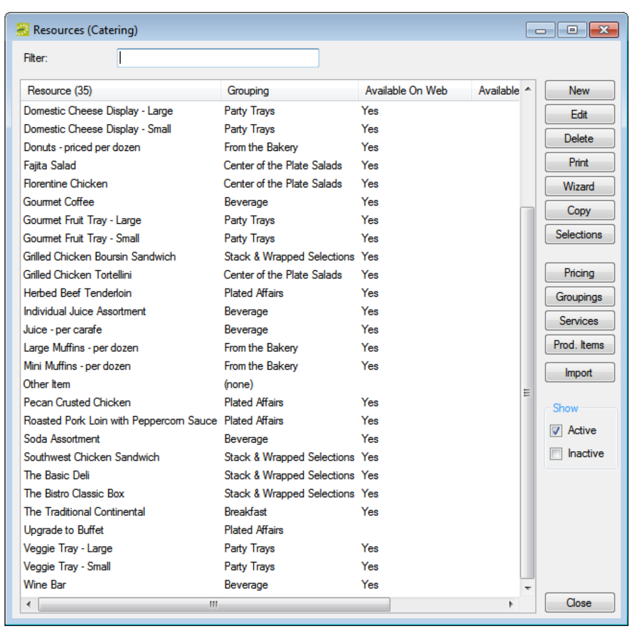
1. On the EMS menu bar, click Configuration > Resources.

   A list of all the categories that are currently configured in your EMS database *and* for which you can configure resources opens.

2. Select the category for which you are pricing the resources.

   The Resources window opens. This window lists all the resources that are currently configured in your EMS database for the selected category and that have a status of Active.

Figure 5-29: Example of a Resources window



3. Optionally, do one or both of the following:

   - To view all resources for the category in your EMS database, regardless of status, under Show, click Inactive.

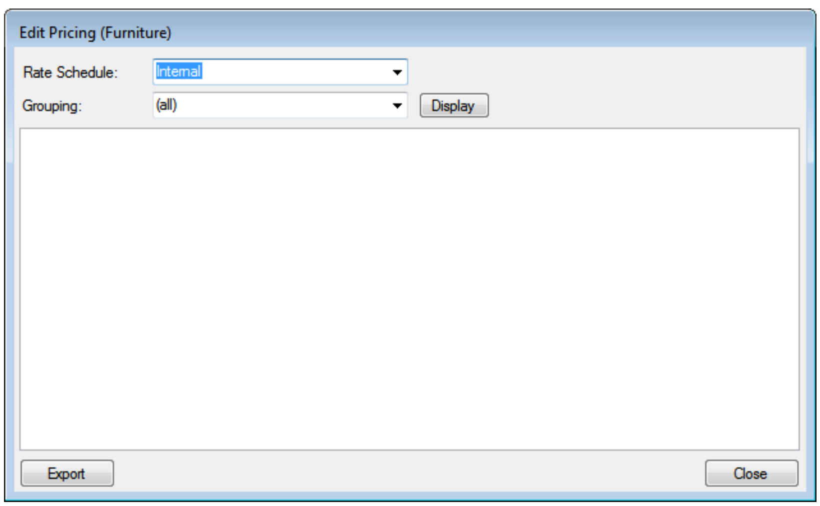
   - To filter the displayed resources based on the Resource name, in the Filter field, enter a search string.

The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of ***Cold*** *returns* ***Cold*** *Boxed Lunches, but not Sandwiches (Cold).*

4. Click Pricing.

   The Edit Pricing window opens.

Figure 5-30: Edit Pricing window



5. On the Rate Schedule dropdown list, select the rate schedule for which you are pricing the resources.

6. Do one of the following:

   - Leave the Grouping set to the default value of (all), and then click Display to display a list of all *active* resources in all the groupings that have been configured for the selected category.

   - On the Grouping dropdown list, select a specific grouping, and then click Display to display a list of all *active* resources in the grouping.

7. For each resource, select the pricing method, which determines the cost for reserving the resource.

If the appropriate rate schedule is not available, you can configure it. See *"Configuring Rate Schedules" on page 247.*

Pricing Method	Description
Half Day/Full Day (Event Time)	The total number of hours for the event is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the event is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the resource. If the total number of hours for the event is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the resource.
Half Day/Full Day (Reserved Time)	The total number of hours for the reservation (event time and reserved time) is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the reservation is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the resource. If the total number of hours for the reservation is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the resource.
Hourly (Event Time)	The price that is indicated in the Price column is multiplied by the event time (in hours) for the booking. This price can be used in conjunction with an initial "flat" fee, as well as minimum and maximum fees.
Hourly (Reserved Time)	The price that is indicated in the Price column is multiplied by the reserved time (in hours) for the booking. This price can be used in conjunction with an initial "flat" fee, as well as minimum and maximum fees.
Hourly (Service Time)	The price that is indicated in the Price column is multiplied by the reserved time (in hours) for the service (resource). This price can be used in conjunction with an initial "flat" fee, as well as minimum and maximum fees.
Hourly (Specific)	The price that is indicated in the Price column is multiplied by the number of hours indicated when adding the resource to a booking.
Unit	The price that is indicated in the Price column is applied to the resource, regardless of the event time or reserved time for the booking.

8. After you select a pricing method, click in the appropriate fields to select the currently displayed amount, and then edit the amount as needed.

Field	Description
Price	The dollar amount that is used in calculating the resource price for a booking. If the pricing method is Unit, then this value is applied in total to a resource, regardless of the event time or reserved time for the booking.

Field	Description
Discount	You can use a discount with any pricing method. If you specify a discount for a resource, then the actual price, the discount percentage, and the discounted amount are displayed on confirmations and invoices.
Min. Charge Max. Charge	The values that are indicated in these columns are used in conjunction with the Hourly pricing methods. If you specify a minimum charge for a resource, then the system compares this value to the calculated hourly rate and applies the greater of the two charges. Likewise, if you specify a maximum charge for a resource, then the system compares this value to the calculated hourly rate and applies the lesser of the two charges.
Flat Price	A resource price that remains constant regardless of the total number of hours booked for the resource. Used in conjunction with Hourly (Event Time) and Hourly (Reserved Time).
Half Day Price	The dollar amount that is used in calculating the resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/ Full Day (Reservation Time).
Full Day Price	The dollar amount that is used in calculating the resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/ Full Day (Reservation Time).
Hours	Multiplier used in calculating the resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).

9. Repeat Step 5 through Step 8 for each rate schedule and/or grouping as needed.
10. Click Close.

    The Edit Pricing window closes. The pricing information is saved for the resource.

Exporting Pricing Information for a Resource

You can export any pricing information that you configure for a resource on a per rate schedule basis on the Edit Pricing window. The information is exported to a Microsoft Excel file.

You do not need Microsoft Excel on your EMS client to export the information to the file; however, you must have Microsoft Excel on your EMS client to view the file.

You can also export pricing information for a resource at the time that you are configuring rate schedules. See *"Exporting Pricing Information for Billable Items (Rooms or Resources)" on page 252.*

To export pricing information for a resource

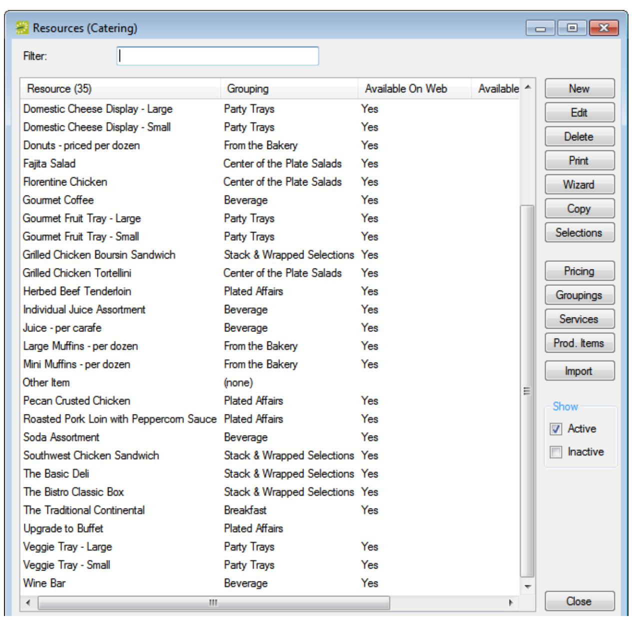
1. On the EMS menu bar, click Configuration > Resources.

   A list of all the categories that are currently configured in your EMS database *and* for which you can configure resources opens.

2. Select the category for which you are pricing the resources.

   The Resources window opens. This window lists all the resources that are currently configured in your EMS database for the selected category and that have a status of Active.

Figure 5-31: Example of a Resources window



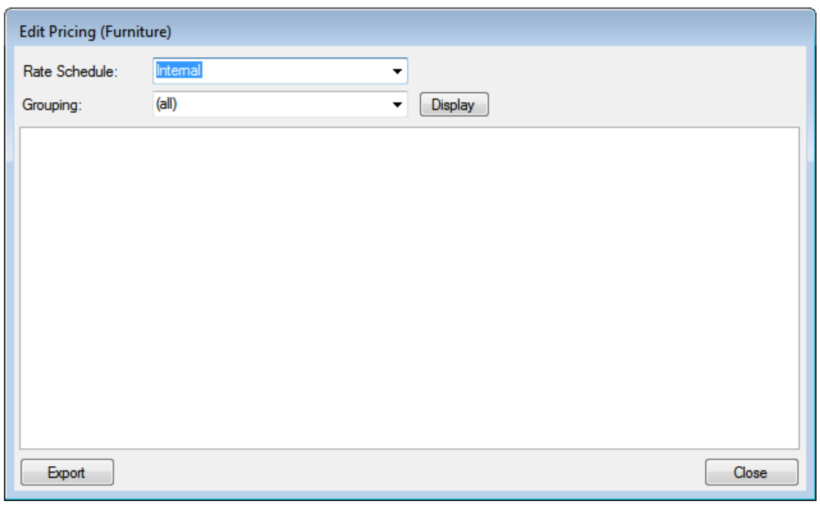
3. Optionally, do one or both of the following:
    - To view all resources for the category in your EMS database, regardless of status, under Show, click Inactive.
    - To filter the displayed resources based on the Resource name, in the Filter field, enter a search string.

The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of ***Cold*** *returns* ***Cold*** *Boxed Lunches, but not Sandwiches (Cold).*

4. Click Pricing.

    The Edit Pricing window opens.

Figure 5-32: Edit Pricing window



5. On the Rate Schedule dropdown list, select the rate schedule for which you are exporting the pricing information.
6. Do one of the following:
    - Leave the Grouping set to the default value of (all), and then click Display to display a list of all *active* resources and their prices in all the groupings that have been configured for the selected category.
    - On the Grouping dropdown list, select a specific grouping, and then click Display to display a list of all *active* resources and their pricing in the grouping.
7. Click Export.

    A Save As dialog box opens. The export file is named Pricing.xls by default.
8. Optionally, edit the name of the export file, and then save the file to a location of your

choice.

An Export Report message opens indicating that the export was successful and asks you if you want to preview the exported file.

9. Do one of the following:
   - Click Yes to open the export file in Microsoft Excel. After viewing the file, you can close it to return to the Edit Pricing window.
   - Click No to close the message and return to the Edit Pricing window.
10. Repeat Step 5 through Step 9 for each rate schedule and/or grouping for which you are exporting the information.
11. After you have exported all the necessary pricing information for a resource, click Close.

    The Edit Pricing window closes. The Resources window remains opens.

Core Configuration - Billing

Before you can use EMS to manage your organization's events, you must configure core data items that are specific to your organization. For example, before you can automatically price items in a reservation, you must first configure rate schedules and pricing plans.

This chapter covers the following topics:

- "Overview of Billing in EMS" on page 243.
- "Configuring Rate Schedules" on page 247.
- "Configuring Pricing Plans" on page 255.
- "Configuring Calculations" on page 258.
- "Configuring Accounts" on page 263.
- "Configuring Payment Types" on page 265.
- "Configuring Sales Categories" on page 267.
- "Configuring Billing Reference and PO Numbers" on page 269.
- "Configuring Currencies" on page 272.

Overview of Billing in EMS

In EMS, *rate schedules* and *pricing plans* allow you to define the pricing for your resources and rooms so that the pricing is automatically applied to the resources or rooms when a reservation is made.

Rate schedules

A *rate schedule* correlates to a pricing sheet that details all the prices for the billable items in your EMS database. For example, if your organization is an academic organization, then at the most basic of levels, you might configure three different rate schedules for the three primary groups that book events at your facilities—an Internal group (students, faculty, staff, and so on), an External group (outside organizations that are not affiliated with your organization in any way), and an Alumni group. These rate schedules could detail the prices for such things as the room charge, A/V equipment charges, catering charges, and so on.

Figure 6-1: Rate Schedule example

Rate Schedule	Billable Item: Video Projector Pricing
Internal	$20.00/hour (reserved time). 100% discount
External	$20.00/hour (reserved time). $50.00 minimum. 5% Tax.
Alumni	$20.00/hour (reserved time). $50.00 minimum. 5% Tax. 25% discount.

Four factors affect how pricing is applied for a rate schedule—the pricing method (flat rate, hourly rate, and so on), calculations (taxes, gratuities, and so on), discount percentage, and minimum/maximum charge. You specify the pricing method, and if applicable, the discount percentage, and the minimum and maximum charges when you assign the prices to billable items based on your rate schedules. (See "Rate schedules and billable items (rooms and resources)" below.) You can assign calculations directly to a category, a group, a group type, a resource, or a room or you can assign calculations through pricing plans. (See "Calculations" on page 244.)

Rate schedules and billable items (rooms and resources)

After you define your organization's rate schedules, you have three options for *manually* assigning the prices to billable items (rooms and resources) based on these schedules:

- During the configuration of a room or resource. When you are configuring a room or resource, the configuration dialog box contains a Pricing tab. This tab lists all the rate schedules that are currently configured in your EMS database. You can specify the pricing method for the billable item that you are configuring for each rate schedule. You can also specify a discount percentage for the item, a minimum charge for the item, a maximum charge for the item, or any combination of these options. (See "Configuring Rooms" on page 109 and "Configuring Resources for a Category" on page 206.)

- After all necessary rooms and resources are configured. Both the Rooms window and the Resources window contain a Pricing button. You can click Pricing to open an Edit Pricing window. You can use the options on this window to specify the pricing method for the billable items (rooms and resources) for a selected rate schedule. You can also specify a discount percentage for the item, a minimum charge for the item, a maximum charge for the item, or any combination of these options. (See "Configuring Rooms" on page 109 or "Configuring Resources for a Category" on page 206.)
- Where rate schedules are defined. The Rate Schedules window has a Pricing button. After you have defined a rate schedule, you can select a rate schedule in the Rate Schedules window and click Pricing to open an Edit Pricing window. You can use the options on this window to specify the pricing method for every billable item for the rate schedule. You can also specify a discount percentage for the item, a minimum charge for the item, a maximum charge for the item, or any combination of these options. (See "Configuring Rate Schedules" on page 247.)

Calculations

Calculations are additional charges that can be applied to billable items (a category, a group, a group type, a resource, or a room) such as gratuity or sales tax. A calculation can be applied to a resource item every time a group uses the item, or the calculation can be applied only when a particular pricing plan is used for a group's reservation. For a calculation to be applied *every time* a group uses a resource item, the calculation must be defined not only for the resource item, but also, for the group that is using the item. For a calculation to be applied to a resource item on as-needed basis, then you must use pricing plans. (See "Pricing Plans" below. below.)

Pricing Plans

A *pricing plan* bundles rate schedules. When your users apply a preconfigured pricing plan to a reservation, EMS automatically calculates the pricing for the billable items that are reserved for an event. You can use a pricing plan to customize the pricing for a specific group type or even a specific group. When you configure a group type or group, you can assign a default pricing plan to the group type or group. When your users book a reservation for the group type or group, then the default pricing plan is applied to the reservation and EMS automatically calculates the pricing for the billable items that are reserved for the group's reservation. For example, consider the following rate schedules:

Rate Schedule	Charges
Internal	• Room Charge - $10/hour (event time). 100% discount. • A/V (for example, overhead projector) - $20/unit. 100% discount.
External	• Room Charge - $10/hour (event time). $50 minimum. • A/V (for example, overhead projector) - $20/unit.

Rate Schedule	Charges
Alumni	• Room Charge - $10/hour (event time). $50 minimum. 25% discount. • A/V (for example, overhead projector) - $20/unit. 25% discount.
Standard	• Catering (for example, coffee) - $5/unit. 5% sales tax.

Based on the rate schedules that are defined above, you might configure your pricing plans as shown in Figure 6-2 below.

Figure 6-2: Pricing Plans example

Internal	Room Charge	Internal
	A/V	Internal
	Catering	Standard
External	Room Charge	External
	A/V	External
	Catering	Standard
Alumni	Room Charge	Alumni
	A/V	Alumni
	Catering	Standard

Note that these three pricing plans do not make a distinction between External for Profit groups and External for Non-Profit groups; however, if you want to customize the pricing so that External for Profit groups pay sales tax, but External Not For Profit groups do not, you could configure the following pricing plans:

Pricing Plan	Billable Item	Rate Schedule
Internal	• Room Charge • A/V • Catering	• Internal • Internal • Standard
External for Profit	• Room Charge • A/V • Catering	• External • External • Standard
External Not For Profit	• Room Charge • A/V • Catering	• Alumni • Internal • Standard (No Tax)
Alumni	• Room Charge • A/V • Catering	• Alumni • Internal • Standard

A pricing plan is also required to apply calculations correctly to invoiced items. A calculation can be applied to a resource item every time a group uses the item, or the calculation can be applied only when particular pricing plan is used for a group's reservation. For a calculation to be applied *every time* a group uses a resource item, the calculation must be defined not only for the resource item, but also for the group that is using the item. For a calculation to be applied to a resource item on as needed basis, then you must use pricing plans. When you are configuring a pricing plan, you have the option to:

- Have no calculations associated with the pricing plan.
- Add charges *in addition* to what a group already pays.
- Override a group’s set charges with different charges.

Also, the pricing for a billable item is determined at the time that the item is reserved for an event. If your users do not select a pricing plan at the time they are making a reservation, no pricing information is retrieved. If your users select a pricing plan after the fact, or if they change the pricing plan for a reservation, then they can update the prices of the billable items that are reserved for the event only by using the Update Pricing function in the Navigator.

Configuring Rate Schedules

When you configure a rate schedule, you can configure one “from scratch,” or you can copy an existing rate schedule and edit the name and any configured pricing as needed to make a new rate schedule. Optionally, after you configure a rate schedule, you can define the pricing for the billable items (rooms and resources) in the rate schedule.

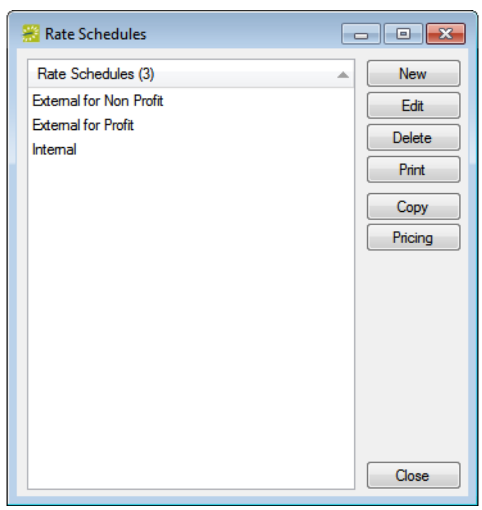
You can also configure the price for a room or resource at the time that you are configuring the room or resource (see “To configure the pricing for a room” on page 117 or “To configure the pricing for a resource” on page 211) or after you configure the room or resource (see “Configuring Room Pricing on the Edit Pricing window” on page 137 or “Configuring Room Pricing on the Edit Pricing window” on page 137).

To configure a rate schedule

1. On the EMS menu bar, click Configuration > Billing > Rate Schedules.

   The Rate Schedules window opens. This window lists all the rate schedules that are currently configured in your EMS database.

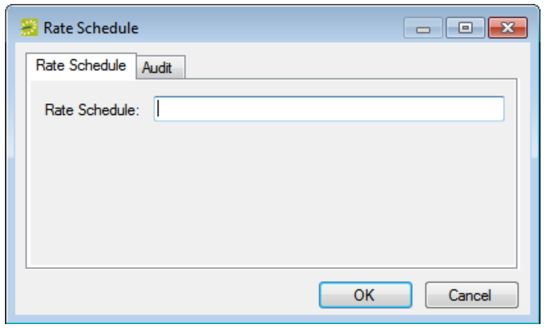
Figure 6-3: Rate Schedules window



2. Click New.

   The Rate Schedule dialog box opens.

Figure 6-4: Rate Schedule dialog box



3. In the Rate Schedule field, enter a name or description for the new rate schedule.

The rate schedule can be a maximum of 30 characters, including spaces.

4. Click OK.

   The Rate Schedule dialog box closes. You return to the Rate Schedules window with the newly configured rate schedule automatically selected.

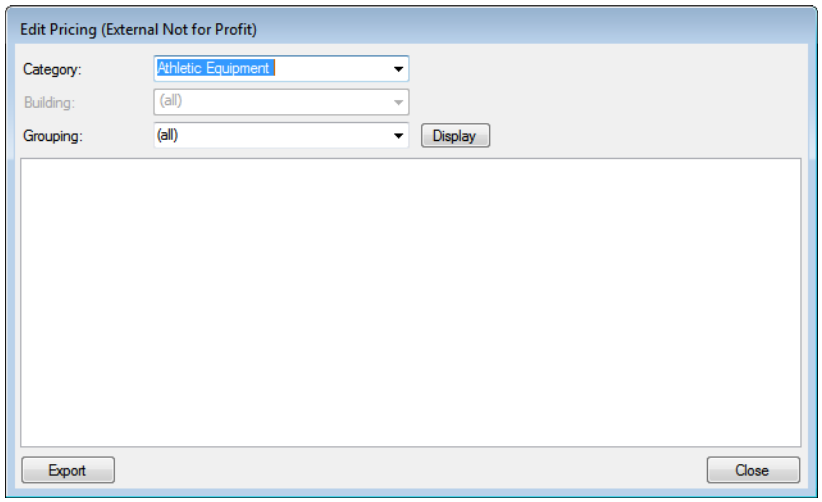
5. Optionally, continue to "To configure pricing for the billable items in a rate schedule" on page 249.

To configure pricing for the billable items in a rate schedule

1. If you have not already done so, open the Rate Schedule window (see "To configure a rate schedule" on page 247) and then select the rate schedule for which you are configuring the pricing for the billable items.
2. Click Pricing.

   The Edit Pricing window opens.

Figure 6-5: Edit Pricing window



3. Do one of the following:
   - To configure the pricing for a resource category, on the Category dropdown list:
     - Select the category, and then click Display.
     - Optionally, on the Grouping dropdown list, select a resource grouping to filter the search results.
   - To configure the pricing for rooms, on the Category dropdown list:
     - Select Room Charge.

       All rooms in all buildings that are currently configured in your EMS database are displayed in the lower pane of the dialog box.
     - Optionally, on the Building dropdown list, select a specific building, area, or view to filter the search results.
     - Optionally, on the Grouping dropdown list, select a room type to filter the search results.

4. For each billable item (resource or room), select the pricing method, which determines the cost for reserving the item.

Pricing Method	Description
Half Day/Full Day (Event Time)	The total number of hours for the event is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the event is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the billable item. If the total number of hours for the event is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the billable item.
Half Day/Full Day (Reserved Time)	The total number of hours for the reservation (event time and reserved time) is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the reservation is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the billable item. If the total number of hours for the reservation is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the billable item.
Hourly (Event Time)	The price that is indicated in the Price column is multiplied by the event time (in hours) for the booking. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Reserved Time)	The price that is indicated in the Price column is multiplied by the reserved time (in hours) for the booking. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Service Time)	The price that is indicated in the Price column is multiplied by the reserved time (in hours) for the service. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Specific)	The price that is indicated in the Price column is multiplied by the number of hours indicated when adding a billable item to a booking.
Unit	The price that is indicated in the Price column is applied to the billable item, regardless of the event time or reserved time for the booking.

5. After you select a pricing method, click in the appropriate fields to select the currently displayed amount, and edit the amount as needed.

Field	Description
Price	The dollar amount that is used in calculating the room or resource price for a booking. If the pricing method is Unit, then this value is applied in total to the resource or room, regardless of the event time or reserved time for the booking.
Discount	You can use a discount with any pricing method. If you specify a discount for a room or resource, then the actual price, the discount percentage, and the discounted amount are all displayed on confirmations and invoices.

Field	Description
Min. Charge Max. Charge	The values that are indicated in these columns are used in conjunction with the Hourly pricing methods. If you specify a minimum charge for a room or resource, then the system compares this value to the calculated hourly rate and applies the greater of the two charges. Likewise, if you specify a maximum charge for a room or resource, then the system compares this value to the calculated hourly rate and applies the lesser of the two charges.
Flat Price	A resource or room price that remains constant regardless of the total number of hours booked for a room or resource. Used in conjunction with Hourly (Event Time) and Hourly (Reserved Time).
Half Day Price	The dollar amount that is used in calculating room or resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).
Full Day Price	The dollar amount that is used in calculating the room or resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).
Hours	Multiplier used in calculating the room or resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).

6. Click Close.

   The Edit Pricing window closes. You return to the Rate Schedules window with the rate schedule automatically selected.

Exporting Pricing Information for Billable Items (Rooms or Resources)

After you configure a rate schedule and define the pricing for the billable items (rooms and resources) in the rate schedule, you can export the pricing information on the Edit Pricing window. The information is exported to a Microsoft Excel file.

You do not need Microsoft Excel on your EMS client to export the information to the file; however, you must have Microsoft Excel on your EMS client to view the file.

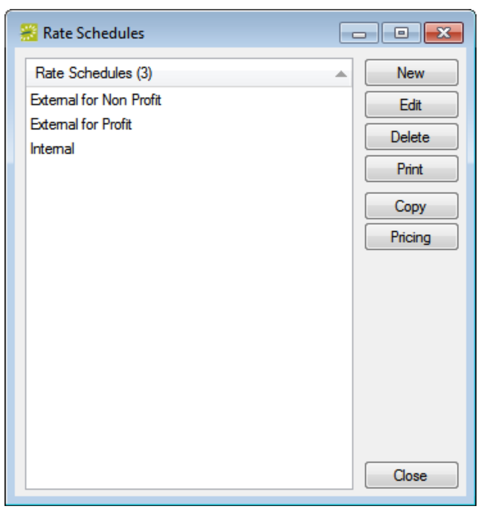
You can also export the pricing information for rooms and resources after you have configured the information for the room or resource. See “Exporting Pricing Information for a Room” on page 141 and “Exporting Pricing Information for a Resource” on page 238.

To export pricing information for rooms and resources

1. On the EMS menu bar, click Configuration > Billing > Rate Schedules.

   The Rate Schedules window opens. This window lists all the rate schedules that are currently configured in your EMS database.

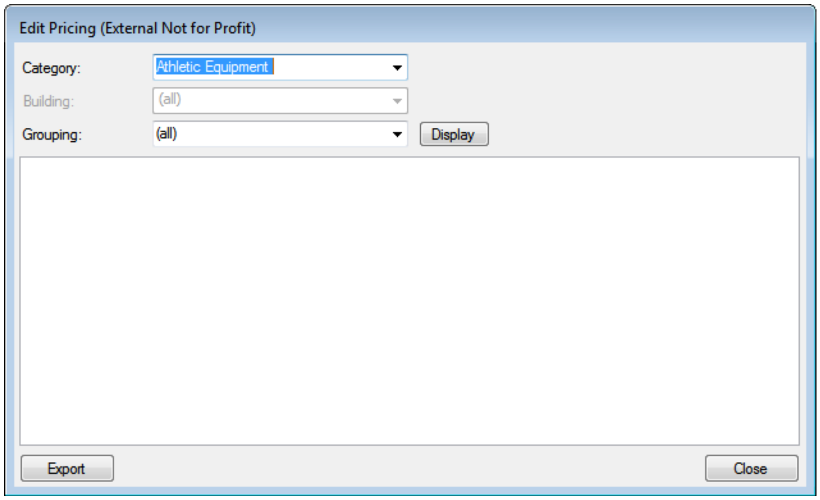
Figure 6-6: Rate Schedules window



2. Click Pricing.

   The Edit Pricing window opens.

Figure 6-7: Edit Pricing window



3. Do one of the following:
   - To export the pricing information for a room or rooms, on the Category dropdown list:
     - Select Room Charge.

       All active rooms in all buildings that are currently configured in your EMS database are displayed in the lower pane of the dialog box.
     - Optionally, on the Building dropdown list, select a specific building, area, or view to filter the search results.
     - Optionally, on the Grouping dropdown list, select a room type to filter the search results.
   - To export the pricing information for all the resources in a category, on the Category dropdown list:
     - Select the category, and then click Display.
     - Optionally, on the Grouping dropdown list, select a resource grouping to filter the search results.
4. Click Export.

   A Save As dialog box opens. The export file is named Pricing.xls by default.

5. Optionally, edit the name of the export file, and then save the file to a location of your choice.

   An Export Report message opens indicating that the export was successful and asks you if you want to preview the exported file.

6. Do one of the following:

   - Click Yes to open the export file in Microsoft Excel. After viewing the file, you can close it to return to the Edit Pricing window.
   - Click No to close the message and return to the Edit Pricing window.

7. Repeat Step 3 through Step 6 for each room or resource for which you are exporting the pricing information.

8. After you have exported all the necessary pricing information, click Close.

   The Edit Pricing window closes. The Rate Schedule dialog box remains opens.

Configuring Pricing Plans

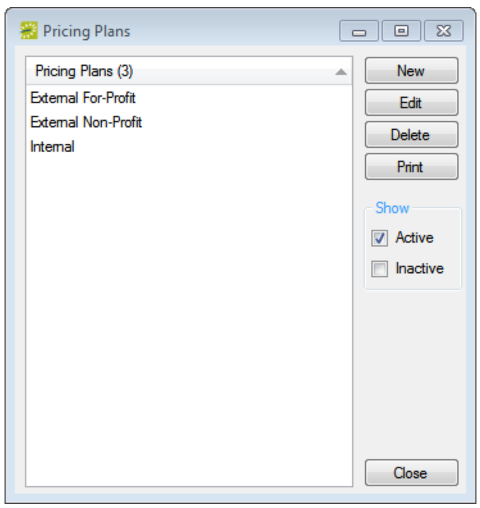
A *pricing plan* bundles different rate schedules. When you configure a pricing plan, you can not only specify different rates schedules for the billable items in the plan, but also you can specify the calculation that is to be applied to a billable item when the plan is used for a group's reservation. After you configure pricing plans, you can assign a default plan to a group's record. Whenever a user makes a reservation for the group, the default pricing plan is displayed automatically in the Pricing Plan field on the Billing tab of the Reservation Wizard.

To configure pricing plans

1. On the EMS menu bar, click Configuration > Billing > Pricing Plans.

   The Pricing Plans window opens. This window lists all the pricing plans that are currently configured in your EMS database and that have a status of Active.

Figure 6-8: Pricing Plans window

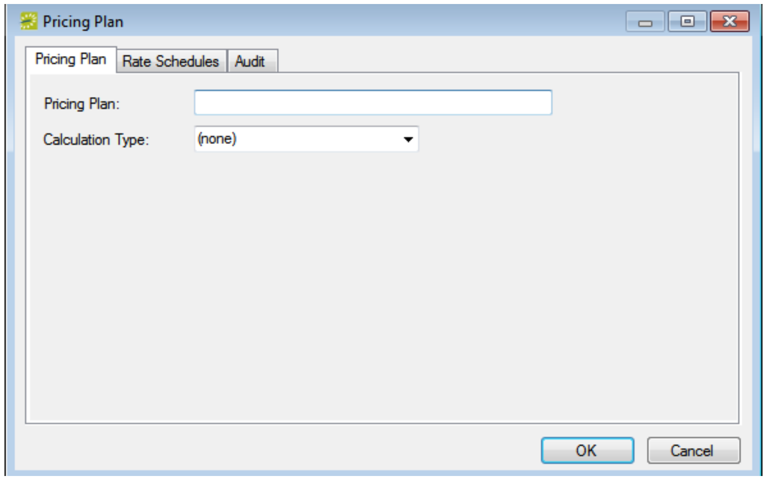


Optionally, to view all pricing plans, regardless of status, under Show, click Inactive.

2. Click New.

   The Pricing Plan dialog box opens. The Pricing Plan tab is the active tab. See Figure 6-9 on page 256.

Figure 6-9: Pricing Plan dialog box, Pricing Plan tab



3. In the Pricing Plan field, enter a name or description for the new plan.

The pricing plan can be a maximum of 30 characters, including spaces.

4. Optionally, on the Calculation Type dropdown list, select the type of calculation that is to be applied to a resource when the plan is used for a group's reservation and then go to Step 5; otherwise, go to Step 6.
   - In Addition to Group—The group must pay the calculations that are set for the billable items in the pricing plan *in addition* to any calculations that it must always pay.
   - Override Group—Override any calculations that are defined at the Group level and pay what is defined for the billable items in the pricing plan.
5. Open the Calculations tab, and on the Available list select the calculation, or CTRL-click to select the multiple calculations that are to always apply to this pricing plan, and then click the Move button (>) to move the selected calculations to the Selected list.

If the appropriate calculation is not available, you can configure it. *"Configuring Calculations" on page 258.*

6. Open the Rate Schedules tab, and for each resource category (including Room Charge) that is to have its price set by this pricing plan, double-click in the Rate Schedule field, and then select the appropriate rate schedule from the dropdown list.

If you do not select a rate schedule for a resource category, or for the Room Charge, then the pricing for these items is set to zero in the pricing plan.

7. Click OK.

   The Pricing Plan dialog box closes. You return to the Pricing Plans window with the newly configured pricing plan automatically selected.

Configuring Calculations

Calculations are additional charges that can be applied to billable items (a category, a group, a group type, a resource, or a room) such as gratuity or sales tax. Both pricing methods and calculations determine the final cost for a billable item; however, unlike pricing, which is applied when a billable item is reserved (and retained, even if the price for the item later changes), calculations are figured each time a confirmation or an invoice is generated. When you configure a calculation, you must specify the rate for the calculation, the calculation sequence (the order in which the calculation is carried out relative to other calculations), and if applicable, the minimum charge for the calculation. You must also indicate whether the calculation should be carried out on the base amount or on a running total, and whether the result of the calculation should be added to the base amount and then considered in subsequent calculations. For example, consider the following four calculations for a base amount of $1,000.00:

Item	Calculated on	Calculation Result	Running Total
• Gratuity 10% • Calc Sequence = 1 • Calc on Base = Yes • Calc Incl in Tot = Yes	$1000	$100	$1100
• Sales Tax 5% • Calc Sequence = 2 • Calc on Base = No • Calc Incl in Tot = Yes	$1100	$55	$1155
• State Tax 5% • Calc Sequence = 3 • Calc on Base = Yes • Calc Incl in Tot = No	$1000	$50	$1155
• Federal Tax 10% • Calc Sequence = 4 • Calc on Base = No • Calc Incl in Tot = No	$1155	$115.50	$1155
Total Calculations:		$320.50	
Grand Total (Base + Calculations):		$1320.50	

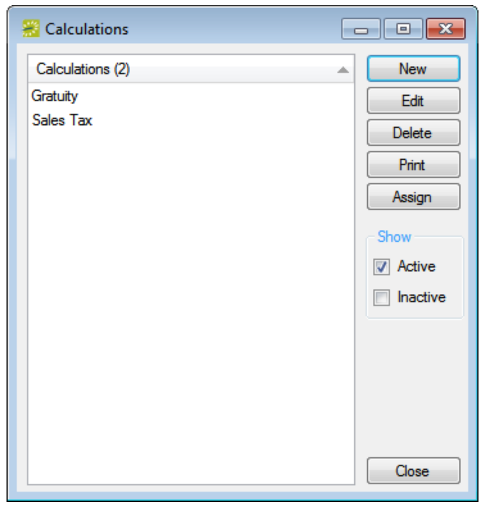
After you configure calculations, you can assign the calculations to a category, group, group type, resource, or room.

To configure calculations

1. On the EMS menu bar, click Configuration > Billing > Calculations.

   The Calculations window opens. This window lists all the calculations that are currently configured in your EMS database and that have a status of Active.

Figure 6-10: Calculations window

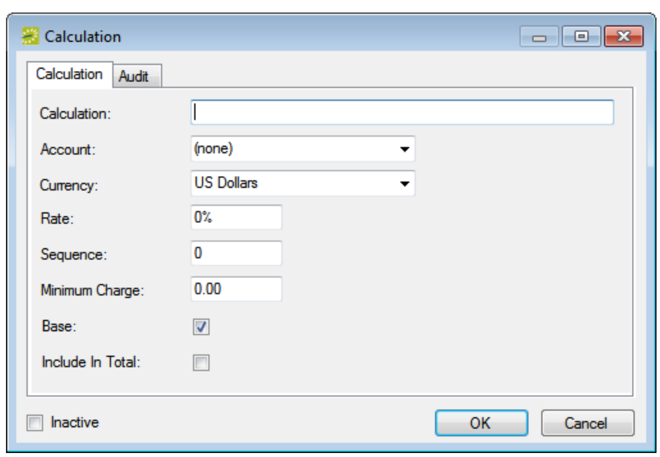


Optionally, to show all calculations, regardless of status, under Show, click Inactive.

2. Click New.

   The Calculation dialog box opens.

Figure 6-11: Calculation dialog box



3. Enter the information for the new calculation.

Field	Description
Calculation	The name or description for the calculation. **Note:** The calculation can be a maximum of 30 characters, including spaces.
Account	Optional field. The account within your internal accounting system that should be credited with the revenue. **Note:** If the appropriate account is not available, you can configure it. See “Configuring Accounts” on page 263.
Currency	The currency symbol that is used to display the results of the calculation.
Rate	The percentage for the calculation rate, for example 5%.
Sequence	The order in which multiple calculations are to be carried out. **Note:** This value is critical when multiple calculations are to be carried out and the order of the calculations affects the resulting value.
Minimum Charge	Optional field. The minimum charge that is to applied to a billable item for which this calculation applies.
Base Include in Total	• Both Base and Include in Total selected—The calculation is carried out on the *original* base amount. The result of the calculation is added to the current running total to make a new running total. The result is also added to the grand total (Base + All Calculations) that is current at the time that the calculation is carried out. • Only Include in Total selected—The calculation is carried out on the *current* running total and the result of the calculation is added to the current running total to make a new running total. The result of the calculation is also added to the grand total (Base + All Calculations) that is current at the time that the calculation is carried out. • Only Base selected—The calculation is carried out on the *original* base amount. The result of the calculation is added to the grand total (Base + All Calculations) that is current at the time that the calculation is carried out. • Neither Base nor Include in Total selected—The calculation is carried out on the *current* running total. The result of the calculation is added to the grand total (Base + All Calculations) that is current at the time that the calculation is carried out.
Inactive	Leave this option blank to add the calculation as an active calculation. Select this option to inactivate the calculation.

4. Click OK.

   The Calculation dialog box closes. You return to the Calculations window with the newly configured calculation automatically selected.

5. Optionally, continue to “To assign calculations” on page 261.

To assign calculations

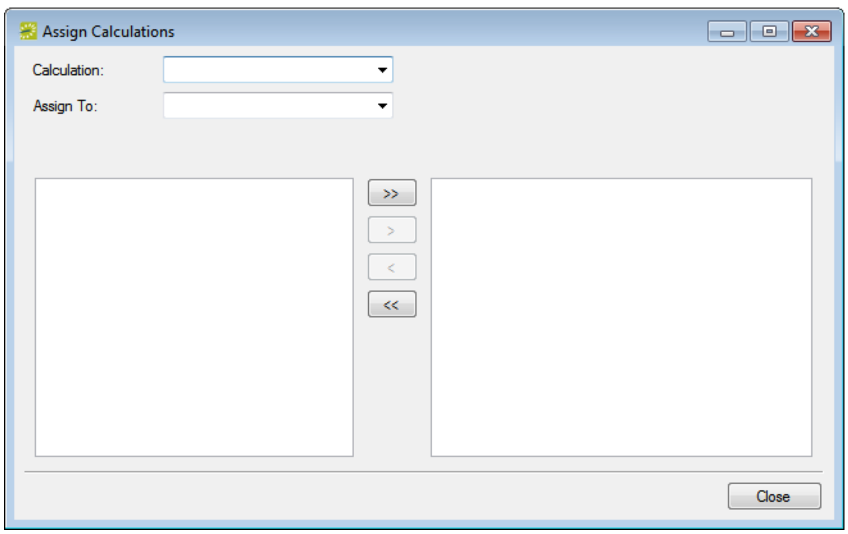
After you configure a calculation, you can assign the calculation to a category, group, group type, resource, or room from the Calculations window.

Remember, you also have the option of assigning calculations to a category, group, group type, resource, or room at the time that you are configuring the category, group, group type, resource, or room. The advantage to assigning a calculation after you configure it is that you can assign the calculation to multiple items in a single step.

1. If needed, click Configuration > Billing > Calculations to open the Calculations window.
2. Click Assign.

   The Assign Calculations dialog box opens.

Figure 6-12: Assign Calculations dialog box



3. On the Calculation dropdown list, select the calculation that you are assigning.
4. On the Assign To dropdown list, select the item (category, group, group type, resource, or room) to which you are assigning the calculation.

Item Selected	Comments
Category	A list of all categories that are currently configured in your EMS database is displayed. If you assign a calculation at the category level, then the calculation is assigned to all resources that are configured for the category. To assign a calculation to a specific resource in a category, then select Resource on the Assign To dropdown list.

Item Selected	Comments
Group	A list of all groups that are currently configured in your EMS database is displayed. Two additional fields are displayed—Group Type and Starts with. Optionally, select a Group Type and/or enter a search string in the Starts with Field to filter the list of groups that are displayed.
Group Type	A list of all group types that are currently configured in your EMS database is displayed.
Resource	A Category dropdown list opens. Select the appropriate category for the resource. A list of all resources that are currently configured for the selected category in your EMS database is displayed.
Room	A Building dropdown list opens. Select the appropriate building. A list of all the rooms that are currently configured for the selected building in your EMS database is displayed.

5. On the Available list, select the item, or CTRL-click to select the multiple items to which the calculation is being assigned, and then click the Move button (>) to move the selected items to the Selected list.
6. Click Close.

   The Assign Calculations dialog box closes. You return to the Calculations window.

Configuring Accounts

EMS uses *accounts* to indicate where the monies that your organization receives for billable items should be deposited, based on your internal accounting system.

Accounts in EMS are used for reporting purposes only. EMS does not provide any functions for physically moving funds.

Examples of accounts include the following:

- Facilities Account
- Catering Fees Account
- Miscellaneous Charges Accounts

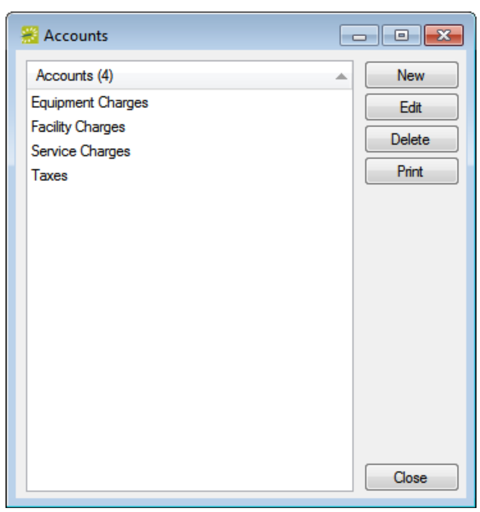
Income for each resource or room is recorded into only one account. The account that is credited typically corresponds to the operational department that receives the income credit for the sale of the resource or room. For instance, in this model, room charges might be credited to the Facilities Account and food and beverage resources would be credited to the Catering Account. When you configure an account, you must specify both an account name and an account code. After you configure accounts, you can use them to label billable items (rooms, equipment items, and so on). If you invoice out of EMS, then you can run the General Ledger Distribution report to group your receivables by account.

To configure accounts

1. On the EMS menu bar, click Configuration > Billing > Accounts.

   The Accounts window opens. This window lists all the accounts that are currently configured in your EMS database.

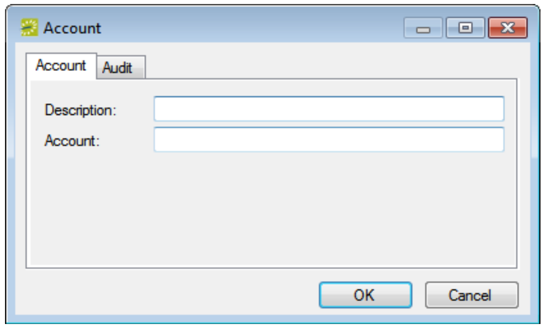
Figure 6-13: Accounts window



2. Click New.

   The Account dialog box opens.

Figure 6-14: Account dialog box



3. Enter the information for the new account.

Field	Description
Description	The name or description for the account. **Note:** The description can be a maximum of 50 characters, including spaces.
Account	The code for the account. Typically, this is numerical, but it can be abbreviated text that conveys the account name or description. **Note:** The code can be a maximum of 50 characters, including spaces.

4. Click OK.

   The Account dialog box closes. You return to the Accounts window with the newly configured account automatically selected.

Configuring Payment Types

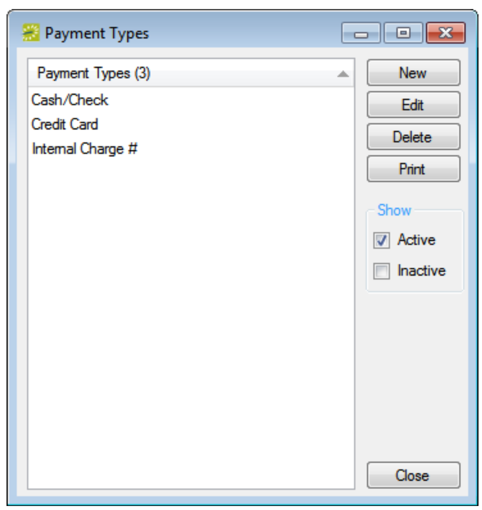
A *payment type* indicates the forms of payment that your organization accepts. Payment types are also used to track the forms of payment that your groups are using. Examples of payment types include checks, credit card, and cash. Because payment types are for informational purposes only and do not affect the pricing or billing of an event, configuration of payment types is not required; however, after you configure payment types, you can assign a default payment type to a group's record. Whenever a user makes a reservation for the group, the default payment type is displayed automatically in the Payment Type field on the Billing tab of the Reservation Wizard.

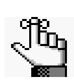
To configure payment types

1. On the EMS menu bar, click Configuration > Billing > Payment Types.

   The Payment Types window opens. This window lists all the payment types that are currently configured in your EMS database and that have a status of Active.

Figure 6-15: Payment Types window



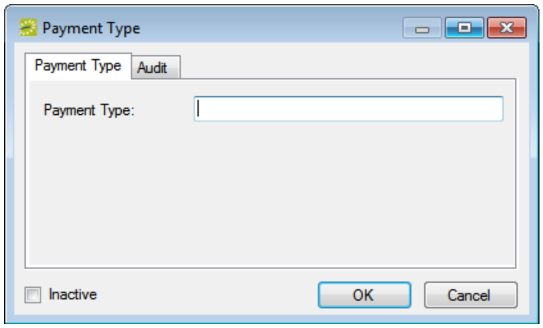


Optionally, to show all payment types, regardless of status, under Show, click Inactive.

2. Click New.

   The Payment Type dialog box opens.

Figure 6-16: Payment Type dialog box



3. In the Payment Type field, enter a name or description for the new payment type.

The payment type can be a maximum of 30 characters, including spaces.

4. Leave Inactive blank to add the payment type as an active payment type. Optionally, select Inactive to inactivate the payment type.
5. Click OK.

   The Payment Type dialog box closes. You return to the Payment Types window with the newly configured payment type automatically selected.

Configuring Sales Categories

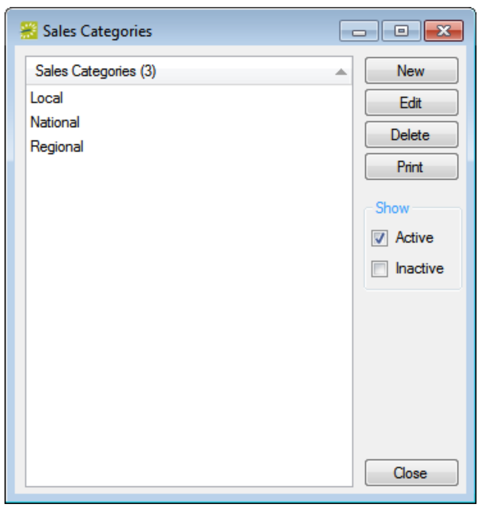
You can configure *sales categories* to sort your groups for the purposes of tracking sales figures. For example, you could sort your groups based on local, regional, and national sales figures. Because sales categories are for informational purposes only and do not affect the pricing or billing of an event, configuration of sales categories is not required; however, after you configure sales categories, you can assign a default category to a group's record. Whenever a user makes a reservation for the group, the default sales category is displayed automatically in the Sales Category field on the Billing tab of the Reservation Wizard.

To configure sales categories

1. On the EMS menu bar, click Configuration > Billing > Sales Categories.

   The Sales Categories window opens. This window lists all the sales categories that are currently configured in your EMS database and that have a status of Active.

Figure 6-17: Sales Categories window

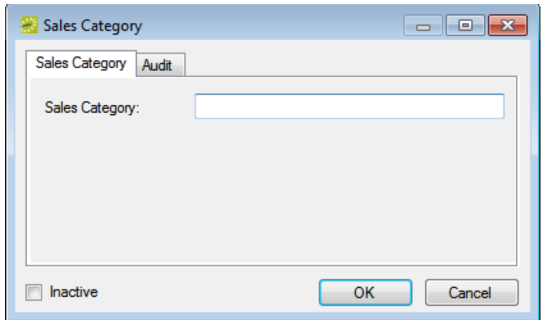


Optionally, to show all sales categories regardless of status, under Show, click Inactive.

2. Click New.

   The Sales Category dialog box opens.

Figure 6-18: Sales Category dialog box



3. In the Sales Category field, enter a name or description for the new sales category.

The sales category can be a maximum of 30 characters, including spaces.

4. Leave Inactive blank to add the sales category as an active category. Optionally, select Inactive to inactivate the sales category.
5. Click OK.

   The Sales Category dialog box closes. You return to the Sales Categories window with the newly configured sales category automatically selected.

Configuring Billing Reference and PO Numbers

When you configure billing reference numbers and PO numbers, they are assigned to a "master list." When reservationists or web users are making a reservation or submitting a reservation request through the EMS client or VEMS, respectively, then they can look up the available billing references or PO numbers on this master list and assign the appropriate value to the reservation or request. Because billing references and PO numbers are for informational purposes only and do not affect the pricing or billing of an event, configuration of these items is not required; however, after you configure billing references and PO numbers, you can assign a default value to a group's record. Whenever a user makes a reservation for the group, the default value is displayed automatically in the Billing Reference field and/or PO number field on the Billing tab of the Reservation Wizard, but a user can change the values if needed.

To configure billing reference numbers and PO numbers

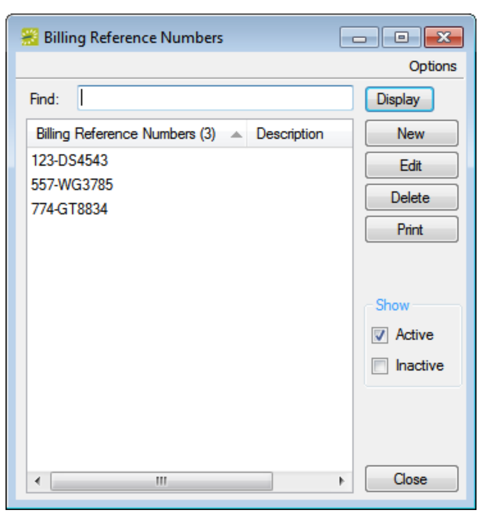
The following procedure is written from the perspective of billing reference numbers; however, by analogy, you can follow this procedure to configure PO numbers.

1. On the EMS menu bar, click Configuration > Billing > Billing Reference Numbers.

   The Billing Reference Numbers window opens. This window lists a specific number of billing references that are currently configured in your EMS database and that have a status of Active.

You can set the specific number of records that are to be returned under Options in the top right corner of the Billing References window.

Figure 6-19: Billing Reference Numbers window



2. Optionally, do one or more of the following:

   - Click Options, and then select a different number of records that are to be returned in the window.
   - To filter the list based on the Billing Reference, enter a search string in the Find field, and then click Display.

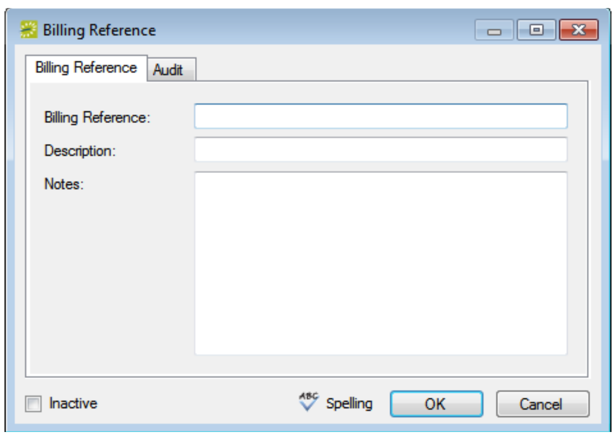
The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of ***Alu*** *returns* ***Alu****mniNE, but not NEAlumni.*

   - To show both active and inactive billing references, under Show, click Inactive.

3. Click New.

   The Billing Reference Number dialog box opens.

Figure 6-20: Billing Reference Number dialog box



4. Enter information for the billing reference number.

Field	Description
Billing Reference Number	Required field. Alphanumeric data allowed. **Note:** The number can be a maximum of 100 characters, including spaces.
Description	A name or description for the billing reference number. **Note:** The description can be a maximum of 50 characters, including spaces.
Notes	Any additional information that is pertinent for the billing reference. **Note:** This field is available for reporting in the Query Builder. See the EMS User's Manual.

5. Leave Inactive blank to add the item as an active billing reference. Select Inactive to inactivate the billing reference.

6. Optionally, to check the spelling for the billing reference before you save it, click Spelling.
7. Click OK.

   The Billing Reference Number dialog box closes. You return to the Billing Reference Numbers window with the newly configured reference automatically selected.

Configuring Currencies

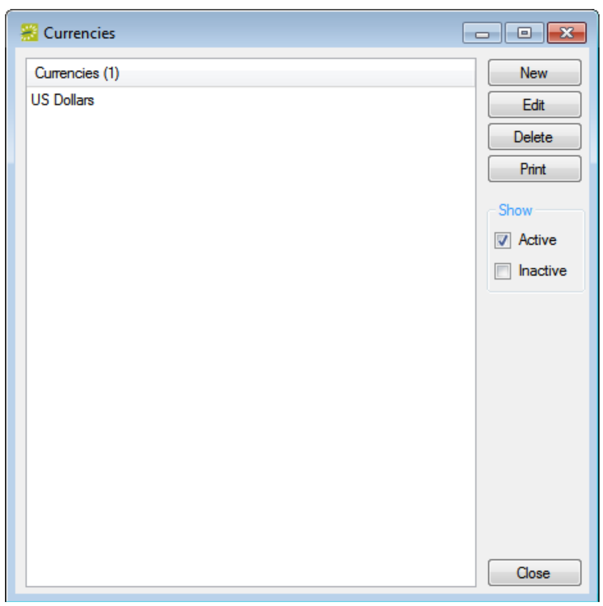
A *currency* in EMS is either an abbreviation or symbol that indicates how a room or resources in a category should be charged. For example, the currency for the US dollar could be either USD or $. Because currencies are for informational purposes only and do not affect the pricing or billing of an event, configuration of these items is not required; however, after you configure currencies, you can assign a default value to a room's record or a service category's record. If a reservation is made with multiple currencies, then the billable items, the items' prices, and the currencies used for items' charges are broken out by currency in sales reports, in confirmations, in VEMS, and so on.

To configure currencies

1. On the EMS menu bar, click Configuration > Billing > Currencies.

   The Currencies window opens. This window lists all the currencies that are currently configured in your EMS database and that have a status of Active.

Figure 6-21: Currencies window

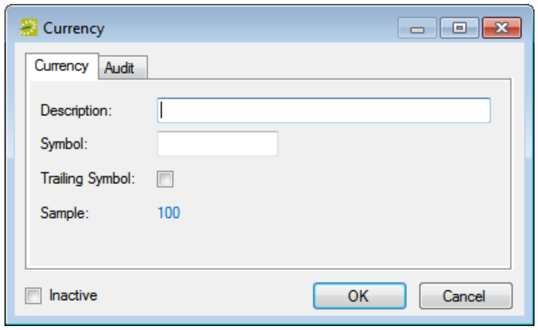


Optionally, to show all currencies, regardless of status, under Show, click Inactive.

2. Click New.

   The Currency dialog box opens.

Figure 6-22: Currency dialog box



3. Enter the information for the new currency.

Field	Description
Description	The name or description for the currency. **Note:** The description can be a maximum of 50 characters, including spaces.
Symbol	Required field. The abbreviation or symbol for the currency, for example, USD or $ for US dollars.
Trailing Symbol	Leave this option blank if the currency symbol is to be displayed in a leading position, for example, $45.00. Select this option if the symbol is to be displayed as the far right hand character.
Note: As you enter the information for the currency, an example currency entry is displayed in the Sample field.	

4. Leave Inactive blank to add the currency as an active currency. Select Inactive to inactivate the currency.

5. Click OK.

   The Currency dialog box closes. You return to the Currencies window with the newly configured currency automatically selected.

Core Configuration - Groups and Contacts

A *group* is an entity for which reservations are made at your facilities. A group is one of the four core data items that you must configure in EMS so that your users can make reservations. A *contact* is a person who serves as the coordinator or focal point for a group.

This chapter covers the following topics:

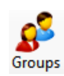
- "Configuring Groups" on page 277.
- "Configuring Additional Information for a Group" on page 285.
- "Configuring Contacts" on page 295.
- "Editing Group Information" on page 303.
- "Importing Groups" on page 308.

Configuring Groups

A *group* is an entity for which reservations are made at your facilities. A group is one of the four core data items that you must configure so that your users can make reservations. A group can be an internal or external entity and it can be an organization or an individual. Optionally, if you want to first confirm that a group has not already been configured, then you can search for the group.

Your organization might use a different term (such as client, customer, and so on) to identify the entities for which reservations are made at your facilities. To change the term from "group" to your organization-specific term throughout your EMS system (menus, window and dialog box titles, confirmation headings, and so on), you must edit the Group Title Plural and Group Title Singular parameters. See *"Editing System Parameters" on page 311.*

To search for a group and/or contact

1. On the toolbar, click the Groups icon 

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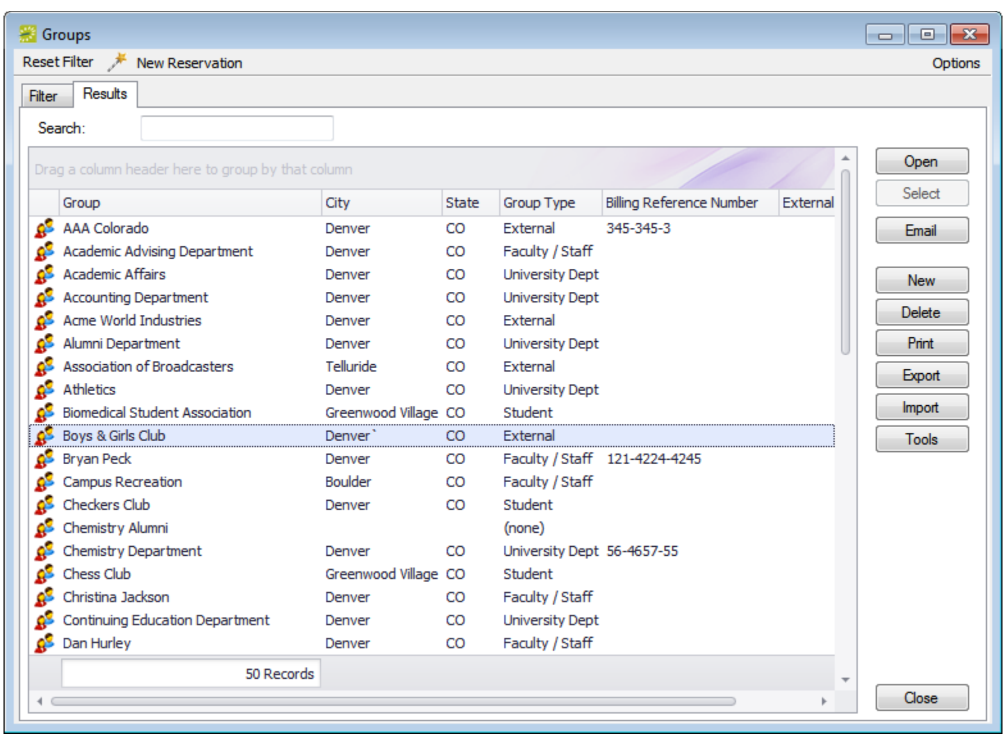
   The Groups window opens. The Results tab is the active tab. By default, when the Results tab first opens, it lists the first 1000 groups that are currently configured in your EMS database and that have a status of Active.

Figure 7-1: Groups window, Results tab



Optionally, to change the number of records that are displayed in the Groups window, click Options, and then on the Group Options dialog box, select a different number of records to return.

2. Open the Filter tab and set your search criteria.

Option	Description
Display	• Group—Display all groups that meet your search criteria on the Results tab. • Contact—Display all contacts that meet your search criteria on the Results tab. **Note:** When a list of contacts is displayed, the contact's group is also displayed.
Search Fields	• Starts with—The string is not case-sensitive, but your search is limited to the exact order of the characters in the string, and the string must begin with the information for which you are searching. For example, **Assoc** returns **Assoc**iation of Broadcasters but not Biomedical Student Association. • Contains—Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive, and the string can be found anywhere in your search results. For example, **Assoc** returns both **Assoc**iation of Broadcasters and Biomedical Student **Assoc**iation.
Group	Fields are available if you select Groups for Display. Enter values as needed in any or all fields.
Contact	Fields are available only if you select Contacts for Display. Leave all fields set to their default search values to search for all active contacts that are currently configured in your EMS database, or enter values as needed in any or all fields. **Note:** If you select Contact, then both the Group fields and the Contact fields are available for searching. If you enter data in both sets of fields when you are searching for a contact, then your search criteria must be met for both the contact *and* the contact's group for the contact to be displayed on the Results tab.
Note: To reset the Filter at any time to its default settings, click Reset Filter.	

3. Click Get Data.

   The Results tab opens with a list of search results that meet all your search criteria.

4. To further filter the display on the Results tab, in the Search field, enter a search string.

   The list of groups is dynamically updated as you enter your search string.

*Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive, and it can appear anywhere in your search results. For example, a search string of **Assoc** returns both **Assoc**iation of Broadcasters and Biomedical Student **Assoc**iation.*

To configure groups

The following procedure describes the basic information that an EMS administrator typically configures for a group. Groups configured this way are generally a satisfactory starting point for the reservationists at your organization, and they always have the option of configuring additional information for a group if needed. For example, they can configure comments or reminders for a group. Your reservationists can also configure and/or edit a groups “on the fly” during the reservation process. See the *EMS User’s Manual* for details.

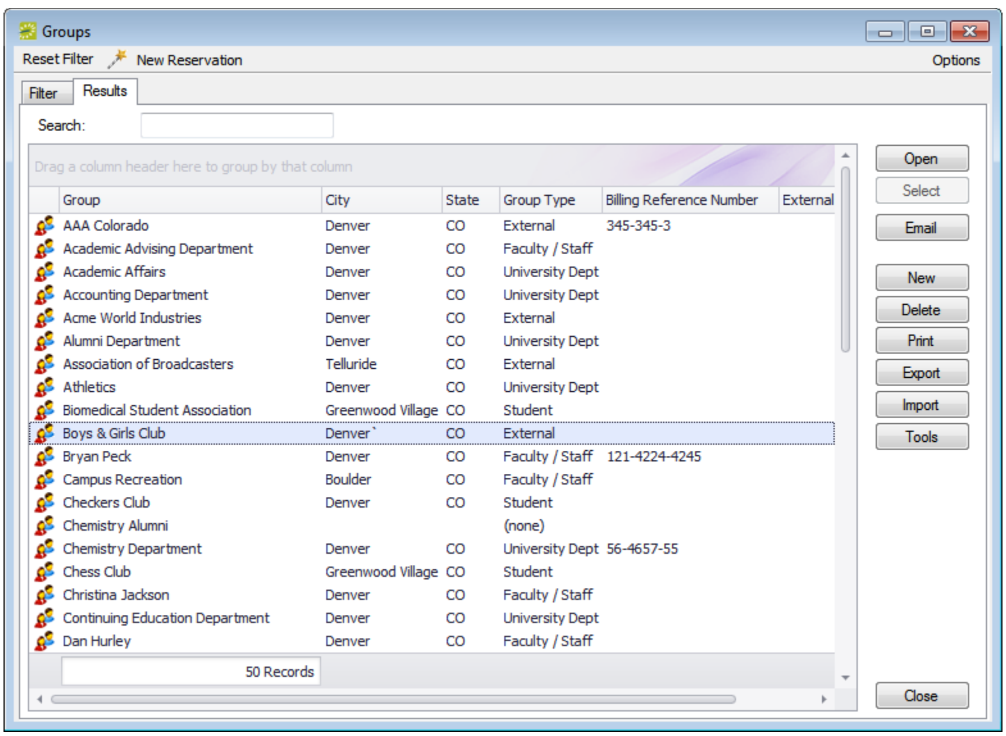
Remember that before you configure a group, you might want to search for the group to verify that it has not already been configured. See *“To search for a group and/or contact” on page 277.*

1. On the toolbar, click the Groups icon 

.

   The Groups window. The Results tab is the active tab. By default, when the Results tab *first* opens, it lists up the first 1000 groups that are currently configured in your EMS database and that have a status of Active.

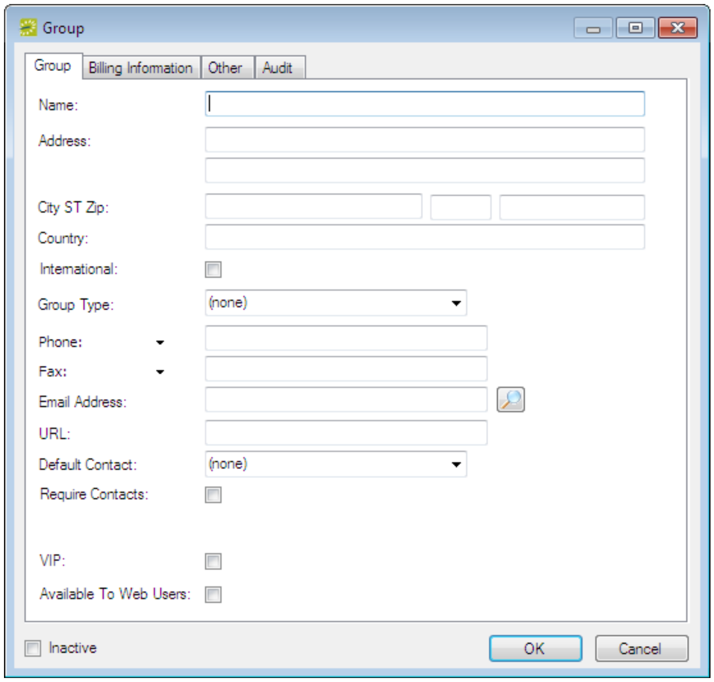
Figure 7-2: Groups window, Results tab



2. Click New.

   The Group dialog box opens. The Group tab is the active tab.

Figure 7-3: Group dialog box, Group tab



3. Enter the summary information for the new group.

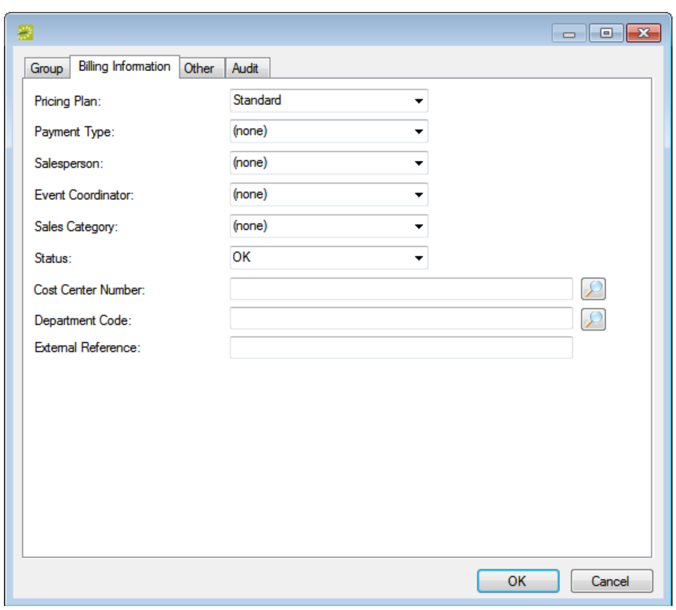
The only required information is the group name. All other information on all tabs is optional and can be added at a later date when needed.

Field	Description
Name	Required field. The name of the group. **Note:** The name can be a maximum of 50 characters, including spaces.
Address City ST Country Zip	The street or mailing address for the group.
International	Select this option to drop the State and Zip fields for an international group.
Group Type	If the appropriate group type is not available, you can configure it. See “Configuring Group Types” on page 47.

Field	Description
Phone Fax	The phone number and fax number for the group. **Note:** The Phone and Fax fields have a dropdown list available from which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.
Email Address	The email address for the group. **Note:** If your computer is connected to a network, click the Search icon to open a Global Address Lookup dialog box and search for the email address.
URL	The URL for the group’s website. **Note:** Web users can link to this group's web site on VEMS.
Default Contact	Populated with the name of the default contact for the group *after* you have defined default contacts for the group.
Require Contacts	Select this option if the group is to *always require* a contact when a reservation is being made for the group.
VIP	Select this option if the group is to be designated as a VIP group.
Available to Web Users	Select this option if users are to be able to select the group on the Group Lookup page in VEMS.
Inactive	Leave this option blank to add the group as an active group. Select this option to inactivate the group.

4. Optionally, do one or both of the following; otherwise, go to Step 5.
   - Open the Billing Information tab and add the default billing information for the group.

Figure 7-4: Group dialog box, Billing Information tab



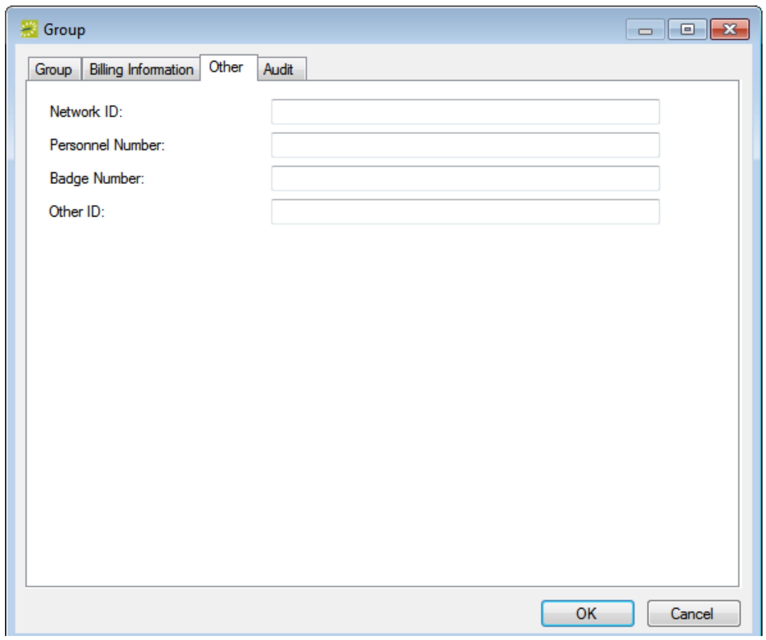
The values that you specify here are the default values that are applied when a new reservation is made for the group. An EMS user can change these values if needed.

Option	Description
Pricing Plan	If the appropriate pricing plan is not available, you can configure it. See “Configuring Pricing Plans” on page 255.
Payment Type	If the appropriate payment type is not available, you can configure it. See “Configuring Payment Types” on page 265.
Salesperson	The salesperson for the event. **Note:** An EMS user is designated as a Salesperson at the time that the user’s account is configured. If you do not see the appropriate user in the list, you can edit an existing user account, or create a new user account as needed. See “Configuring User Accounts” on page 329.
Event Coordinator	The event coordinator for the group. **Note:** An EMS user is designated as an Event Coordinator at the time that the user’s account is configured. If you do not see the appropriate user in the list, you can edit an existing user account, or create a new user account as needed. See “Configuring User Accounts” on page 329.
Sales Category	If the appropriate sales category is not available, you can configure it. See “Configuring Sales Categories” on page 267.
Status	The status is a way to indicate the standing or ranking of the group. The default values are the following: • OK—A reservation can be made for the group. (In your organization, this status could indicate that the group is current in payments due.) • Warning—If a group status is set to Warning, then a Warning message opens when you make a reservation for the group. It does not, however, prevent a reservation from being made for the group. • Bad—If a group status is set to Bad, then reservations cannot be made for the group. **Note:** You can always change the default values for these group statuses. See “Editing System Parameters” on page 311.
Billing Reference Number	You can manually enter data into the field, or you can click the Search icon to open a master list of billing reference numbers and select a reference. **Note:** To define a list of eligible billing references that are specific to the group, see “Configuring Additional Information for a Group” on page 285.
PO Number	You can manually enter data into the field, or you can click the Search icon to open a master list of PO Numbers and select a PO number. **Note:** To define a list of eligible PO numbers that are specific to the group, see “Configuring Additional Information for a Group” on page 285.
External Reference	Links the group to an outside program, if needed.

Option	Description
Account	If the appropriate account is not available, you can configure it. See "Configuring Accounts" on page 263. **Note:** This field is displayed only if the EMS system parameter "Show Account Field on Group" is set to "Yes." See "EMS System Parameters" on page 492.

- Open the Other tab and add any other identifying information for the group as needed.

Figure 7-5: Group dialog box, Other tab

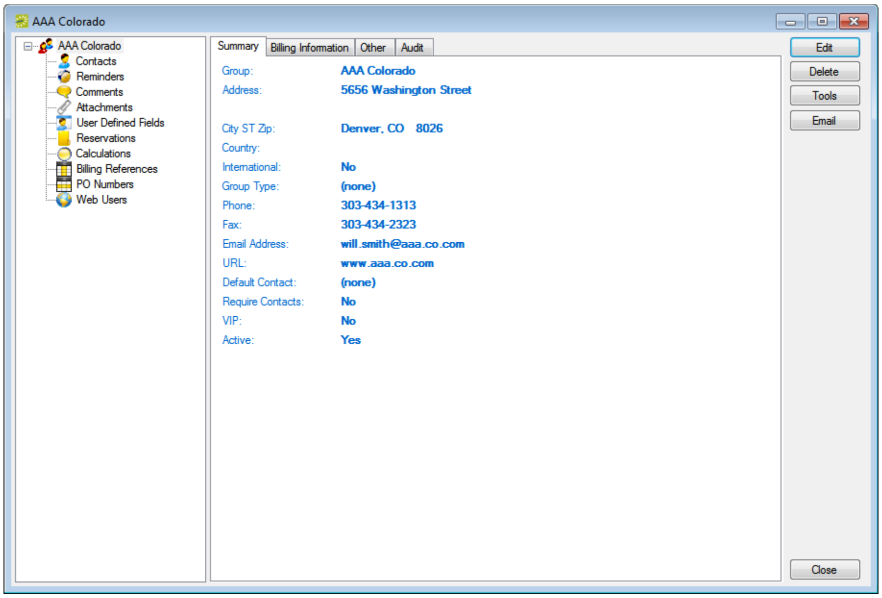


Option	Description
Network ID	The Windows login for the group.
Personnel Number	Organization number for the group.
Badge Number	Badge number for the group.
Other ID	Any secondary ID for the group.

5. Click OK.

The Group dialog box closes and a group-specific window opens with the newly configured group automatically selected. (See Figure 7-6 on page 284.) You can use the options on this window to carry out additional configuration for the group. See "Configuring Additional Information for a Group" on page 285.

Figure 7-6: Example of a group-specific window



Configuring Additional Information for a Group

After you have configured a new group in your EMS database with the basic group information (group identifying information, billing information and/or other information), you have the option of configuring additional information for the group. You can:

- Create a web user from the group. See "To create a web user from a group" below.
- Assign the group to a web user. See "To assign the group to a web user" on page 289.
- Assign calculations to the group. See "To assign calculations to a group" on page 290.
- Configure a master list of group-specific billing reference numbers. See "To configure a list of billing reference numbers" on page 292.
- Configure a master list of group-specific PO numbers. See "To configure a list of PO numbers" on page 293.

When you select a configuration item (contacts, reminders, and so on) for a group in the group-specific window, the right pane for the window is an EMS browser window. See "An EMS Browser Window" on page 33.

For information about configuring a contact for a group, including creating a web user for a contact, see "Configuring Contacts" on page 295. For information about editing or deleting a contact for a group, see "Editing Group Information" on page 303.

To create a web user from a group

A *web user* is a registered user who can submit requests for reservations or schedule reservations in VEMS. When you add a new group in your EMS database, you decide the "level" of the group that you are adding. For a group that is added at the individual (personnel/employee) level, you might also need to create a web user from the group. This user can then create and view reservations on behalf of a group or groups in VEMS. You can create only one web user *from* a group. When you create a web user, you can also specify one or more delegates for the web user. A *delegate* is a web user who can create and view reservations on behalf of another web user.

The following procedure addresses the creation of a web user at the time that you are configuring a group in EMS. Configuration of web users as part of the overall configuration of your VEMS module is discussed in , "Virtual EMS (VEMS) Configuration," on page 397.

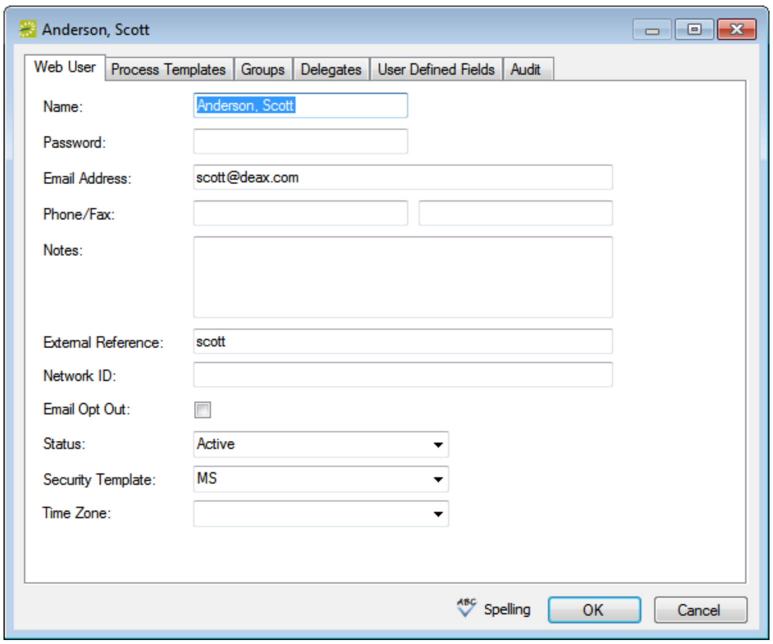
1. Open the Groups window and search for the group for which you are creating the web user. See "To search for a group and/or contact" on page 277.

2. On the Groups window, select the group, and then click Tools > Create Web User.

   A group-specific dialog box opens. The Web User tab is the active tab.

The User Defined Fields tab displays the questions that a web user was required to answer when the user requested to create an account through VEMS and it is not relevant to the procedure that is described below.

Figure 7-7: Group-specific dialog box, Web User tab



3. Enter the information for the new web user.

Ideally, you should enter all the necessary information for your web user before you save the web user; however, at any time if you need to access your web user, on the EMS menu bar, click Configuration > Web > Web Users.

Field	Description
Name	Automatically populated after you select the group from the Groups window.
Password	The password that a web user must enter to log in to VEMS.
Email address	If this information has been entered in the Groups window for the group, then this field is automatically populated after you select the group from the Groups window. If the field is blank, you must enter the full email address for the user. (The user must enter this address to log in to VEMS.)

Field	Description
Phone/Fax	Optional fields. If this information has been entered for the group, then these fields are automatically populated after you select the group from the Groups window. If the fields are blank, you can enter values if needed.
Notes	Optional field.
External Reference	Optional field. Links the web user to an outside program if needed.
Network ID	Optional field. The web user’s network ID.
Email Opt Out	Select this option if the web user is not to receive automatic emails (such as reservation summary emails) from VEMS. The user will still receive manually sent emails.
Status	Required field. Select the status for the web user: • Active—The web user can log in to VEMS. • Inactive—The user cannot log in to VEMS and is instructed to contact the EMS administrator. • Pending—The web user cannot log in to VEMS and is informed that he/she must check back at a later time.
Security Template	Required field. This determines the web user's access to the system—the menu items that the user can see and the information that the user can view in a tooltip when 'rolling-over' an event in VEMS. **Note:** For detailed information about web security templates, see “Configuring Web Templates” on page 399.
Time Zone	Required field. Select the time zone for the user.

4. Open the Process Templates tab and on the Available list, select the web process template, or CTRL-click to select the multiple templates to which you are assigning the user, and then click the Move button (>) to move the selected templates to the Selected list.

A web process template defines the functions that are available to each type of web user in VEMS when the user is submitting a request for a reservation. For detailed information about web process templates, see “Configuring Web Templates” on page 399.

5. Open the Groups tab and do one of the following to specify the groups on whose behalf the web user can view and make reservations in VEMS.

   - The group (web user) is selected by default. You can leave this group in the Selected list, or you can select the group and click the Remove button (<).
   - Specify any combination of search criteria for the Find field and Group Type, and then click Display to produce a list of all groups that meet the criteria. In the Available list, select a group, or CTRL-click to select multiple groups, and then click the Move button (>) to move the selected groups to the Selected list.

If you leave the Find field blank, then a list of all currently active groups for the selected group type is displayed. If you enter a search string in the Find field, the string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, ***And*** *returns* ***And****erson, Scott, but not Cooper, Anderson.*

6. Open the Delegates tab, and on the Search by dropdown list, do one of the following to specify the delegates for the web user:

   - Leave the Find field blank, and then click Display to open a list of *all* currently available web users. Select a user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.
   - On the Search By dropdown list, select the option by which to search (Email Address or User Name), and in the Find field, enter the string by which to filter your search, and then click Display. Select a web user, or CTRL-click to select web multiple users, and then click the Move button (>) to move the selected users to the Selected list.

The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of ***bob*** *returns* ***bob****.worth@emssoftware.com but not dbobbett@emssoftware.com.*

7. Optionally, click Spelling to spell check any information that you manually entered for the web user.

8. Click OK.

   The dialog box for creating a web user closes and a message opens indicating that the web user was created successfully.

9. Click OK to close the message and return to the Groups window.

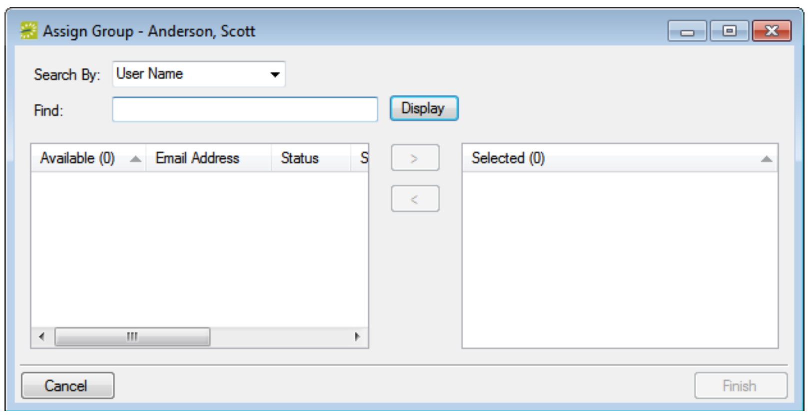
To assign the group to a web user

When you add a new group in your EMS database, you should also assign the group to a web user. This web user can then create and view reservations on behalf of the group in VEMS. You can assign a group to one or more web users.

1. Open the Groups window and search for the group to which you are assigning the web user. See “To search for a group and/or contact” on page 277.
2. On the Groups window, select the group, and then click Tools > Assign to Web Users.

   The Assign Group dialog box opens.

Figure 7-8: Assign Group dialog box



3. Do one of the following to select the web users whom you are assigning to the group:
   - Leave the Find field blank, and then click Display to open a list of *all* currently active web users. Select the web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.
   - In the Search By dropdown list, select the option by which to search (Email Address or User Name) and then in the Find field, enter the string by which to filter your search, and then click Display. Select the web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected users to the Selected list.

The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and the string must begin with the information for which you are searching. For example, if searching by Email Address, a search string of ***bob*** *returns* ***bob****.worth@emssoftware.com but not dbobbett@emssoftware.com.*

4. Click Finish.

   A message opens indicating that the group was assigned successfully.

5. Click OK to close the message and return to the Groups window.

To assign calculations to a group

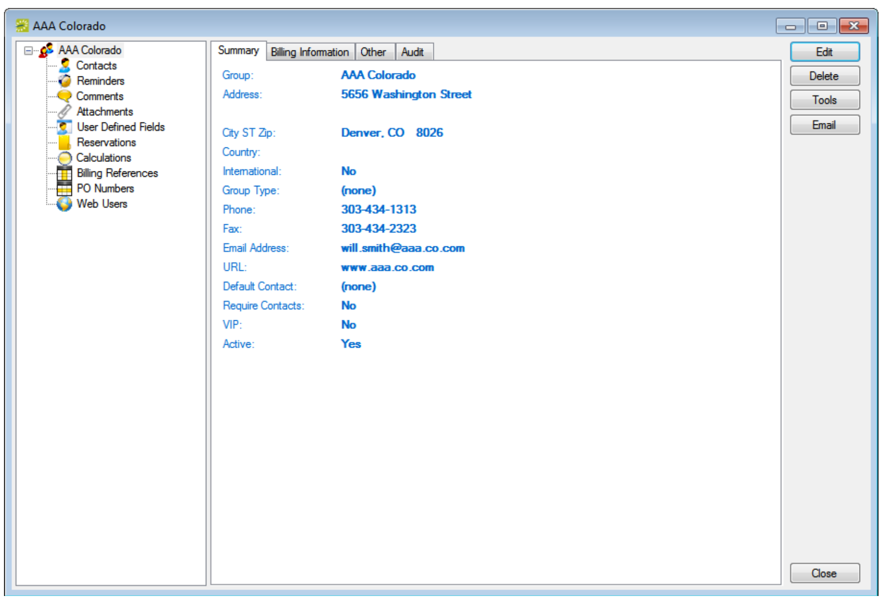
Calculations are additional charges that can be applied to billable items (a category, a group, a group type, a resource, or a room) such as gratuity or sales tax. When you configure a group, you can assign the calculations that are to always apply to the group.

1. Open the Groups window and search for the group to which you are assigning the calculations. See “To search for a group and/or contact” on page 277.

2. On the Groups window, select the group, and then click Open.

   A group-specific window opens. The group is automatically selected in the window.

Figure 7-9: Group-specific window



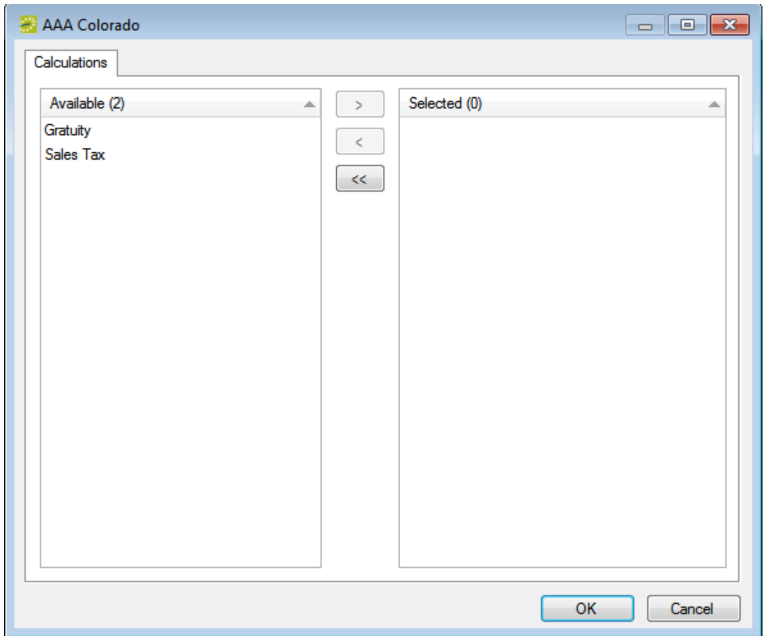
3. In the left pane of the group-specific window, select Calculations.

   The right pane of the group-specific window displays any calculations that have already been assigned to the group.

4. Click Edit.

   The Calculations dialog box opens.

Figure 7-10: Calculations dialog box



5. On the Available list, select the calculation, or CTRL-click to select the multiple calculations that are to always apply to this group, and then click the Move button (>) to move the selected calculations to the Selected list.

If the appropriate calculation is not available, you can configure it. See *"Configuring Calculations" on page 258.*

Remember, you can also assign calculations to a group type. (See *"Configuring Group Types" on page 47.)* *If you have already assigned calculations for this group's type, then these calculations are automatically applied to the group. The calculations are displayed in the Selected list after you click OK and save the group.*

6. Continue with any other optional configuration for the group as needed; otherwise, click OK to close the Calculations dialog box and return to the group-specific window.

To configure a list of billing reference numbers

You can configure a master list of billing reference numbers that are specific to the group.

1. Open the Groups window and search for the group for which you are configuring the master billing reference numbers list. See “To search for a group and/or contact” on page 277.

2. On the Groups window, select the group, and then click Open.

   A group-specific window opens. The group is automatically selected in the window.

For an example of a group-specific window, see Figure 7-6 on page 284.

3. In the left pane of the group-specific window, select Billing References.

   A list of all currently active billing reference numbers for the group is displayed in the right pane of the group-specific window.

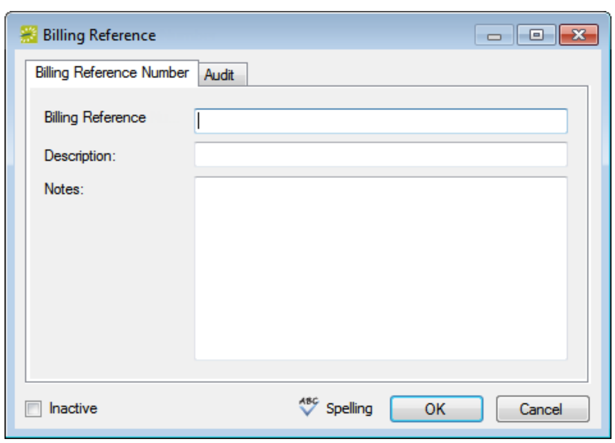
4. Optionally, to display all billing reference numbers regardless of status, click Show Inactive.

   Any inactive billing reference numbers are displayed in italics in the right pane.

5. Click New.

   The Billing Reference dialog box opens.

Figure 7-11: Billing Reference dialog box



6. Enter the information for the new billing reference number.

Option	Description
Billing Reference Number	The billing reference number that is associated with the group. **Note:** The reference can be alphanumeric and it has a maximum of 100 characters, including spaces.
Description	A description of the billing reference number.
Notes	Any other comments or statements that are applicable for the billing reference number.
Inactive	Leave this option blank to add the reference as an active reference (the billing reference number is to be available when a reservation is made for the group). Select this option to inactivate the billing reference number.

7. Optionally, click Spelling to spell check the information for the billing reference number before you save it.
8. Continue with any other optional configuration for the group as needed; otherwise, click OK to close the Billing Reference Number dialog box and return to the group-specific window.

To configure a list of PO numbers

You can configure a master list of PO numbers that are specific to the group. That way, if you need to edit the group information, instead of having to manually enter a new or different PO number, you can simply select it from this master list.

1. Open the Groups window and search for the group for which you are configuring the master PO numbers list. See “To search for a group and/or contact” on page 277.
2. On the Groups window, select the group, and then click Open.

   A group-specific window open. The group is automatically selected in the window.

For an example of a group-specific window, see Figure 7-6 on page 284.

3. In the left pane of the group-specific window, select PO Numbers.

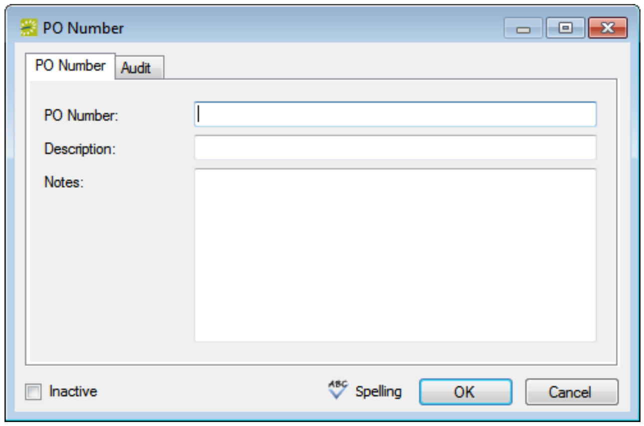
   A list of all currently active PO numbers for the group is displayed in the right pane of the group-specific window.
4. Optionally, to display all PO numbers regardless of status, click Show Inactive.

   Any inactive PO numbers are displayed in italics in the right pane.

5. Click New.

   The PO Number dialog box opens.

Figure 7-12: PO Number dialog box



6. Enter the information for the new PO number.

Option	Description
PO Number	The PO number that is associated with the group. **Note:** The reference can be alphanumeric and it has a maximum of 100 characters, including spaces.
Description	A description of the PO number.
Notes	Any other comments or statements that are applicable for the PO number.
Inactive	Leave this option blank to add the PO number as an active number (the PO number is to be available when a reservation is made for the group). Select this option to inactivate the PO number.

7. Optionally, click Spelling to spell check the information for the PO number before you save it.
8. Continue with any other optional configuration for the group as needed; otherwise, click OK to close the PO Number dialog box and return to the group-specific window.

Configuring Contacts

A *contact* is a person who serves as the coordinator or focal point for a group. You have two options for configuring a contact for a group. You can configure a” free form” contact, which requires you to manually enter the contact information, or you can configure a contact from another group, which means that you do not have to manually enter the contact information. Instead, the group information is automatically used for the contact.

You can also configure and edit a contact “on the fly” during the reservation process. See the EMS User’s Manual for details.

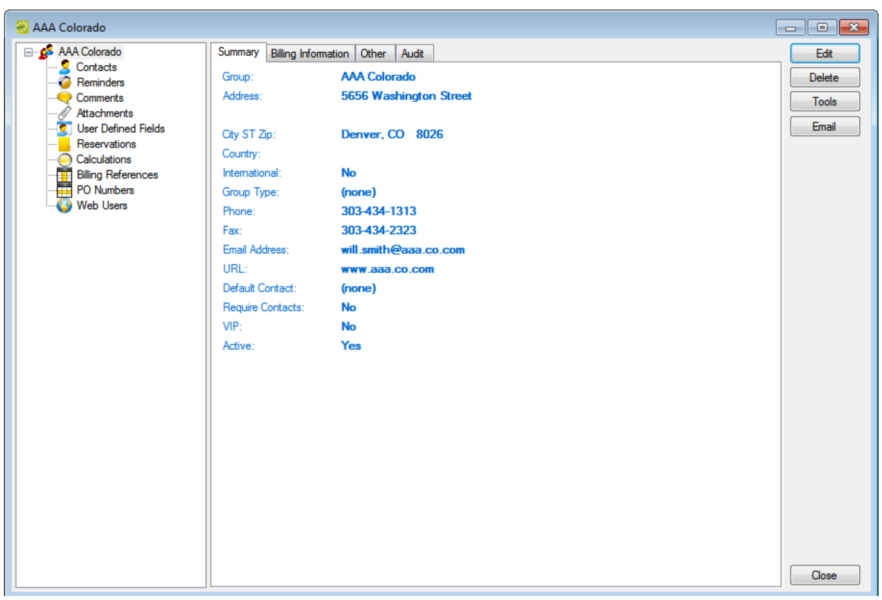
To configure contacts

1. Open the Groups window and search for the group for which you are configuring the contact. See “To search for a group and/or contact” on page 277.

2. Select the group, and then click Open.

   A group-specific window open. The group is automatically selected in the window.

Figure 7-13: Group-specific window



3. In the left pane of the group-specific window, select Contacts.

   A list of all currently active contacts for the group is displayed in the right pane of the group-specific window.

Optionally, to display all group contacts regardless of status, click Show Inactive. Any inactive contacts are displayed in red italics in the right pane.

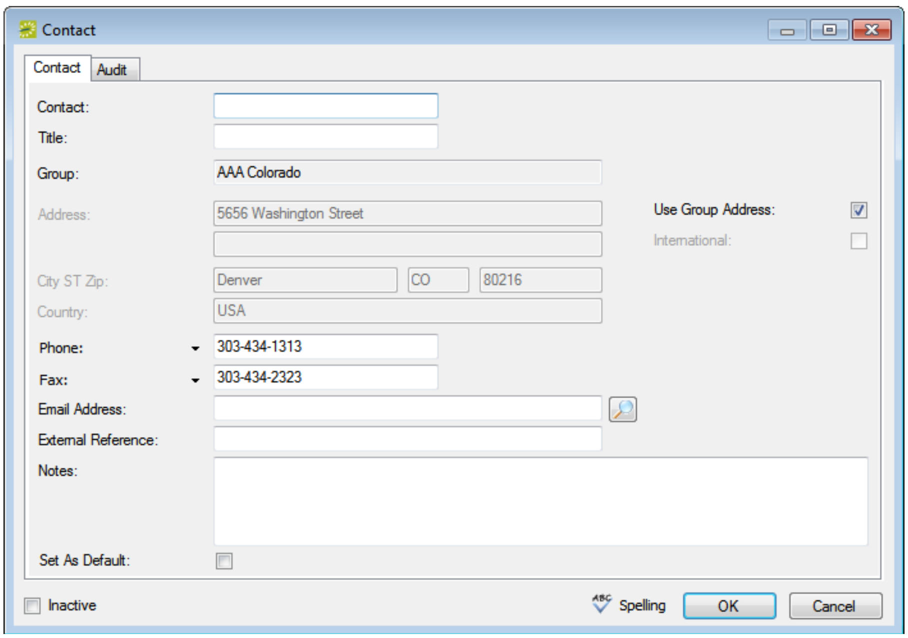
4. Continue to one of the following:
   - "To configure a contact manually" below.
   - "To configure a contact from a group" on page 298.

To configure a contact manually

1. Click New.

   The Contact dialog box opens.

Figure 7-14: Contact dialog box



2. Enter the information for the new contact.

Field	Description
Contact	The name of the contact. **Note:** The name can be a maximum of 50 characters, including spaces.
Title	The title (Mr., Ms., Dr., and so on) of the contact.
Group	Populated with the name of the group that you selected. You cannot change this value.
Address	Populated with the address of the group that you selected. If the contact address is not the same as the group address, then clear Use Group Address and enter the appropriate values in the Address fields.
International	Select this option to drop the State and Zip fields for an international group.

Field	Description
Phone Fax	The phone number and fax number for the contact. By default, they are set to the phone number and fax number for the group, but you can always edit these values. **Note:** The Phone and Fax fields have a dropdown list available from which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.
Email Address	The email address for the contact. **Note:** If your computer is connected to a network, click the Search icon to open a Global Address Lookup dialog box and search for the email address.
External Reference	Links the contact to an outside program if needed.
Notes	Any other information that is pertinent for the contact.
Set as Default	Select this option if the contact is to be the default contact for the selected group. **Note:** If a default contact has been defined for a group, then when you specify the group information for a reservation, the Contact field is automatically populated with the name of the default contact. **Note:** You can always specify a contact as the default contact for a selected group at a later date. To do so, select the contact in the right pane of the group-specific window, click Set Default, and then click Yes at the prompt to set the selected user as the default contact.
Inactive	Leave this option blank to add the contact as an active contact. Select this option to inactivate the contact.

3. Optionally, do one or both of the following:
   - Click Spelling to spell check the information for the contact before you save it.
   - Create a web user from the contact. See “To create a web user from a contact” on page 300.
4. Click OK.

   The Contact dialog box closes. The contact is added to the group. The group-specific window remains open.

To configure a contact from a group

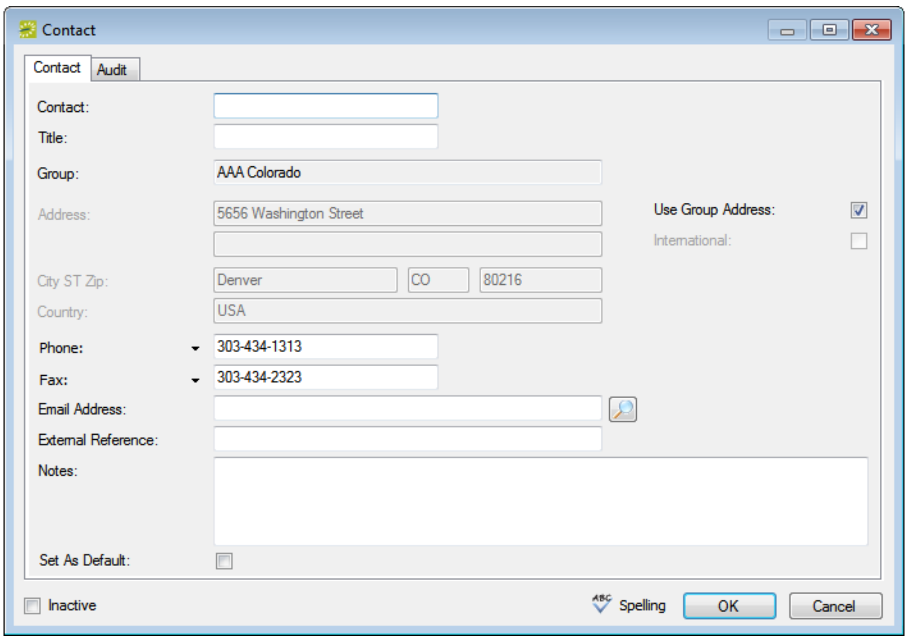
1. Click Tools > Click Create Contact from Another Group.

   A second Groups window opens.

2. Search for the group that is to be the source of the contact, and then click Select. (See “To search for a group and/or contact” on page 277.)

   The Contact dialog box opens. The name of the group that you just selected is displayed in the Group field and you cannot edit this value. The remainder of the fields display the information for the selected group or user (Contact Name, Address, Phone, and so on.)

Figure 7-15: Contact dialog box



3. If needed, edit the information for the new contact.

Field	Description
Contact	The name of the contact. **Note:** The name can be a maximum of 50 characters, including spaces.
Title	The title (Mr., Ms., Dr., and so on) of the contact.
Group	Populated with the name of the group that you selected first (the group for which you are configuring the contact). You cannot change this value.
Address	Populated with the address of the contact. If the contact address is the same as the group address, then select Use Group Address to populated the address fields with the group address; otherwise, you can edit these values.

Field	Description
International	Not applicable if Use Group Address is selected. Select this option to drop the State and Zip fields from the address for an international contact.
Phone Fax	The phone number and fax number for the group. **Note:** The Phone and Fax fields have a dropdown list available from which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.
Email Address	The email address for the contact. **Note:** If your computer is connected to a network, click the Search icon  to open a Global Address Lookup dialog box and search for the email address.
External Reference	Links the contact to an outside program if needed.
Notes	Any other information that is pertinent for the contact.
Set as Default	Select this option if the contact is to be the default contact for the selected group. **Note:** If a default contact has been defined for a group, then when you specify the group information for a reservation, the Contact field is automatically populated with the name of the default contact. **Note:** You can always specify a contact as the default contact for a selected group at a later date. See "To edit the contacts for a group" on page 304.
Inactive	Leave this option blank to add the contact as an active contact. Select this option to inactivate the contact.

4. Optionally, do one or both of the following:
   - Click Spelling to spell check the information for the contact before you save it.
   - Create a web user from the contact. See "To create a web user from a contact" on page 300.
5. Click OK.

   The Contact dialog box closes. The contact is added to the group. The group-specific window remains open.

To create a web user from a contact

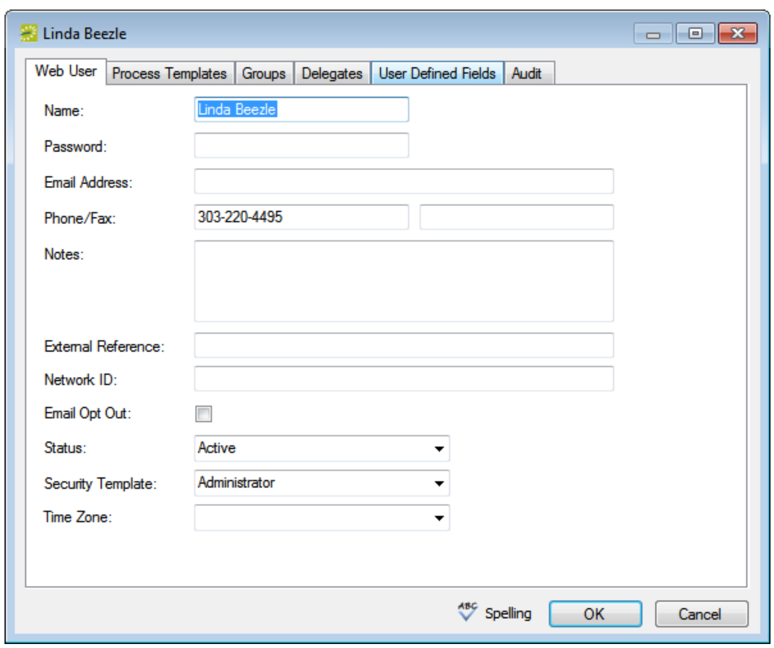
A *web user* is a registered user who can submit requests for reservations or schedule reservations in VEMS. When you add a contact to a group in your EMS database, you might also need to create a web user from the contact. This web user can then create and view reservations on behalf of the contact in VEMS. You can create only one web user *from* a contact. When you create a web user, you can also specify one or more delegates for the web user. A *delegate* is a web user who can create and view reservations on behalf of another web user.

1. If needed, open the group that contains the contact in the group's specific window. See "To configure contacts" on page 295.
2. In the left pane of the group-specific window, make sure that Contacts is selected.
3. In the right pane of the window, select the contact from which you are creating the web user.
4. Click Tools > Create Web User from Contact.

   A contact-specific dialog box opens. The Web User tab is the active tab.

The User Defined Fields tab displays the questions that a web user was required to answer when the user requested to create an account through VEMS and it is not relevant to the procedure that is described below.

Figure 7-16: Contact-specific dialog box, Web User tab



5. Enter the information for the new web user.

Ideally, you should enter all the necessary information for your web user before you save the web user; however, at any time if you need to access your web user, on the EMS menu bar, click Configuration > Web > Web Users.

Field	Description
Name	Automatically populated after you select the contact.
Password	The password that a web user must enter to log in to VEMS.
Email address	If this information has been entered for the contact, then this field is automatically populated after you select the contact. If the field is blank, you must enter the full email address for the user. (The user must enter this address to log in to VEMS.)
Phone/Fax	Optional fields. If this information has been entered for the contact, then these fields are automatically populated after you select the contact. If the fields are blank, you can enter values if needed.
Notes	Optional field.
External Reference	Optional field. Links the web user to an outside program if needed.
Network ID	Optional field. The web user's network ID.
Email Opt Out	Select this option if the web user is not to receive automatic emails (such as reservation summary emails) from VEMS. The user will still receive manually sent emails.
Status	Required field. Select the status for the web user: • Active—The web user can log in to VEMS. • Inactive—The user cannot log in to VEMS and is instructed to contact the EMS administrator. • Pending—The web user cannot log in to VEMS and is informed that he/she must check back at a later time.
Security Template	Required field. This determines the web user's access to the system—the menu items that the user can see and the information that the user can view in a tooltip when 'rolling-over' an event in VEMS. **Note:** For detailed information about web security templates, see "Configuring Web Templates" on page 399.
Time Zone	Required field. Select the time zone for the user.

6. Open the Process Templates tab and on the Available list, select the web process template or CTRL-click to select the multiple templates to which to which you are assigning the user, and then click the Move button (>) to move the selected templates to the Selected list.

A web process template defines the functions that are available to each type of web user in VEMS when the user is submitting a request for a reservation. For detailed information about web process templates, see "Configuring Web Templates" on page 399.

7. Open the Groups tab and do one of the following to specify the groups on whose behalf the web user can view and make reservations in VEMS.
    - The contact's group is selected by default. You can leave this group in the Selected list, or you can select the group and click the Remove button (<).
    - Specify any combination of search criteria for the Find field and Group Type, and then click Display to produce a list of all groups that meet the criteria. In the Available list, select a group, or CTRL-click to select multiple groups, and then click the Move button (>) to move the selected groups to the Selected list.

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*If you leave the Find field blank, then a list of all currently active groups for the selected group type is displayed. If you enter a search string in the Find field, the string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of **AAA** returns **AAA** Colorado, but not Colorado AAA.*

8. Open the Delegates tab, and on the Search by dropdown list, do one of the following to specify the delegates for the web user:
    - Leave the Find field blank, and then click Display to open a list of *all* currently available web users. Select a web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.
    - On the Search By dropdown list, select the option by which to search (Email Address or User Name), and in the Find field, enter the string by which to filter your search, and then click Display. Select a web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.

---

*The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of **bob** returns **bob**.worth@emssoftware.com but not dbobbett@emssoftware.com.*

9. Optionally, click Spelling to spell check any information that you manually entered for the user.
10. Click OK.

    The dialog box for creating a web user closes and a message opens indicating that the web user was created successfully.
11. Click OK to close the message and return to the group-specific window.

Editing Group Information

You can edit any and all information for a group. The way that you edit the information depends on the information itself. You can edit the Summary information, the Billing information, and the Other information through the Edit function on the group-specific dialog box. You must edit the group's contacts, calculations, billing reference numbers, PO numbers, and web users on the group-specific window.

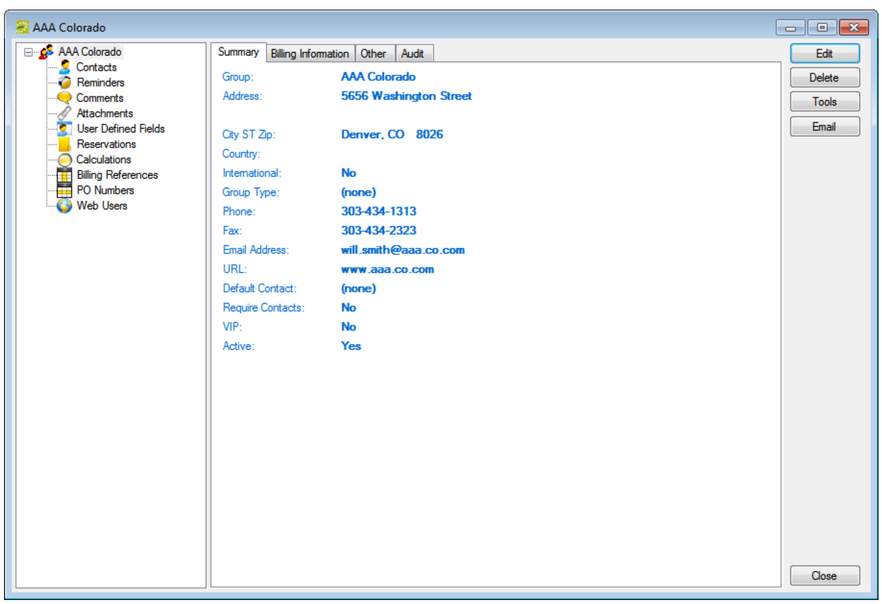
When you select a configuration item (contacts, reminders, and so on) for editing in the group-specific window, the right pane for the window is an EMS browser window. See *"An EMS Browser Window" on page 33.*

To edit group information

1. Open the Groups window and search for the group for which you are editing the information. See "To search for a group and/or contact" on page 277.
2. Select the group, and then click Open to open the group in the group-specific window.

   The group is selected by default. The Summary tab is the active tab.

Figure 7-17: Group-specific window



3. Continue to one of the following:
   - "To edit summary, billing, and/or other group information" on page 304.
   - "To edit the contacts for a group" on page 304.
   - "To edit the calculations for a group" on page 305.

- “To edit the billing reference numbers for a group” on page 305.
- “To edit the PO numbers for a group” on page 306.
- “To edit web users for a group” on page 307.

To edit summary, billing, and/or other group information

1. To edit the summary information, billing information, and/or other information for the group, click Edit.

   The group-specific dialog box opens.

2. Open the appropriate tab, and then edit the information as needed.

   See Step 3 and Step 4 of “To configure groups” on page 279.

3. After you edit the information, click OK.

   The group-specific dialog box closes. You return to the group-specific window with the group still selected.

To edit the contacts for a group

1. In the left pane of the group-specific window, select Contacts.
2. In the right pane of the window, select the contact that you are editing, and then do one of the following:
   - To set the selected contact as the default contact for the group, click Set Default, and then click Yes at the prompt.
   - To edit the information for the contact, click Edit.

     The Contact dialog box opens. The dialog box displays the information for the selected contact.
3. Edit the information for the contact as needed. See “To configure a contact manually” on page 296.
4. Click OK.

   The Contact dialog box closes. You return to the group-specific window with Contacts still selected.

To edit the calculations for a group

1. In the left pane of the group-specific window, select Calculations, and then click Edit.

   The Calculations dialog box opens.

2. Do one or both of the following:

   - On the Available list, select the calculation, or CTRL-click to select the multiple calculations that are to always apply to this group, and then click the Move button (>) to move the selected calculations to the Selected list.

If the appropriate calculation is not available, you can configure it. See "Configuring Calculations" on page 258.

   - On the Selected list, select the calculation, or CTRL-click to select the multiple calculations that are *not* to apply to this group, and then click the Remove button (<) to move the selected calculations to the Available list.

Remember, you can also assign calculations for a group type. If you have already assigned calculations for this group's type, then these calculations are automatically applied to the group. To edit group type calculations, you must either edit the calculations at the group type level (see "To configure group types" on page 47), or you must edit the group type for the group. See "To edit summary, billing, and/or other group information" on page 304.

3. After you edit the information, click OK.

   The Calculations dialog box closes. You return to the group-specific window with Calculations still selected.

To edit the billing reference numbers for a group

1. In the left pane of the group-specific window, select Billing References.

2. In the right pane of the window, select the billing reference number that you are editing, and then click Edit.

   The Billing Reference dialog box opens. The dialog box displays the information for the selected billing reference number.

3. Edit the information for the billing reference number as needed.

Option	Description
Billing Reference	The billing reference number that is associated with the group. **Note:** The PO number can be alphanumeric and it has a maximum of 100 characters, including spaces.
Description	A description of the billing reference number.

Option	Description
Notes	Any other comments or statements that are applicable for the billing reference number.
Inactive	Leave this option blank to add the reference as an active reference (the billing reference number is to be available when a reservation is made for the group). Select this option to inactivate the billing reference number.

4. Optionally, click Spelling to spell check the information for the billing reference number before you save it.
5. After you edit the information, click OK.

   The Billing Reference Number dialog box closes. You return to the group-specific window with Billing References still selected.

To edit the PO numbers for a group

1. In the left pane of the group-specific window, select PO Numbers.
2. In the right pane of the window, select the PO number that you are editing, and then click Edit.

   The PO Number dialog box opens. The dialog box displays the information for the selected PO number.
3. Edit the information for the PO number as needed.

Option	Description
PO Number	The PO number that is associated with the group. **Note:** The reference can be alphanumeric and it has a maximum of 100 characters, including spaces.
Description	A description of the PO number.
Notes	Any other comments or statements that are applicable for the PO number.
Inactive	Leave this option blank to add the PO number as an active number (the PO number is to be available when a reservation is made for the group). Select this option to inactivate the PO number.

4. Optionally, click Spelling to spell check the information for the billing reference number before you save it.
5. After you edit the information, click OK.

   The PO Number dialog box closes. You return to the group-specific window with PO Numbers still selected.

To edit web users for a group

When you edit the web users for a group, you can select additional web users for the group, or you can remove web users for the group. If you need to edit the web user itself or the delegates for a web user, you must do so in the web user configuration area. (See “Configuring Web Users” on page 419.)

1. In the left pane of the group-specific window, select Web Users.

   The Web Users dialog box opens.

2. Do one or both of the following:

   - To add a new web user for the group:

     - Leave the Find field blank, and then click Display to open a list of *all* currently active web users. Select the web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.

     - In the Search By dropdown list, select the option by which to search (Email Address or User Name) and then in the Find field, enter the string by which to filter your search, and then click Display. Select the web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected users to the Selected list.

The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and the string must begin with the information for which you are searching. For example, if searching by Email Address, a search string of ***bob*** *returns* ***bob****.worth@emssoftware.com but not dbobbett@emssoftware.com.*

   - To remove a web user from a group, in the Selected field, select the user, or CTRL-click to select the multiple web users that you are removing from the group, and then click the Remove button (<) to move the selected web users to the Available list.

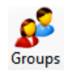
3. After you edit the information, click OK.

   The Web User dialog box closes. You return to the group-specific window with Web Users still selected.

Importing Groups

You can import groups into your EMS database from a tab-delimited text file. (See Appendix E, “Import File Specifications,” on page 539 for the file specifications.)

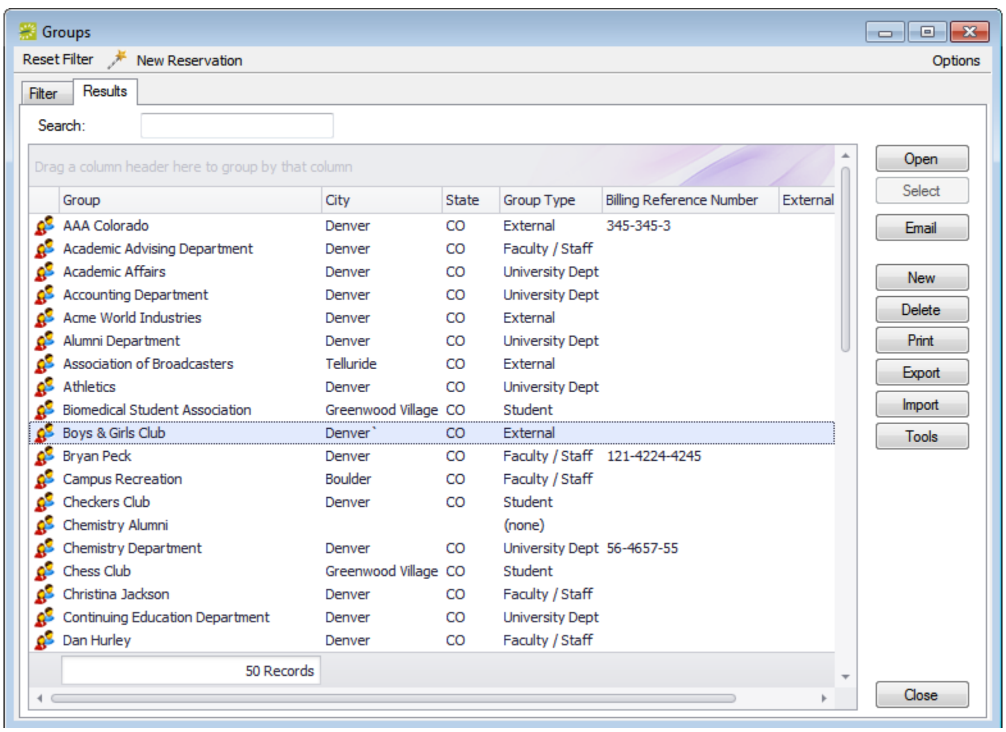
To import groups

1. On the toolbar, click the Groups icon 

.

   The Groups window opens.

Figure 7-18: Groups window



2. Click More, and then click Import Groups.

   The Open File dialog box opens.

3. Browse to and select the text file that lists the groups that are importing.

   A dialog box opens, indicating the number of groups that you are about to import, and asking you if you want to continue.

4. Click Yes.

   A message opens indicating that the import was successful.

5. Click OK to close the message and return to the Groups window.

System Administration Configuration - Settings

In addition to configuring core data items that are specific to your organization, you must configure settings that determine a variety of operational factors for your EMS installation, such as system-wide parameters, registration information, email settings, and Reservation Wizard required fields.

This chapter covers the following topics:

Editing System Parameters

System parameters are global settings that affect all your EMS users, your Virtual EMS (VEMS) users, or your EMS Kiosk users. The parameters are grouped first by system (EMS, Virtual EMS (VEMS), or EMS Kiosk) and then by the functional areas that they affect (Billing, Email, and so on). When any system is first installed, the parameters are set to their default value. Although you can edit the value for a system parameter whenever necessary, you typically set the value for a system parameter at the time you are configuring your EMS, Virtual EMS (VEMS), and EMS Kiosk implementations.

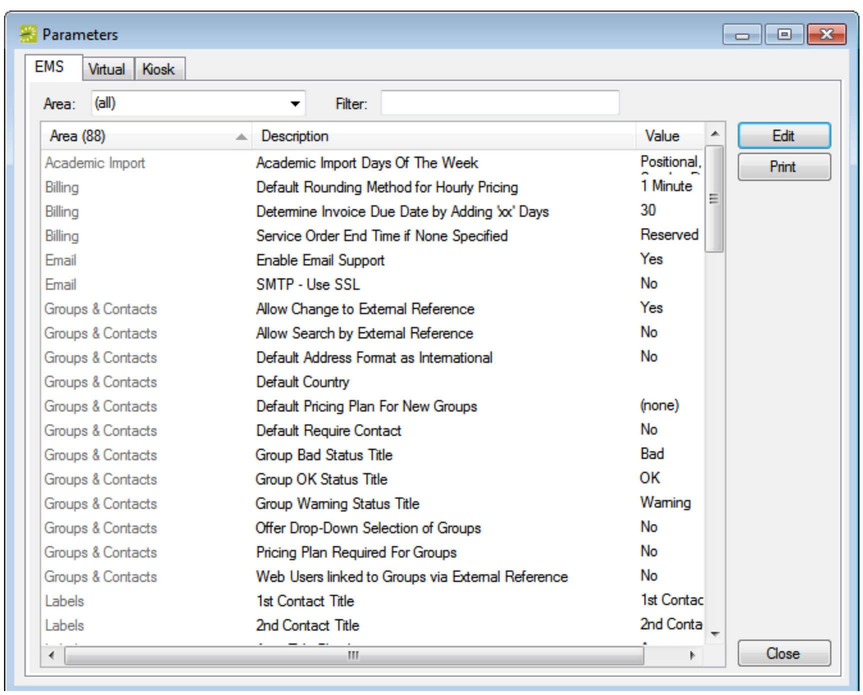
To edit system parameters

See Appendix A, "System Parameters," on page 491 for detailed definitions of the available system parameters and their default values.

1. On the EMS menu bar, click System Administration > Settings > Parameters.

   The Parameters window opens. This window lists all the current global settings for the parameters that affect all EMS users (EMS tab), all VEMS users (Virtual tab), and all EMS Kiosk users (Kiosk tab). The EMS tab is the active tab.

Figure 8-1: Parameters window, EMS tab



2. Open the tab that contains the parameter that you are editing.
3. Optionally, filter the list by area, by the parameter description, or both.

To filter by the parameter description, enter a search string in the Filter field. The search string is limited to the exact order of the characters in the string, but the string is not case-sensitive, and it can appear anywhere in the search results. For example, a search string of ***Security*** *both* ***Security*** *Status for a User and Default* ***Security*** *Template for a User.*

4. Select the parameter that you are editing, and then click Edit.

   The Parameter dialog box opens. This dialog box displays the information that you can edit for the selected parameter.

See Appendix A, "System Parameters," on page 491 for detailed definitions of the available system parameters and their default values.

5. Edit the parameter as needed, and then click OK.

   The Parameter dialog box closes. You return to the Parameters window with the edited parameter automatically selected.
6. Confirm in the Value column that you have correctly edited the value for the parameter.
7. Click Close.
   - If you edited EMS parameters, you might have to log out and then log back in to EMS to have the changes take effect.
   - If you edited Virtual EMS (VEMS) parameters, a message opens indicating that virtual parameters have changed, and that you must clear the VEMS cache for the changes to take affect. Click OK to close the message, and then clear the VEMS cache by logging in to VEMS, clicking Admin > Admin Functions, and then clicking Clear Cache.
   - If you edited EMS Kiosk parameters, a message opens indicating that kiosk parameters have changed, and that you must clear the kiosk cache for the changes to take affect. Click OK to close the message, and then clear the kiosk cache by opening the EMS Kiosk config.aspx page.

Importing Registration Information

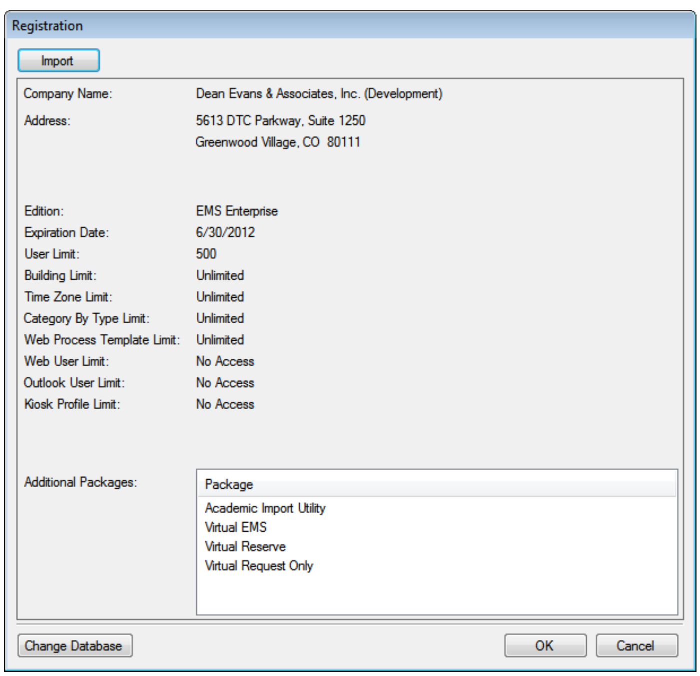
The first time that your EMS application is accessed at your organization, a Registration dialog box opens. You must import the license file (License.lic) that was received with the software to register your software. You can change the database that your EMS system is using.

If you need to make any corrections to your registration information, contact sales@emssoftware.com or 800-440-3994, ext. 863 to have a license file with the corrected registration information sent to you. You can then import this license file to update the registration information.

To import registration information

1. On the EMS menu bar, click System Administration > Settings > Registration.
   The Registration dialog box opens. This dialog box displays the registration information that is contained in the license file—your organization's name and address, the EMS edition (Enterprise, Professional, and so on), the license expiration date, the limits for your software edition, and any additional packages for which your organization is licensed (for example, VEMS).
2. If the registration information is correct, then continue to Step 3; otherwise, if the information is incorrect, contact sales@emssoftware.com or call 1-800-440-3994 to have a corrected license file sent to you.

Figure 8-2: Registration dialog box



3. Click Import, and in the Open File dialog box, browse to and select the license file (License.lic) that you are importing, and then click Open.

   The License file is imported.

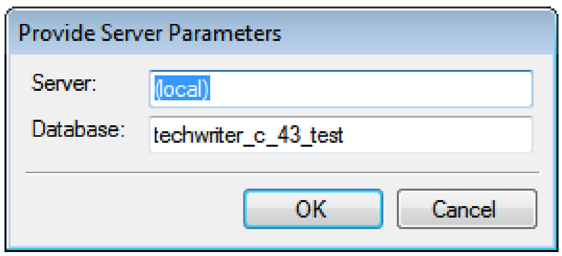
4. If you need to change the database that your EMS application is using, go to Step 5; otherwise, click OK.

   The Registration dialog box closes. Your EMS application is now registered and is ready for use.

5. Click Change Database.

   The Provide Server Parameters dialog box opens.

Figure 8-3: Provide Server Parameters dialog box



6. Edit the server name and/or database name, and then click OK.

   EMS closes and the EMS Login window opens. You can now log in to EMS using the newly specified database.

Configuring the Confirmation Email Subject Line

In EMS, users can produce printed confirmations for events. They can also email confirmations directly to the contact person. To make the emailing of confirmations efficient, EMS automatically fills in the subject line on the email with text that you configure in the Confirmation Email Subject Line dialog box. Examples of confirmation email subject lines include the following:

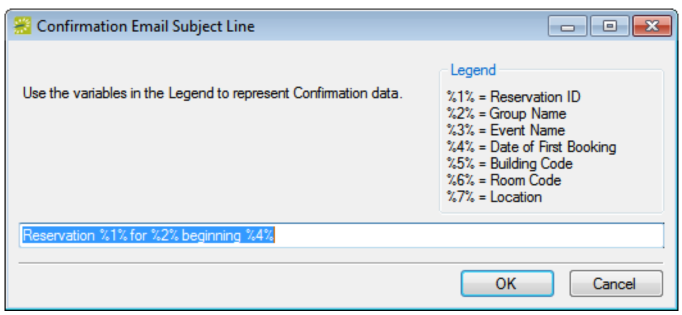
- Reservation 5421 for Acme, Inc., beginning 3/15/2012
- Confirmation for your event in Smith Hall on 3/22/2012

To configure the confirmation email subject line

1. On the EMS menu bar, click System Administration > Settings > Confirmation Email Subject Line.

   The Confirmation Email Subject Line dialog box opens. This dialog box displays the confirmation subject line currently in use.

Figure 8-4: Confirmation Email Subject Line dialog box



2. Enter the text and variables that are to make up the default subject line for every confirmation that is emailed.

Variables pull in selected data from the event for which the confirmation is being emailed. You can include variables in the subject line as described in the Legend. For example, %2% is the code for the group name, so "Reservation for %2%" would result in "Reservation for Academic Affairs" being displayed in the subject line. Available variables include the following: Reservation ID, Group Name, Event Name, Date of First Booking, Building Code, Room Code, and Location.

3. Click OK.

Configuring Email Settings

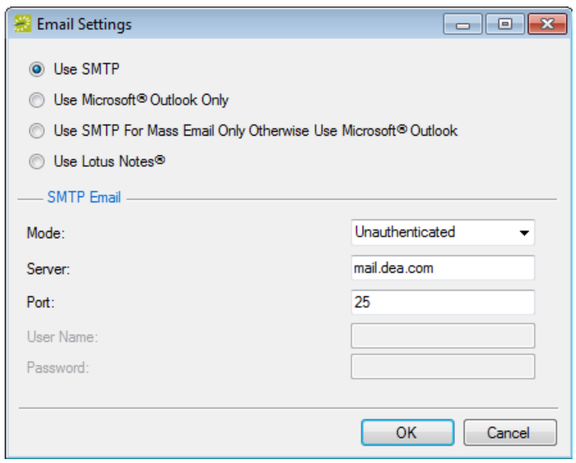
The system administration email settings determine how your EMS implementation interacts with your organization's email standard—will it interact with Microsoft Outlook or must you configure it to use a simple mail transfer protocol (SMTP), which is the default value? After installation of your EMS system, you must configure these settings.

To configure email settings

1. On the EMS menu bar, click System Administration > Settings > Email Settings.

   The Email Settings dialog box opens.

Figure 8-5: Email Settings dialog box



2. Do one of the following:

   - Leave the default value of Use SMTP as-is, and then enter the appropriate values for Mode, Server, and Port in the SMTP Email panel.
   - Select Use Microsoft Outlook Only.
   - Select SMTP for Mass Email Only Otherwise Use Microsoft Outlook, and then enter the appropriate values for Mode, Server, and Port in the SMTP Email panel.

Select this third option if you want to use Outlook or Lotus Notes for all of your individual emails but use the mass email function found in the Browser and the Calendar. If you select this option and you use Lotus Notes, then individual emails open in the mass email window, but they are still sent via Lotus Notes.

   - Select Use Lotus Notes. (Available only if Lotus Notes is installed on your computer.)

3. Click OK.

Configuring Required Fields in the Reservation Wizard

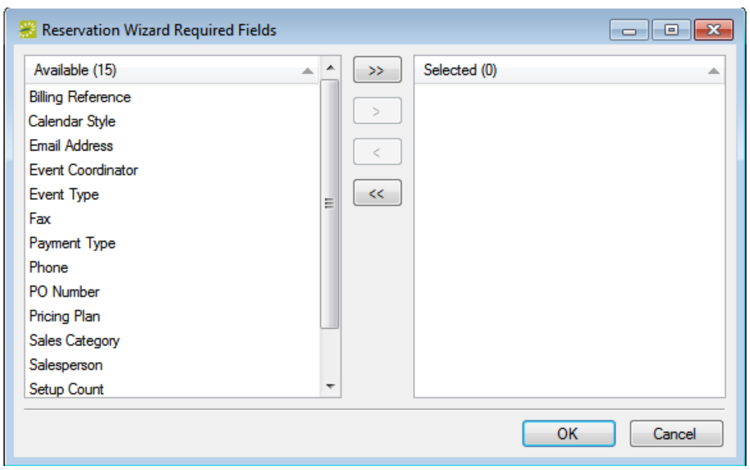
To ensure that your users supply the information that is critical for your organization when making a reservation, you can configure required fields in the Reservation Wizard. Required fields are marked with a red dot in the Reservation Wizard.

To configure required fields in the Reservation Wizard

1. On the EMS menu bar, click System Administration > Settings > Reservation Wizard Required Fields.

   The Reservation Wizard Required Fields dialog box opens. This dialog box lists all the fields that are available on the Reservation Wizard.

Figure 8-6: Reservation Wizard Required Fields dialog box



2. On the Available list, select the field or CTRL-click to select the multiple fields that are to be marked as “Required” in the Wizard, and then click the Move button (>) to move the selected fields to the Selected list.
3. Click OK.

System Administration Configuration - User Security

In addition to configuring core data items that are specific to your organization, you must configure settings that determine a variety of operational factors for your EMS installation, including user security settings. These settings determine the functions to which your users have access in your EMS installation.

This chapter covers the following topics:

Overview of User Processes

When you configure a user template or a user account, you must assign one or more *processes* to the template or account. Each process grants a specific permission to the user. The following sections detail the event processes or academic event processes that you can assign to a user template or account, or an academic user template or account, respectively, and the permissions that are granted to the user by each process.

Before assigning processes to a user template account, read through all the processes and note the implied relationships between certain items. For example, if you plan to give a user the right to edit a booking, you must also give the user the right to open a booking.

Event processes

Event processes are categorized according to the following:

- "Billing processes"
- "Configuration processes"
- "Inquiry processes"
- "Report processes"
- "Reservation processes"
- "Special processes"
- "Hoteling processes" (Available only in EMS Workplace)

Billing processes

Process	Permission Granted
Ageing Report	Run the Ageing report.
Browse Transactions	Use the Browse Transaction function.
General Ledger Distribution	Run the General Ledger Distribution report.
Invoice Detail Report	Run the Invoice Detail report.
Invoicing	Run the Billing Worksheet report and generate invoices.
Payments, Deposits & Adjustments	Enter payments, deposits, and adjustments.
Reprint an Invoice	Reprint an existing invoice.
Statements	Print financial statements for groups.
Transaction Report	Print the Transaction report.
Void an Invoice	Void an existing invoice.
Voided Transaction Report	Print the Voided Transaction report.

Configuration processes

Process	Permission Granted
Configure Web Template LDAP Groups	Shows the LDAP Groups tab in the Web Process Template settings window. **Warning:** This tab reveals the names of your Active Directory or other LDAP-type Groups.
Define and Edit [Configuration Item]	Add, change, or delete indicated configuration item. For example, Define & Edit Accounts provides add, change, or delete rights to the Accounts that are configured in your system.
Resource category items [Category Name]	Resource categories that you have defined are also included as Configuration processes. Add, change, or delete resources from the selected categories.
Web Data Translation	Allows a user to provide translations for items on the web.

Inquiry processes

Process	Permission Granted
Browse Reservations	Use the Browser to search for existing reservations, bookings, service orders, and resources.
Calendar Inquiry	View the Calendar Inquiry, which shows the number of bookings on each day of a month in a wall calendar-type format.
Open Reservation Book	View the Reservation Book, which displays bookings for a day, week, or month as colored bars on a room/timeline grid.
Resource Calendar Inquiry	View the Resource Calendar, which shows, on a monthly calendar, the number of times an item is reserved.
Visitors	Open the Visitors browser, which lists attendees by date and identifies visitors as such.

Report processes

Report Name	Permission Granted
< > Report	Run, review, and print the indicated report.
Define and Edit Queries	Create and edit the queries that have been created in the Query Builder.

Reservation processes

Process	Permission Granted
Academic Import (Academic Import Module)	Run the Academic Import Utility, which you use to manually import an academic course schedule into EMS.
Attendance Entry	Use the Attendance Entry function to note the actual attendance for bookings that took place on a particular date.
Delete Attachments	Give a user the ability to delete attachments for a room record, a reservation, a booking, or a group.
Email History	Review email history.
Manage Services	Give a user access to Manage Services option on the EMS toolbar and under the Reservations menu.
Open Navigator	Open a reservation in the Navigator window.
Open Reservation Wizard	Create a single-date or series reservation using the Reservation Wizard. This process also provides read-only access to groups.
Reminders	Use the Dashboard to add and manage reminders.

Special processes

Process	Permission Granted
Allow Department Selection	Select any of the defined departments when billing.
Copy Reservation	Copy a reservation, including all its bookings and details, from one date or date range, to another reservation.
Define Public Memorized Reports	Define the settings for public memorized reports.
EMS API Web Service Access	Used for optional EMS API.
Explode Combo Room	Use the Explode Combination Bookings utility, which takes the booking of combination room and breaks it down into bookings for the components of the combination room.
Edit Booking Details	Add or edit booking detail information.
Edit Critical Booking Information	Edit booking information that could cause one booking to be in conflict with another. The critical booking data items are date, reserved time, room, and status.
Edit Non-Critical Booking Information	Edit booking information that will not cause one booking to be in conflict with another (for example, the event name or the setup type and count).
Edit Pricing	Change the pricing on a booking detail item that has been reserved.
Edit Reservation Information	Edit reservation information.

Process	Permission Granted
View and Book Access On All Rooms	Grants rights to an EMS user for all rooms without having to explicitly provide access on the Rooms tab. **Note:** This overrides any selections that have been made in the Room Access area.

Web processes (Web Admin and Web Request)

Process	Permission Granted
Define and Edit Web Cultures	Define and edit web cultures (the languages that are available for translation) in VEMS.
Define and Edit Web Menus	Define and edit web menus, including the creation and modification of links from VEMS to other web pages.
Define and Edit Web Process Templates	Define users’ access to process templates that are used in VEMS.
Define and Edit Web Security Templates	Define users’ access to security templates that are used in VEMS.
Define and Edit Web Text	Define and edit web help text, page labels, and so on.
Define and Edit Web Users	Define and edit the users who have access to VEMS.
Web Reservations	Run the Web Reservations Browser, which displays reservations entered into your EMS database through VEMS.

Hoteling processes

For detailed information about each of the listed reports, see the EMS User’s Manual.

Process	Permission Granted
Booking Notice Statistics	Run, review and print the Booking Notice Statistics report.
Check In Status	Run the Check In Status utility, which allows users to determine whether a group has checked in (or out) at your facility.
Check In Statistics	Run, review and print the Check In Statistics report.
Define and Edit Reservation Wizard Templates	Add, change, or delete reservation wizard templates.
Early Check Out Report	Run, review and print the Early Check Out Report.
Arrivals and Departures Report	Run the Arrivals and Departure report, which lists the respective arrival and departure times for each booking.
Groups With Multiple Bookings	Run, review and print the Groups With Multiple Bookings report.
No Show Report	Run, review and print the No Show Report.

Process	Permission Granted
No Show Wizard	Run the No Show Wizard.
Room Occupancy Summary	Run, review and print the Room Occupancy Summary report.
Transition Report	Run, review and print the Transition report.
Visitor Report	Run, review and print the Visitor report.

Academic event processes

Academic event processes are categorized according to the following:

- "Administrative processes"
- "Campus Planning Interface processes"
- "Configuration processes"
- "Course processes"
- "Inquiry processes"
- "Report processes"

Administrative processes

Process	Permission Granted
Administrative processes	
Allow Domain Selection	Allows the user to select from all domains that are configured in the Academic planning area.
Copy Term Preferences	Allows a user to copy course preferences from one term to another.
Define and Edit Domains	Create and/or edit domains within the Academic Planning-Configuration area of EMS Campus.
Define and Edit Final Exam Schedule Templates	Allows the user to create or make changes to the Final Exam Schedule template.
Define and Edit Final Exam Sessions	Allows the user to create and publish final exam sessions.
Define and Edit Optimization Scenarios	Allows the user to create and apply an optimization scenario.
Edit Terms	Allows the user to edit the mode of a term.
Manually Update SIS	Allows the user to manually push location updates back to the SIS, assuming that this has not been automated in the system parameters.

Process	Permission Granted
Publish/Unpublish Terms	Allows the user to publish a term and create room reservations in EMS or unpublish a term and delete room reservations in EMS.

Campus Planning Interface processes

Process	Permission Granted
Web Administrator	Grants access to the administrative functions after the user is logged in to the Campus Planning Interface client.

Configuration processes

Process	Permission Granted
Configuration	
Define and Edit Academic Units	Allows the user to add or edit academic units.
Define and Edit Course Types	Allows the User to assign course types to event types.
Define and Edit Instructors	Allows the user to set the importance level of synchronized instructors.
Match Course Type/Room Types	The user can match a course type to a room type (or vice-versa) for course optimization.
Synchronize Academic Unit	User can synchronize the specified item from the SIS.
Synchronize Buildings	User can synchronize the specified item from the SIS.
Synchronize Course Types	User can synchronize the specified item from the SIS.
Synchronize Courses	User can synchronize the specified item from the SIS.
Synchronize Instructors	User can synchronize the specified item from the SIS.
Synchronize Room Types	User can synchronize the specified item from the SIS.
Synchronize Rooms	User can synchronize the specified item from the SIS.
Synchronize Subjects	User can synchronize the specified item from the SIS.
Synchronize Terms	User can synchronize the specified item from the SIS.

Course processes

Process	Permission Granted
Add Courses	Allows the user to add new courses during Define & Edit mode or Dual mode.
Add Sections	Allows the user to create a new section of an existing course (copy courses) during Define & Edit mode or Dual mode.
Edit Course Credit Hours	User can edit the specified course detail during Define & Edit mode or Dual mode.

Process	Permission Granted
Edit Course Days of the Week	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Enrollment	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Instructor	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Notes	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Number	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Seat Fill	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Section	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Start/End Dates	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Start/End Times	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Subject	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Title	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Type	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit/Cancel Courses	The user edit or cancel existing courses during Define & Edit mode or Dual mode.
Override Time Block Patterns	The user can edit the Time Block for a term during Define & Edit mode or Dual mode.
Preassign Scenarios	The user can create and run Preassignment optimization scenarios during Set Preferences mode or Dual mode.
Search for Rooms	The user can search for rooms during Define & Edit mode or Dual mode.
Set Preferences	The user can set preferences for the course (for optimization) during Set Preferences mode or Dual mode.
Set Specific Room Preferences	The user can choose a specific room in Set Preferences mode or Dual mode.
Share Space Across Domains	The user can share space between two courses on different domains during Define & Edit mode or Dual mode.
Share/Unshare Space	The user can share space (or unshare space) between two courses on the same domain during Define & Edit mode or Dual mode.

Inquiry processes

Process	Permission Granted
Academic Book	The user can access the Academic Book.
Academic Browser	The user can access the Academic Browser.
Open Course Navigator	The user can open a course in the Navigator window.

Report processes

Report Name	Permission Granted
< > Report	User can run and print the indicated report.

Configuring User Accounts

Users are the people who log in to EMS, whether they are making reservations or just using the system in a read-only capacity. When your EMS application is first installed, it is installed with a default user admin account with “admin” for both the User ID and password. As DEA recommends, for security reasons, after you log in to EMS the first time using “admin” as both the username and password, at a minimum, you should change the account password. Ideally, you should configure an entirely new administrator account with a new username and password. You must also configure all the necessary accounts for your users, which includes assigning processes to the user account. You can create user accounts entirely from “scratch,” or you can copy an existing user account, and then make the necessary edits to the account for another user. You can also export a list of all your user accounts to an Excel spreadsheet.

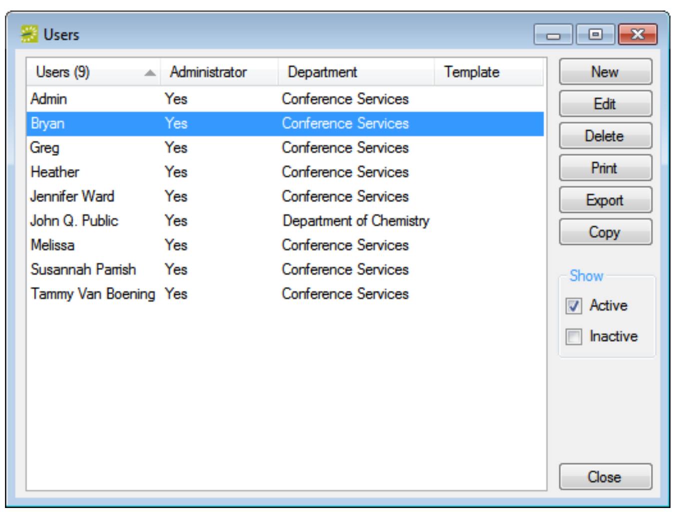
Instead of configuring user accounts individually, you can configure a template and then assign all users who are to have the same security settings to a given user template. See *“Configuring User Templates” on page 343* *and* *“Configuring Academic User Templates” on page 352.*

To configure a user account

1. On the EMS menu bar, click System Administration > Security > Users.

   The Users window opens. This window lists the names and types for all users who currently have an account for your EMS installation and that have a status of Active.

Figure 9-1: Users window



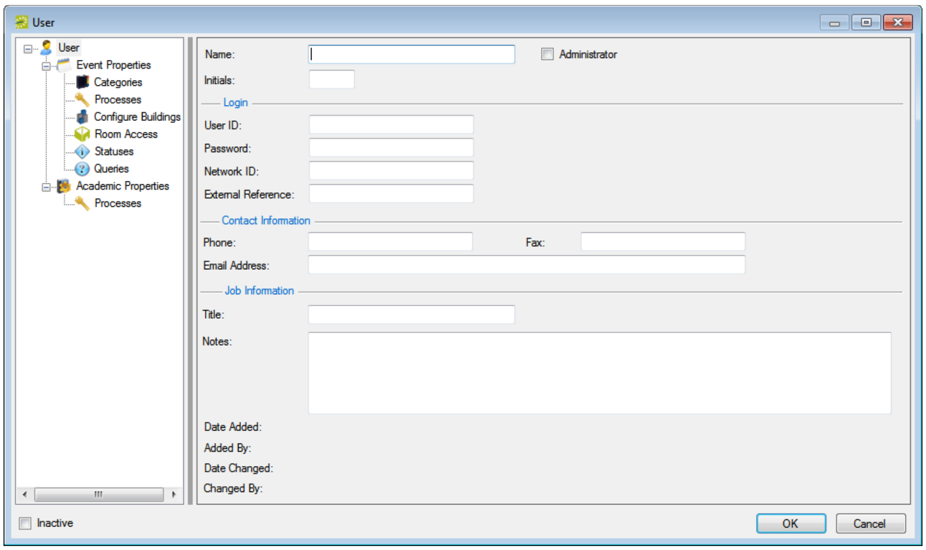
Optionally, to show all user accounts, regardless of status, under Show, click Inactive.

The remainder of this procedure describes how to configure a user account "from scratch." You can also configure a user account by copying an existing account. Select the user account that you want to copy, click Copy, and then continue to *Step 3.*

2. Click New.

   The User dialog box opens.

Figure 9-2: User dialog box



3. Enter the information for the new user and define the user access for each of the following—categories, processes, building configuration, room access, statuses and queries, and for EMS Campus, academic properties and processes as well. See:

- "User information" on page 331.
- "Event Properties" on page 332.
- "Categories" on page 333.
- "Processes" on page 334.
- "Configure Buildings" on page 335.
- "Room Access" on page 336.
- "Statuses" on page 338.
- "Queries" on page 339.
- "Academic Properties (EMS Campus Only)" on page 340.
- "Processes (EMS Campus Only)" on page 341.

4. Click OK.

   The User dialog box closes. You return to the Users window with the newly configured user automatically selected.

User information

1. If needed, open the User dialog box (see "To configure a user account" on page 329), and then make sure that User is selected.
2. Enter the user information.

At a minimum, to create a new user account, you must enter the user name, the user type, and the user ID and password. All other information is optional and can be added at later dates when needed.

Field	Description
Name	First and last name for the user.
Administrator	Select this option if the user is to be an EMS administrator. **Note:** If you select this option, then only Event Properties remains displayed on the User dialog box as an EMS administrative user has access to all EMS functions (categories, processes, buildings, rooms, statuses, and queries).
Initials	The user's initials, which are printed at the bottom of all reports as well as the date and time that the user ran the report.
Login	
User ID	The ID that the user must use to log in to EMS. **Note:** The User ID must be 20 characters or less, including spaces.
Password	The password that the user must use to log in to EMS. **Note:** The user can change this password. See the *EMS User's Manual.*
Network ID	If you enter a value in this field, the user is automatically logged in to EMS based on the user's Windows credentials without being asked to enter a user ID and password. **Note:** Enter the network domain along with the network ID, such as DOMAIN\john.doe.
External Reference	Links the user account to an outside program, if needed.
Contact Information	
Phone	The phone number for the user. This value is not printed on any correspondence (reports, emails, and so on) from the user.
Fax	The fax number for the user. This value is not printed on any correspondence (reports, emails, and so on) from the user.
Email Address	The email for the user. This value is not printed on any reports that the user generates; however, this is a required value if the user wants to email reports or confirmations from EMS using the SMTP email option.

Field	Description
Job Information	
Title	The user’s title, such as Mr., Ms., and so on.
Notes	Any additional information that is relevant to the user. **Note:** This information is not printed on any report.
Inactive	Leave this option blank to add the user as an active user. Select this option to inactive the user’s account. An inactive user cannot log in to EMS.

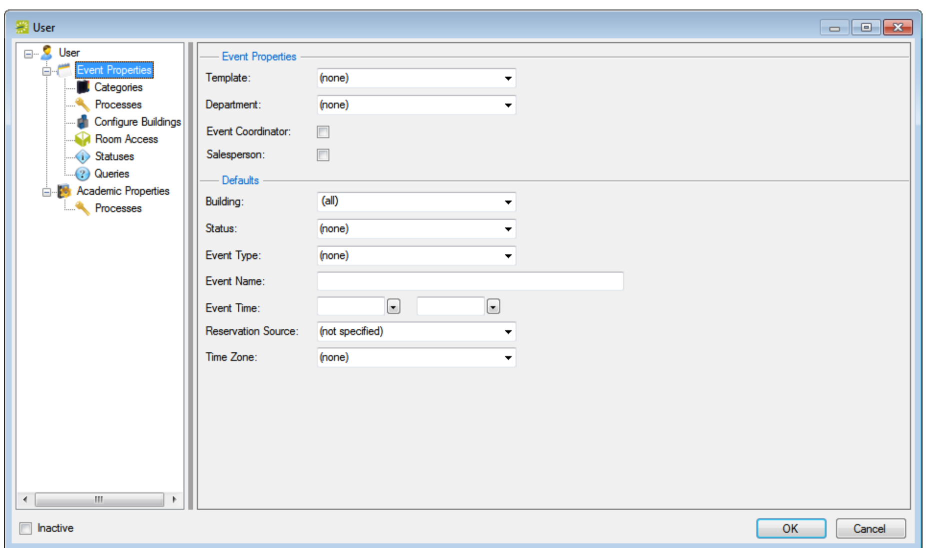
3. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

Event Properties

1. If needed, open the User dialog box. (See “To configure a user account” on page 329.)
2. Select Event Properties.

   The User dialog box is refreshed with options for the event security settings for the user.

Figure 9-3: User dialog box, Event Properties



3. Specify the event security settings for the user.

Field	Description
Event Properties	
Template	If you select a template, then only the Event Properties options remain available. The categories, processes, buildings, rooms, statuses, and queries are automatically assigned to the user based on the selected template. See “Configuring User Templates” on page 343.
Defaults—All the values that you select here (Building, Status, Event Type, Event Name, Event Time, Reservation Source, and Time Zone) are displayed by default when the user opens the Reservation Wizard to make a reservation; however, the user can edit any and all values as needed.	

4. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

Categories

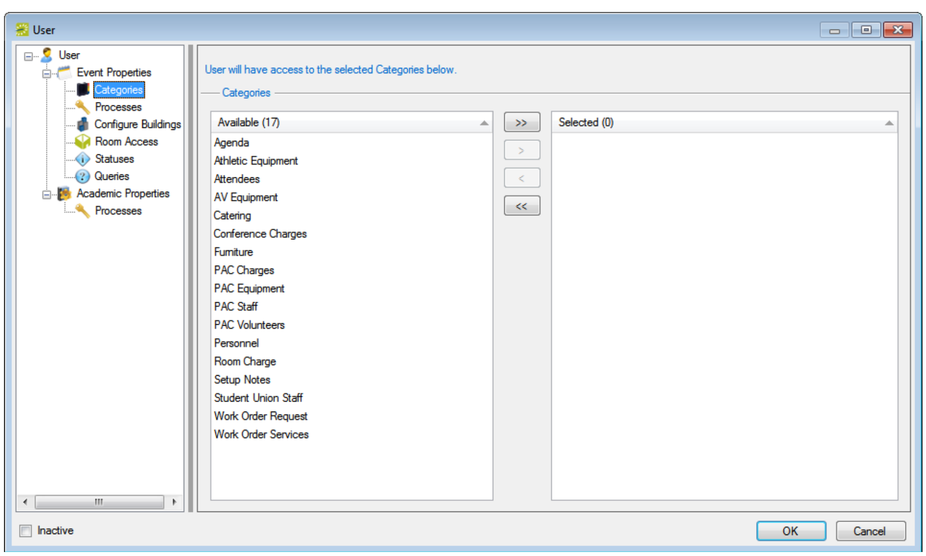
You specify the categories that a user can add to a booking or edit for a booking on the Categories tab.

1. If needed, open the User dialog box. (See “To configure a user account” on page 329.)

2. Select Categories.

   The User dialog box is refreshed with a list of all the active categories that you can select for the user.

Figure 9-4: User dialog box, Categories



3. On the Available list, select the category or CTRL-click to select the multiple categories to which a user is to have access, and then click the Move button (>) to move the selected categories to the Selected list.

To add these categories to a booking, a user needs access to the Edit Booking Details process.

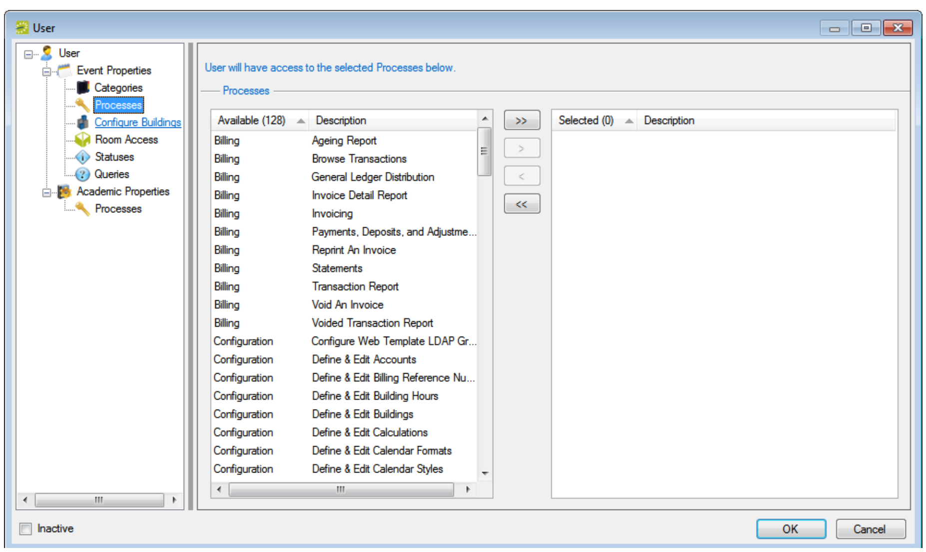
4. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

Processes

1. If needed, open the User dialog box. (See "To configure a user account" on page 329.)
2. Select Processes.

   The User dialog box is refreshed with a list of all the processes that you can select for the user.

Figure 9-5: User dialog box, Processes



3. On the Available list, select the process or CTRL-click to select the multiple processes to which a user is to have access, and then click the Move button (>) to move the selected processes to the Selected list.

For an explanation of each process, see *"Event processes" on page 321.*

4. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

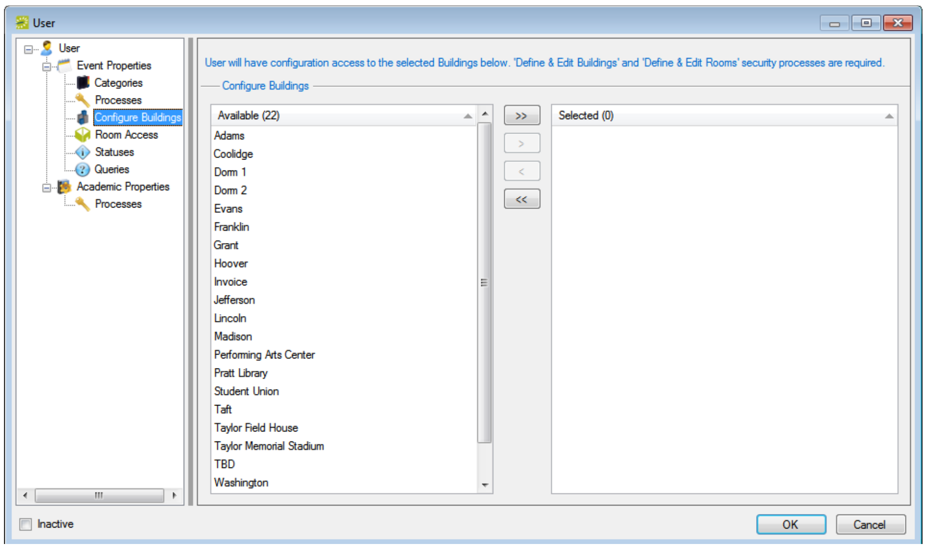
Configure Buildings

You specify the building configuration rights for a user on the Buildings tab.

1. If needed, open the User dialog box. (See “To configure a user account” on page 329.)
2. Select Configure Buildings.

   The User dialog box is refreshed with a list of all the buildings that you can select for the user.

Figure 9-6: User dialog box, Buildings



3. On the Available list, select the building or CTRL-click to select the multiple buildings to which a user is to have access, and then click the Move button (>) to move the selected buildings to the Selected list.

Define and Edit Buildings and Define and Edit Rooms security processes are required for a user to have configuration access to selected buildings.

4. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

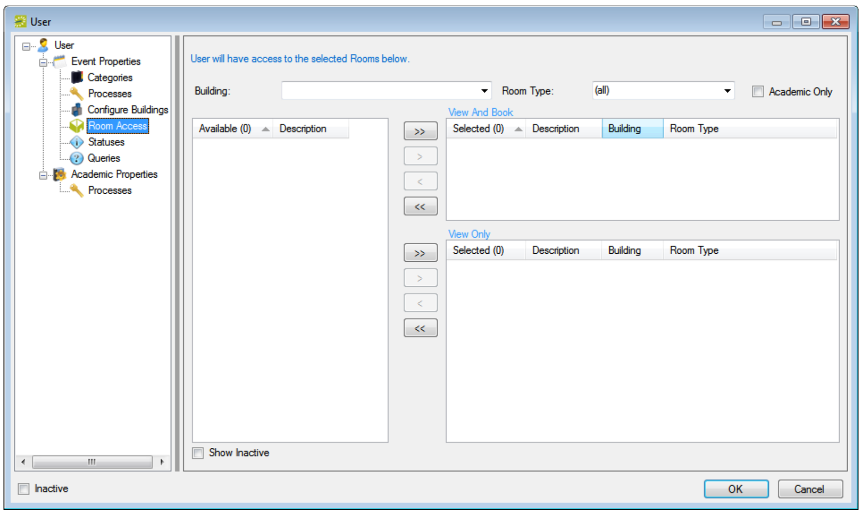
Room Access

You specify the rooms to which a user has access on the Room Access tab.

1. If needed, open the User dialog box. (See "To configure a user account" on page 329.)
2. Select Room Access.

   The User dialog box is refreshed a options for searching for the rooms to add to the user account.

Figure 9-7: User dialog box, Room Access



3. Search for the rooms to which the user is to have access by doing one or both of the following:
   - On the Building dropdown list, select (all) buildings, a specific building, an area, or a view.
   - On the Room Type dropdown list, leave the default value of (all), or select a specific room type.

   The Available list is updated with a list of rooms that meet your search criteria.

4. On the Available list, select the room or CTRL-click to select the multiple rooms to which a user is to have access, and then click the Move button (>) to move the selected rooms to the appropriate Selected list.

EMS Enterprise has both the View and Book and the View Only access for user security. EMS Professional has just the View and Book access for user security.

- View and Book—A user who has access to the Special - Edit Critical Booking Information process *and* who is assigned to this option can reserve the room, move an event into or out of the room, change the time or status of an event that is scheduled in the room, and add resources to events in the room.

The Special - View and Book Access On All Rooms process can be used as an alternative to manually assigning all rooms to the View and Book list.

- View Only—A user who is assigned to this option cannot reserve the room, move an event into or out of the room, or change the time or status of an event that is scheduled in the room; however, as long as the user has access to the appropriate category and to the Special - Edit Booking Details process, the user can view events in the room and add resources to events in the room.

5. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

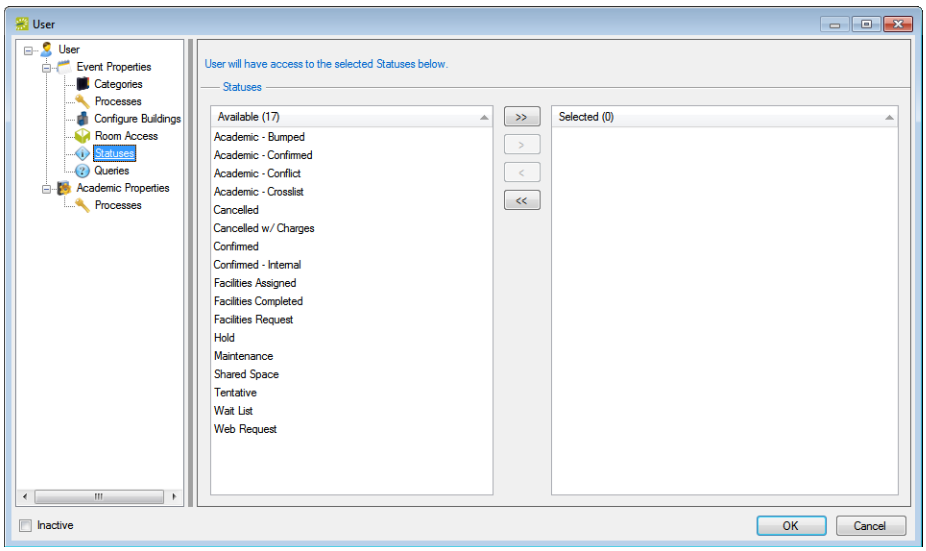
Statuses

You select the statuses to which a user is to have access on the Statuses tab. A user needs access to a status in order to create a reservation with the status or edit a booking with the status.

1. If needed, open the User dialog box. (See "To configure a user account" on page 329.)
2. Select Statuses.

   The User dialog box is refreshed with a list of all the active event statuses that you can select for the user.

Figure 9-8: User dialog box, Statuses



3. On the Available list, select the status or CTRL-click to select the multiple statuses to which a user is to have access, and then click the Move button (>) to move the selected statuses to the Selected list.
4. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

Queries

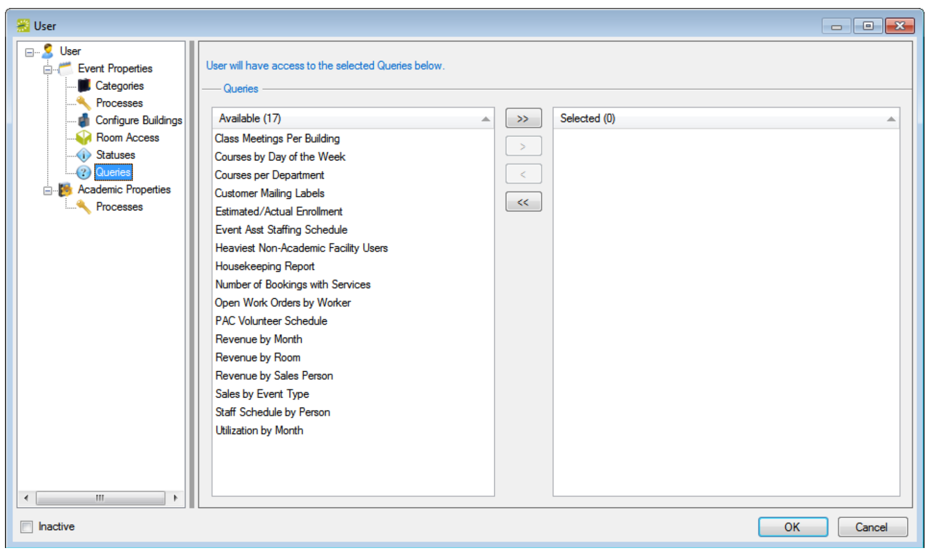
You specify the queries that a user can run on the Queries tab.

You can specify the queries to run by user only in EMS Enterprise. All queries are available to all users in EMS Professional.

1. If needed, open the User dialog box. (See "To configure a user account" on page 329.)
2. Select Queries.

   The User dialog box is refreshed with a list of all the defined queries that you can select for the user account.

Figure 9-9: User dialog box, Queries



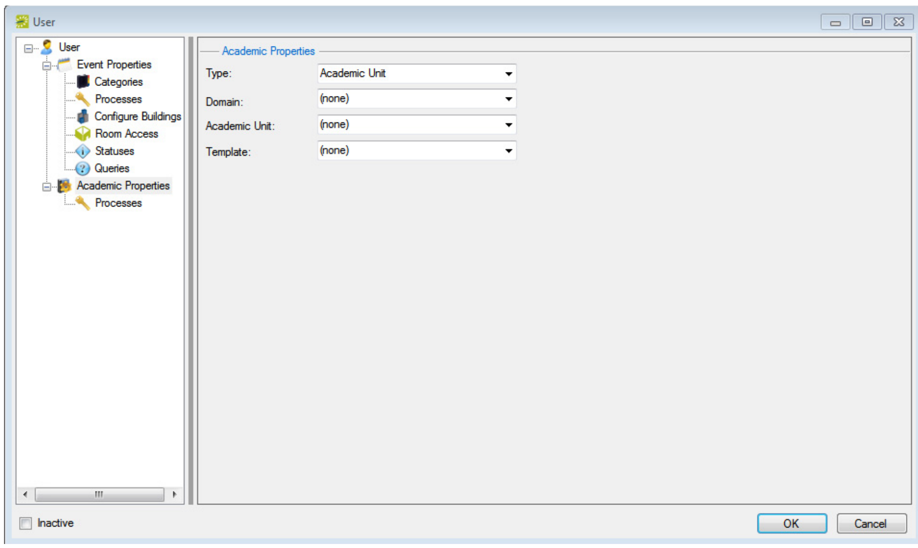
3. On the Available list, select the query or CTRL-click to select the multiple queries to which a user is to have access, and then click the Move button (>) to move the selected queries to the Selected list.
4. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

Academic Properties (EMS Campus Only)

1. If needed, open the User dialog box. (See "To configure a user account" on page 329.)
2. Select Academic Properties.

   The User dialog box is refreshed with options for the academic security settings for the user.

Figure 9-10: User dialog box, Academic Properties (EMS Campus only)



3. Specify the academic security settings for the user.

Field	Description
Type	• Domain—The domain (typically renamed to campus or school) to which the user belongs. • Academic Unit—The academic unit (typically renamed to academic department or division) to which the user belongs.
Domain	The domain to which the user belongs.
Academic Unit	Available only if the user is assigned the type of "Academic Unit." The academic unit to which the user belongs.
Template	The academic template to which the user is assigned. The template determines the academic processes to which the user has access. See "Configuring Academic User Templates" on page 352.

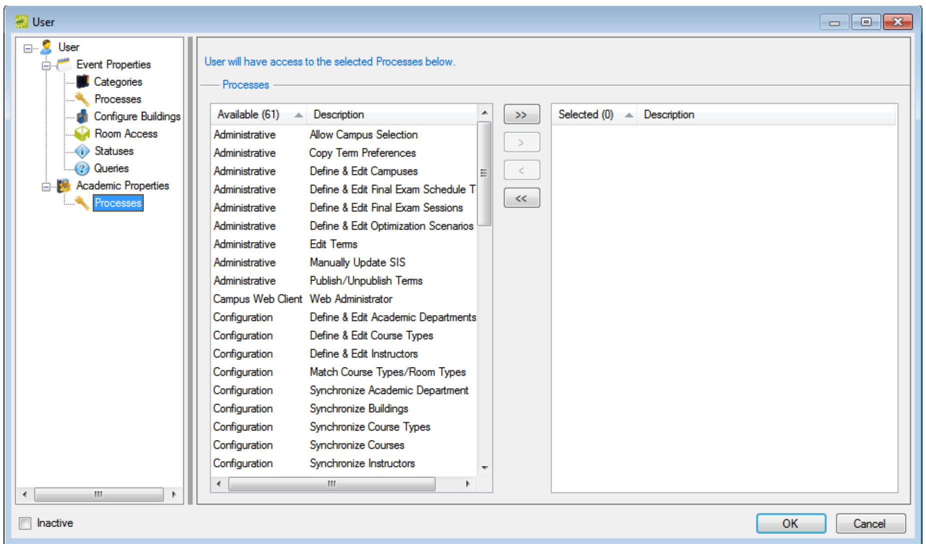
4. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

Processes (EMS Campus Only)

1. If needed, open the User dialog box. (See “To configure a user account” on page 329.)
2. Select Processes (under Academic Properties).

   The User dialog box is refreshed with a list of all the academic processes that you can select for the user.

Figure 9-11: User dialog box, Academic Processes (EMS Campus only)



3. On the Available list, select the academic process or CTRL-click to select the multiple academic event processes to which a user is to have access, and then click the Move button (>) to move the selected processes to the Selected list.

For an explanation of each process, see *“Academic event processes” on page 325.*

4. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

To export a list of user accounts

1. On the EMS menu bar, click System Administration > Security > Users.

   The Users window opens. This window lists the names and types for all users who currently have an account for your EMS installation.

2. Click Export.

   The Save As dialog box opens. The default file name is User List.

The default file type is Microsoft Excel Workbook (.xls) and you cannot change this.*

3. Optionally, change the file name, and save the file in a location of your choosing.

Configuring User Templates

Users are the people who log on to EMS, whether they are making reservations or just using the system in a read-only capacity. A *user template* defines the categories, processes, buildings, rooms, statuses, and queries to which a group of EMS users has access. Instead of defining users individually and then configuring security for each user, you can configure a template and then assign all the users who are to have the same security settings to a given template in a single step. You can configure a user template user entirely from “scratch,” or you can copy an existing user template, and then make the necessary edits to configure another template.

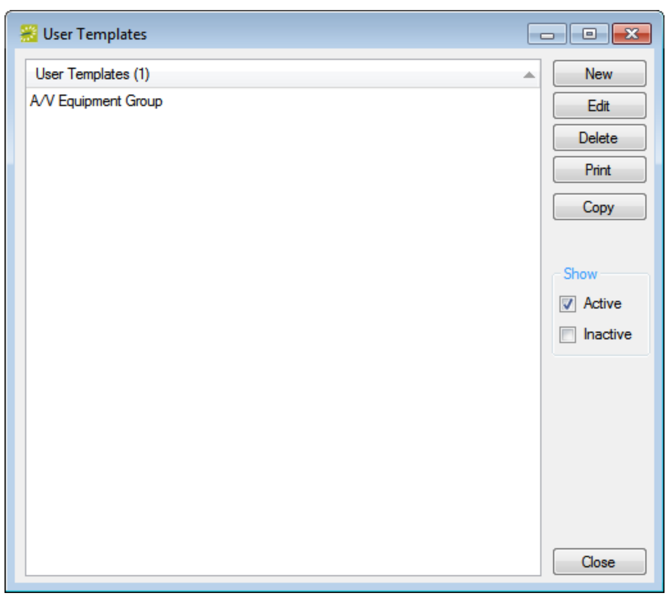
If the EMS users who are to have the same security settings are also EMS Campus users, then you must also define academic user templates for these users. *See “Configuring Academic User Templates” on page 352.*

To configure a user template

1. On the EMS menu bar, click System Administration > Security > User Templates.

   The User Templates window opens. This window lists all the user templates that are currently configured in your EMS database and that have a status of Active.

Figure 9-12: User Templates window



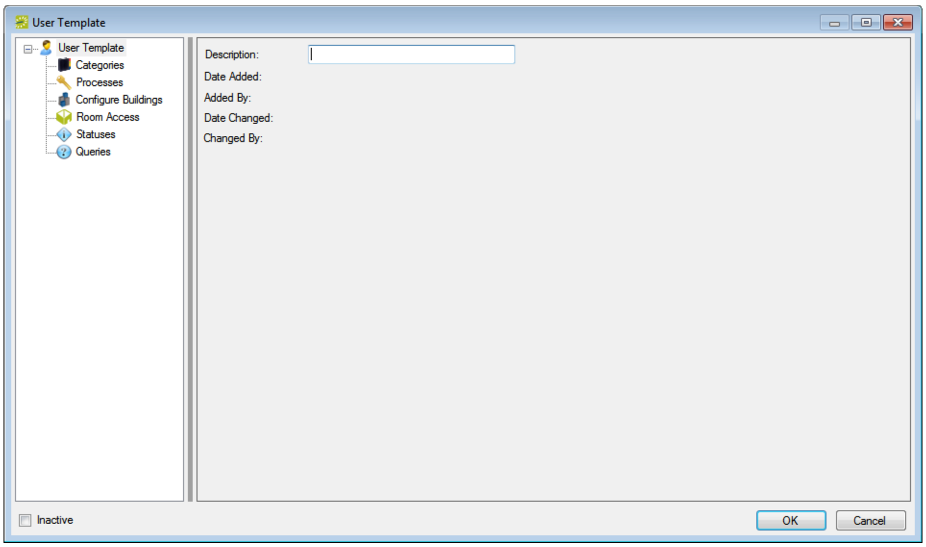
Optionally, to show all templates, regardless of status, under Show, click Inactive.

The remainder of this procedure describes how to configure a user template "from scratch." You can also configure a user template by copying an existing template. Select the user template that you want to copy, click Copy, and then continue to Step 3.

2. Click New.

   The User Template dialog box opens.

Figure 9-13: User Template dialog box



3. In the Description field, enter a name or description for the new user template.

The name or description can be a maximum of 50 characters, including spaces.

4. Defining the user access for each of the following—categories, processes, building configuration, room access, statuses and queries. See:

   - "Categories" on page 345.
   - "Processes" on page 346.
   - "Configure Buildings" on page 347.
   - "Room Access" on page 348.
   - "Statuses" on page 350.
   - "Queries" on page 351.

5. Click OK.

   The User Template dialog box closes. You return to the User Templates window with the newly configured template automatically selected.

Categories

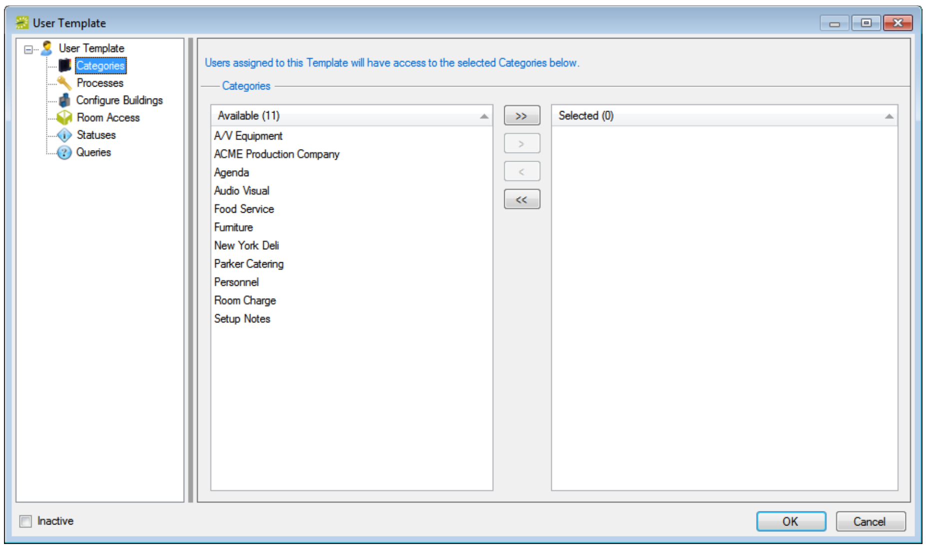
You specify the categories that a user who is assigned to this template can add to a booking or edit for a booking on the Categories tab.

1. If needed, open the User Template dialog box. (See "To configure a user template" on page 343.)

2. Select Categories.

   The User Template dialog box is refreshed with a list of all the active categories that you can select for the user template.

Figure 9-14: User Template dialog box, Categories



3. On the Available list, select the category or CTRL-click to select the multiple categories to which a user is to have access, and then click the Move button (>) to move the selected categories to the Selected list.

To add these categories to a booking, a user needs access to the Edit Booking Details process.

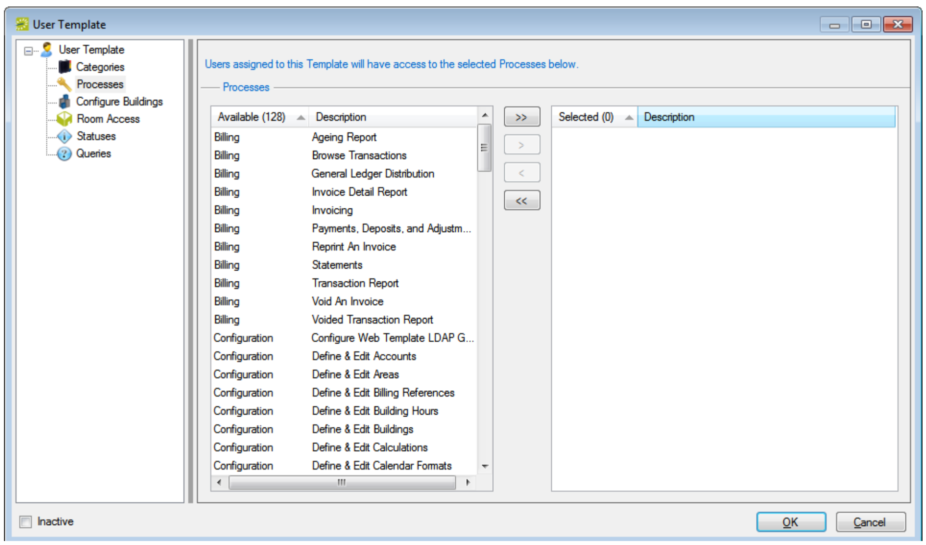
4. Continue with any other configuration for the template as needed; otherwise, click OK to close the User Template dialog box and return to the User Templates window with the newly configured user template automatically selected in the window.

Processes

1. If needed, open the User Template dialog box. (See “To configure a user template” on page 343.)
2. Select Processes.

   The User Template dialog box is refreshed with a list of all the processes that you can select for the user template.

Figure 9-15: User Template dialog box, Processes



3. On the Available list, select the process or CTRL-click to select the multiple processes to which a user is to have access, and then click the Move button (>) to move the selected processes to the Selected list.

For an explanation of each process, see *“Event processes” on page 321.*

4. Continue with any other configuration for the template as needed; otherwise, click OK to close the User Template dialog box and return to the User Templates window with the newly configured user template automatically selected in the window.

Configure Buildings

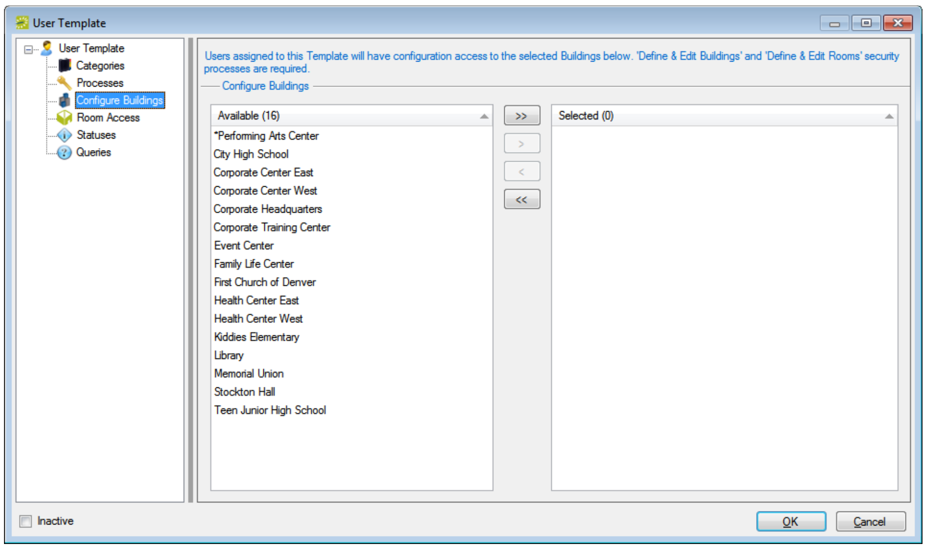
You select the building configuration rights for a user who is assigned to this template on the Buildings tab.

1. If needed, open the User Template dialog box. (See "To configure a user template" on page 343.)

2. Select Buildings.

   The User Template dialog box is refreshed with a list of all the buildings that you can select for the user template.

Figure 9-16: User Template dialog box, Buildings



3. On the Available list, select the building or CTRL-click to select the multiple buildings to which a user is to have access, and then click the Move button (>) to move the selected buildings to the Selected list.

Define and Edit Buildings and Define and Edit Rooms security processes are required for a user to have configuration access to selected buildings and/or rooms.

4. Continue with any other configuration for the template as needed; otherwise, click OK to close the User Template dialog box and return to the User Templates window with the newly configured user template automatically selected in the window.

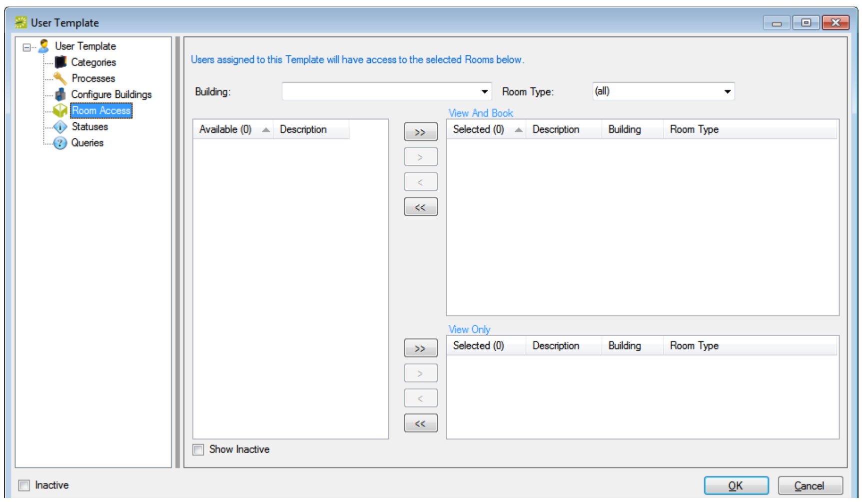
Room Access

You specify the room access for a user who is assigned to this template on the Room Access tab.

1. If needed, open the User Template dialog box. (See "To configure a user template" on page 343.)
2. Select Room Access.

   The User Template dialog box is refreshed a options for searching for the rooms to add to the user template.

Figure 9-17: User Template dialog box, Rooms



3. Search for the rooms to which to add to the user template by doing one or both of the following:
   - On the Building dropdown list, select (all) buildings, or select a specific building.
   - On the Room Type dropdown list, leave the default value of (all), or select a specific room type.

   The Available list is updated with a list of rooms that meet your search criteria.

4. On the Available list, select the room or CTRL-click to select the multiple rooms to which a user is to have access, and then click the Move button (>) to move the selected rooms to the appropriate Selected list.

EMS Enterprise has both the View and Book and the View Only access for user security. EMS Professional has just the View and Book access for user security.

- View and Book—A user who has access to the Special - Edit Critical Booking Information process *and* who is assigned to this template can reserve the room, move an event into or out of the room, change the time or status of an event that is scheduled in the room, and add resources to events in the room.

The Special - View and Book Access On All Rooms process can be used as an alternative to manually assigning all rooms to the View and Book list.

- View Only—A user who is assigned to this template cannot reserve the room, move an event into or out of the room, or change the time or status of an event that is scheduled in the room; however, as long as the user has access to the appropriate category and to the Special - Edit Booking Details process, the user can view events in the room and add resources to events in the room.

5. Continue with any other configuration for the template as needed; otherwise, click OK to close the User Template dialog box and return to the User Templates window with the newly configured user template automatically selected in the window.

Statuses

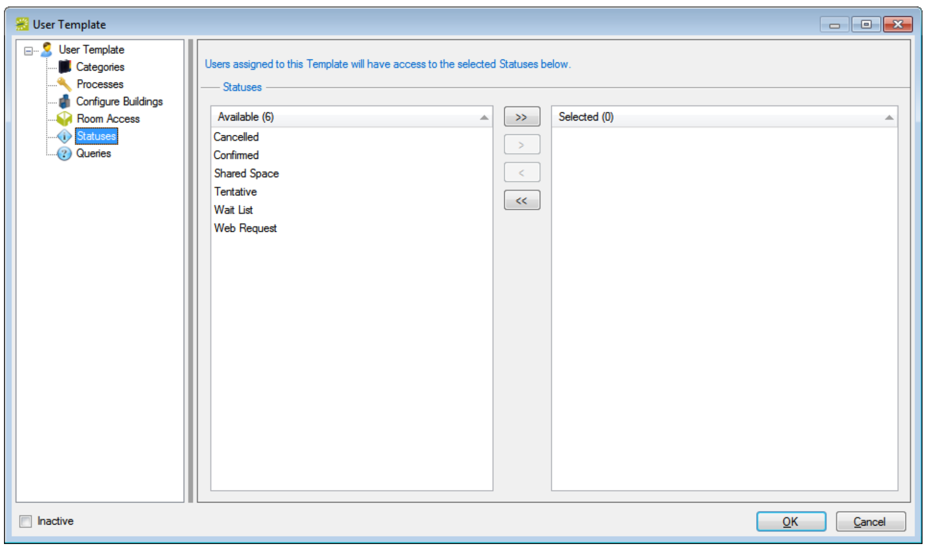
You specify the statuses to which a user who is assigned to this template is to have access on the Statuses tab. A user needs access to a status in order to create a reservation with the status or edit a booking with the status.

1. If needed, open the User Template dialog box. (See “To configure a user template” on page 343.)

2. Select Statuses.

   The User Template dialog box is refreshed with a list of all the active event statuses that you can select for the user template.

Figure 9-18: User Template dialog box, Statuses

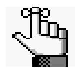


3. On the Available list, select the status or CTRL-click to select the multiple statuses to which a user is to have access, and then click the Move button (>) to move the selected statuses to the Selected list.

4. Continue with any other configuration for the template as needed; otherwise, click OK to close the User Template dialog box and return to the User Templates window with the newly configured user template automatically selected in the window.

Queries

You specify the queries that a user who is assigned to this template can run on the Queries tab.

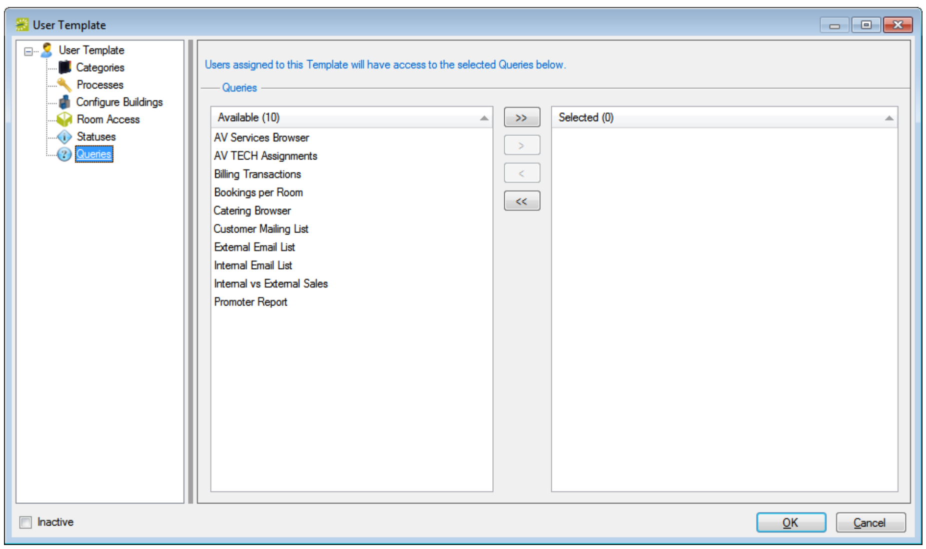


You can specify the queries to run by user only in EMS Enterprise. All queries are available to all users in EMS Professional.

1. If needed, open the User Template dialog box. (See “To configure a user template” on page 343.)
2. Select Queries.

   The User Template dialog box is refreshed with a list of all the defined queries that you can select for the user template.

Figure 9-19: User Template dialog box, Queries



3. On the Available list, select the query or CTRL-click to select the multiple queries to which a user is to have access, and then click the Move button (>) to move the selected queries to the Selected list.
4. Continue with any other configuration for the template as needed; otherwise, click OK to close the User Template dialog box and return to the User Templates window with the newly configured user template automatically selected in the window.

Configuring Academic User Templates

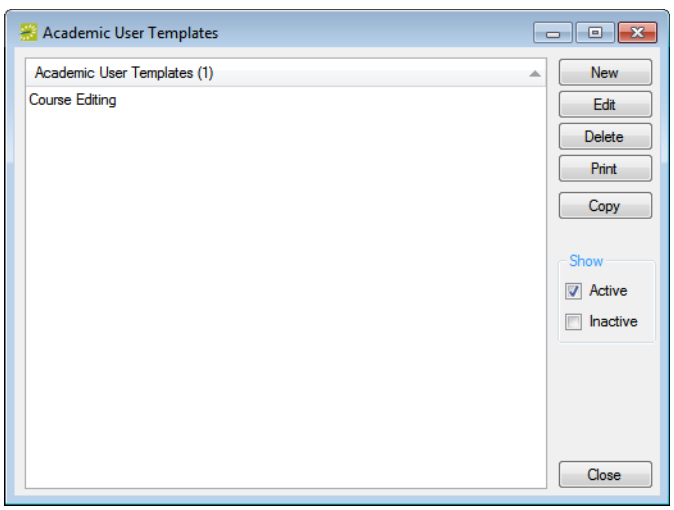
If the EMS users who are to have the same security settings are also EMS Campus users, then you must configure academic user templates for these users. An *academic user template* defines the academic event processes to which a group of EMS Campus users has access. Instead of defining campus users individually and then configuring security for each user, you can configure a template and then assign all the users who are to have the same security settings to a given template in a single step. You can configure an academic user template user entirely from "scratch," or you can copy an existing academic user template, and then make the necessary edits to configure another template.

To configure an academic user template

1. On the EMS menu bar, click System Administration > Security > Academic User Templates.

   The Academic User Templates window opens. This window lists all the academic user templates that are currently configured in your EMS database and that have a status of Active.

Figure 9-20: Academic User Templates window



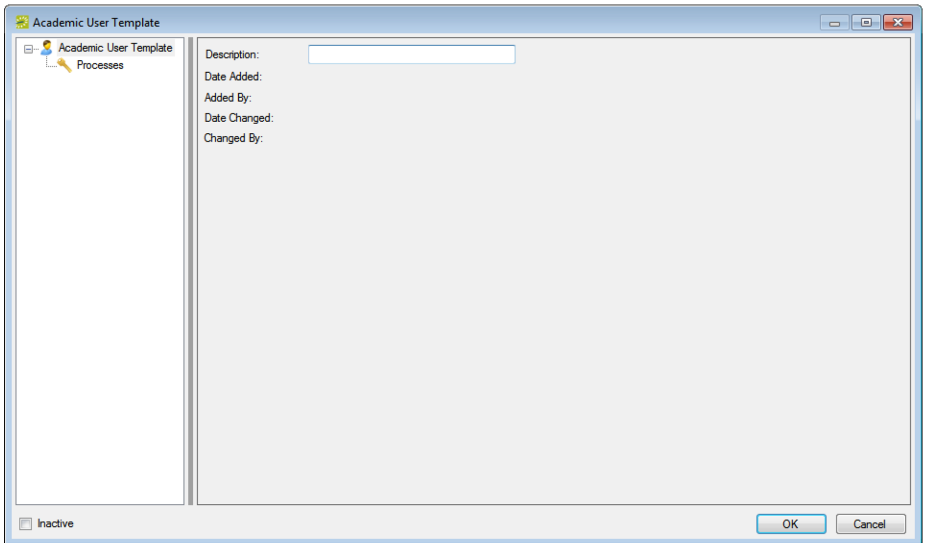
Optionally, to show all templates, regardless of status, under Show, click Inactive.

The remainder of this procedure describes how to configure an academic user template "from scratch." You can also configure an academic user template by copying an existing template. Select the academic user template that you want to copy, click Copy, and then go to Step 3.

2. Click New.

The Academic User Template dialog box opens.

Figure 9-21: Academic User Template dialog box



3. In the Description field, enter a name or description for the new academic user template.

The name or description can be a maximum of 30 characters, including spaces.

4. Select Processes, and define the user access for the appropriate academic processes.

For an explanation of each process, see *"Academic event processes" on page 325.*

5. Click OK.

   The Academic User Template dialog box closes. You return to the Academic Users Template window with the newly configured template automatically selected.

Configuring User Security for Multiple User Accounts

If you configure users individually (that is, you are not using user templates) and you need to mass assign security to multiple users (for example, you have added a new room and many of your users need access to the room), then you can use the User Security function. You can use the User Security function to mass assign security for categories, processes, rooms, and statues for multiple users that have been individually configured.

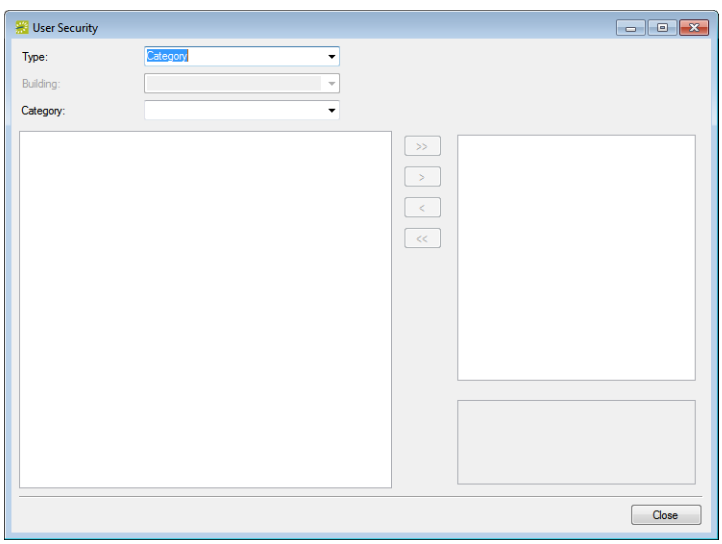
If you need to mass assign security for queries to multiple users, you can do so from within the Query Builder itself. See the EMS User's Manual for detailed information.

To configure user security for multiple user accounts

1. On the EMS menu bar, click System Administration > Security > User Security.

   The User Security dialog box opens.

Figure 9-22: User Security dialog box



2. On the Type dropdown list, select the item for which you are configuring user security—Category, Process, Room, or Status, and then continue to one of the following:

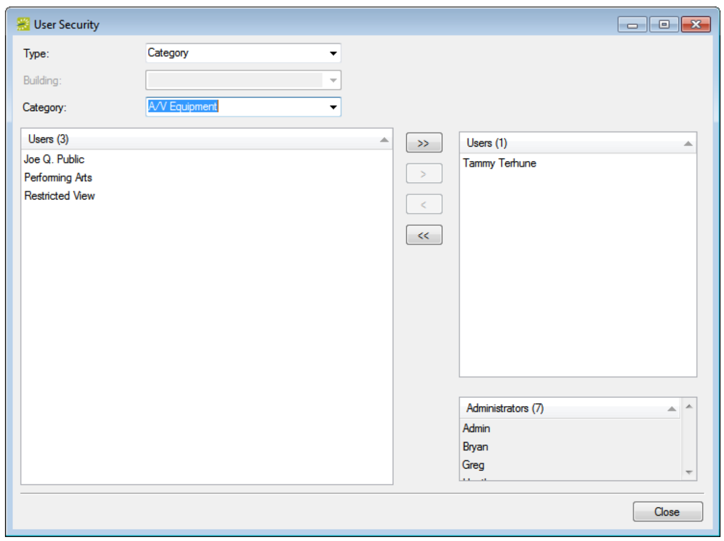
   - "To configure mass user security for a category" on page 355.
   - "To configure mass user security for a process" on page 356.
   - "To configure mass user security for a room" on page 357.
   - "To configure mass user security for a status" on page 358.

To configure mass user security for a category

1. On the Category dropdown list, select the specific category for which you are configuring user security.

   The User Security dialog box is refreshed with a list of all individual users who do *not* have access to the selected category (the left Users list), and a list of all individual users who do have access to the selected category (the right Users list). All administrator users are displayed as well. (By default, an administrator user has access to all categories in an EMS database, and therefore, this list is not enabled.)

Figure 9-23: User Security dialog box, Categories



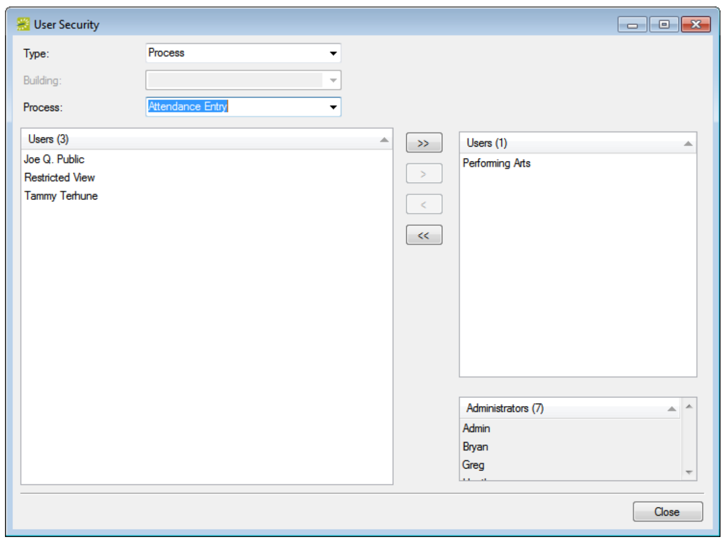
2. On the left Users list, select the user, or CTRL-click to select the multiple users who are to have access to the selected category, and then click the Move (>) button to move the selected users to the right Users list.
3. Continue with any other security configuration as needed; otherwise, click Close to close the User Security dialog box.

To configure mass user security for a process

1. On the Process dropdown list, select the specific process for which you are configuring user security.

   The User Security dialog box is refreshed with a list of all individual users who do *not* have access to the selected process (the left Users list), and a list of all individual users who do have access to the selected process (the right Users list). All administrator users are displayed as well. (By default, an administrator user has access to all processes in an EMS database, and therefore, this list is not enabled.)

Figure 9-24: User Security dialog box, Processes



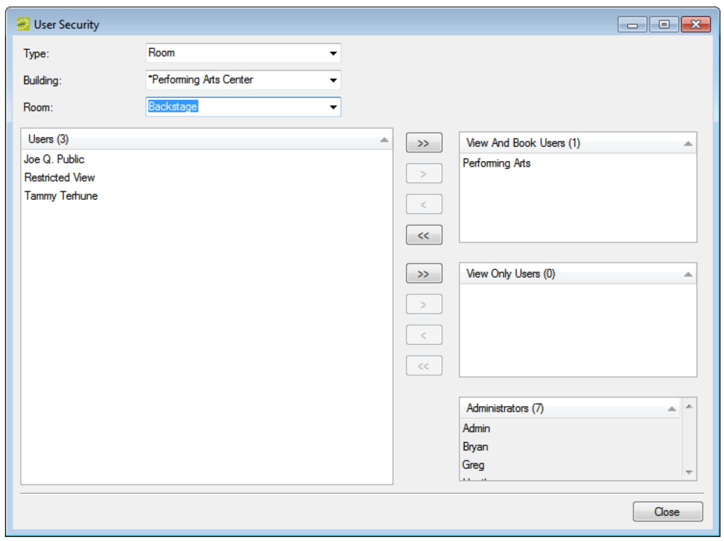
2. On the left Users list, select the user, or CTRL-click to select the multiple users who are to have access to the selected process, and then click the Move (>) button to move the selected users to the right Users list.
3. Continue with any other security configuration as needed; otherwise, click Close to close the User Security dialog box.

To configure mass user security for a room

1. On the Building dropdown list, select a building, and then on the Room dropdown list select the specific room in the building for which you are configuring user security.

   The User Security dialog box is refreshed with a list of all individual users who do *not* have access to the selected room (the left Users list), a list of all individual users who have View and Book access to the selected room and a list of all individual users who have View Only access to the room. All administrator users are displayed as well. (By default, an administrator user has access to all processes in an EMS database, and therefore, this list is not enabled.)

Figure 9-25: User Security dialog box, Rooms



2. On the left Users list, select the user, or CTRL-click to select the multiple users who are to have access to the selected room, and then click the Move (>) button to move the selected users to the appropriate Users list.

EMS Enterprise has both the View and Book and the View Only access for user security. EMS Professional has just the View and Book access for user security.

- View and Book—A user who has access to the Special - Edit Critical Booking Information process *and* who is assigned to this option can reserve the room, move an event into or out of the room, change the time or status of an event that is scheduled in the room, and add resources to events in the room.

The Special - View and Book Access On All Rooms process can be used as an alternative to manually assigning all rooms to the View and Book list.

- View Only—A user who is assigned to this option cannot reserve the room, move an event into or out of the room, or change the time or status of an event that is scheduled in the room; however, as long as the user has access to the appropriate category and to the Special - Edit Booking Details process, the user can view events in the room and add resources to events in the room.

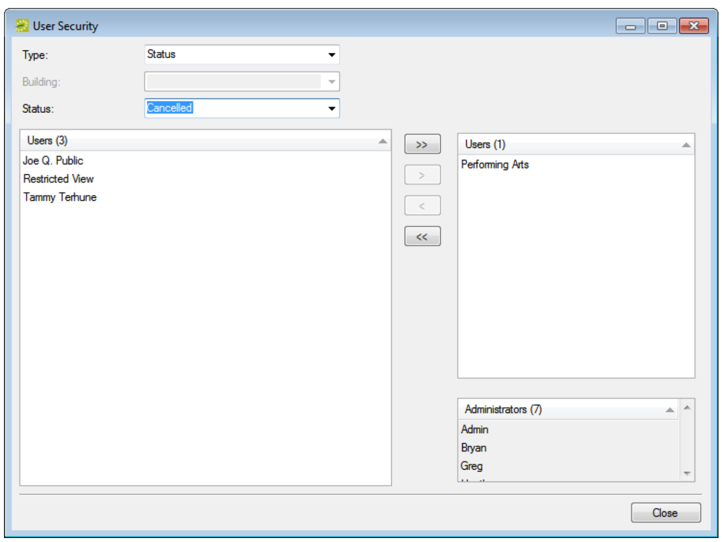
3. Continue with any other security configuration as needed; otherwise, click Close to close the User Security dialog box.

To configure mass user security for a status

1. On the Status dropdown list, select the specific status for which you are configuring user security.

   The User Security dialog box is refreshed with a list of all individual users who do *not* have access to the selected status (the left Users list), and a list of all individual users who do have access to the selected status (the right Users list). All administrator users are displayed as well. (By default, an administrative user has access to all statuses in an EMS database, and therefore, this list is not enabled.)

Figure 9-26: User Security dialog box, Statuses



2. On the left Users list, select the user, or CTRL-click to select the multiple users who are to have access to the selected status, and then click the Move (>) button to move the selected users to the right Users list.

3. Continue with any other security configuration as needed; otherwise, click Close to close the User Security dialog box.

System Administration Tools

You have several tools at your disposal in EMS to assist you in your administrative duties. These include a tool to update various group attributes such as pricing plans or account name, managing memorized reports, viewing logged-in users and if necessary, log these users off your EMS system, emailing logged-in users, deleting old data in your EMS database, and so on.

This chapter covers the following topics:

For detailed information the Video Display Interface tool, see Appendix C, “Video Display Interface,” on page 521.

Change Group Wizard

You use the Change Group Wizard to update various group attributes. You can reassign an account, an event coordinator, a group type, a payment type, a pricing plan, a sales category, or a salesperson.

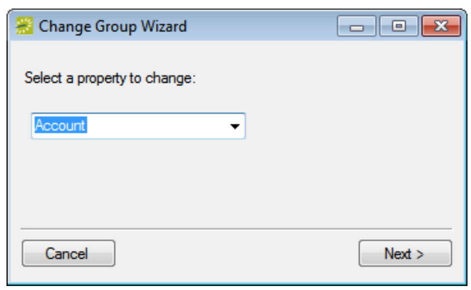
To use the Change Group Wizard

The following procedure is written from the perspective of changing an account, but by analogy, you can follow this procedure to change any of the allowed properties for your group records.

1. On the EMS menu bar, click System Administration > Tools > Change Group Wizard.

   The Change Group Wizard opens.

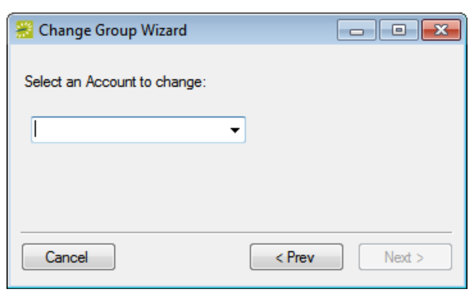
Figure 10-1: Change Group Wizard



2. Select Account (the property to change), and then click Next.

   You are prompted to select an account to change.

Figure 10-2: Change Group Wizard



3. Select the account that you want to change, for example Equipment Charges.

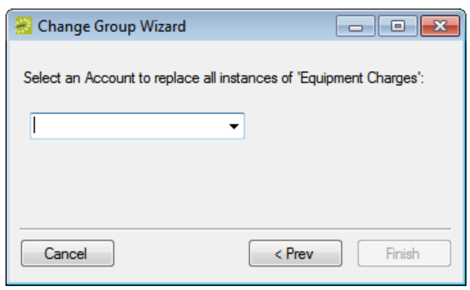
   The Change Group Wizard is updated with information that indicates the number of groups that use the account that you are changing.

Figure 10-3: Change Group Wizard

4. Click Next.

   The Change Group Wizard prompts you to select an account to replace all instances of Equipment Charges.

Figure 10-4: Change Group Wizard



5. Select the appropriate account, for example, Denver A/V, and then click Finish.

   A Property Changed message opens, indicating that the property was changed, and the number of groups that were affected.

6. Click OK to close the message and the Change Group Wizard.

Change Reservation Wizard

You use the Change Reservation Wizard to change various properties for all reservations or all future reservations with bookings after a specific date in a single step. You can change the calendar style, the event coordinator, the event type, the sales category, the salesperson, the reservation source, or the web user.

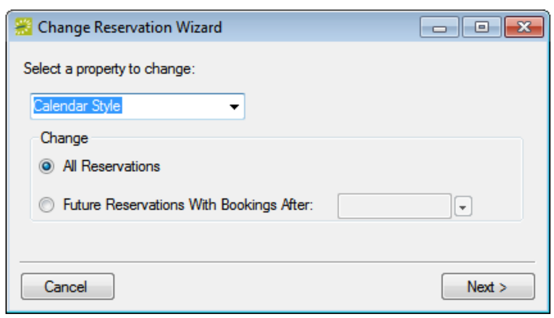
To use the Change Reservation Wizard

The following procedure is written from the perspective of changing the event type, but by analogy, you can follow this procedure to change any of the allowed properties for your reservations.

1. On the EMS menu bar, click System Administration > Tools > Change Reservation Wizard.

   The Change Reservation Wizard opens.

Figure 10-5: Change Reservation Wizard



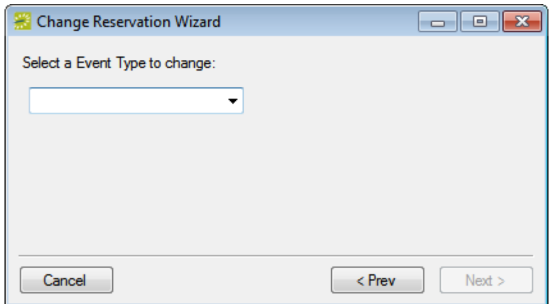
2. Select Event Type for the property to change, and then do one of the following:
   - Select All Reservations.
   - Select Future Reservations with Bookings After, and then select a booking date.

The date must be greater than or equal to the current day’s date.

3. Click Next.

   The Change Reservation Wizard prompts you to select an event type to change.

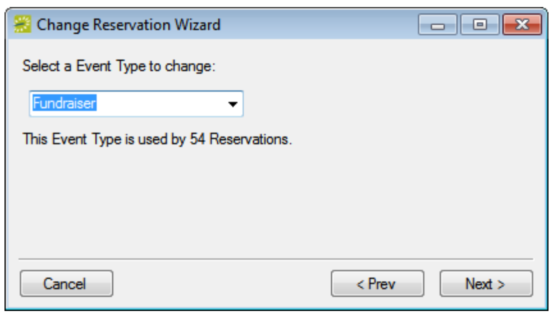
Figure 10-6: Change Reservation Wizard



4. Select an event type, for example, Fundraiser.

   The Change Reservation Wizard is updated with information that indicates the number of reservations that use the selected event type.

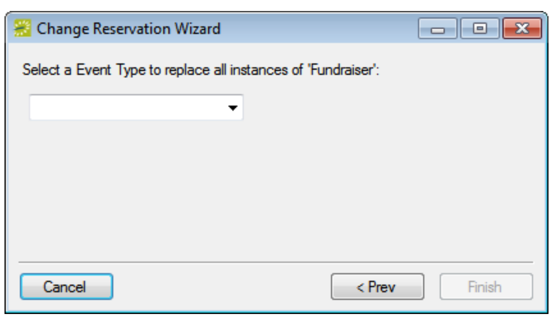
Figure 10-7: Change Reservation Wizard



5. Click Next.

   The Change Reservation Wizard prompts you to select an event type to replace all instances of “Fundraiser.”

Figure 10-8: Change Reservation Wizard



6. Select a different event type, for example, Fundraising Dinner, and then click Finish.

   A Property Changed message opens, indicating that the property was changed, and the number of reservations that were affected.

7. Click OK to close the message and the Change Reservation Wizard.

Room Administration Wizard

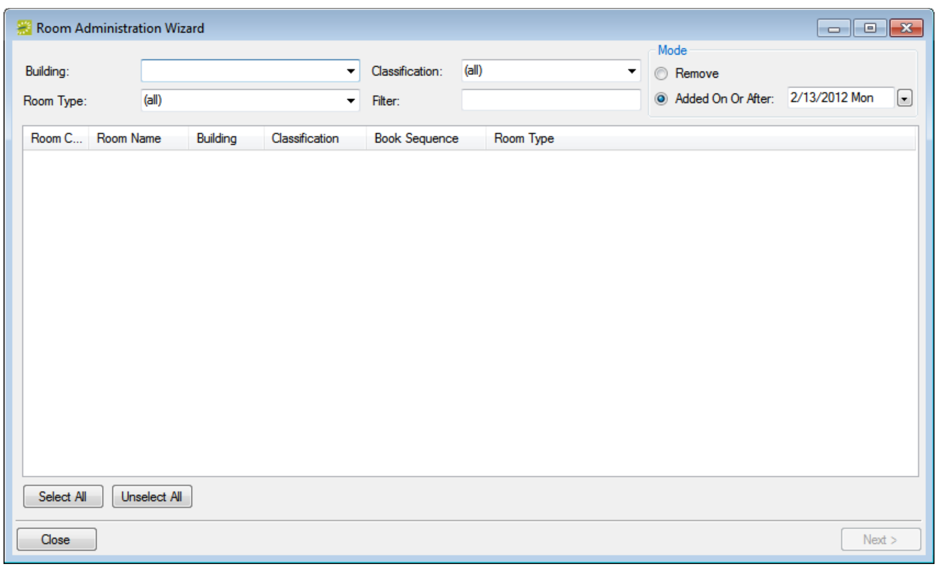
You use the Room Administration Wizard to identify new rooms that have been configured in your EMS database and add these rooms to or delete these rooms from public views, notification rules, group notification rules, users, user templates, web process templates, and if applicable, kiosk profiles. (If you are using the Room Administration Wizard in EMS Campus, then you can add specific rooms to or delete specific rooms from domains and/or academic units.)

To use the Room Administration Wizard

1. On the EMS menu bar, click System Administration > Tools > Room Administration Wizard.

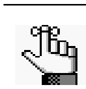
   The Room Administration Wizard opens.

Figure 10-9: Room Administration Wizard



2. Do one of the following:

   - If you are using the wizard to add rooms to a view, rule, or so on, then leave Add On or After Date selected, if needed, select a date, and then continue to “To use the Room Administration Wizard to add rooms” on page 367.



The default value for the date is the current day’s date.

   - If you are using the wizard to delete rooms from a view, rule, or so on, select Remove, and then continue to “To use the Room Administration Wizard to delete rooms” on page 369.

To use the Room Administration Wizard to add rooms

1. On the Building dropdown list, select all buildings, a specific building, or an area.

   All rooms that have been added to the selected building or area on or after the indicated date are displayed.

2. Optionally, do one or both of the following to filter the rooms that are displayed:

   - On the Classification dropdown list, leave the default value of (all), or select a specific room classification.
   - On the Room Type dropdown list, leave the default value of (all), or select a specific room type.

   As you select your search criteria, the list of rooms that meet the search criteria is dynamically updated.

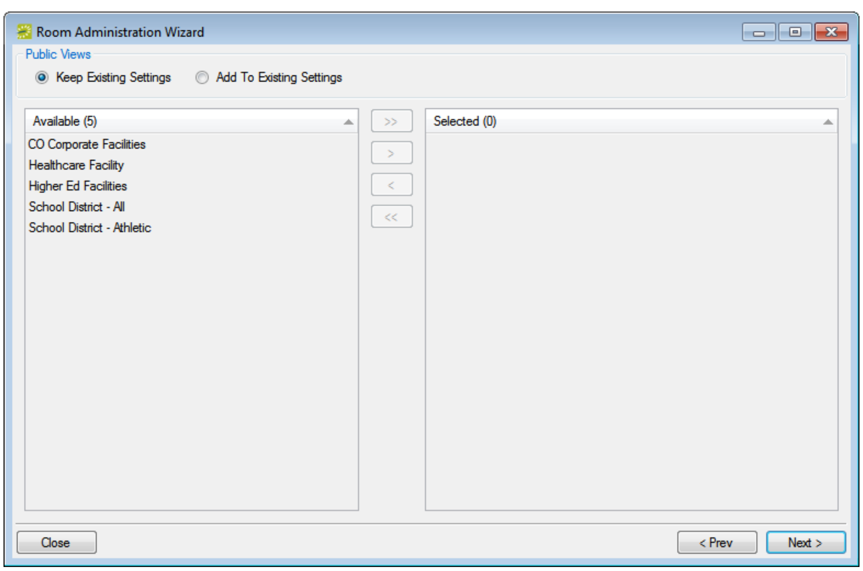
3. Optionally, to further filter the displayed search results based on the Room Name, in the Filter field, enter a search string.

The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of ***Mee*** *returns* ***Mee****ting room, but not Science Meeting room.*

4. Select the room or CTRL-click to select the multiple rooms that you are adding, and then click Next.

   The Room Administration Wizard is updated with a list of the public views that are currently configured in your EMS database.

Figure 10-10: Room Administration Wizard, Public Views



5. Do one of the following:

   - To keep all public views as is (none of the selected rooms are to be added to any existing public views), leave Keep Existing Settings selected, and then click Next.
   - To add the selected rooms to one or more of the existing public views, click Add to Existing Settings, and on the Available list, select the view or CTRL-click to select the multiple views, click the Move (>) button to move the selected views to the Selected list, and then click Next.

6. Repeat the process detailed in Step 5 to move through the configuration process for each of the remaining configuration items—Notification Rules, Group Notification Rules, Users, User Templates, Web Process Templates, and if applicable, Kiosk Profiles.

   - For Users, User Templates, and Web Process Templates, a third option, Overwrite Existing Settings is available. If you select this option, then the current (existing) room access for the configuration item is replaced by the room access that you define here. For example, if you select Overwrite Existing Settings for Users, then any room access that has been previously defined for a selected user is replaced by the room access that you define here.

7. Do one or more or all of the following as needed:

   - For Notification Rules, Group Notification Rules, and Kiosk Profiles, go to Step 8.
   - For Users and User Templates, select the appropriate access, and then go to Step 8.

EMS Enterprise has both the View and Book and the View Only access for user security. EMS Professional has just the View and Book access for user security.

- View and Book—A user who has access to the Special - Edit Critical Booking Information process *and* who is assigned to this option can reserve the room, move an event into or out of the room, change the time or status of an event that is scheduled in the room, and add resources to events in the room.

The Special - View and Book Access On All Rooms process can be used as an alternative to manually assigning all rooms to the View and Book list. *See "Configuring User Security for Multiple User Accounts" on page 354.*

- View Only—A user who is assigned to this option cannot reserve the room, move an event into or out of the room, or change the time or status of an event that is scheduled in the room; however, as long as the user has access to the appropriate category and to the Special - Edit Booking Details process, the user can view events in the room and add resources to events in the room.

- For Web Process Templates, select the appropriate access, and then go to Step 8.
    - Move rooms that can be reserved without approval (that is, booked into the Reserve Status on the Web Template tab) into the Reserve pane.
    - Move rooms that require approval (that is, booked into the Request Status on the Web Template tab) into the Request pane.

8. Click Finish.

   A Process message opens indicating that you are about to process the selected rooms and possibly overwrite data, and asking you if it is OK to continue.

9. Click Yes.

   A message opens indicating that the rooms were processed successfully, and asking you if you want to select more rooms.

10. Do one of the following:
    - Click Yes to close the message and return to the Room Administration Wizard.
    - Click No to close the message and the Room Administration Wizard.

To use the Room Administration Wizard to delete rooms

1. On the Building dropdown list, select all building, a specific building, or an area.

   All rooms that have been configured for the selected building, area, or view are displayed.

2. Optionally, do one or both of the following to filter the rooms that are displayed:
    - On the Classification dropdown list, leave the default value of (all), or select a specific room classification.
    - On the Room Type dropdown list, leave the default value of (all), or select a specific room type.

   As you select your search criteria, the list of rooms that meet the search criteria is dynamically updated.

3. Optionally, to further filter the displayed search results based on the Room Name, in the Filter field, enter a search string.

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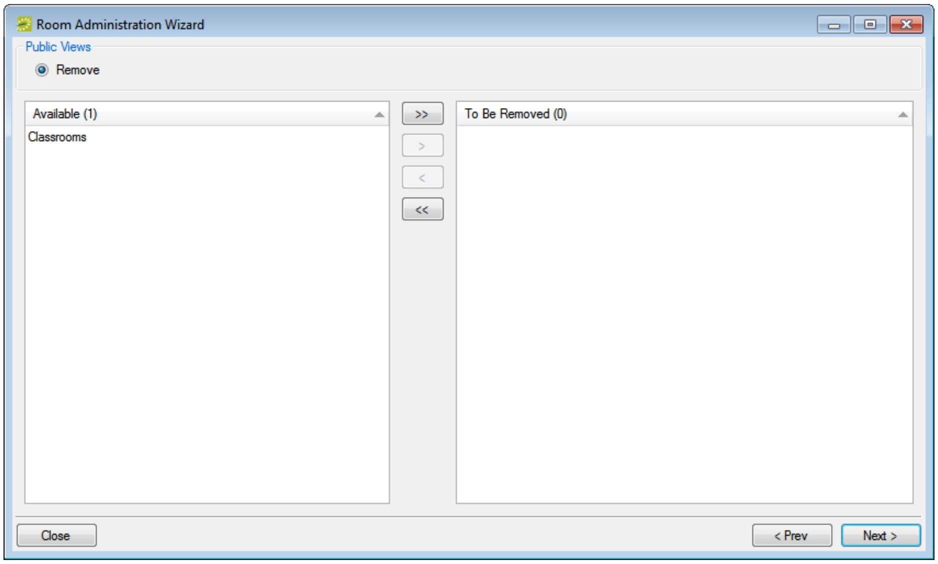
*The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of **Mee** returns **Mee**ting room, but not Science Meeting room.*

4. Select the room or CTRL-click to select the multiple rooms that you are removing, and then click Next.

   The Room Administration Wizard is updated with a list of the public views that are currently configured in your EMS database *and* that contain the selected room or rooms.

Figure 10-11: Room Administration Wizard, Public Views



5. Do one of the following:

   - To keep all public views as is (none of the selected rooms are to be removed from any of these public views), leave Keep Existing Settings selected, and then click Next.

   - To remove the selected rooms from one or more of the public views, on the Available list, select the view, or CTRL-click to select the multiple views from which you are removing the rooms, click the Move (>) button to move the selected views to the Selected list, and then click Next.

6. Repeat the process detailed in Step 5 to move through the configuration process for each of the remaining configuration items—Notification Rules, Group Notification Rules, Users, User Templates, Web Process Templates, and if applicable, Kiosk Profiles.

7. Click Finish.

   A Process message opens indicating that you are about to process the selected rooms and possibly overwrite data, and asking you if it is OK to continue.

8. Click Yes.

   A message opens indicating that the rooms were processed successfully, and asking you if you want to select more rooms.

9. Do one of the following:
    - Click Yes to close the message and return to the Room Administration Wizard.
    - Click No to close the message and the Room Administration Wizard.

Managing Memorized Reports

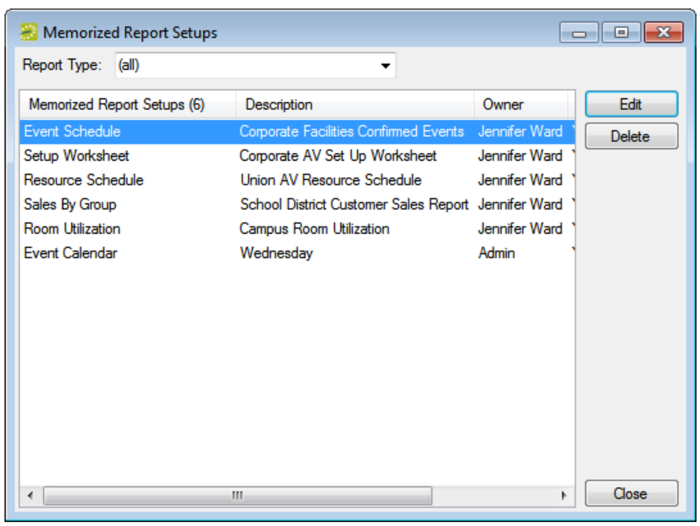
A *memorized report* is a report for which the filter settings have been saved, or *memorized*, so that you do not have to adjust the filter settings every time you run the report. A memorized report always has an owner, and it can be a *public* report (available to all users in your EMS database), or it can be a *private* report (available only to the owner of the report.) You use the Manage Memorized Reports tool to edit or delete a memorized report.

To use the Manage Memorized Reports tool

1. On the EMS menu bar, click System Administration > Tools > Manage Memorized Reports.

   The Memorized Report Setups window opens. By default, this window lists the memorized reports of all types that are configured in your EMS database.

Figure 10-12: Memorized Report Setups dialog box



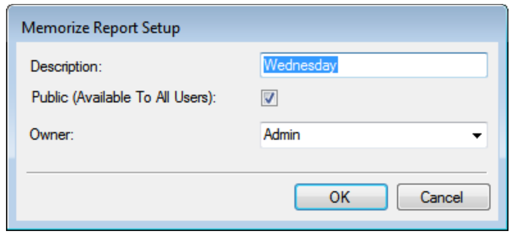
2. Optionally, select on the Report Type dropdown list, select a report type to filter the list of reports that are displayed.
3. Select a memorized report, and then continue to one of the following:
   - “To edit a memorized report” on page 373.
   - “To delete a memorized report” on page 373.

To edit a memorized report

1. Click Edit.

   A Memorize Report Setup dialog box opens, populated with the information for the selected report.

Figure 10-13: Memorize Report Setup dialog box



2. Edit one or more of the following for the report—the report description, the availability of the report (if the report is not to be available to the all users, then clear the Public option; otherwise, select the Public option), and/or the report owner.

3. Click OK.

   The Memorize Report Setup dialog box closes and you return to the Memorize Report Setups window with the newly edited report automatically selected.

To delete a memorized report

1. Click Delete.

   A message opens asking you if you are sure that you want to delete the selected memorized report.

2. Click Yes.

   The message closes. The report is deleted.

Override Existing Bookings Utility

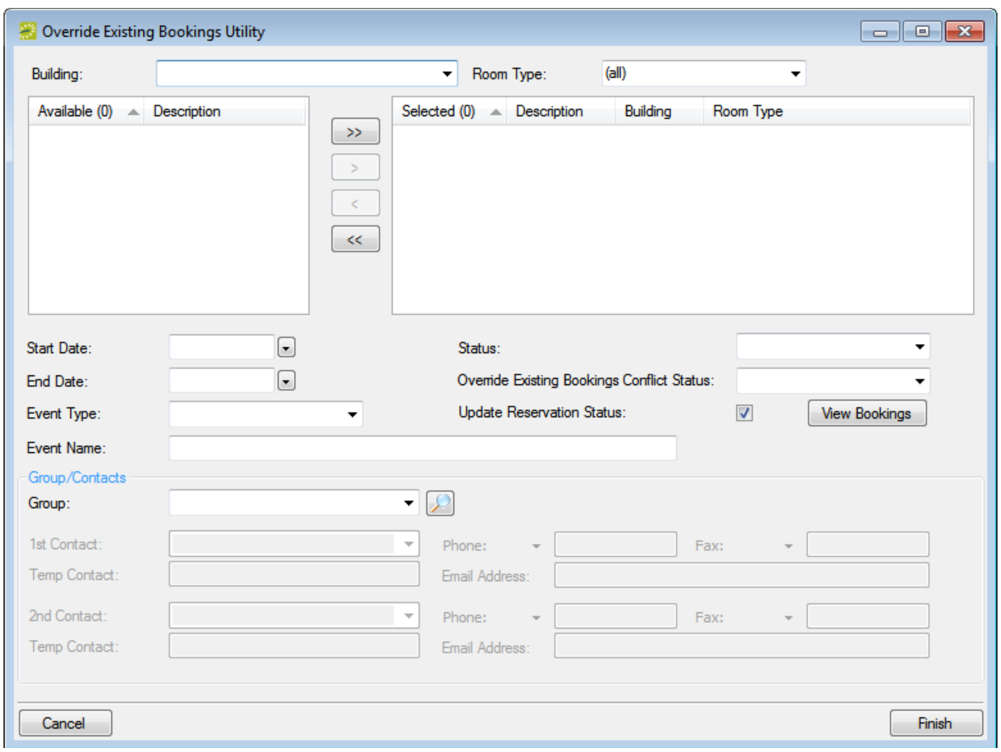
In some situations, such as a building closure, a scheduled maintenance repair, a priority event, and so on, you might need to “bump” one or more bookings from their scheduled location. You use the Override Existing Bookings Utility to bump all the bookings that meet specific criteria and place them in a Conflict status. A new all day booking that uses the settings (Event Name, Event Type, and Group) that you specify is created in place of these bumped bookings.

To use the Override Existing Bookings Utility

1. On the EMS menu bar, click System Administration > Tools > Override Existing Bookings Utility.

   The Override Existing Bookings Utility window opens.

Figure 10-14: Override Existing Bookings Utility window



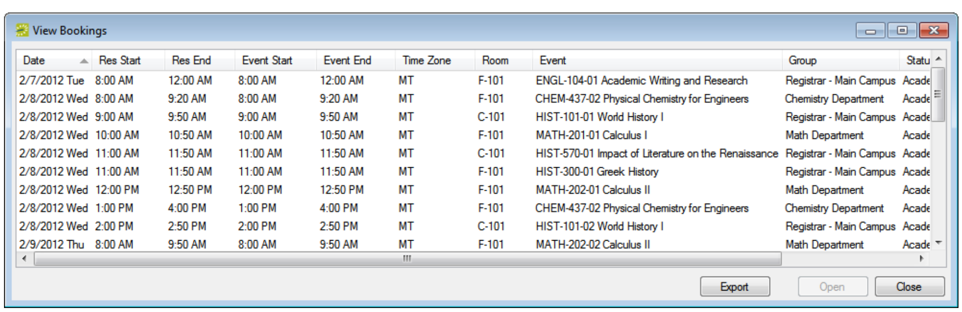
2. Do the following to search for the rooms that contain the bookings that you are bumping:
   - On the Building dropdown list, select a specific building, area, or view.
   - On the Room Type dropdown list, leave the Room Type set to the default value of (all), or select a specific room type.

   A list of all the rooms configured for the selected building, area, or view and that are of the indicated Room Type are displayed on the Available list.
3. Select the room, or CTRL-click to select the multiple rooms that contain the bookings that you are bumping, and then click the Move button (>) to move the selected rooms to the Selected list.
4. Repeat Step 2 and Step 3 until you have selected all the rooms that contain the bookings that you are bumping.
5. Enter a Start Date and an End Date to filter the list of bookings that you are bumping for the selected rooms.
6. Optionally, to see a list of the bookings that you are bumping, click View Bookings; otherwise, go to Step 7.

   The View Bookings window opens. A list of all rooms with the bookings that you are bumping is displayed in the window.

Optionally, you can select a booking in this window, and then click Open to open the booking's reservation in the Navigator for a more detailed examination, and you can also click Export to export the list of bookings to an Excel spreadsheet. After you have viewed the bookings and/or exported the booking, click Close to close the View Bookings window and return to the Override Existing Bookings Utility window.

Figure 10-15: View Bookings window



7. Specify the event type, event name, the status, and the group for the new all day bookings that are to be created in place of the bumped bookings.

If the appropriate event type is not available, you can configure it. See “Configuring Event Types” on page 43. If the appropriate status is not available, you can configure it. See “Configuring Statuses” on page 164.You can select a group from the Group dropdown list, or you can search for a group. If the appropriate group is not available, you can configure it. See “Configuring Groups” on page 277.

8. Select the Override Existing Bookings Conflict Status (the status to which the bumped bookings are changed).

If the appropriate status is not available, you can configure it. See “Configuring Statuses” on page 164. If you select a status with a Cancel type, a Cancel Status dialog box opens. You must enter a cancel reason and indicate who cancelled the booking for Cancel type status. Optionally, you can also enter notes about the booking cancellation.

9. To update the reservation status to the status for the new all day bookings, leave Update Reservation Status; otherwise, clear this option to leave the reservation status unchanged.

10. Click Finish.

    A message opens indicating that the existing bookings (which are all the bookings the meet the search criteria) will be overridden and set to the conflict status that you selected and asking you if it is OK to continue.

11. Click Yes.

    The message closes and the Navigator opens, displaying the new all day bookings with their new status.

Import Reservations Utility

You can import reservations into your EMS database from a tab-delimited text file. (See "Reservation Import File Specifications" on page 545 for the import file specifications.) Importing reservations is a two-step process. First, you must configure the reservation import session. Second, after you configure the import session, you must import the reservations into the session. You an can also delete an import session.

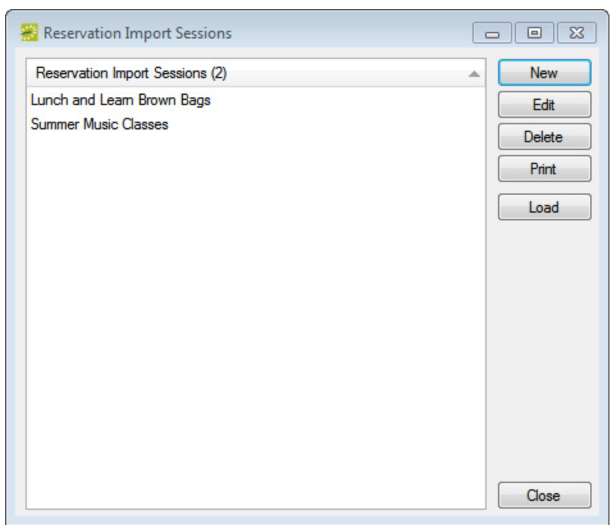
To configure the import reservation session

This section describes the steps for configuring a new reservation import session. If you simply need to load an existing session, then after opening the Reservation Import Sessions window, skip to "To import reservations into a session" on page 379.

1. On the EMS menu bar, click System Administration > Tools > Import Reservations Utility.

   The Reservation Import Sessions window opens. This window lists all the reservation sessions that have been imported into your EMS database.

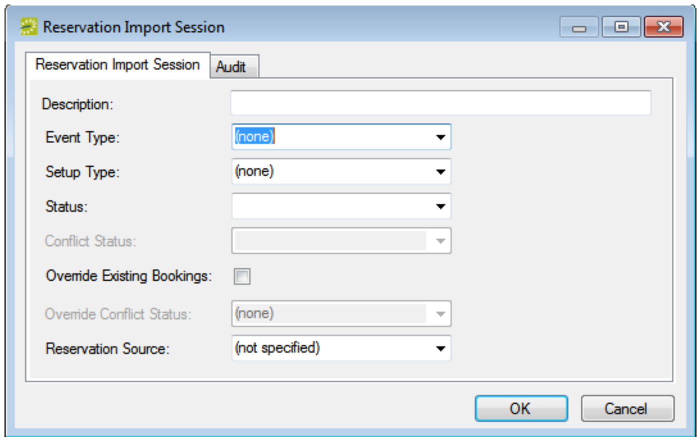
Figure 10-16: Reservation Import Sessions window



2. Click New.

   The Reservation Import Session dialog box opens.

Figure 10-17: Reservation Import Session dialog box



3. Enter the information for the new import session.

Option	Description
Description	A name or description for the import session. **Note:** The name can be a maximum of 50 characters, including spaces.
Event Type	Select the event type for the imported reservations. **Note:** If the appropriate event type is not available, you can configure it. See “Configuring Event Types” on page 43.
Setup Type	Select the setup type for the imported reservations. **Note:** If the appropriate setup type is not available, you can configure it. See “Configuring Setup Types” on page 87.
Status	Select the status that is to be applied to the imported reservations. **Note:** Only statuses that do not have a Reconfirm Date are available.If the appropriate status is not available, you can configure it. See “Configuring Statuses” on page 164.
Conflict Status	Available only if you select a status with a type of Book Space. This status is applied only if the status that you selected results in the imported bookings being in conflict with existing bookings. **Note:** If the appropriate status is not available, you can configure it. See “Configuring Statuses” on page 164.
Override Existing Bookings	Select this option if the imported bookings are to override existing bookings.
Override Conflict Status	Available only Override Existing Bookings is selected. If imported bookings override existing bookings, then select the conflict status into which the overridden bookings are to be placed. **Note:** If the appropriate status is not available, you can configure it. See “Configuring Statuses” on page 164.

Option	Description
Reservation Source	Select a source if applicable. **Note:** If the appropriate reservation source is not available, you can configure it. See “Configuring Reservation Sources” on page 70.

4. Click OK.

   The Reservation Import Session dialog box closes. You return to the Reservation Import Sessions window. The newly configured import session is displayed in the window.

5. Continue to “To import reservations into a session” below.

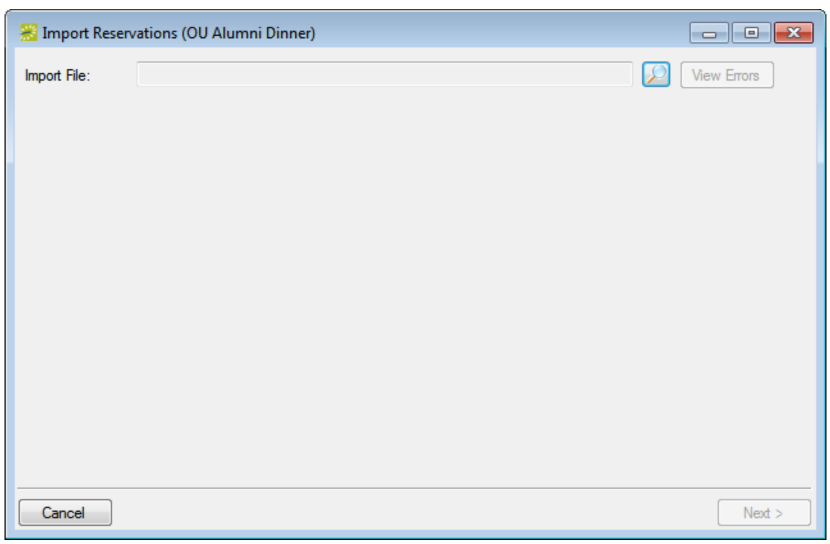
To import reservations into a session

1. If you have not already done so, on the EMS menu bar, click System Administration > Tools > Import Reservations Utility to open the Reservation Import Sessions window.

2. Select the reservation session into which you are importing the reservations, and then click Load.

   The Import Reservations wizard opens.

Figure 10-18: Import Reservations wizard

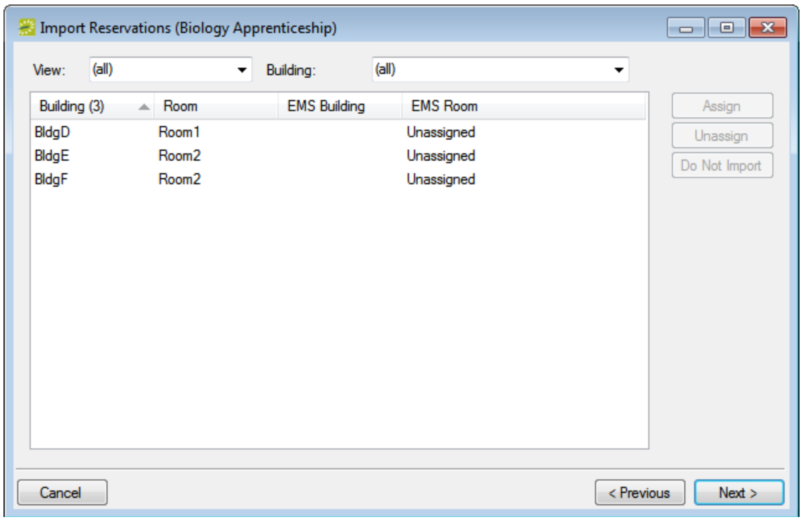


3. Click the Search icon  to browse to and select the file that you are importing, and then click Next.

   The Import Reservations wizard displays *all* the reservations in the import file by the building/room combinations that have been assigned to reservations in the import file. See Figure 10-19 on page 380.

If a Building/Room combination in the import file is identical to a Building Code/ Room code in the EMS database, then the record is automatically assigned; otherwise, the record remains unchanged.

Figure 10-19: Import Reservations Wizard

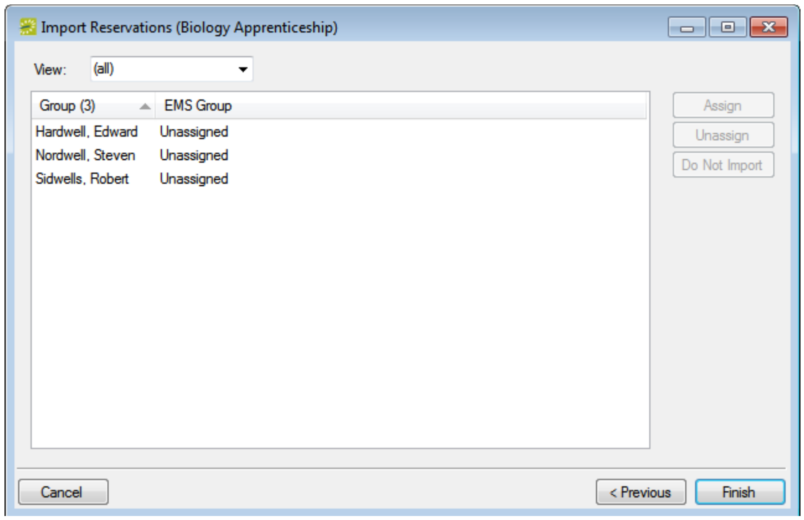


4. Optionally, to filter the list, select a different view on the View dropdown list and/or a different building on the Building dropdown list.
5. Do one of the following:
   - Select a Building/Room Combination, or CTRL-click to select multiple combinations, and then click Assign to open the Room Selector dialog box and select the room in your EMS database for which all reservations that are assigned to this Building/Room combination will be booked.
   - Select a Building/Room Combination, or CTRL-click to select multiple combinations, and then click Do Not Import to exclude all the reservations that are assigned to this Building/Room combination.
   - Select a Building/Room Combination, or CTRL-click to select multiple combinations, and then click Unassign to undo a Building/Room assignment.

6. Click Next.

   The Import Reservations Wizard displays all groups that are assigned to reservations in the import file.

Figure 10-20: Import Reservations Wizard



If a group name in the import file is identical to a group name in the EMS database, then the record is automatically assigned; otherwise, the record remains unassigned.

7. Do one of the following:

   - Select a group, or CTRL-click to select multiple groups, and then click Assign to open the Groups window, and select the group in your EMS database for which all reservations that are assigned to the selected group will be made.

   - Select a group, or CTRL-click to select multiple groups, and then click Do Not Import to exclude all reservations that are assigned to this group.

   - Select a group, or CTRL-click to select multiple groups, and then click Unassign to undo a Group assignment.

8. Click Finish.

   A message opens indicating that the reservations were imported successfully.

9. Click OK to close the message and the Import Reservations Wizard and return to the Reservation Import Sessions window.

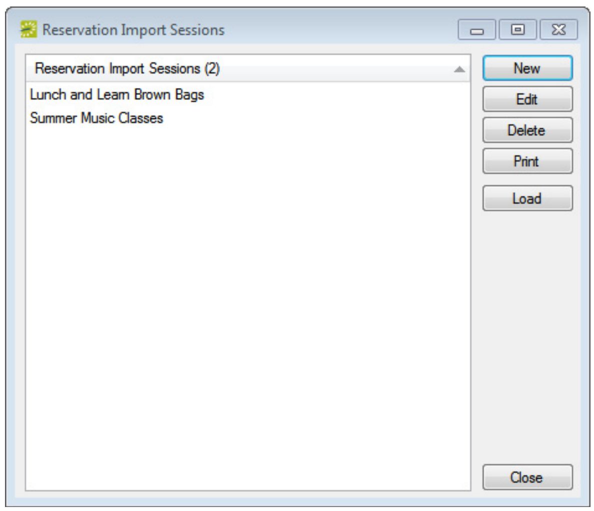
To delete a reservation import session

If needed, you can delete a reservation import session; however, if you delete an import session, all reservations that were created in the session are deleted. Because there is no way to recover these reservations other than to repeat the import process, make sure that you do indeed want to delete the session.

1. On the EMS menu bar, click System Administration > Tools > Import Reservations Utility.

   The Reservation Import Sessions window opens. This window lists all the reservation sessions that have been imported into your EMS database.

Figure 10-21: Reservation Import Sessions window



2. Select the import session that you are deleting, and then click Delete.

   A message opens informing you that all reservations related to the session will be deleted and asking you if it is OK to continue.

3. Click Yes.

   The message closes. The import session is deleted.

Viewing and Emailing Logged-In Users

A user who is currently logged in to your EMS system is referred to as an *active* user. You view logged-in users and if necessary, log these users off your EMS system. You can also send an email to all users who are currently logged in to EMS.

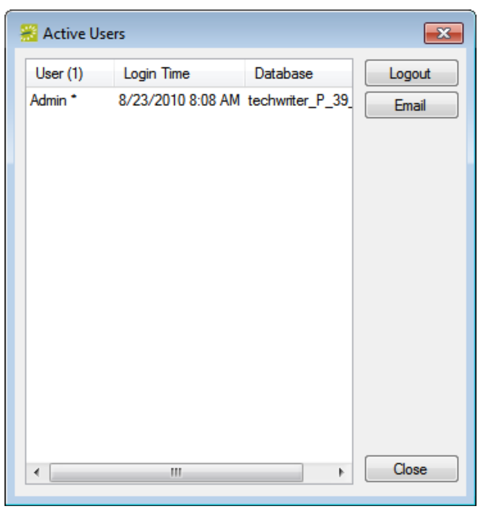
To receive email, a user must have an email address configured for his/her user account.

To view and email logged-in users

1. On the EMS menu bar, click System Administration > Tools > Active Users.

   The Active Users window opens. This window lists all the users who are currently logged in to your EMS system, the date and time they logged in to the system, and in multi-EMS database environments, the database that they are logged in to. An asterisk (*) marks the user account that you used to log in.

Figure 10-22: Active Users window



2. Optionally, do one or both of the following:

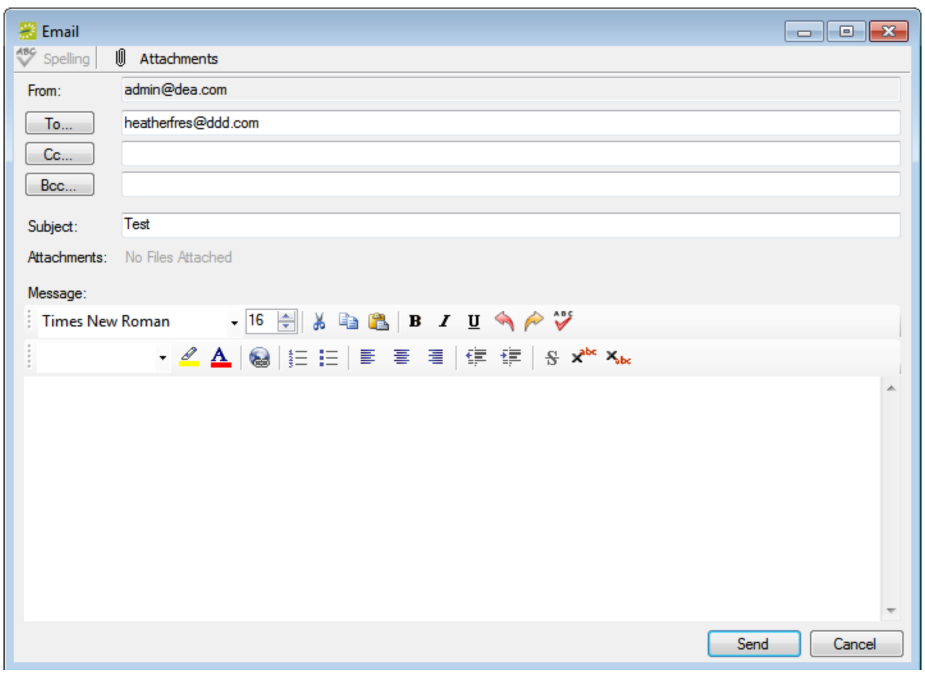
   - To log a user off of the system, select the user, or CTRL-click to select multiple users, and then click Logout.

Users who are logged off of the system can complete the process they are currently involved in (making a reservation, editing a booking, and so on), but when they attempt to start another process, a message opens informing them that they have been logged out and must restart EMS.

   - To send an email to a user, select the user and then click Email.

     A blank email, pre-addressed to the user, opens. The To field is populated with the email address that was defined for the user, but you can edit this value if needed. Create and send the email as you normally would.

Figure 10-23: SMTP Email window



Currency Configuration Wizard

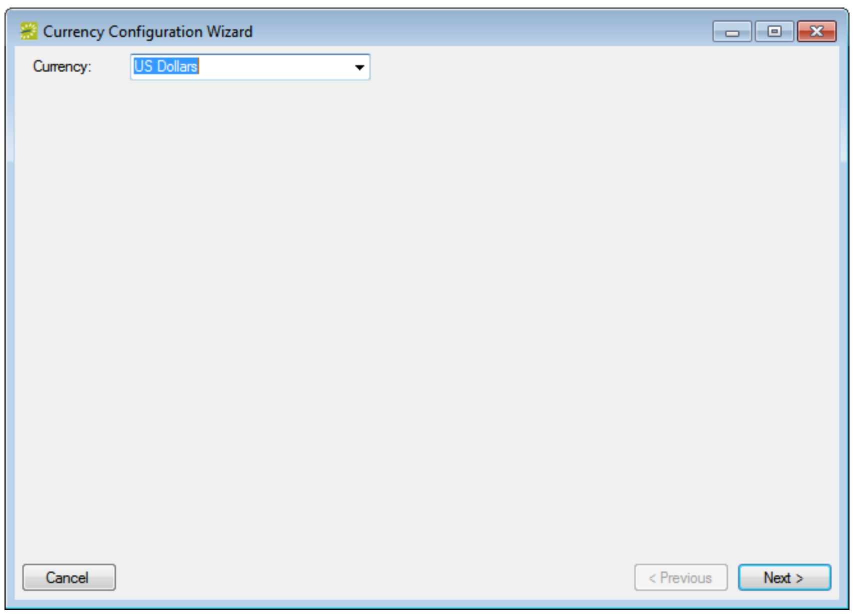
After you configure a currency in your EMS database, you can assign the currency to buildings, categories, and/or calculations. You can assign the currency to a single building, category, or calculation during configuration, or you can use the Currency Configuration Wizard to assign the currency to multiple buildings, categories, and/or calculations in a single step.

To use the Currency Configuration Wizard

1. On the EMS menu bar, click System Administration > Tools > Currency Configuration Wizard.

   The Currency Configuration Wizard opens. All the active currencies that are currently configured in your EMS database are displayed on the Currency dropdown list.

Figure 10-24: Currency Configuration Wizard

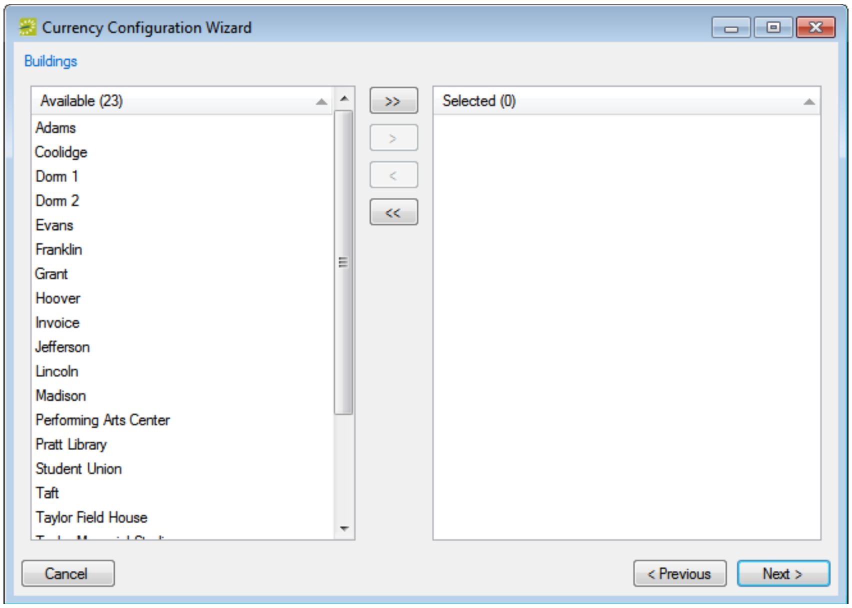


2. On the Currency dropdown list, select the currency that you are assigning, and then click Next.

If the appropriate currency is not available, you can configure it. See “Configuring Currencies” on page 272.

The Currency Configuration Wizard, Buildings page opens. This page lists all the buildings that are currently configured in your EMS database. See Figure 10-25 on page 386.

Figure 10-25: Currency Configuration Wizard, Buildings page



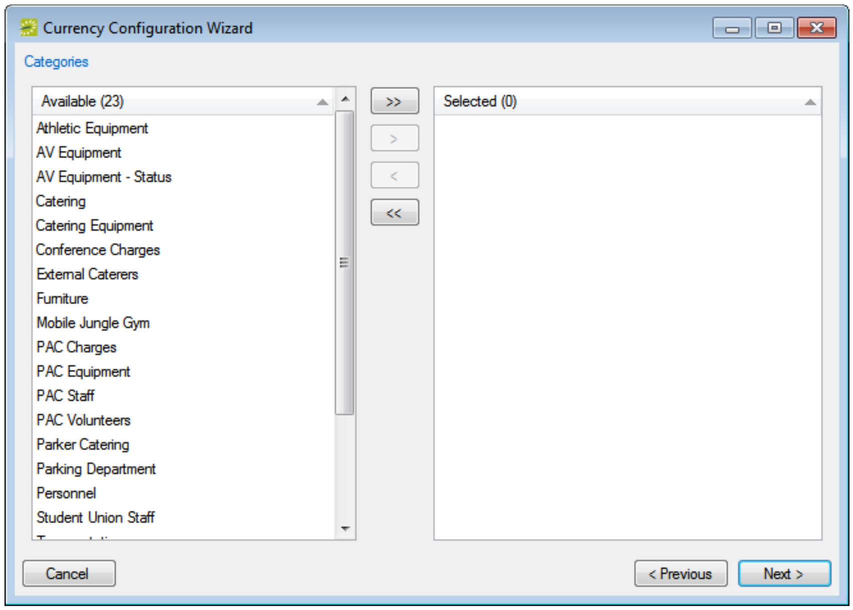
3. On the Available list, select the building, or CTRL-click to select the multiple buildings to which you are assigning the currency, and then click the Move button (>) to move the selected buildings to the Selected list.

When you assign a currency to a building, the currency is used to price all the rooms in the building. If the appropriate building is not available, you can configure it. See *"Configuring Buildings" on page 91.*

4. Click Next.

   The Currency Configuration Wizard, Categories page opens. This page lists all the active categories that are currently configured in your EMS database.

Figure 10-26: Currency Configuration Wizard, Categories page



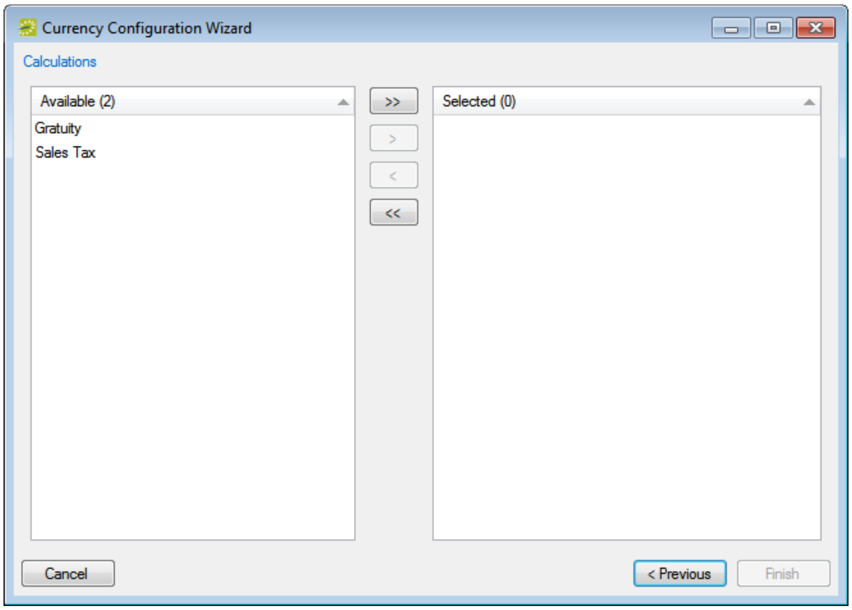
5. Select the category, or CTRL-click to select the multiple categories to which you are assigning the currency, and then click the Move button (>) to move the selected categories to the Selected list.

When you assign a currency to a category, the currency is used to price all the resources in the category. If the appropriate category is not available, you can configure it. See *"Configuring Categories" on page 155.*

6. Click Next.

   The Currency Configuration Wizard, Calculations page opens. This page lists all the active calculations that are currently configured in your EMS database.

Figure 10-27: Currency Configuration Wizard, Calculations page



7. On the Available list, select the calculation, or CTRL-click to select the multiple calculations to which you are assigning the currency, and then click the Move button (>) to move the selected calculations to the Selected list.

When you assign a currency to a calculation, the currency symbol is used to display the results of the calculation. If the appropriate calculation is not available, you can configure it. See *"Configuring Calculations" on page 258.*

8. Click Finish.

   A message opens, asking you if you are sure that you want to set the currency on the selected items to be <selected currency>? For example, are you sure that you want to set the currency on the selected items to be US Dollars?

9. Click Yes.

   The message closes and another message opens indicating that the currency configuration was successful.

10. Click OK to close the second message and the Currency Configuration Wizard.

Changing Booking Dates and/or Statuses

You can use the The Booking Move/Change Status Wizard to change critical information (date and/or status) for *multiple* bookings across *multiple* reservations in a single step.

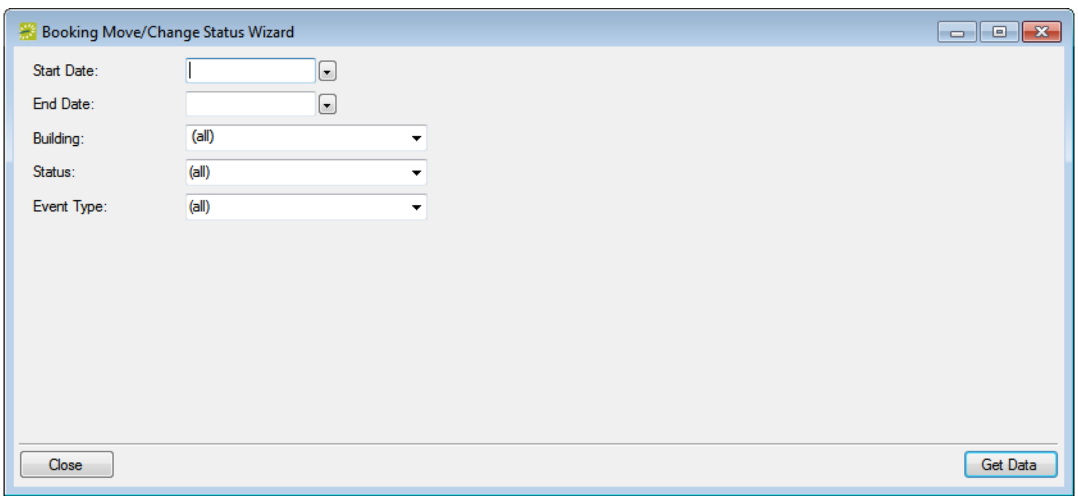
Your users have access to the Change Booking Date/Time Wizard and the Change Booking Status Wizard in the Navigator. They can use these wizards to change critical booking information for multiple bookings in a single reservation.

To use the Move Booking/Change Status Wizard

1. On the EMS main menu, click System Administration > Tools > Booking Move/Change Status Wizard.

   The Booking Move/Change Status Wizard opens.

Figure 10-28: Booking Move/Change Status Wizard



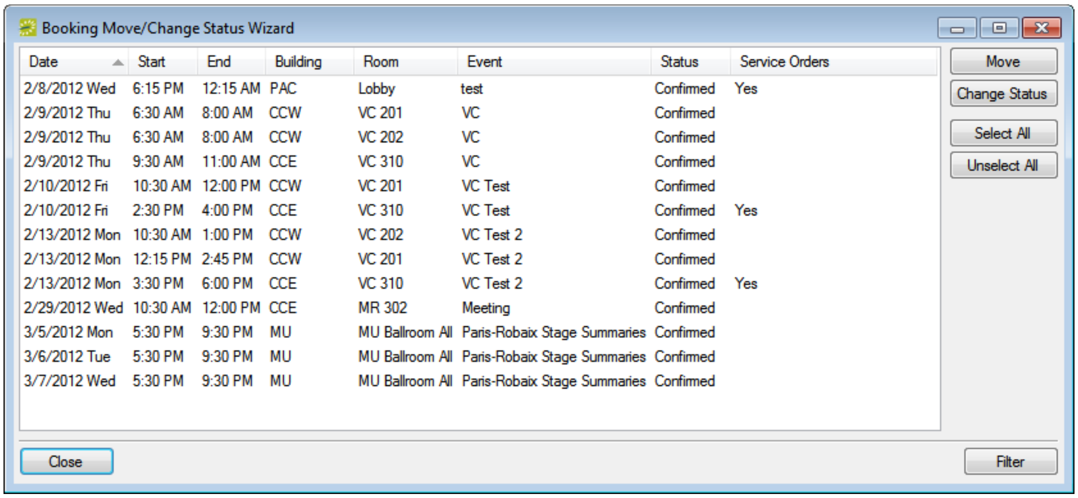
2. In the Start Date field, enter the starting date for the bookings for which you are changing the date and/or status, and in the End Date field, enter the ending date.
3. Leave the default values set to (all) for the other search criteria (Building, Status, and Event Type), or optionally, select different values as needed.

For Building, you can select (all) buildings, a specific building, a specific area, or a specific view.

4. Click Get Data.

   The Select Bookings window opens. This window displays all the bookings that meet your search criteria.

Figure 10-29: Booking Move/Change Status Wizard, Select Bookings window



5. Continue to one of the following:

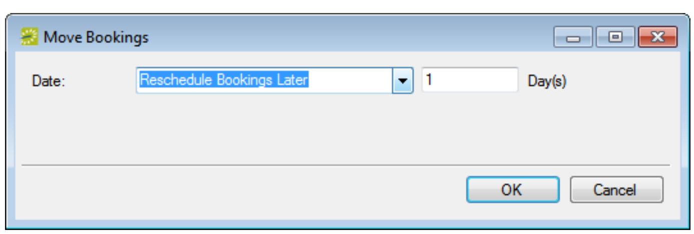
   - "To move multiple bookings to a different date" below.
   - "To change the status for multiple bookings" on page 392.

To move multiple bookings to a different date

1. Select the booking, or CTRL-click to select the multiple bookings for which you are changing the date.
2. On the Select Bookings window, click Move.

   The Move Bookings dialog box opens.

Figure 10-30: Move Bookings dialog box

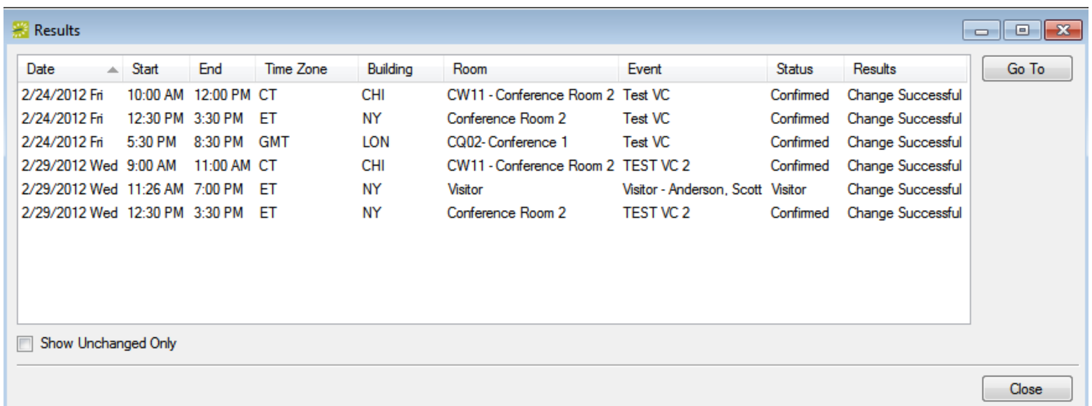


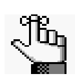
3. Select a different value for the date, and then click OK.

Value	Description
Reschedule Booking Earlier	The default value. Reschedule the bookings to an earlier date that is based on the number of days that you specify.
Reschedule Booking Later	Reschedule the bookings to a later date based on the number of days that you specify.
Reschedule Booking to Specific Date	Reschedule the bookings to a new date that you specify.

The Results window opens. This window displays a list of all the selected bookings, whether the date change was successful or not.

Figure 10-31: Change Booking Date Results window





Optionally, to view only the bookings for the selected reservation that were NOT successfully changed, select Show Unchanged Only. To view the details for a specific booking that was changed, select the booking, and then click Go To.

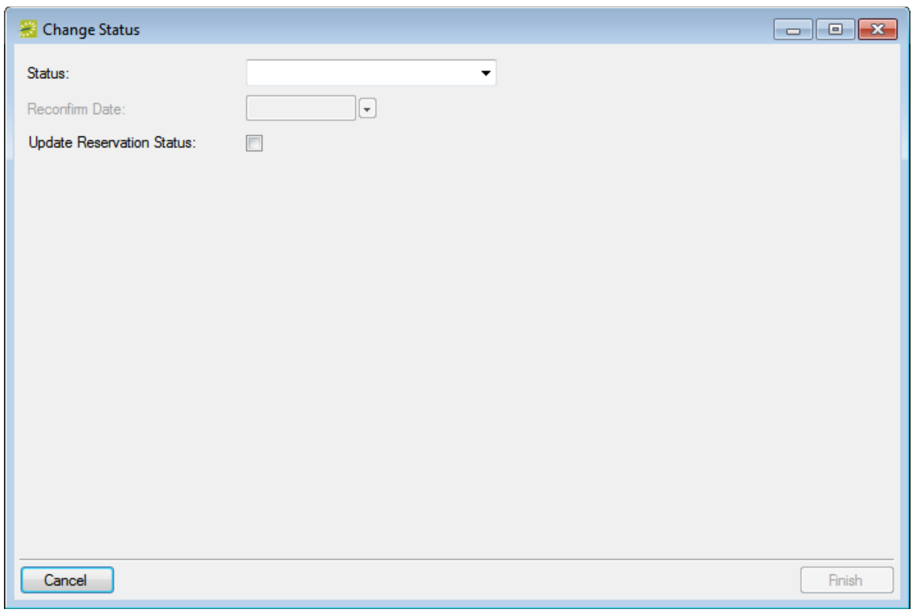
4. Click Close to close the Change Booking Date Results window and return to the Select Bookings window.
5. Repeat Step 1 through Step 4 until you have moved all the bookings as needed.
6. Do one of the following:
   - If you are done moving bookings to a different date, click Close to close the Select Bookings window.
   - If you also want to change the status for any of the bookings, continue "To change the status for multiple bookings" on page 392.

To change the status for multiple bookings

1. Select the booking, or CTRL-click to select the multiple bookings for which you are changing the status.
2. On the Select Bookings window, click Change Status.

   The Change Status dialog box opens.

Figure 10-32: Change Status dialog box



3. On the Status dropdown list, select the new status for the bookings.

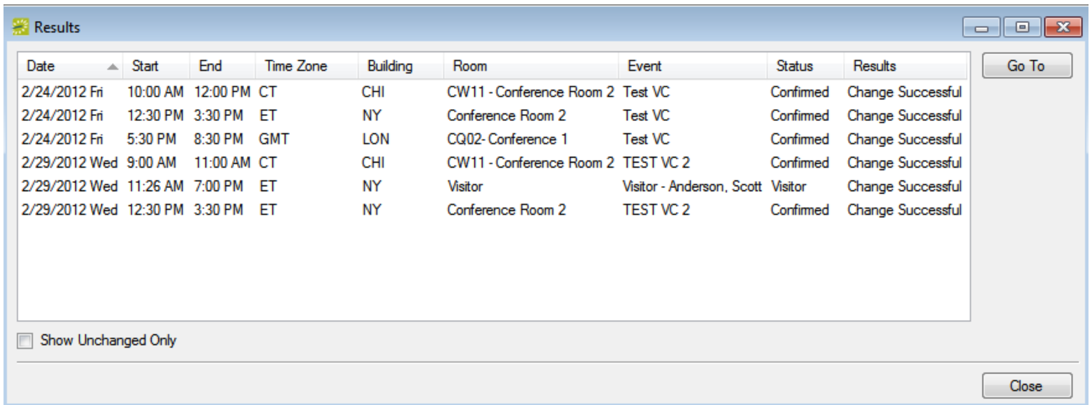
If you select any type of Canceled status, then three additional fields—Reason, Who Cancelled and Notes—are displayed on the Change Booking Status window. You must enter data in all three of these fields before you can continue in the Wizard.

4. Enter a Reconfirm Date if it is required for the new status that you selected.
5. Optionally, select Update Reservation Status to have the reservation-level status changed as well.

6. Click Finish.

   The Results window opens. This window displays a list of all the selected bookings, whether the status change was successful or not.

Figure 10-33: Change Booking Date Results window



Optionally, to view only the bookings for the selected reservation that were NOT successfully changed, select Show Unchanged Only. To view the details for a specific booking that was changed, select the booking, and then click Go To.

7. Click Close to close the Change Booking Status Results window and return to the Select Bookings window.

8. Repeat Step 1 through Step 7 until you have changed the status for all the bookings as needed.

9. Do one of the following:

   - If you are done changing the status for the bookings, click Close to close the Select Bookings window.

   - If you also want to move any of the bookings to a new date, continue "To change the status for multiple bookings" on page 392.

Deleting Old Data

As the EMS administrator, you can delete bookings, historical data, email history, holidays, building hours, notifications, and if applicable, EMS Kiosk transactions that occur on or before a specific date. You can also delete unused groups, contacts and web users (groups, contacts, and web users who have no associated records in your EMS database). If you delete all the bookings for a reservation, the reservation is also deleted from the EMS database. As a safeguard, it is a system requirement that the date that you specify for bookings, historical data, email history, holidays, building hours, or notifications be at least three months prior to the current day's date.

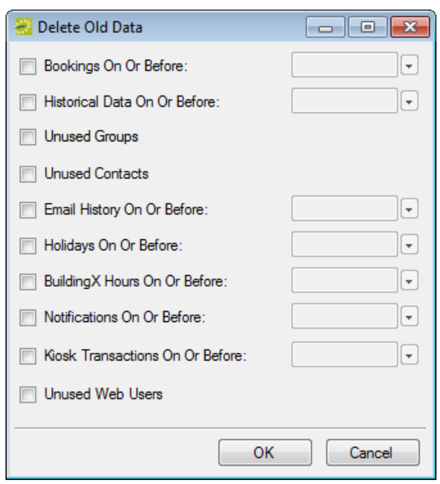
Before using the Delete Old Data utility, make a backup of your EMS database. Deletion of data using this utility is a permanent deletion and you can recover the data only by using a backup copy of your EMS database.

To delete old data

1. On the EMS menu bar, click System Administration > Tools > Delete Old Data.

   The Delete Old Data dialog box opens.

Figure 10-34: Delete Old Data dialog box



2. Select that data that is being deleted, and then, if applicable enter the on/or before deletion date.

The date that you specify for bookings, historical data, email history, holidays, building hours, notifications, and /or kiosk transactions must be at least three months prior to the current day's date.

3. Click OK.

   A message opens indicating that deleting this data is a permanent action and asking you if it is OK to continue.

Remember, if you delete all the bookings for a reservation, the reservation is also deleted from the EMS database; however, no message opens indicating that the reservation was also deleted.

4. Click Yes.

   A message opens when all the data is deleted.

5. Click OK.

Migrating Data

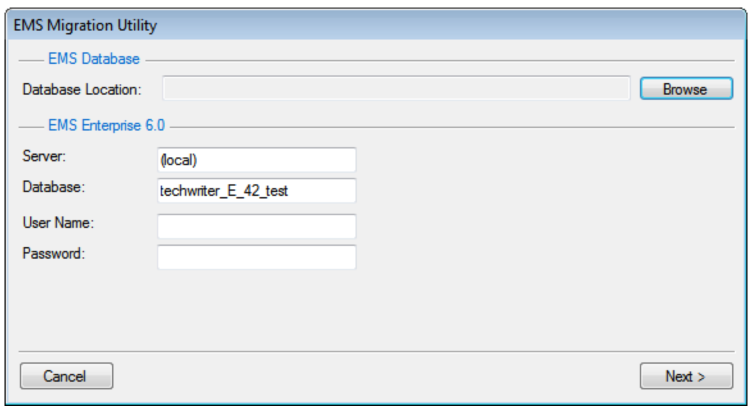
Older versions of EMS use a Microsoft Access database. You use the Migrating Data tool to migrate data from these older databases into the current database version (SQL Server) for EMS.

To migrate data

1. On the EMS menu bar, click System Administration > Tools > Data Migration.

   The EMS Migration Utility opens.

Figure 10-35: EMS Migration Utility



2. Click Browse to browse to and select the Microsoft Access database that you are migrating.
3. In the EMS pane, enter the connection information for the new EMS database.
4. In the User Name and Password fields, enter the name and password that you use to log in to EMS.
5. Click Next.

   A message opens indicating that all existing EMS data will be overwritten by the migration process and asking you if you want to continue.
6. Click Yes.

   A dialog box opens, indicating the progress of the migration. When the migration process is complete, a migration complete message opens.
7. Click OK to close the message, and then restart EMS.

Virtual EMS (VEMS) Configuration

Virtual EMS (VEMS) is an optional web-based application that EMS users can use to view EMS events, and if allowed, to submit and manage reservations. As the EMS administrator, you are responsible for setting up and maintaining the necessary components for this module, including defining web users, web security templates, web process templates, web menus and links, and web text.

This chapter covers the following topics:

Configuring Web Templates

A *web user* is a registered user who can submit requests for reservations or schedule reservations in VEMS. A *web template* defines and controls the access that a web user has in VEMS. VEMS uses two types of web templates—a web security template and a web process template.

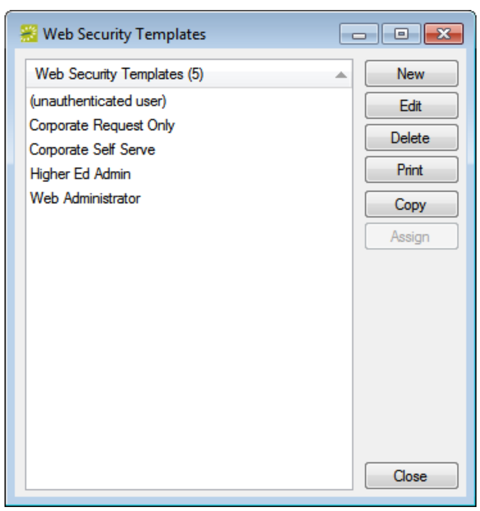
- Web Security template—You configure a web security template to specify which menu items are available to the users who are assigned to the template, which fields can be viewed in event tooltips, and other information. A single pre-defined web user—*unauthenticated user*—is defined by default for any VEMS implementation. You use this role to manage the settings for an anonymous or "guest" users.
- Web Process template—You configure web process templates to support the various types of reservations (conference room, workspace, study room, and so on) at your organization as well as date/time restrictions, room security (reserve, request only, no access), and service availability (A/V, catering, and so on) at your organization.

To configure a web security template

1. On the EMS menu bar, click Configuration > Web > Web Security Templates.

   The Web Security Templates window opens. This window lists the one web user role (unauthenticated user) that is defined by default for any VEMS implementation as well as any other web security templates that have been defined for your VEMS implementation.

Figure 11-1: Web Security Templates window

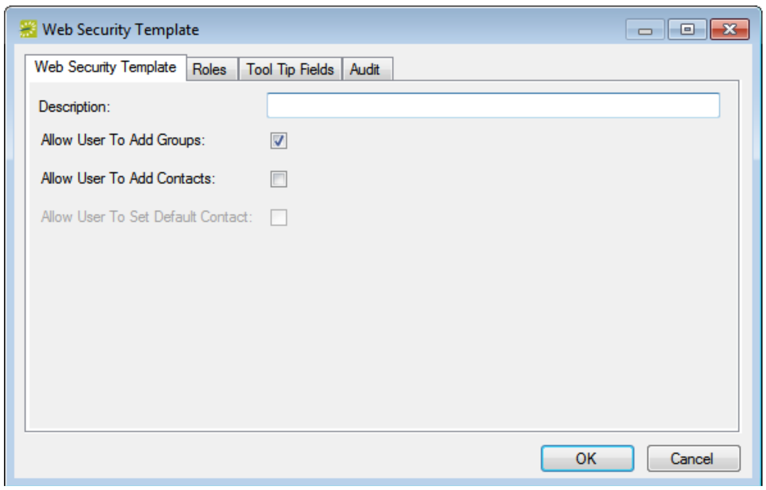


The remainder of this procedure describes how to configure a web security template “from scratch.” You can also configure a web security template by copying an existing rule. Select the web security template that you are copying, click Copy, and then go to Step 3.

2. Click New.

   The Web Security Template dialog box opens. The Web Security Template tab is the active tab.

Figure 11-2: Web Security Template dialog box, Web Security Template tab



3. Enter the information for the new web user role.

Option	Description
Description	The description or name for the web security template. **Note:** The description can be a maximum of 50 characters, including spaces.
Allow User to Add Groups	Selected by default. Users who are attached to this web security template can select from a list of existing groups in your EMS database when submitting a request or making a reservation.
Allow User to Add Contacts	Select this option if you want users who are attached to this web security template to be able to select from a list of existing contacts in your EMS database when submitting a request or making a reservation.
Allow User to Set Default Contact	Available only if Allow User to Add Contacts is selected. Select this option if you want users who are attached to this web template to be able to specify a default contact for a selected group when submitting a request or making a reservation.

4. Roles are the tasks that a user who is assigned to the selected template can carry out. Open the Roles tab, and on the Available list, select the role, or CTRL-click to select the multiple roles for the users who are to be assigned to this template, and then click the Move button (>) to move the selected roles to the Selected list.

Role	Description
Allow Check In/Allow Check Out	Allows a VEMS user to check in to/check out of a building from VEMS and the EMS Kiosk.
Browse Events	Provides access to the Events calendar in VEMS.
Browse Facilities	Allows a VEMS user to browse a listing of your organization's rooms and available setup types and minimum/maximum capacities.
Browse for Space	Allows a VEMS user to browse for available rooms in a read-only grid view.
Create\Edit an Account	For the (unauthenticated user) template, allows a new user to create his/her own VEMS user account. This new web user account is set to active or pending based on your VEMS parameter settings. For the authenticated users, this determines if an existing web user can access the Edit My Account area within VEMS.
Custom Events	Provides access to any custom events calendars created.
Delegation	Allows VEMS users to delegate control of their reservations (new and existing) to other VEMS web users.
Locate Group	Allows a VEMS user to view a specific group's reservations for today.
Location Details	Allows a VEMS user to view details (room type, size, phone, features, setup types, images and so on) about a room.
Login\Logout	Allows an anonymous user or "guest" to log in to VEMS.
View Floor Map	Requires the optional Floor Plan module. Allows a VEMS user to view and book rooms on a floor plan.
Web Administrator	Available only for the authenticated administrator template. Provides access to various administrative functions within VEMS such as clearing the cache, enabling help text edit model and enabling detailed errors.

5. Tool Tip Fields is the information that is displayed in grid tooltips when a VEMS user reserves a room in the Room Request area or browses for space in the Browse for Space Area. Open the Tool Tip Fields tab, and on the Available list, select what information is to be displayed in the grid tooltips (CTRL-click to select multiple items), and then click the Move button (>) to move the selected items to the Selected list.

6. Click OK.

   The Web Security Template dialog box closes. The changes are saved to the template. You return to the Web Security Templates window.

To configure a web process template

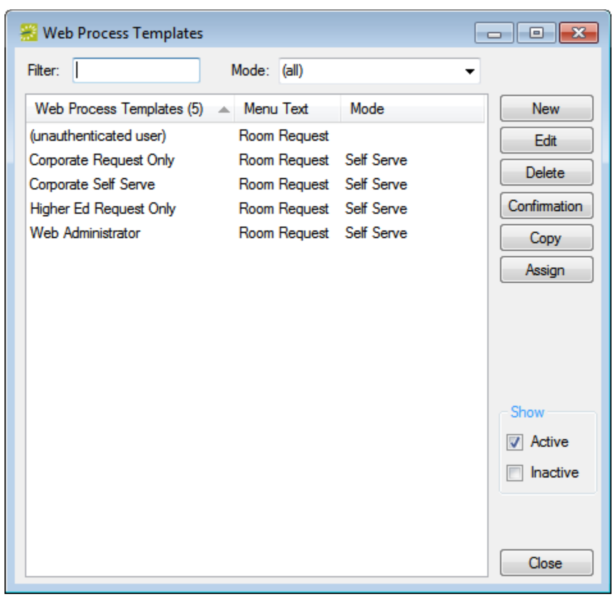
In EMS Enterprise, the (unauthenticated user) web process template is always available and you can have an unlimited number of other web process templates. In EMS Professional, the (unauthenticated user) web process template is always available, but you can have only two additional web process templates. An unlimited number of web process templates is not allowed in EMS Professional.

1. On the EMS menu bar, click Configuration > Web > Web Process Templates.

   The Web Process Templates window opens. The window lists the one web process template (unauthenticated user) that is defined by default for any VEMS implementation as well as any other active web process templates that have been defined for your VEMS implementation. The window also lists the currently defined value for the *menu text* that is associated with each template.

The menu text is the text or link that a VEMS user sees when requesting a room using a web process template. This is discussed in detail later in this section.

Figure 11-3: Web Process Templates window

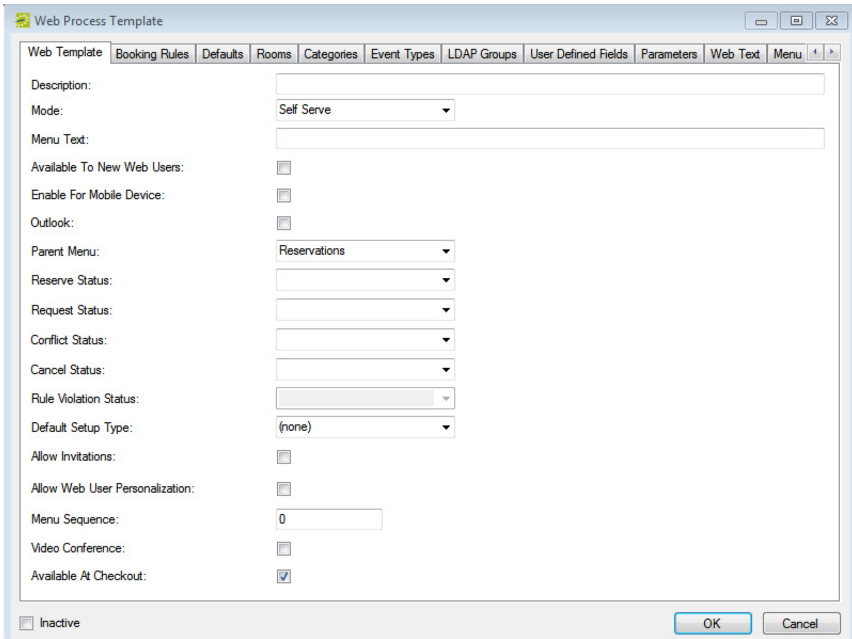


Optionally, to view all web process templates in your EMS database, regardless of status, under Show, click Inactive.

2. Click New.

   The Web Process Template dialog box opens. The Web Template tab is the active tab. See Figure 11-4 on page 403.

Figure 11-4: Web Process Template dialog box, Web Template tab



If you are editing a web process template, then the Web Template tab is available for all web process templates other than the unauthenticated user template. If you selected unauthenticated user, then the Booking Rules tab is the active tab when the dialog box opens.

3. Enter the information for the new web process template as needed. See:

- “Web Template tab” on page 404.
- “Booking Rules tab” on page 406.
- “Defaults tab” on page 408.
- “Video Conference tab” on page 409.
- “Rooms tab” on page 410.
- “Categories tab” on page 411.
- “Event Types tab” on page 412.
- “LDAP Groups tab” on page 413.
- “User Defined Fields tab” on page 414.
- “Parameters tab” on page 415.
- “Web Text tab” on page 416.
- “Menu Text Translations tab” on page 417.
- “Terms and Conditions tab” on page 418.

4. Click OK.

   The changes to the web process template are saved. For a web user to be able to view and use this template, you must assign the user to the template. See “Configuring Web Users” on page 419.

Web Template tab

1. Enter the information for the new template.

Field	Description
Description	Read-only information.
Mode	Determines how a user can make a reservation in VEMS. • Request - Web users can complete a simple online form requesting a room. Unlike the Self Serve mode, this mode does not provide options for the web user to view real-time room availability. In addition, requests must be reviewed, approved, and manually processed into actual reservations by an EMS client user. The room is not taken out of inventory until this step has occurred. • Self Serve - Registered web users can view real-time room availability (in list or grid views) and create actual reservations in the EMS database. Rooms can be booked in a confirmed or request status based on your configuration and business process. **Note:** You must select this option if the web users who are attached to this web process template must be able to request rooms that have a video conferencing feature. • Service Only Request - Allows web users to request a service (for example, catering, A/V equipment, and so on) for a location that is not managed in EMS. **Note:** Various settings within the Web Process template are enabled/disabled based on the selected mode.
Menu Text	The menu text or link that a VEMS user sees when requesting a room using this web process template.
Available to New Web Users	Select this option if this web process template is to be automatically assigned to newly registered web users.
Enable for Mobile Device	Select this option if this web process template is to be available (in an appropriate format) on a mobile device browser.
Outlook	Enables the web process template for use with the EMS for Outlook module.
Parent Menu	The parent menu item on the VEMS main menu under which the name of this template appears.
Reserve Status	Available only for Self Serve mode. The default status that is applied to reservations that are booked in rooms identified as 'reserveable' on the Rooms tab.
Request Status	Available only for Self Serve mode. The default status that is applied to reservations that are booked in rooms identified as 'requestable' on the Rooms tab.

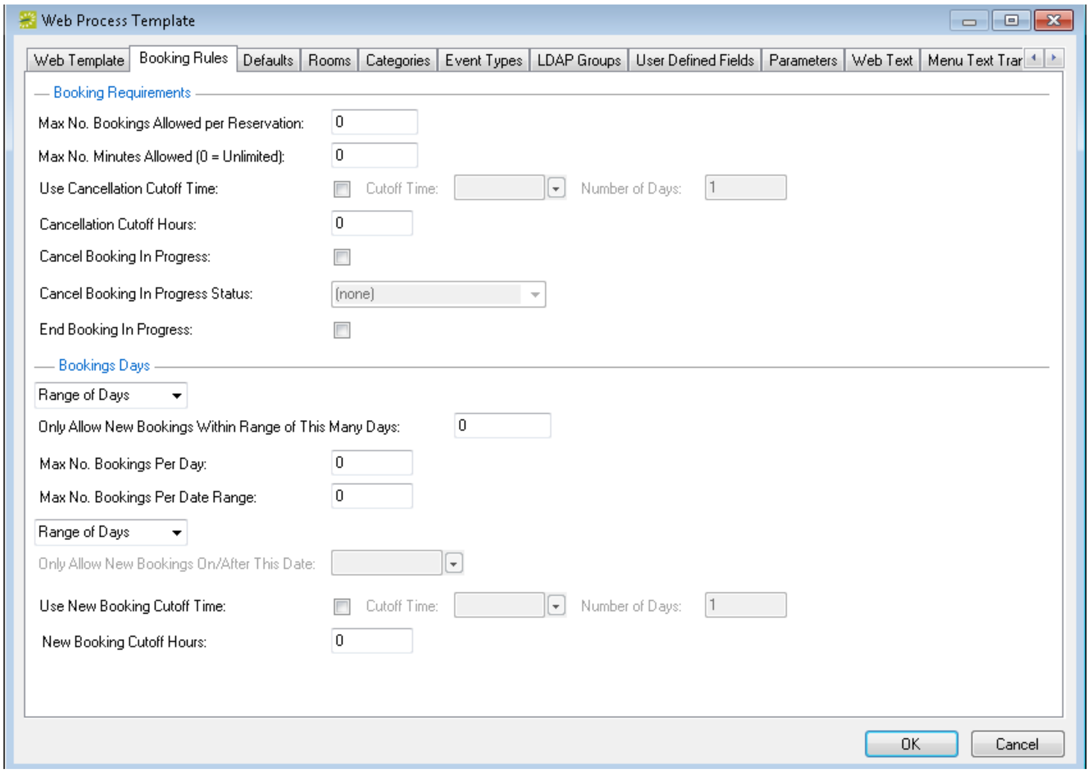
Field	Description
Conflict Status	Available only for Self Serve mode. The default status that is applied to bookings made by web users attached to this template that result in a conflict (the room is already booked).
Cancel Status	Available only for Self Serve mode. The default status that is applied to bookings that are canceled by web users who are attached to this template.
Rule Violation Status	Enabled only if Outlook is selected. Used in conjunction with the EMS for Outlook module. If you carry out an action in the EMS for Outlook module that violates a category date/time restriction, then the booking is changed to this status.
Default Setup Type	The setup type that is selected by default for a room search when a web user who is attached to this template is reserving a room in VEMS. The web user can always select a different value.
Allow Invitations	Enabled only if your organization has purchased the optional Plan a Meeting (PAM) module. Select this option if users who are attached to this template must be able to see the free/busy schedules of the attendees. The web user can choose a date and time that is convenient for all attendees and then send invitations through VEMS, which attendees receive and can manage through Outlook.
Allow Web User Personalization	Select this option if web users must be able to use the Options feature to customize their settings on VEMS pages.
Menu Sequence	Enter a number that indicates the order in which this menu option is relative to other menu items that fall under the same parent menu. Items are ordered from lowest to highest sequence number, with the item with the lowest sequence number appearing first. **Note:** If you leave the sequence set to the default value of zero for all menu items, then by default, the items are displayed alphabetically.
Video Conference	Select this option if the web users who are attached to this template must be able to request rooms that have a video conferencing feature. **Note:** This option is available only for EMS Enterprise. It is not available for EMS Professional. To use the Video Conference option correctly with a web process template, the Self Serve Mode must be selected for the template.
Available at Checkout	Select this option if the web users who are attached to this template must be able to select category resource items on the VEMS “checkout page” (the last page in the Room Request process) in VEMS.

2. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template. See “Configuring Web Users” on page 419.

Booking Rules tab

1. Open the Booking Rules tab.

Figure 11-5: Web Process Template dialog box, Booking Rules tab



2. In the Booking Requirements pane, do the following:

   - In the Max. No. Bookings Allowed Per Reservation field, enter the maximum number of bookings that a new reservation can contain.

   - In the Max. No. Minutes Allowed field, enter the maximum number of minutes for which a new reservation can be created. (This setting is not enforced when a user edits a booking.)

3. Use the time of day and number of days or the number of hours to dictate how far in advance of an event a booking can be canceled.

   - To use a specific cutoff time, select Use Cancellation Cutoff Time, and in the Cutoff Time and Number of Days fields, specify a time of day and a number of days. respectively. For example, if you enter 3 p.m. and one day, then cancellation must take place before 3 p.m. on the day before the event.

   - To use the number of hours instead of a specific time as a cutoff, clear Use Cancellation Cutoff Time and in the Cancellation Cutoff Hours field, specify a number of hours. For example, if you enter 24, then bookings cannot be canceled less than 24 hours before they are to take place, regardless of the time of day.

4. Optionally, select one or both of the following:

    - Cancel Booking in Progress—A web user can cancel a booking that is currently in progress. If you select this option, then the Cancel Booking in Progress Status option is enabled. The status that you select here is applied to bookings that a web user cancels after the booking is already in progress.

If the appropriate status is not available, you can configure it. *See “Configuring Statuses” on page 164.*

    - End Booking in Progress—A web user can end a booking that is in progress early, which makes the room available to other web users.

5. In the fields in the Booking Days panel, indicate how far into the future bookings can be made and how much lead time is required to make a booking.

    - If you select Range of Days from the first dropdown menu, then you must also specify a value for Only Allow New Bookings within Range of This Many Days. If you select Specific Date, then you must specify a value for Only Allow New Bookings Prior to This Date to dictate the future range.
    - The second dropdown menu sets the lead time requirement. If you choose Range of Days, you must indicate a cutoff time or cutoff hours as you did for cancellations. (See Step 3 above.) If you choose Specific Date, you must select a date in the Only Allow New Bookings After This Date field.

6. Optionally, to restrict bookings for reservations made in VEMS, enter a value for one or both of the following:

    - Max. No. Bookings Per Day—Restricts the maximum number of bookings that are allowed per day. The default value of zero indicates that no restrictions are imposed.
    - Max. No. Bookings per Date Range—Restricts the maximum number of bookings that are allowed per date range. The default value of zero indicates that no restrictions are imposed.

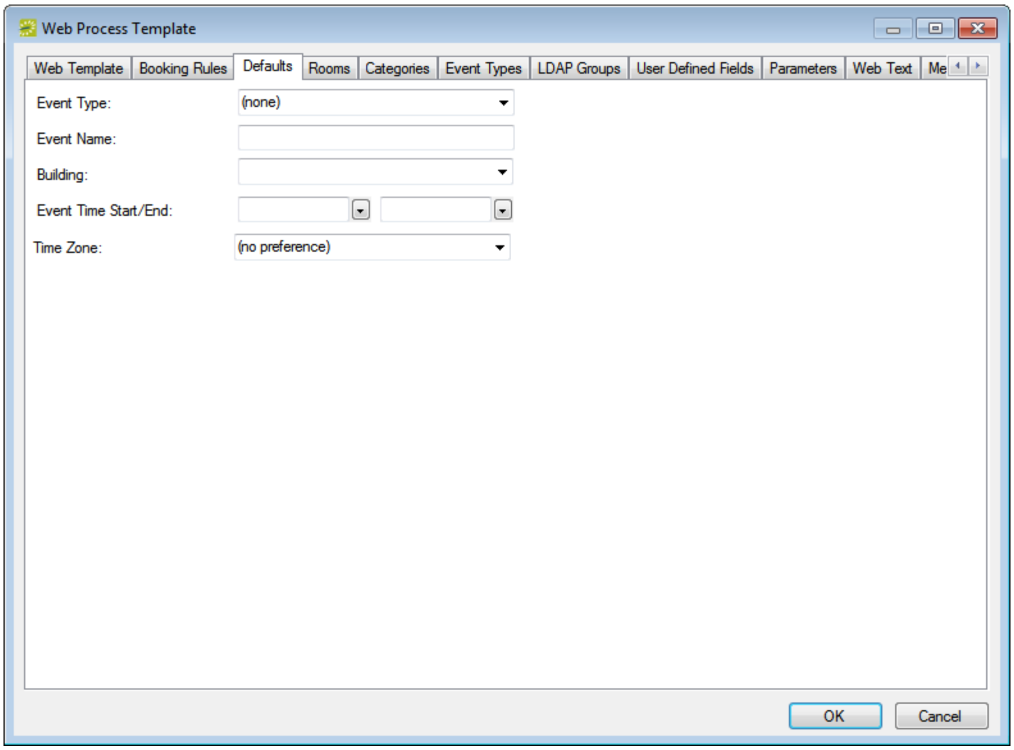
These two booking restriction options are enforced only in VEMS on a per Web Process template basis (not across Web Process templates).

7. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template. See “Configuring Web Users” on page 419.

Defaults tab

1. Open the Defaults tab.

Figure 11-6: Defaults tab



2. Enter the default values for Event Type, Event Name, Building, Event Time Start/End, and Time Zone.

If the appropriate event type is not available, you can configure it. See “Configuring Event Types” on page 43. If the appropriate building is not available, you can configure it. See “Configuring Buildings” on page 91.

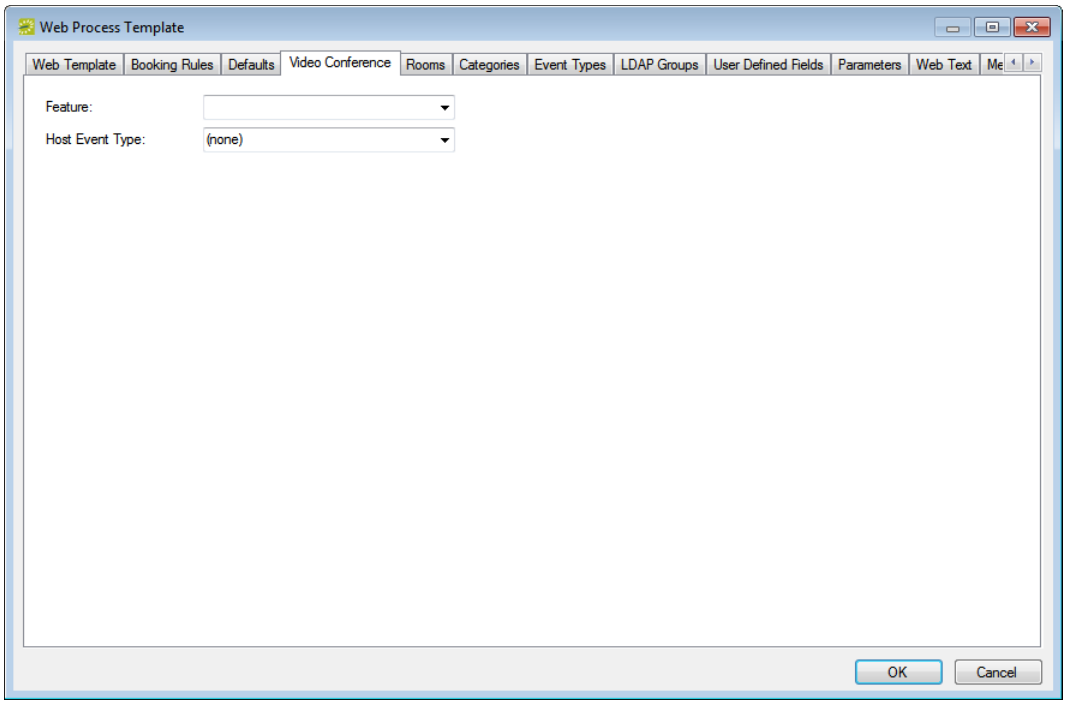
These defaults values automatically populate the correct fields on the Room Requests page, but a user can edit them as needed.

3. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template. See “Configuring Web Users” on page 419.

Video Conference tab

This tab is available only in EMS Enterprise and only if the Video Conference option was selected on the Web Template tab. For information on how to configure the information on this tab correctly so that users who are attached to this web process template can request rooms that have a video conferencing features, see *Appendix B, "Video Conferencing," on page 511.*

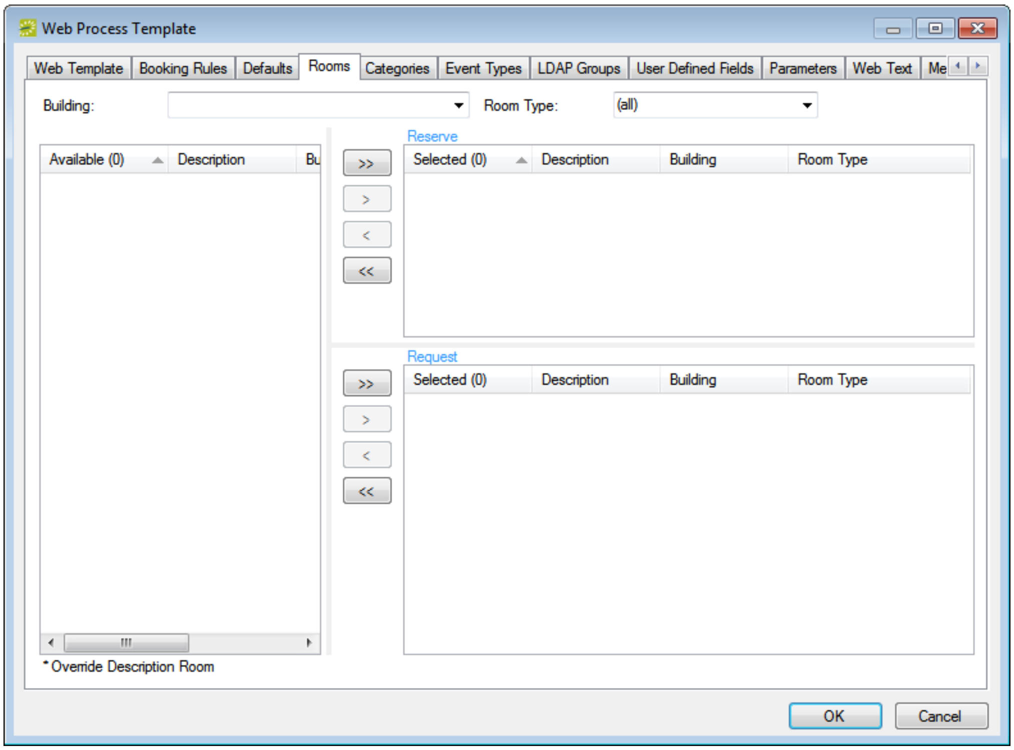
Figure 11-7: Web Process Template, Video Conference tab



Rooms tab

1. Open the Rooms tab.

Figure 11-8: Web Process Template dialog box, Rooms tab



2. Specify your Building and Room Type search criteria.

On the Building dropdown list, you have the option of selecting all buildings, just a specific building, an area, or a view. If any of the appropriate items are not available, you can configure them. See “Configuring Buildings” on page 91, “Configuring Areas” on page 99, “Configuring Public Views” on page 144, or “Configuring Room Types” on page 89.

3. On the Available list, select the room or CTRL-click to select the multiple rooms that users who are attached to this web template must be able to book, and then click the Move button (>) to move the selected rooms to the appropriate Selected list.

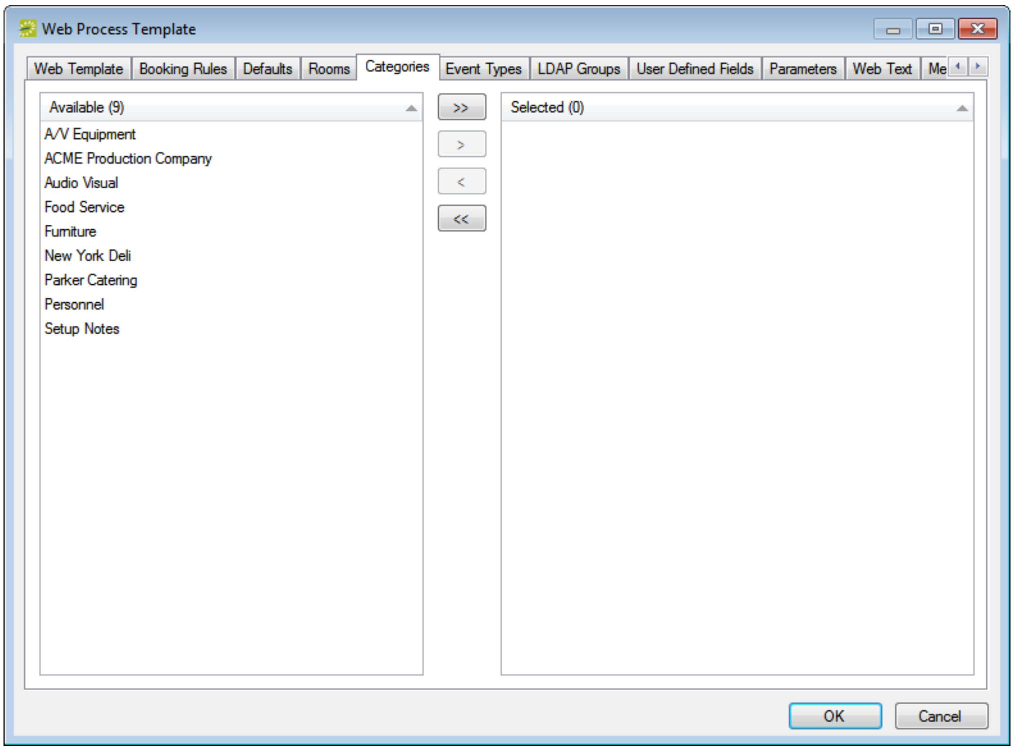
   - Move rooms that can be reserved without approval (that is, booked into the Reserve Status on the Web Template tab) into the Reserve pane.
   - Move rooms that require approval (that is, booked into the Request Status on the Web Template tab) into the Request pane.

4. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template. See "Configuring Web Users" on page 419.

Categories tab

1. Open the Categories tab.

Figure 11-9: Categories tab



2. On the Available list, select the category or CTRL-click to select the multiple categories that users who are attached to this web template must be able to add to a booking, and then click the Move button (>) to move the selected categories to the Selected list.

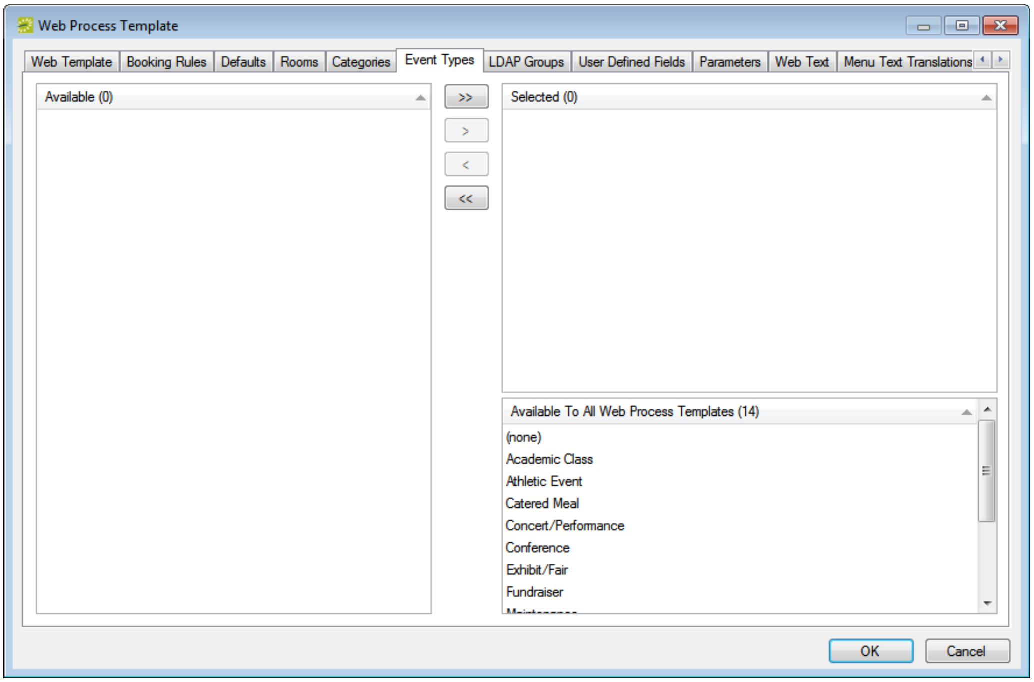
If the appropriate category is not available, you can configure it. See "Configuring Categories" on page 155.

3. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template. See "Configuring Web Users" on page 419.

Event Types tab

1. Open the Event Types tab.

Figure 11-10: Web Process Template dialog box, Event Types tab



2. On the Available list, select the event type or CTRL-click to select the multiple event types that users who are attached to this web template must be able to select, and then click the Move button (>) to move the selected types to the appropriate Selected list.
   - Move the event types that apply only to this web process template into the Selected pane.
   - The Available to All Web Process Templates pane displays all the event types that have the Available to all Web Process Templates option selected. See "Configuring Event Types" on page 43.
3. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template. See "Configuring Web Users" on page 419.

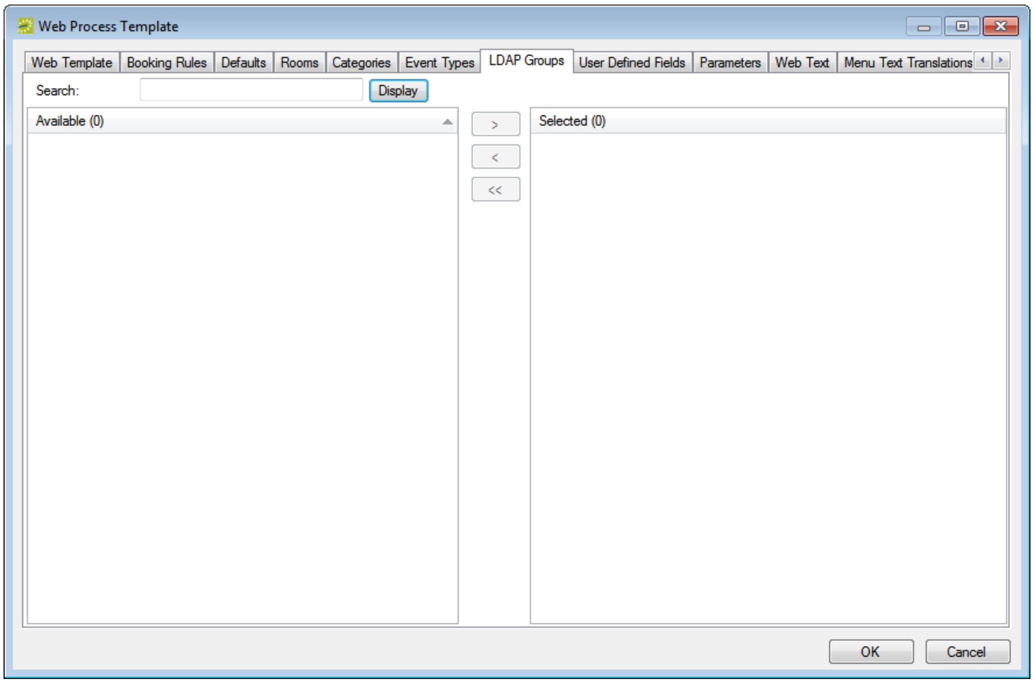
LDAP Groups tab

You use this tab to assign web process templates to VEMS users based on LDAP Groups that are defined in your directory service, for example, Active Directory.

Web process templates that are assigned via LDAP do not need to be explicitly assigned to web user records. When web users log in to VEMS, they “inherit” the web process templates based on the LDAP groups to which they belong.

1. Open the LDAP Groups tab.

Figure 11-11: Web Process Template dialog box, LDAP Groups tab

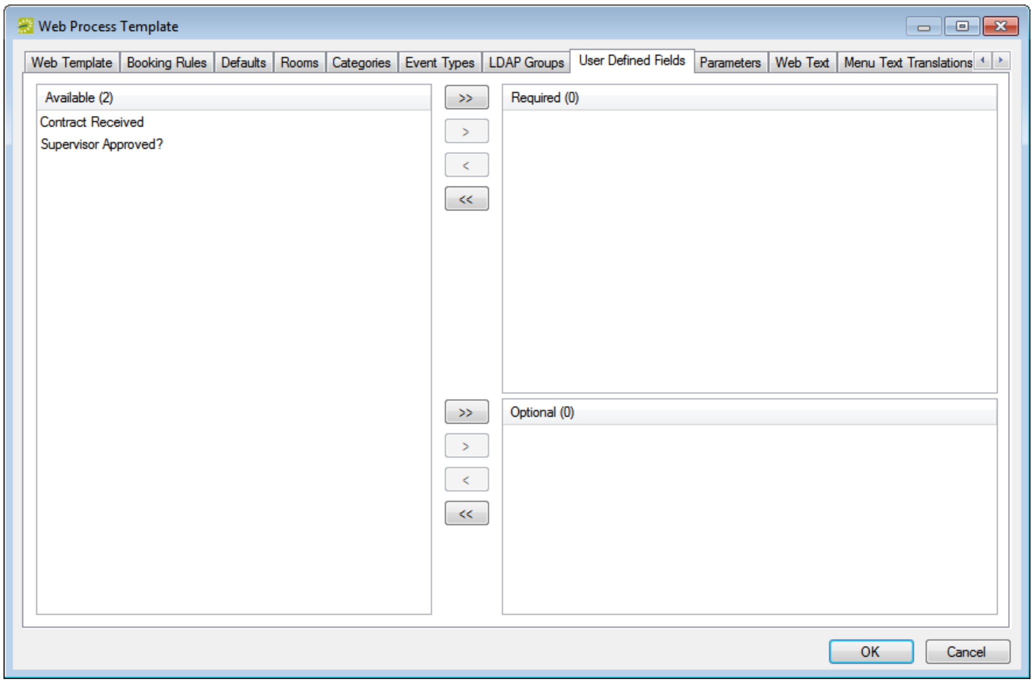


2. On the Available list, select the LDAP group or CTRL-click to select the multiple groups, and then click the Move button (>) to move the selected groups to the Selected list.
3. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template. See “Configuring Web Users” on page 419.

User Defined Fields tab

1. Open the User Defined fields tab.

Figure 11-12: Web Process template, User Defined Fields tab



2. On the Available list, select the question or CTRL-click to select the multiple questions that users who are attached to this web template must answer when reserving space, and then click the Move button (>) to move the selected questions to the appropriate Selected list.
   - Move questions that require an answer into the Required pane.
   - Move questions that are optional into the Optional pane.

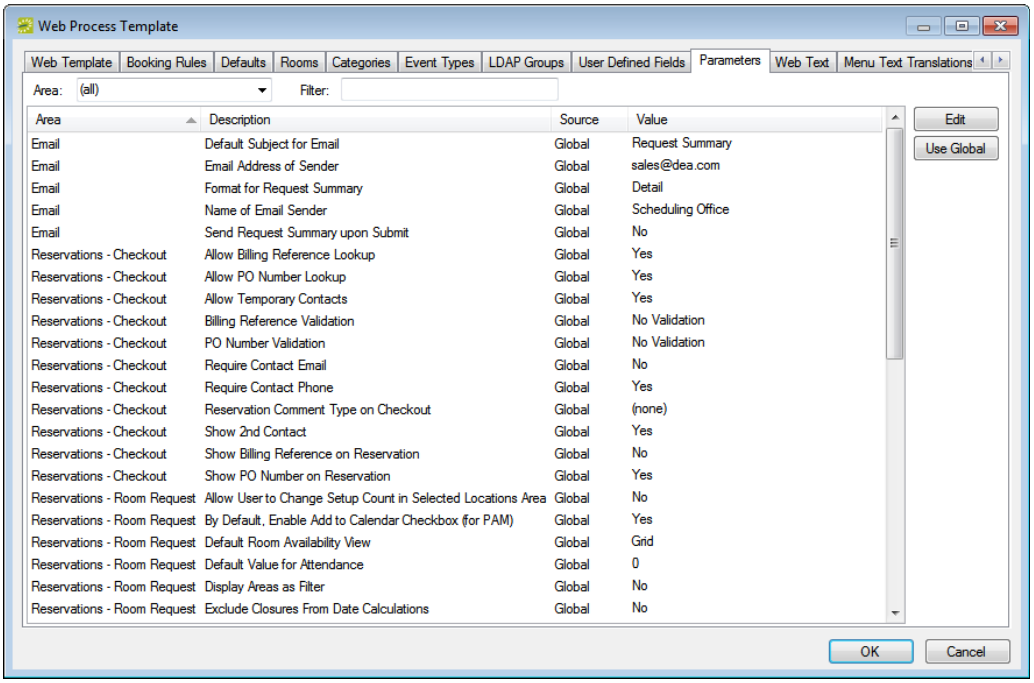
If the appropriate UDF is not available, you can configure it. See *"Configuring User Defined Fields (UDFs)" on page 67.*

3. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template. See "Configuring Web Users" on page 419.

Parameters tab

1. Open the Parameters tab.

Figure 11-13: Web Process Template dialog box, Parameters tab



2. By default, a web process template inherits its parameter settings from the global list of VEMS parameters. (See "VEMS System Parameters" on page 500.) You can review the values for these parameters, and edit the values as needed for the template.

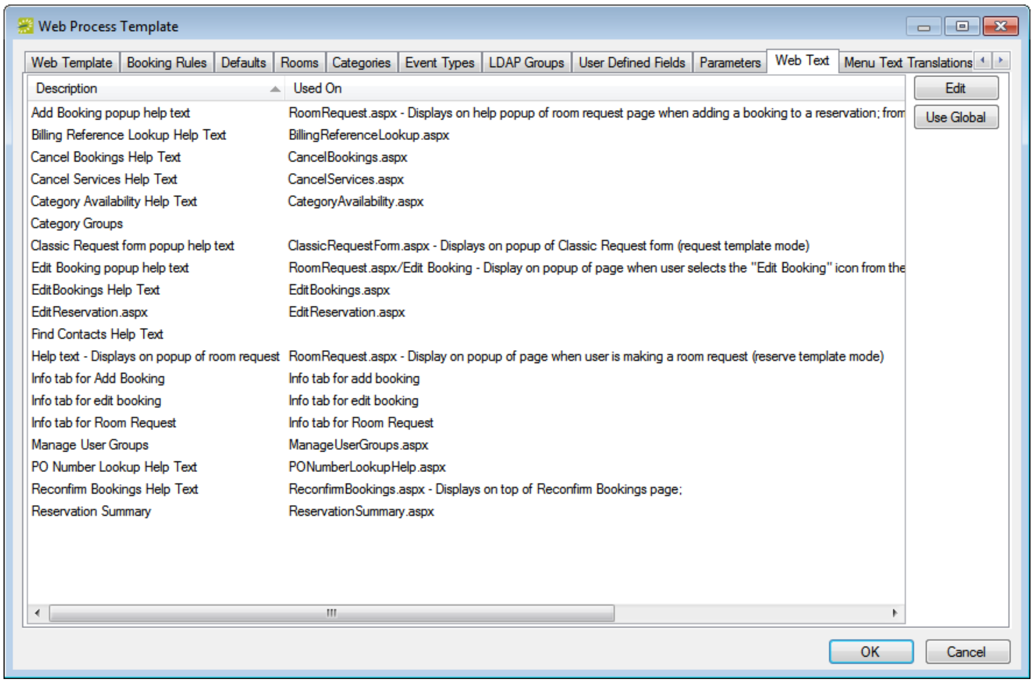
   - To edit the value for a parameter, select the parameter, and then click Edit.
   - To reset the value for a parameter to its default global value, select the parameter, and then click Use Global.

3. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template. See "Configuring Web Users" on page 419.

Web Text tab

1. Open the Web Text tab.

Figure 11-14: Web Process Template dialog box, Web Text tab



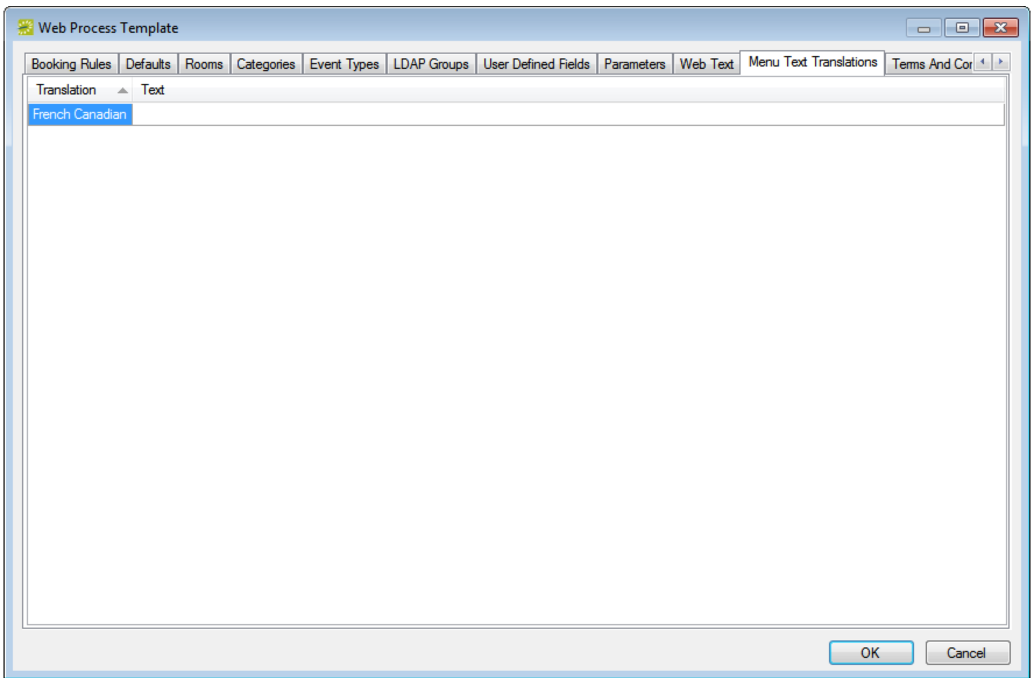
2. By default, web text items inherit their settings from the global Web Text list. (See "Configuring Web Text" on page 440.) You can use the list of web text items on the Web Text tab to override the settings for this particular template if needed.
   - To edit the value for a web text item, select the item, and then click Edit.
   - To reset the value for an item to its default global value, select the item, and then click Use Global.
3. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template. See "Configuring Web Users" on page 419.

Menu Text Translations tab

You need to provide information on this tab only if a foreign language translation has been defined for web templates. See “Configuring Web Cultures” on page 445.

1. Open the Menu Text Translations tab.

Figure 11-15: Web Process Template dialog box, Menu Text Translations tab



2. For each translation that is displayed on the tab, click in the Text field, and then enter the appropriate translation for the menu text (the menu text or link that a VEMS user sees when requesting a room using this web process template).

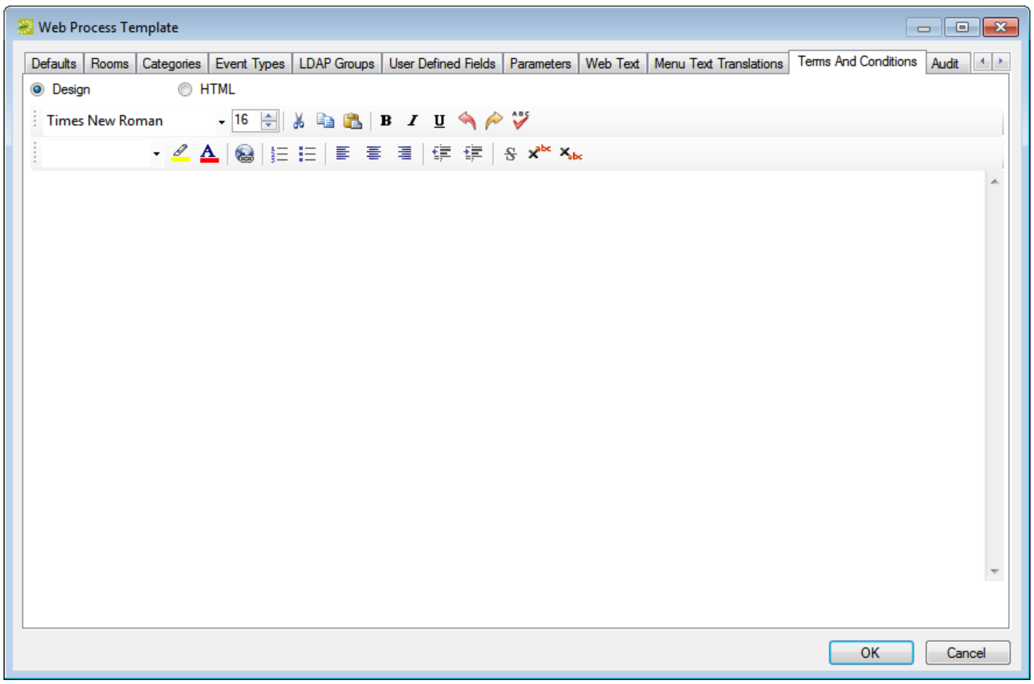
3. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template. See “Configuring Web Users” on page 419.

Terms and Conditions tab

Before users can submit reservations through VEMS, they must agree to the Terms and Conditions that you specify on this tab.

1. Open the Terms and Conditions tab.

Figure 11-16: Web Process Template dialog box, Terms and Conditions tab



2. Format a Terms and Conditions message that is displayed in VEMS when a web user selects a room.
   - Design is selected by default. Use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the Terms and Conditions.
   - Select HTML and enter the necessary HTML code to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the Terms and Conditions.
3. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template. See “Configuring Web Users” on page 419.

Configuring Web Users

VEMS classifies users into two categories—*unauthenticated users* or *visitors* and *authenticated users* or *web users*. If allowed, visitors can browse a calendar of events or view details about your organization's space; however, to submit and manage reservations, a web user account is required. You can configure a web user in one of four ways:

- Anonymous users can register themselves through VEMS and create a user account.

For an anonymous user to register through VEMS and create a user account, the appropriate account management parameters must be set (see "VEMS System Parameters" on page 500) and the Credit\Edit an Account role be selected for the unauthenticated user. (See the Roles tab definition in "To configure a web security template" on page 399.)

- You can define the web user through the EMS client. See "To create a web user from a group" on page 285 or "To create a web user from a contact" on page 300.
- Through the optional HR Toolkit module.
- Through the optional LDAP/Integrated Authentication module.

For more information about using optional HR Toolkit module or the optional LDAP/Integrated Authentication module to configure web users, contact your account representative at DEA.

Optionally, before you configure a web user you can search for the user to verify that the user has not already been created.

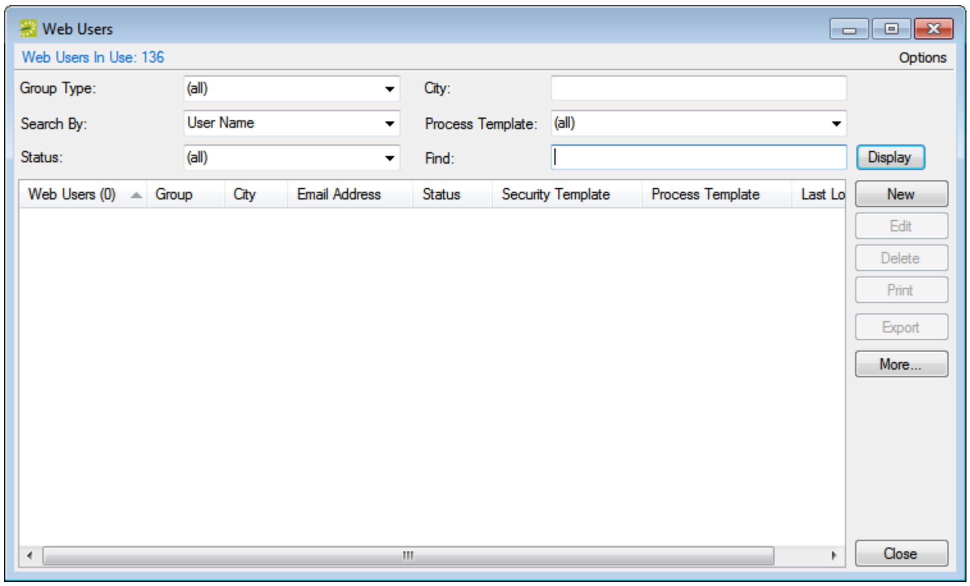
The following procedure describes how to configure a single web user at a time and assign a single web security template and one or more web process templates to the user. To assign multiple web templates to multiple web users in a single step, see "Assigning Web Templates to Multiple Web Users" on page 431.

To search for a web user

1. On the EMS menu bar, click Configuration > Web > Web Users.

   The Web Users window opens. In the upper left hand corner, the number of web users currently in use for VEMS is displayed.

Figure 11-17: Web Users window



2. Enter any combination of the following search criteria:
   - On the Group Type dropdown list, leave the group type set to the default value of (all), or select a specific group type.
   - On the Search by dropdown list, select User Name or Email Address.
   - On the Status dropdown list, select the user status by which to search.
   - On the Process Template dropdown list, leave the default value of (all), or select a specific web process template.
3. To further filter the displayed search results, do one or both of the following:
   - To filter the search results based on the either the User Name or Email Address, in the Filter field, enter a search string.
   - To filter the search results based on city, in the City field, enter a search string.

*For either field, the string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of **bob** returns **bob**worth@emssoftware.com but not dbobbett@emssoftware.com.*

4. Click Display.

The web users who meet your search criteria are displayed in the lower pane of the Web Users window.

To configure web users in EMS

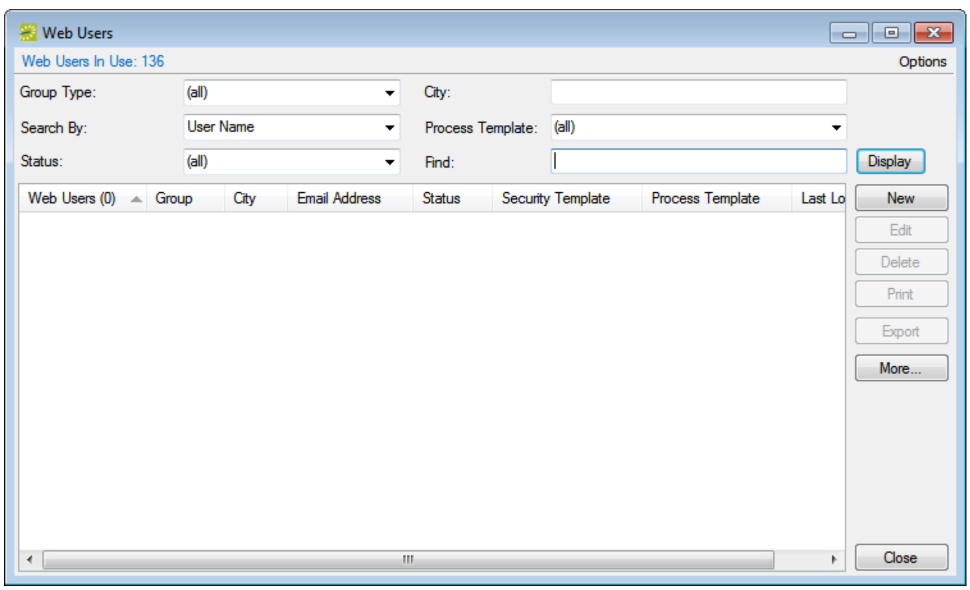
When you configure a web user, you can also specify one or more delegates for the web user. A *delegate* is a web user who can create and view reservations on behalf of another web user.

Remember, before you configure a web user, you might want to search for the user to verify that it has not already been configured. See *"To search for a web user" on page 420.*

1. On the EMS menu bar, click Configuration > Web > Web Users.

   The Web Users window opens. In the upper left corner, the number of web users currently in use for VEMS is displayed.

Figure 11-18: Web Users window

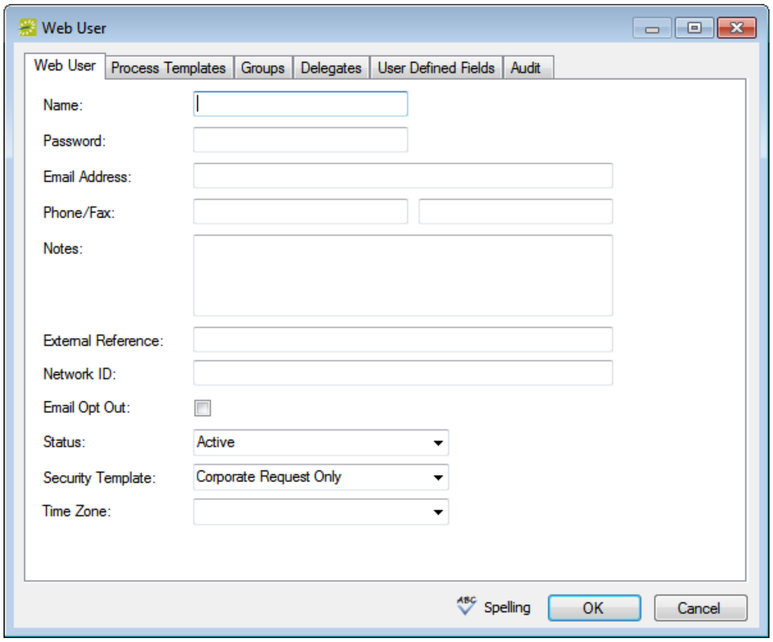


If the EMS system parameter Web Users linked to Groups via External Reference is set to Yes, then a Group column and a City column are also displayed in the Web Users window.

2. Click New.

   The Web User dialog box opens. The Web User tab is the active tab. See Figure 11-19 on page 422.

Figure 11-19: Web User dialog box, Web User tab



3. Optionally, before you configure the new user, if the web user had to answer questions when requesting to create an account through VEMS, then open the User Defined Fields tab to view the user's answers to the questions. You can view the responses that are displayed on the tab to determine if you want to continue with creating an account for the user.
4. Enter the information for the new web user.

At a minimum, to create a new web user, you must enter the user name, the user password, and the user email address on the Web User tab. All other information is optional and can be added at later dates when needed.

Field	Description
Name	The name of the web user. **Note:** The name can be a maximum of 30 characters, including spaces.
Password	The password that the user must enter to log in to VEMS.
Email Address	Enter the full email address for the user as the user must enter this address to log in to VEMS.
Phone/Fax	Optional fields.
Notes	Optional field.
External Reference	Optional field. Links the web user to an outside program if needed.
Network ID	The web user's network ID.

Field	Description
Email Opt Out	Optional field. Select this option if you do *not* want the web user to receive automatic emails (such as reservation summary emails) from VEMS. The user can still receive manually sent emails.
Status	Required field. Select the status for the user: • Active—The web user can log in to VEMS. • Pending—The web user cannot log in to VEMS and is informed that he/she must check back at a later time. • Inactive—The user cannot log in to VEMS and is instructed to contact the EMS administrator.
Security Template	Required field. This determines the user's access to the system—the menu items the user can see, and the information that the user can view when 'rolling-over' an event in VEMS.
Time Zone	Optional field. The time zone in which the user is located.

5. Open the Web Process templates tab and select the web process templates that are to be available to this user.

The web process templates appear as menu items in VEMS.

6. Open the Groups tab and do the following to specify the groups on whose behalf the web user can view and make reservations in VEMS.

   - Specify any combination of search criteria for the Find field and Group Type, and then click Display to produce a list of all groups that meet the criteria.

If you leave the Find field blank, then a list of all currently active groups for the selected group type is displayed. If you enter a search string in the Find field, the string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of ***AAA*** *returns* ***AAA*** *Colorado, but not Colorado AAA.*

   - In the Available list, select a group, or CTRL-click to select multiple groups, and then click the Move button (>) to move the selected groups to the Selected list.

7. Open the Delegates tab, and on the Search by dropdown list, do one of the following to specify the delegates for the web user:

   - Leave the Find field blank, and then click Display to open a list of *all* currently available web users. Select a user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.
   - On the Search By dropdown list, select the option by which to search (Email Address or User Name), and in the Find field, enter the string by which to filter your search, and then click Display. Select a web user, or CTRL-click to select web multiple users, and then click the Move button (>) to move the selected users to the Selected list.

The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of ***bob*** *returns* ***bob****.worth@emssoftware.com but not dbobbett@emssoftware.com.*

8. Optionally, click Spelling to spell check any information that you manually entered for the web user.
9. Click OK.

   The Web Users dialog box closes. You return to the Web Users window with the newly configured web user automatically selected in the window.

Configuring Additional Information for a Web User

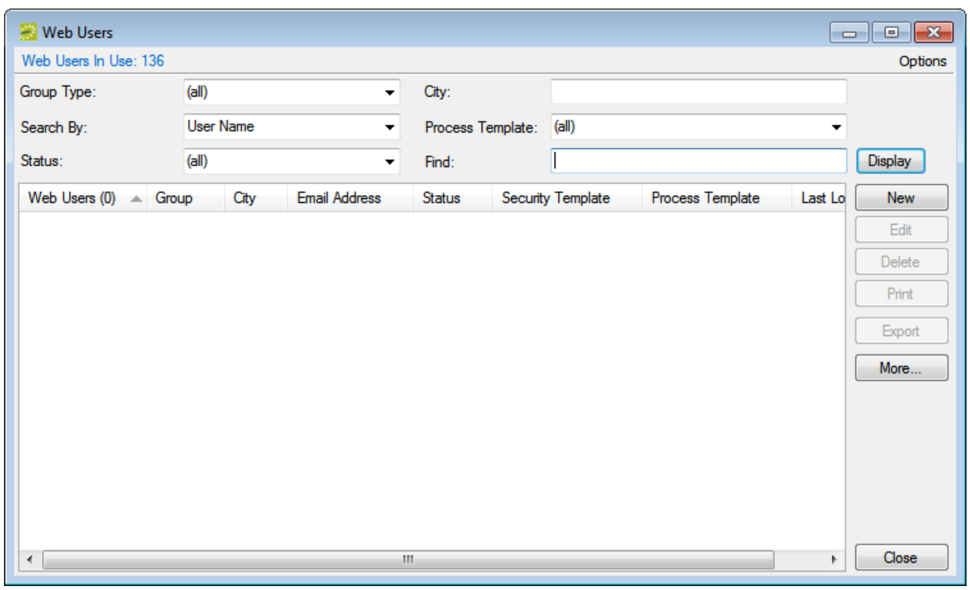
After you have configured a new web user in your EMS database with the basic web user information, you have the option of configuring additional information for the web user. You can create a group from the web user and you can create a contact from the web user.

To configure additional information for a web user

1. On the EMS menu bar, click Configuration > Web > Web Users.

   The Web Users window opens. In the upper left corner, the number of web users currently in use for VEMS is displayed.

Figure 11-20: Web Users window



2. Specify any combination of search criteria, and then click Display to produce a list of all web users that meet the criteria.

If you leave the Find field blank, then a list of all currently active web users that meet your search criteria is displayed. If you enter a search string in the Find field, the string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of ***Bar*** *returns* ***Barry*** *Jones, but not Amanda Barry.*

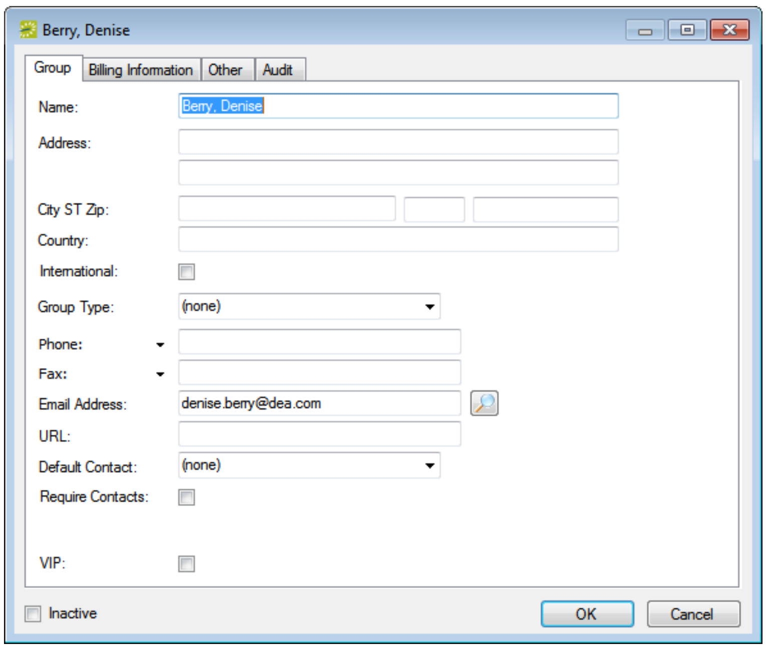
3. Continue to one of the following:
    - "To configure a group from a web user" below.
    - "To configure a contact from a web user" on page 427.

To configure a group from a web user

1. Select the web user from which you are creating a group, and then click More > Create Group.

    The Group dialog box opens. The Group tab is the active tab. By default, the Name field is populated with the name of the selected web user, but you can edit this value if needed.

Figure 11-21: Group dialog box, Group tab



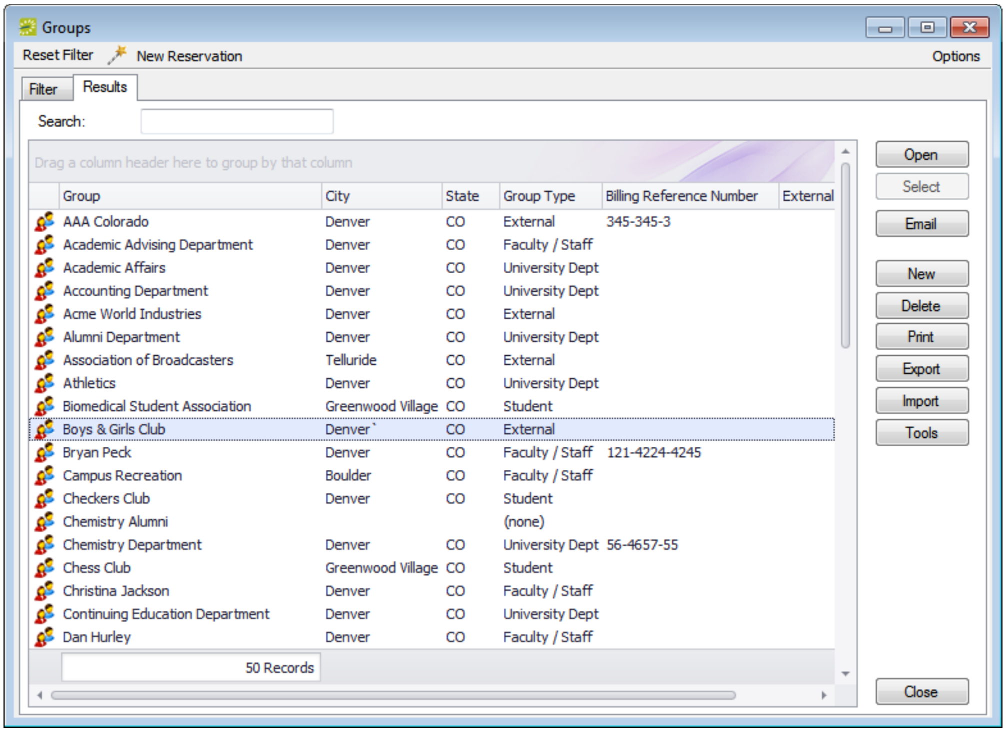
2. Configure the new group as needed. See "To configure groups" on page 279.

To configure a contact from a web user

1. Select the web user from which you are creating a contact, and then click More > Create Contact.

   The Groups window opens.

Figure 11-22: Groups window

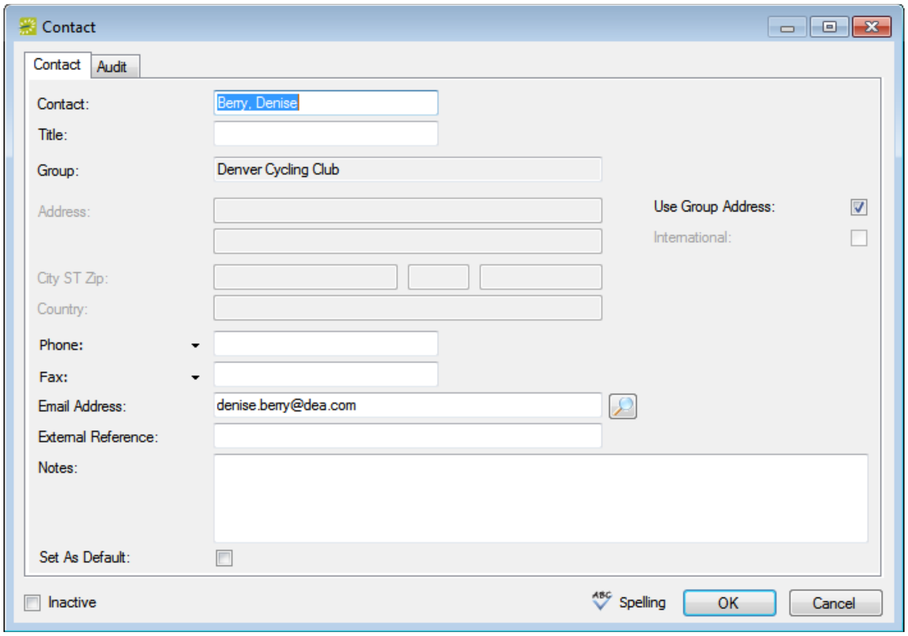


2. Search for the group for which you are creating the contact. See "To search for a group and/or contact" on page 277.

3. Select the group on the Results tab, and then click Select.

   The Contact dialog box opens.

Figure 11-23: Contact dialog box



4. Enter the information for the new contact.

Field	Description
Contact	By default, the Contact field is populated with the name of the web user that you selected, but you can edit this value if needed. **Note:** The name can be a maximum of 50 characters, including spaces.
Title	The title (Mr., Ms., Dr., and so on) of the contact.
Group	Populated with the name of the group that you selected. You cannot change this value.
Address	Populated with the address of the group that you selected. If the contact address is not the same as the group address, then clear Use Group Address and enter the appropriate values in the Address fields.
International	Select this option to drop the State and Zip fields for an international group.
Phone Fax	The phone number and fax number for the group. **Note:** The Phone and Fax fields have a dropdown list available on which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.

Field	Description
Email Address	The email address for the contact. **Note:** If your computer is connected to a network, click the Search icon to open a Global Address Lookup dialog box and search for the email address.
External Reference	Links the contact to an outside program if needed.
Notes	Any other information that is pertinent for the contact.
Set as Default	Select this option if the contact is to be the default contact for the selected group. **Note:** If a default contact has been defined for a group, then when you specify the group information for a reservation, the Contact field is automatically populated with the name of the default contact. **Note:** You can always specify a contact as the default contact for a selected group at a later date. To do so, select the contact in the right pane of the group-specific window, click Set Default, and then click Yes at the prompt to set the selected user as the default contact.
Inactive	Leave this option blank to add the contact as an active contact. Select this option to inactivate the contact.

5. Optionally, click Spelling to spell check the information for the contact before you save it.
6. Click OK.

   The Contact dialog box closes. The contact is created from the web user and added to the group. The group-specific window opens, and Contacts is selected by default.

Emailing a Web User

Whether your organization uses Microsoft Outlook or SMTP, you can always email a web user.

If your organization uses Microsoft Outlook, you can continue to use this email system to send emails to web users; otherwise, to email a web user using the SMTP option, your user account must have an email address

To email a web user

1. Search for the web user whom you are emailing. See “To search for a web user” on page 420.
2. On the Web Users window, make sure that the web user is selected in the lower pane, and then click More > Email.

   Depending on how your system is configured, either a pre-addressed Outlook email form or a pre-addressed SMTP email form opens. The To field is populated with the email address that is defined for the web user, but you can edit this value if needed.
3. Complete and send the email as you normally would.

Assigning Web Templates to Multiple Web Users

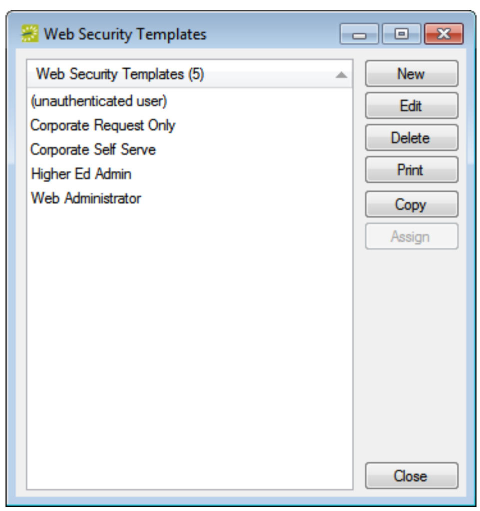
When you configure a web user, you have the option of assigning a web security template and a web process template to the web user. Instead of assigning web templates one at a time to individual users, you can assign multiple web templates to multiple users in a single step. You can assign any web security template other than the unauthenticated user template to multiple users who have the same status, and you can assign multiple web process templates to multiple web users who have database access.

To assign a web security template to multiple web users

1. On the EMS menu bar, click Configuration > Web > Web Security Templates.

   The Web Security Templates window opens. The window lists the one web user role (unauthenticated user) that is defined by default for any VEMS implementation as well as any other web security templates that have been defined for your VEMS implementation.

Figure 11-24: Web Security Templates window

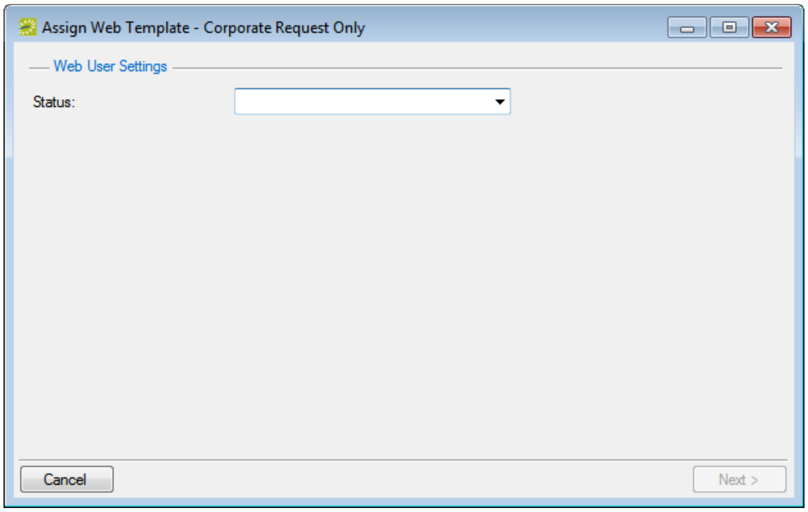


2. Select the web security template that you are assigning to multiple users, and then click Assign.

You can select any web security template other than the unauthenticated user template.

The Assign Web Template window opens. See Figure 11-25 on page 432.

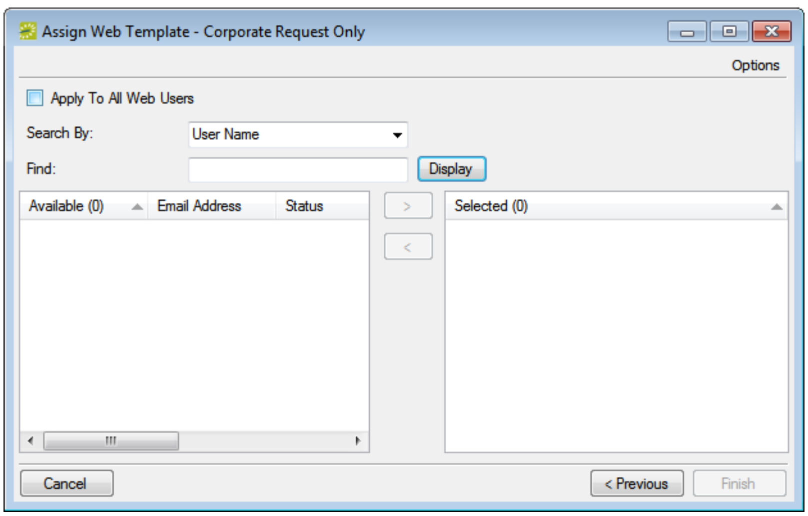
Figure 11-25: Assign Web Template window



3. Select the web user status, and then click Next.

   The Assign Web Template window is updated with options for selecting the users to whom you are assigning the web template.

Figure 11-26: Assign Web Template window



4. Do one of the following:
   - To assign the selected web security template to all the users that you selected in Step 3, click Apply to All Web Users, and then go to Step 7.
   - To assign the web security template to only specific users that you selected in Step 3, search for the users by doing one or both of the following, and go to Step 5.
     - In the Search By field, leave the default of User Name or select Email Address.
     - To further filter the displayed search results based on either the User Name or Email Address, in the Find field, enter a search string.

The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of ***bob*** *returns* ***bob****.worth@emssoftware.com but not dbobbett@emssoftware.com.*

5. Click Display.

   The web users who meet your search criteria are displayed in the Available list.
6. On the Available list, select the user, or CTRL-click to select the multiple users to whom you are assigning the template, and then click the Move button (>) to move the selected users to the Selected list.
7. Click Finish.

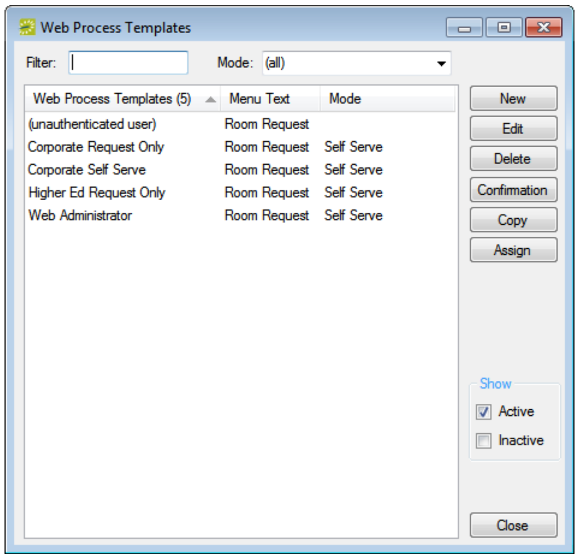
   A message opens indicating that the web template was assigned successfully.
8. Click OK to close the message and return to the Web Security Templates window.

To assign multiple web process templates to multiple users

1. On the EMS menu bar, click Configuration > Web > Web Process Templates.

   The Web Process Templates window opens. The window lists the one web process template (unauthenticated user) that is defined by default for any VEMS implementation as well as any other web process templates that have been defined for your VEMS implementation and that have a status of Active.

Figure 11-27: Web Process Templates window

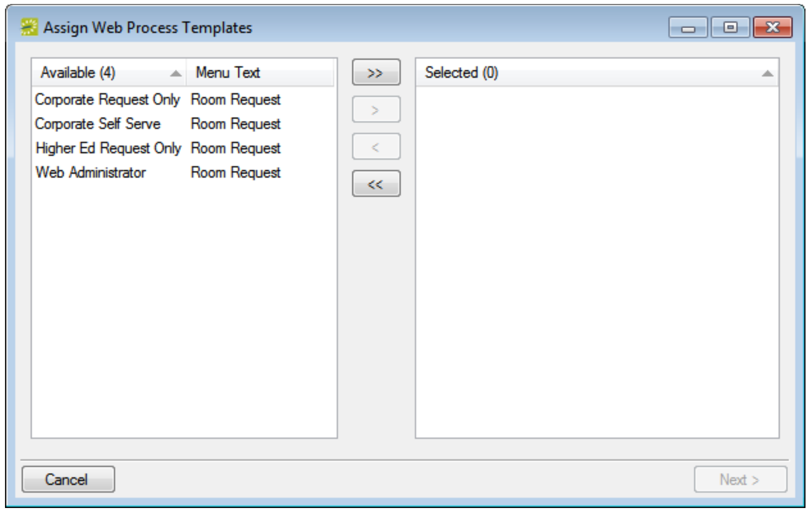


Optionally, to view all web process templates in your EMS database, regardless of status, under Show, click Inactive.

2. Click Assign.

   The Assign Web Process Templates window opens. All the available web process templates for your VEMS implementation are displayed in the Available list. See Figure 11-28 on page 435.

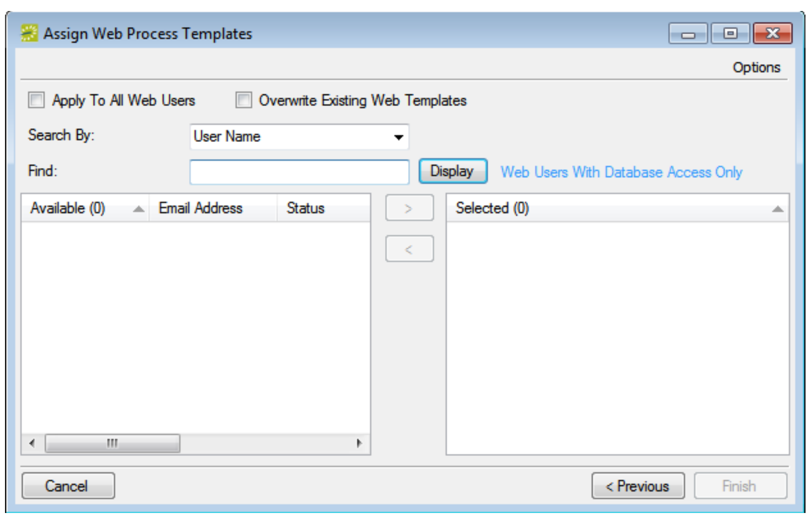
Figure 11-28: Assign Web Process Templates dialog box



3. On the Available list, select the template or CTRL-click to select the multiple templates that are to be assigned to multiple web users, and then click the Move button (>) to move the selected templates to the Selected list.
4. Click Next.

   The Assign Web Process Template window is refreshed with options for selecting users to whom you are assigning the web templates.

Figure 11-29: Assign Web Process Templates window



5. Do one of the following:
    - To assign the selected web process templates to all web users, click Apply to All Web Users, and then go to Step 8.
    - To assign the selected web process templates to only specific users search for the users by doing one or both of the following, and then go to Step 6.
        - In the Search By field, leave the default of User Name or select Email Address.
        - To further filter the displayed search results based on either the User Name or Email Address, in the Find field, enter a search string.

The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of ***bob*** *returns* ***bob****.worth@emssoftware.com but not dbobbett@emssoftware.com.*

6. Click Display.

   The web users who meet your search criteria are displayed in the Available list.

7. On the Available list, select the user or CTRL-click to select the multiple users to whom you are assigning the web process templates, and then click the Move button (>) to move the selected users to the Selected list.
8. Optionally, to replace any web process templates that are currently assigned to the users with the web process templates that you selected in Step 3, click Overwrite Existing Templates.

If you do not select Overwrite Existing Templates, then the templates that you selected in Step 3 are appended to the list of templates that are already assigned to the users.

9. Click Finish.

   A message opens indicating that the web template was assigned successfully.

10. Click OK to close the message and return to the Web Process Templates window.

Configuring Web Menus

When VEMS is first installed, the main menu has a *default* layout that determines the following:

- The default parent menu options
- The order of the parent options in the main menu
- The child options that appear under each parent menu option
- The order of the child options under each parent menu option

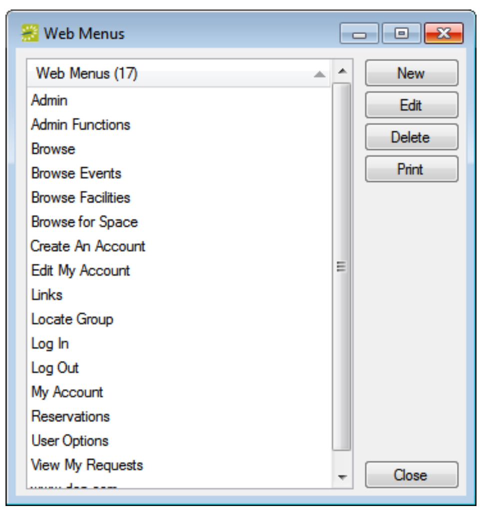
You can add your own user-defined options to the main menu or child options to a parent menu. These items can be links to VEMS pages or to websites outside VEMS.

To configure web menus

1. On the EMS menu bar, click Configuration > Web > Web Menus.

   The Web Menus window opens. This window lists all the current parent menu items and child options in alphabetical order.

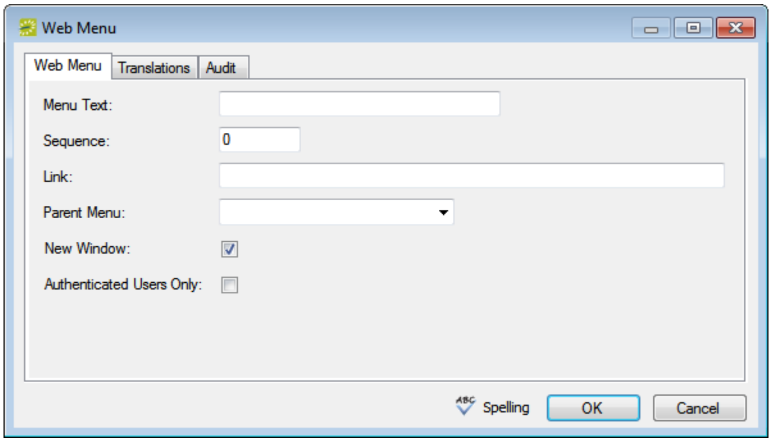
Figure 11-30: Web Menus window



2. Click New.

   The Web Menu dialog box opens. The Web Menu tab is the active tab.

Figure 11-31: Web Menu dialog box, Web Menu tab



3. Enter the information for the new web menu item.

Field	Description
Menu Text	The text for the item as it is to appear on the VEMS menu.
Sequence	Enter a number that indicates the order in which this menu option is to appear relative to other parent menu items or relative to other menu items that fall under the same parent menu. Items are ordered from lowest to highest sequence number, with the item with the lowest sequence number appearing first. **Note:** If you leave the sequence set to the default value of zero for all menu items, then by default, the items are displayed alphabetically.
Link	Enter the URL, or web address, for the link, for example, www. myorganization.com.
Parent Menu	Select the parent menu (the menu under which the item is found) for the item. If this item is to be a new parent menu item, then select (none).
New Window	Select this option if the destination for this new menu item is to open in a new browser window (with VEMS remaining open behind the new window).
Authenticated Users Only	Select this option if access to this new menu item is to be restricted to only those users who have logged in to VEMS.

4. If translations have been defined for web templates (see “Configuring Web Cultures” on page 445), then open the Translations tab, and for each translation, click in the Text field, and enter the appropriate translation for the menu item.

5. Click OK.

   The Web Menu dialog box closes. You return to the Web Menus window with the newly configured menu option displayed in the window.

If you have VEMS open, you might have to log out and then log back in to see the new menu item.

Configuring Web Text

Web text is custom help text or policies and procedures that are specific to your organization that is displayed on various pages in VEMS and EMS Kiosk. As the EMS administrator, you can configure this web text in EMS, or if you are assigned to an appropriate web security template (one that has web administrator access), you can configure it directly in VEMS.

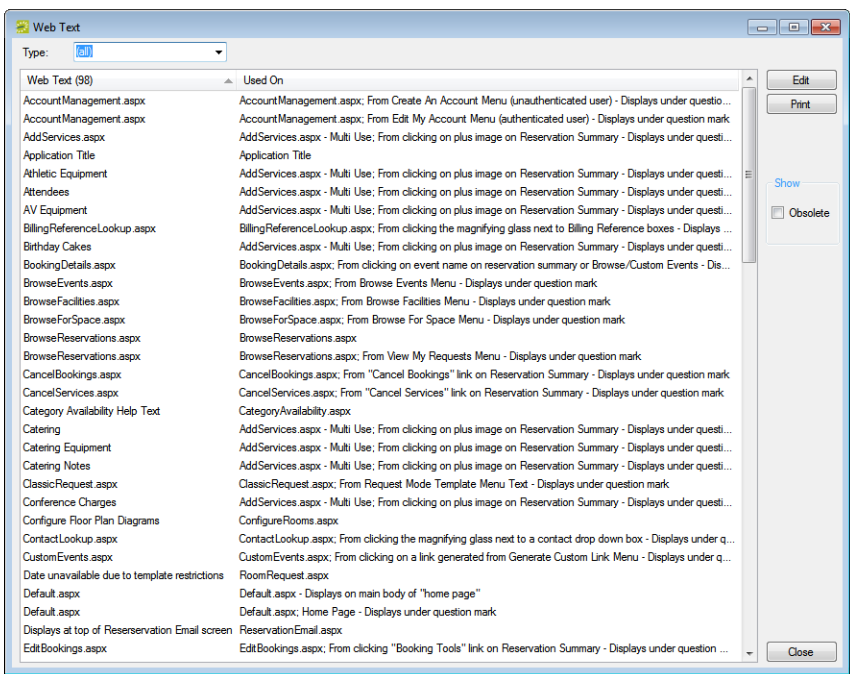
To configure web text in EMS

1. On the EMS menu bar, click Configuration > Web > Web Text.

   The Web Text window opens. This window lists the name or description for all types of web text that is currently in use in your VEMS and EMS Kiosk installations and the VEMS or EMS Kiosk page on which it appears.

To show only a specific type of web text, select a type on the Type dropdown list.

Figure 11-32: Web Text window

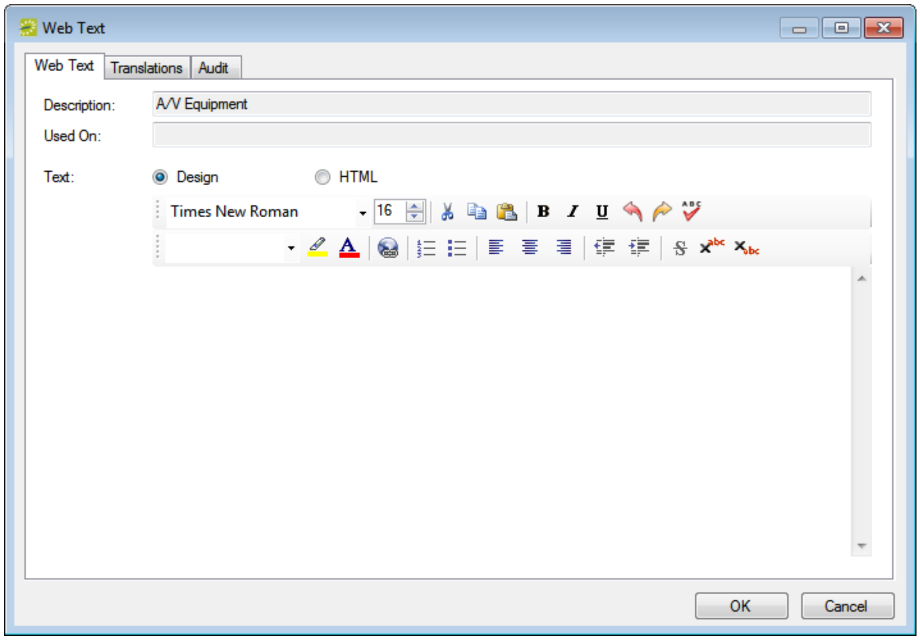


Optionally, to view all web text, whether in use or not, click Obsolete. Obsolete web text is displayed in red and italics in the Web Text window.

2. Select the web text that you are configuring, and then click Edit.

   The Web Text dialog box opens. The Web Text tab is the active tab. The tab contains options for entering and configuring the web text.

Figure 11-33: Web Text dialog box, Web Text tab



3. Configure the needed web text.
   - Design is selected by default. Use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the web text.
   - Select HTML and enter the necessary HTML code to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the web text.
4. If translations have been defined for web templates (see “Configuring Web Cultures” on page 445), then open the Translations tab, and for each translation, click in the Text field, and enter the appropriate translation for the web text item.
5. Click OK.

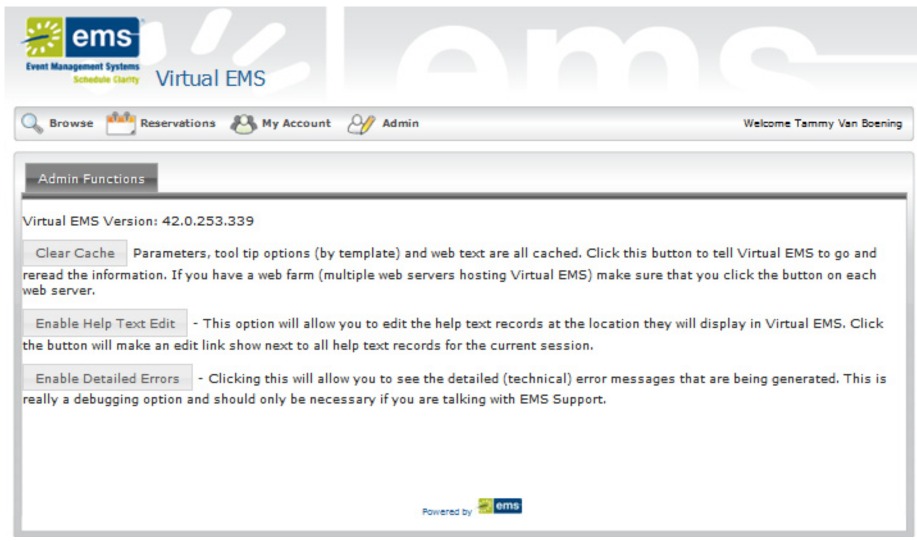
   The Web Text dialog box closes. You return to the Web Text window with the newly configured web text item automatically selected in the window.

To configure web text in VEMS

1. Log in to VEMS.
2. Under Admin, click Admin Functions.

   The VEMS Admin Function page opens.

Figure 11-34: VEMS Admin Functions page

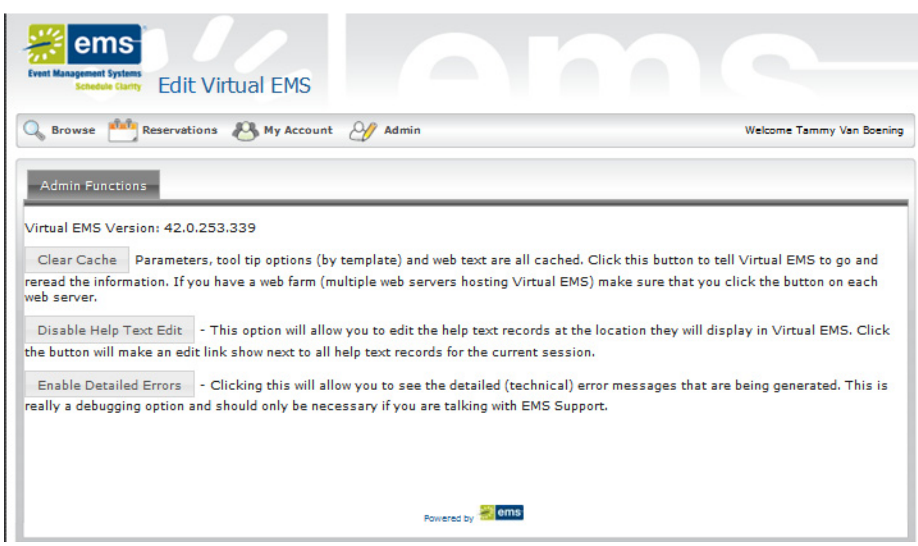


3. Click Enable Help Text Edit.

   A popup window opens indicating that Help Text Mode is now enabled.
4. Close the popup window.

   The Help Text toggle on the Admin Functions page now reads Disable Help Text Edit.

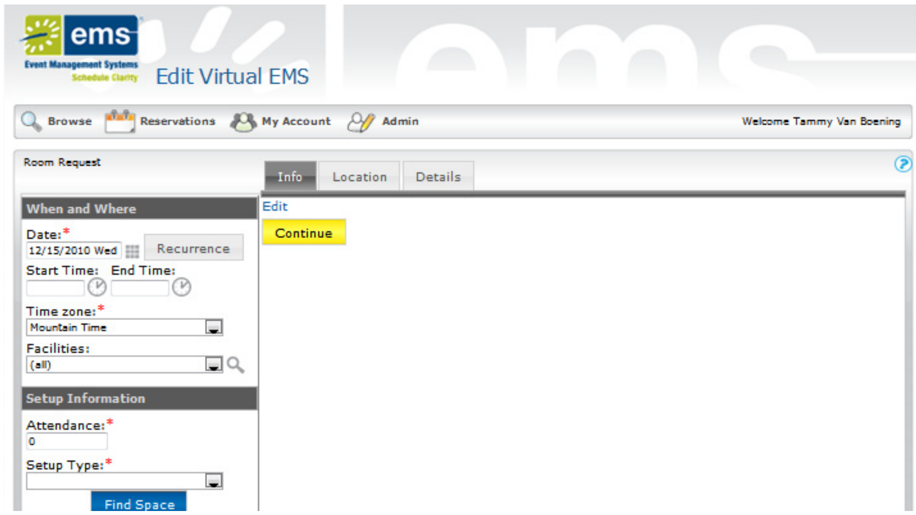
Figure 11-35: VEMS Admin Functions page



5. Open the VEMS page where you are configuring the Help text.

   An Edit option is displayed at the top of the page.

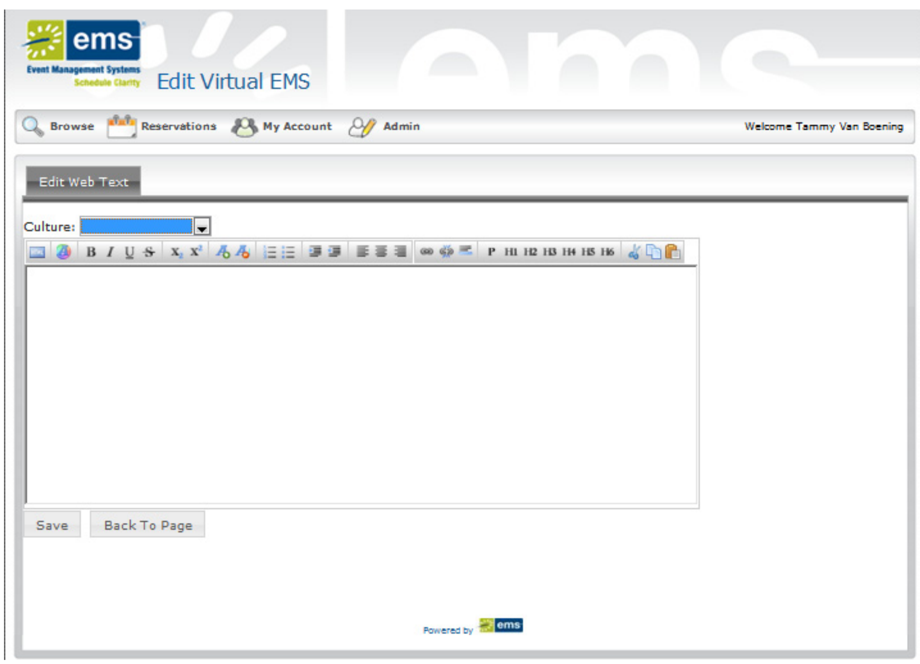
Figure 11-36: VEMS page



6. Click Edit.

   The page is refreshed with options for entering and configuring the Help text.

Figure 11-37: VEMS page with options for configuring Help text



7. After entering and configuring the Help text, click Save to apply the text to the selected page.

8. After you click Save, click Back to Page to view the Help text on its selected page.

Configuring Web Cultures

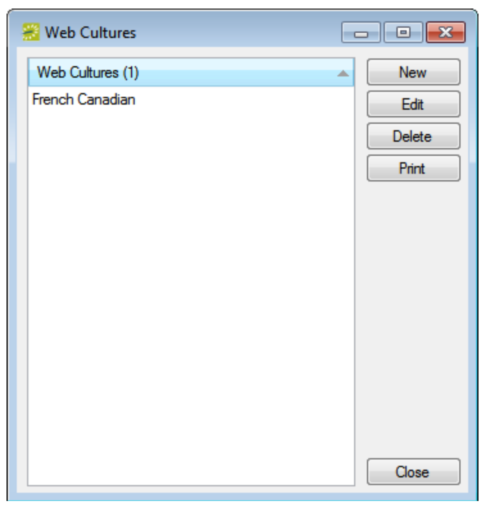
If you need to add language translation capability for your web templates or kiosk pages (menu text, menu items, and web text items), then you must configure web cultures. Each *web culture* represents a foreign language for which translations must be provided in VEMS or EMS Kiosk.

To configure web cultures

1. On the EMS menu bar, click Configuration > Web > Web Cultures.

   The Web Cultures window opens. This window displays all the web cultures that are currently configured in your EMS database.

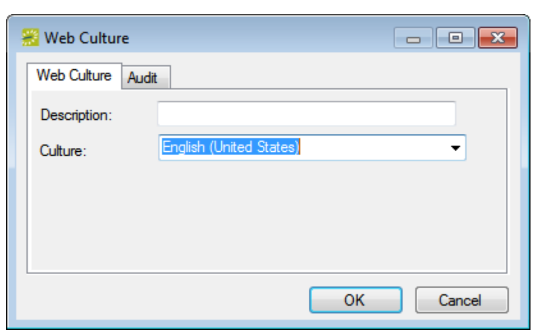
Figure 11-38: Web Cultures window



2. Click New.

   The Web Culture dialog box opens. By default, the culture is set to English (United States).

Figure 11-39: Web Culture dialog box



3. In the Description field, enter a name or description for the new web culture.

The description can be a maximum of 50 characters, including spaces.

4. On the Culture dropdown list, select the appropriate culture (the language into which the menu text, menu items, and web text items will be translated).
5. Click OK.

   The Web Culture dialog box closes. You return to the Web Cultures window with the newly configured web culture automatically selected.

After you configure a web culture, it is displayed on the Translations tab in various configuration areas in EMS.

EMS Kiosk

EMS Kiosk an optional, web-based module that allows users to access information about their reservations or make new reservations from touch screen devices. It can also be used to determine the location of an event or a person's location. This chapter details the configuration of EMS Kiosk.

This chapter covers the following topics:

- "Configuring EMS Kiosk Profiles" on page 449.
- "Configuring EMS Kiosk Menus" on page 459.

Configuring EMS Kiosk Profiles

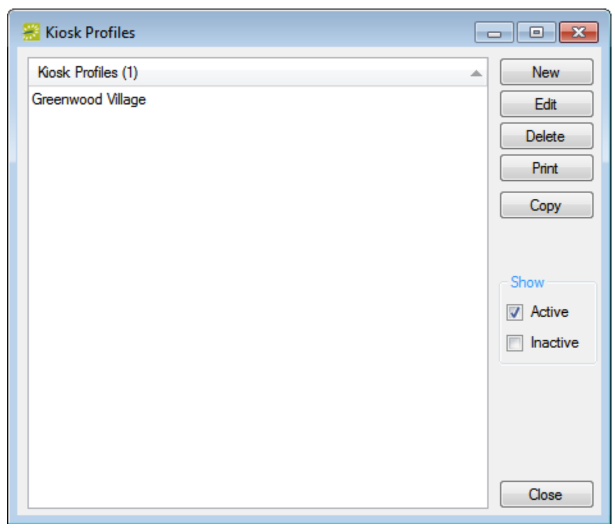
When you configure an EMS Kiosk on a specific touch-screen device, a Kiosk profile is specified to control the functionality that is to be available on the device. You configure an EMS Kiosk profile through the EMS client.

To configure an EMS Kiosk Profile

1. On the EMS menu bar, click Configuration > Kiosk > Kiosk Profiles.

   The Kiosk Profiles window opens. This window lists all the kiosk profiles that are currently configured in your EMS database and that have a status of Active.

Figure 12-1: Kiosk Profiles window



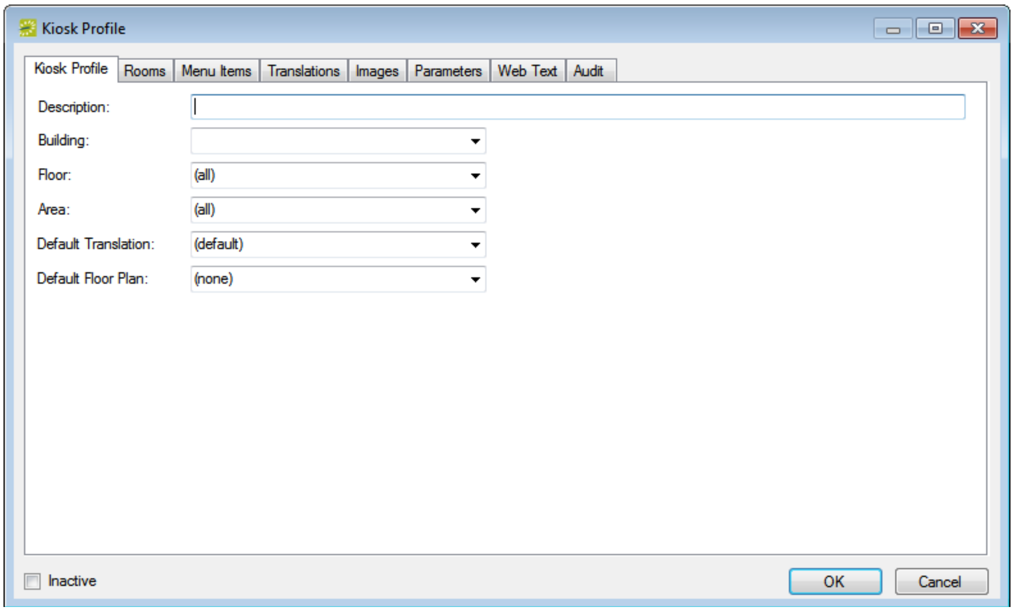
Optionally, to view all kiosk profiles in your EMS database, regardless of status, under Show, click Inactive.

The remainder of this procedure describes how to configure a kiosk profile "from scratch." You can also configure a kiosk profile by copying an existing profile. Select the kiosk profile that you want to copy, click Copy, and then go to Step 3.

2. Click New.

   The Kiosk Profile dialog box opens. The Kiosk Profile tab is the active tab.

Figure 12-2: Kiosk Profile dialog box, Kiosk Profile tab



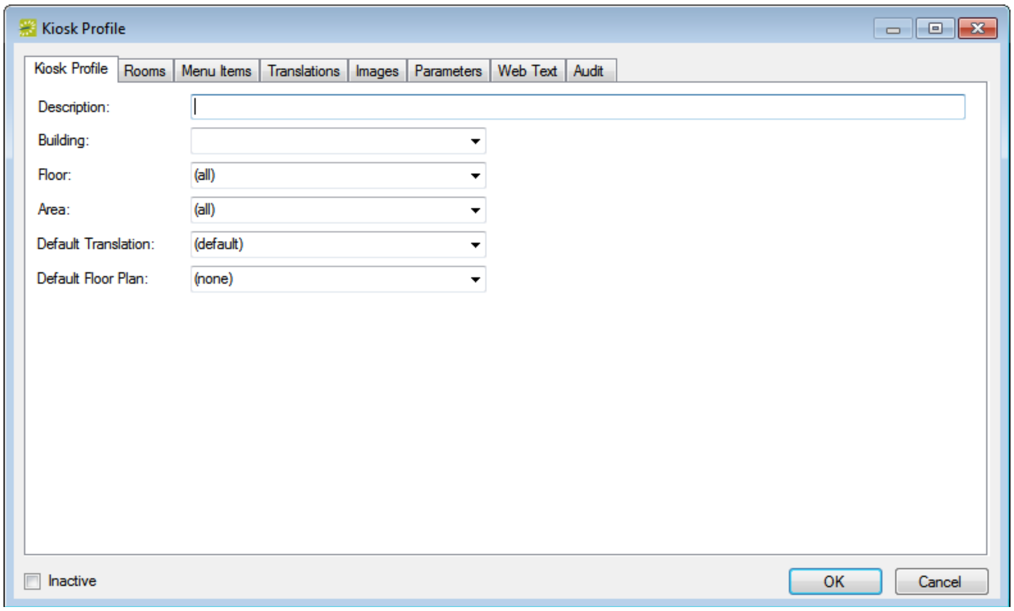
3. Enter the information for the new profile. See:
   - “Kiosk Profile tab” on page 451.
   - “Rooms tab” on page 452.
   - “Menu Items tab” on page 453.
   - “Translations tab” on page 454.
   - “Images tab” on page 455.
   - “Parameters tab” on page 456.
   - “Web Text tab” on page 457.
4. Click OK.

   You return to the Kiosk Profiles window with the newly configured profile automatically selected.

Kiosk Profile tab

1. Enter the information for the new profile.

Figure 12-3: Kiosk Profile dialog box, Kiosk Profile tab



Option	Description
Description	The name or description for the kiosk profile. **Note:** The description can be a maximum of 50 characters, including spaces.
Building Floor Area	Select the default building, and floor, for the current day's events. The area is used to define the scope of the event display on the Today's Events page. EMS Kiosk users will be able to see events across all the buildings that are included in the selected area. **Note:** Building is a required value.
Default Translation	A translation is the language in which the menu items, menu text, and web text are displayed on a kiosk page. Translations are available only after you select the pertinent translations on the Translations tab. (See "Translations tab" on page 454.) If you do not select a translation, then by default, the items and text are displayed in US English. If you need to select a different translation, then after you select the pertinent translations on the Translations tab, return to this tab and select a different default translation. **Note:** For translations to be available for selection, the web culture must be defined. See "Configuring Web Cultures" on page 445.
Default Floor Plan	Select the default floor plan that is to be displayed for the current day's events. **Note:** If the needed floor plan is not available, you can configure it. See "Configuring Floor Plans" on page 147.

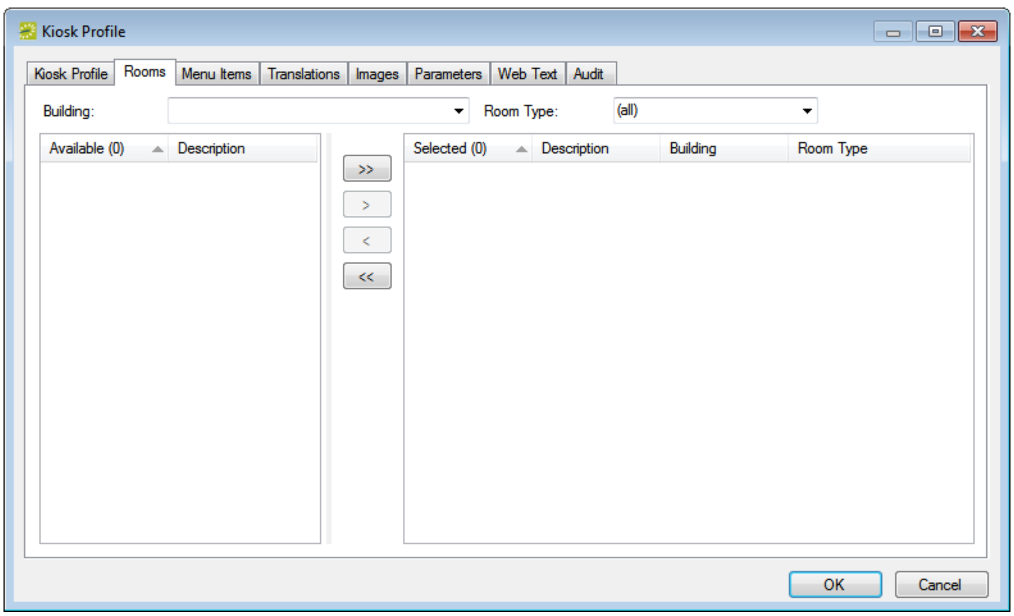
Option	Description
Inactive	Leave this option blank to add the kiosk profile as an active profile. Select this option to inactivate the profile.

2. Continue with any other configuration for the profile as needed; otherwise, click OK to close the Kiosk Profile dialog box and return to the Kiosk Profiles window. The newly configured profile is displayed in the window.

Rooms tab

You use the Rooms tab to select the rooms that a user can book from the Make Reservation page in EMS Kiosk.

Figure 12-4: Kiosk Profile dialog box, Rooms tab

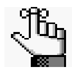


1. On the Building dropdown list, select the applicable building.
2. On the Room Type dropdown list, leave the default value of (all), or select the appropriate room type.

   The Available list displays all the rooms that meet your search criteria.
3. On the Available list, select the room, or CTRL-click to select the multiple rooms that a user can book from the Make Reservation page, and then click the Move (>) button to move the selected rooms to the Selected list.
4. Continue with any other configuration for the profile as needed; otherwise, click OK to close the Kiosk Profile dialog box and return to the Kiosk Profiles window. The newly configured profile is displayed in the window.

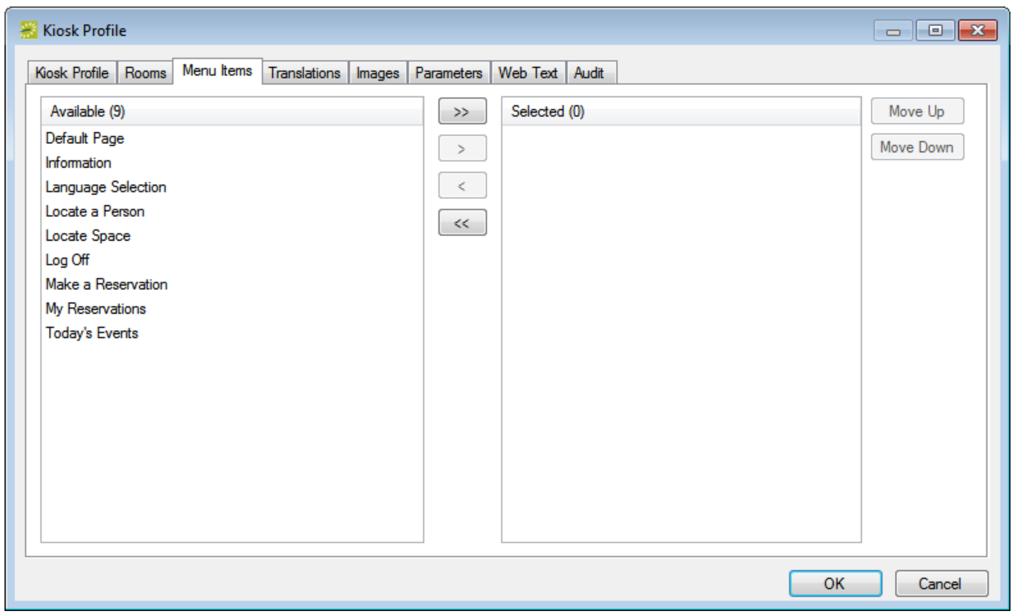
Menu Items tab

You use the Menu Items tab to select the menu items that are to be available to the users of EMS Kiosk. Menus are displayed as buttons at the top of EMS Kiosk pages.



You can configure these items to display different text. See *"Configuring EMS Kiosk Menus" on page 459.*

Figure 12-5: Kiosk Profile dialog box, Menu Items tab

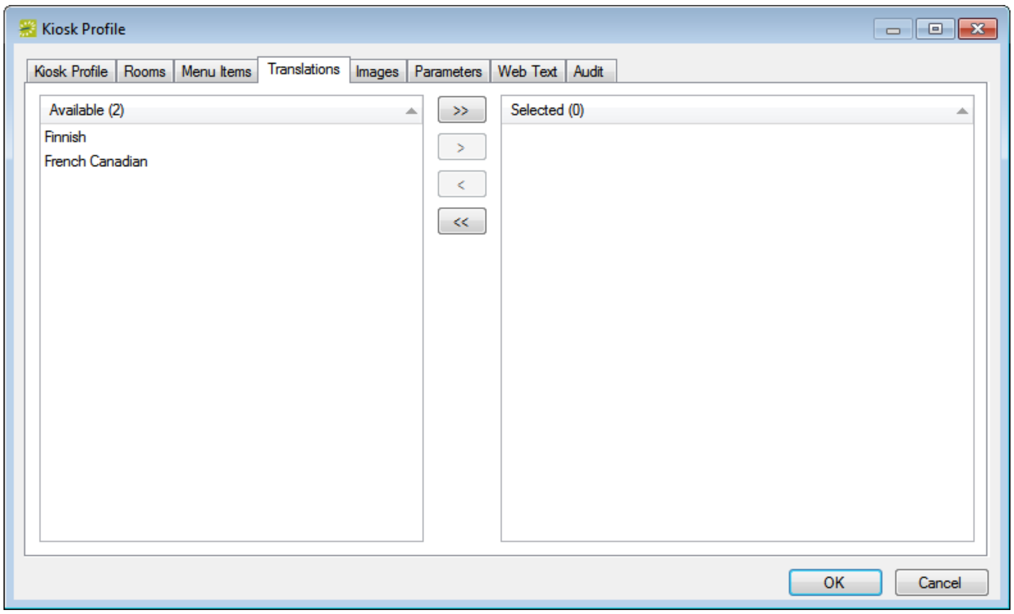


1. On the Available list, select the menu item, or CTRL-click to select the multiple menu items that are to be available to an EMS Kiosk user, and then click the Move (>) button to move the selected items to the Selected list.
2. Continue with any other configuration for the profile as needed; otherwise, click OK to close the Kiosk Profile dialog box and return to the Kiosk Profiles window. The newly configured profile is displayed in the window.

Translations tab

A translation is the language in which the kiosk displays the menu items, menu text, and web text. If a translation is not selected on the Kiosk Profile for EMS Kiosk, then by default, the information is displayed in US English. If the appropriate translation is not available on the Translations tab, then you can define it. See "Configuring Web Cultures" on page 445.

Figure 12-6: Kiosk Profile dialog box, Translations tab



1. On the Available list, select the language, or CTRL-click to select the multiple languages that are to be available for displaying information in EMS Kiosk user, and then click the Move (>) button to move the selected items to the Selected list.
2. If you need to select a default translation, then return to the EMS Kiosk Profile tab, and select the default translation as appropriate.

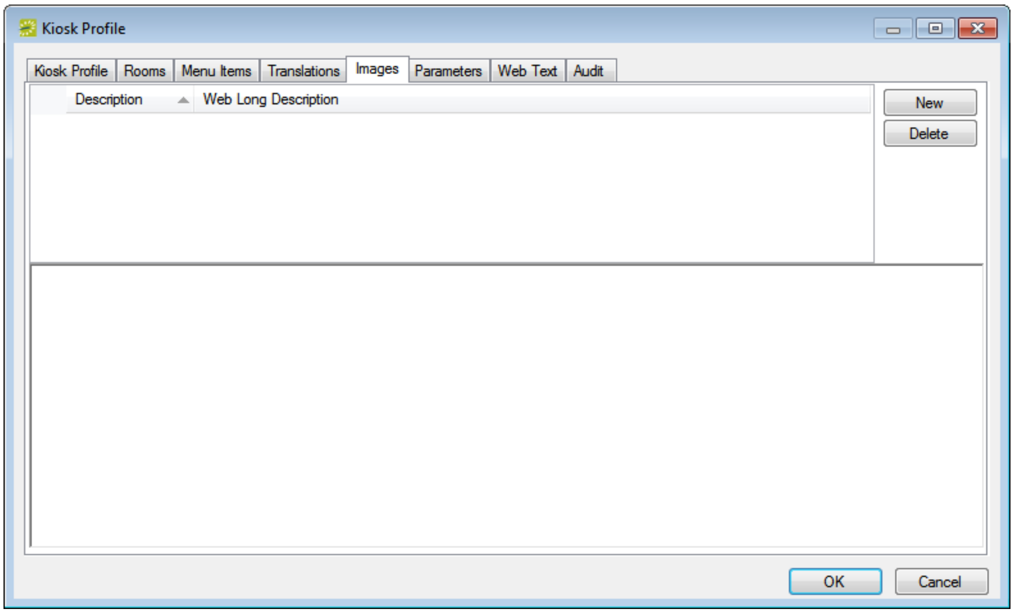
Although you can select multiple languages, only one language can be set as the default language on the Kiosk Profile tab. If you select multiple languages on the Translations tab, an EMS Kiosk user can always select a different language for displaying the menu text, menu items, and web text.

3. Continue with any other configuration for the profile as needed; otherwise, click OK to close the Kiosk Profile dialog box and return to the Kiosk Profiles window. The newly configured profile is displayed in the window.

Images tab

Use the Images tab to select images (map of area, image of building, and so on) that are to be displayed in the Information area of EMS Kiosk.

Figure 12-7: Kiosk Profile dialog box, Images tab



1. Click New to open the Find Image dialog box, and then browse to and select the image that is to be displayed in the Images area of EMS Kiosk.

   The Find Image dialog box closes. You remain on the Images tab with an entry for the image displayed on the tab.

The image must be in one of the following formats—.gif, .jpeg, .jpg, .bmp, .wmf, or .png.

2. Optionally, do one or both of the following:
   - Edit the description for the image.
   - In the Web Long Description field, enter a description of the image.

The value that you enter here defines the "long desc" attribute for web content accessibility.

3. Continue with any other configuration for the profile as needed; otherwise, click OK to close the Kiosk Profile dialog box and return to the Kiosk Profiles window. The newly configured profile is displayed in the window.

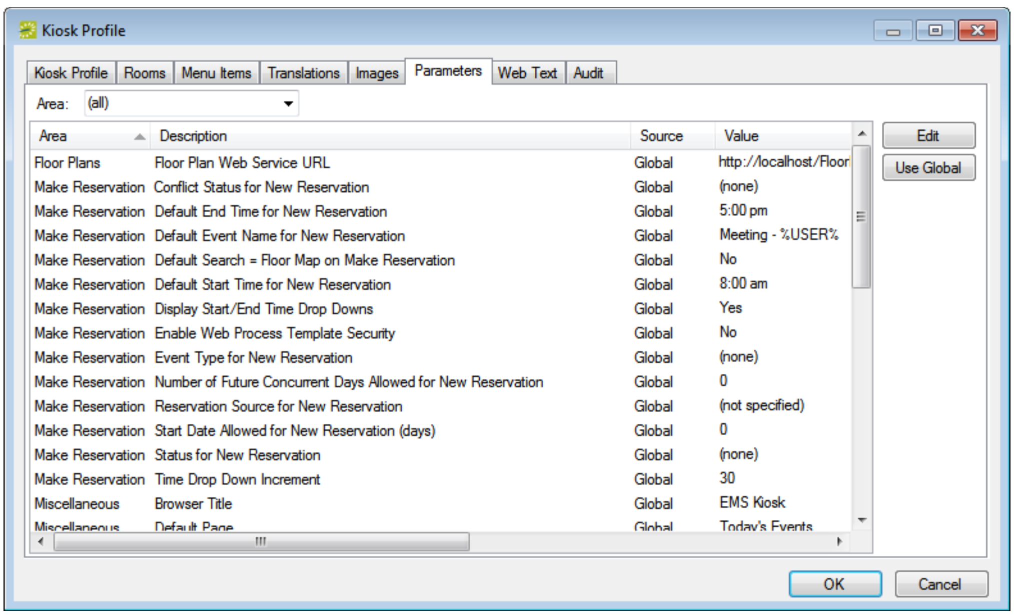
Parameters tab

System parameters are global settings that affect all users on your on EMS Kiosk. The parameters are grouped based on the functional areas that they affect.

1. Edit the parameters as needed on this tab.

You can also edit the parameters under System Administration > Configuration > System Parameters. For a detailed explanation about editing system parameters, see *"Editing System Parameters" on page 311**. For a detailed description of EMS Kiosk system parameters, see* *"EMS Kiosk System Parameters" on page 507**.*

Figure 12-8: Kiosk Profile dialog box, Parameters tab

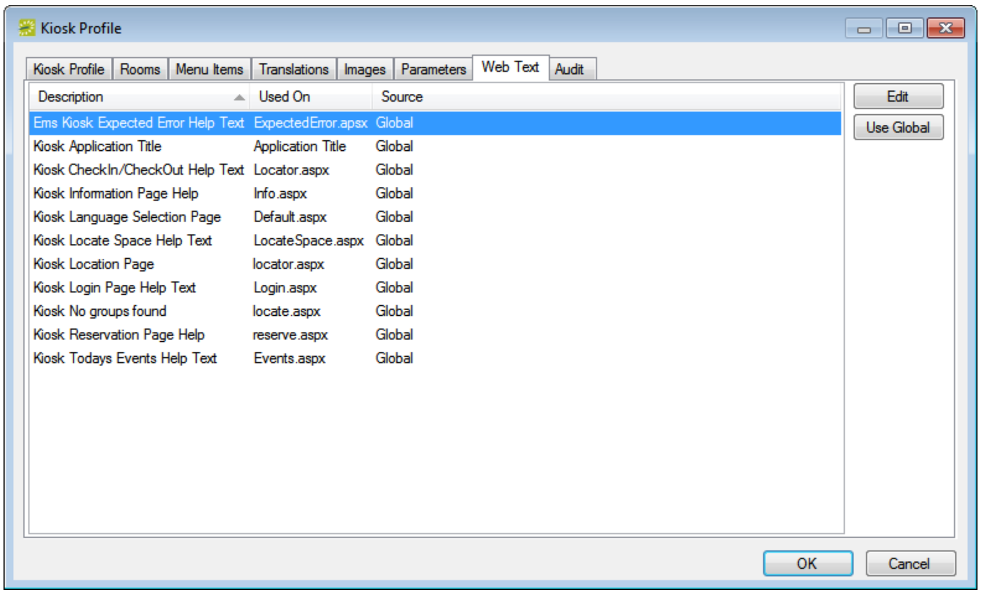


2. Continue with any other configuration for the profile as needed; otherwise, click OK to close the Kiosk Profile dialog box and return to the Kiosk Profiles window. The newly configured profile is displayed in the window.

Web Text tab

Web text is custom help text or policies and procedures that are specific to your organization that is displayed on various pages in VEMS and EMS Kiosk. Web text is defined at the global level under Configurations > Web > Web Text. (See “Configuring Web Text” on page 440.) You use the Web Text tab to override the global setting for a help text and customize the help text for a specific kiosk profile.

Figure 12-9: Kiosk Profile dialog box, Web Text tab



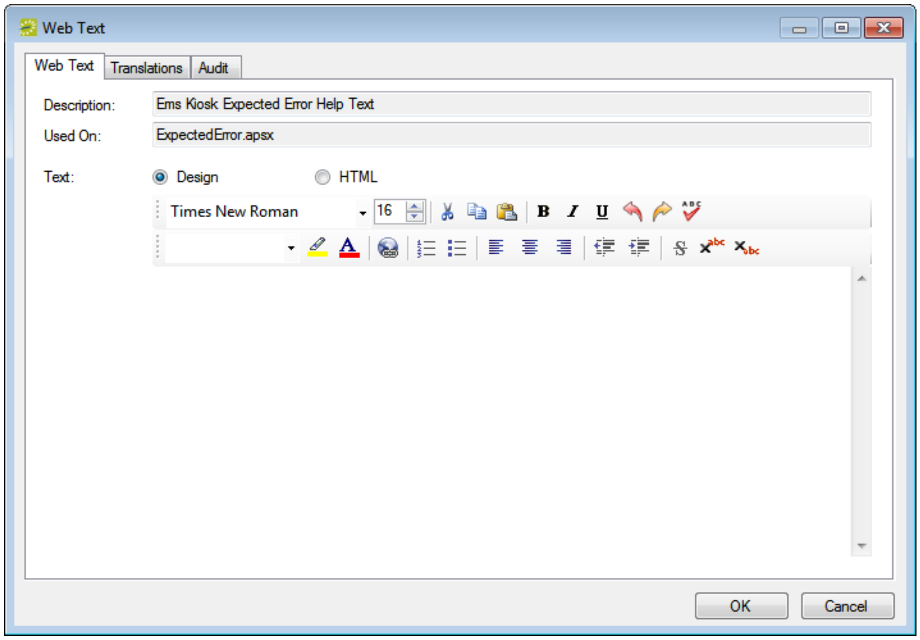
1. Select the web text that you are customizing, and then click Edit.

   The Web Text dialog box opens. The Web Text tab is the active tab. (See Figure 12-10 on page 458.) The tab contains options for entering and configuring the web text.

   - Design is selected by default. Use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the headers and footers.

   - Select HTML and enter the necessary HTML code to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the headers and footers.

Figure 12-10: .Web Text dialog box



2. If translations have been defined for web templates or kiosk pages (see "Configuring Web Cultures" on page 445), then open the Translations tab, and for each translation, click in the Text field, and enter the appropriate translation for the web text item.
3. Click OK.

   The Web Text dialog box closes. You return to the Web Text tab with the newly configured web text item automatically selected in the tab.
4. Continue with any other configuration for the profile as needed; otherwise, click OK to close the Kiosk Profile dialog box and return to the Kiosk Profiles window. The newly configured profile is displayed in the window.

Configuring EMS Kiosk Menus

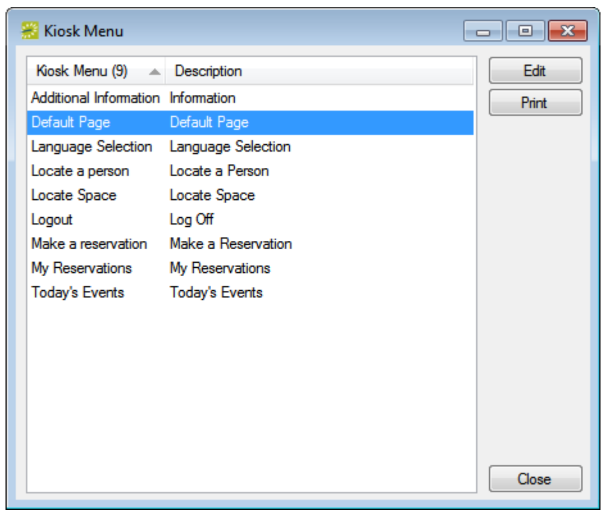
EMS Kiosk menus are displayed as buttons at the top of EMS Kiosk pages. The text that is displayed on each button is predefined, but you can edit it if needed. You configure EMS Kiosk menus through the EMS client.

To configure EMS Kiosk menus

1. On the EMS menu bar, click Configuration > Kiosk > Kiosk Menus.

   The Kiosk Menus window opens. This window lists all the EMS Kiosk menus by name as well as the description for the menu (the text that appears on the menu button at the top of EMS Kiosk pages).

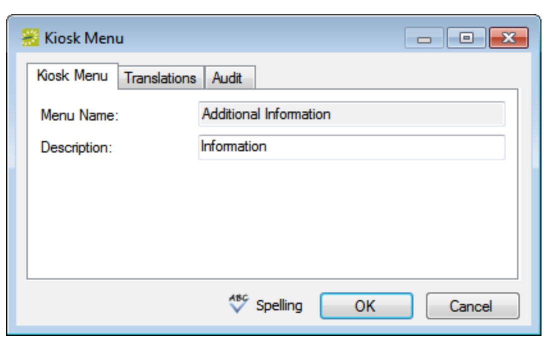
Figure 12-11: Kiosk Menus window



2. Select the menu that you are editing, and the click Edit.

   The Kiosk Menu dialog box opens. The dialog box displays the menu name for the kiosk menu and its current description. You cannot edit the menu name.

Figure 12-12: Kiosk Menu dialog box



3. In the Description field, edit the description for the kiosk menu.

The description can be a maximum of 50 characters, including spaces.

4. If translations have been defined for kiosk information, then open the Translations tab, and for each translation, enter the appropriate description that is to be translated.
5. Click OK.

   The Kiosk Menu dialog box closes and you return to the Kiosk Menus window with the newly configured menu automatically selected.

EMS Campus

Academic Planning is an optional component of the EMS software that provides all the functionality that is necessary for Domain Schedulers to ensure that every class meets in a location and at a time that is acceptable to departments and professors. The system provides automatic room assignment within user-supplied parameters, integration with your SIS/ERP software, and efficient online collaboration tools. It also simplifies final exam scheduling and offers a selection of reports to streamline and analyze the room scheduling process. When added to the functionality that meeting and event staff already have access to, it provides a complete campus-wide space management package referred to as EMS Campus. This chapter details the synchronization of the information in your Student Information System, or SIS, with the information in your EMS database as well as the configuration of campus-specific data items for EMS Campus.

This chapter covers the following topics:

Overview of Synchronization

Your *Student Information System*, or *SIS*, contains a wealth of information about your buildings, room types, rooms, instructors, course types, subjects, and terms. The process of importing this SIS data into your EMS database is referred to as *synchronization*. When you import campus-specific data (instructors, course types, subjects, and terms), you create the data items in your EMS database. When you import facility data (buildings, room types, and rooms), you must either create the data items in your EMS database, or if the facility data already exists in your EMS database, then you must link the SIS facility data to the corresponding facility data in your EMS database.

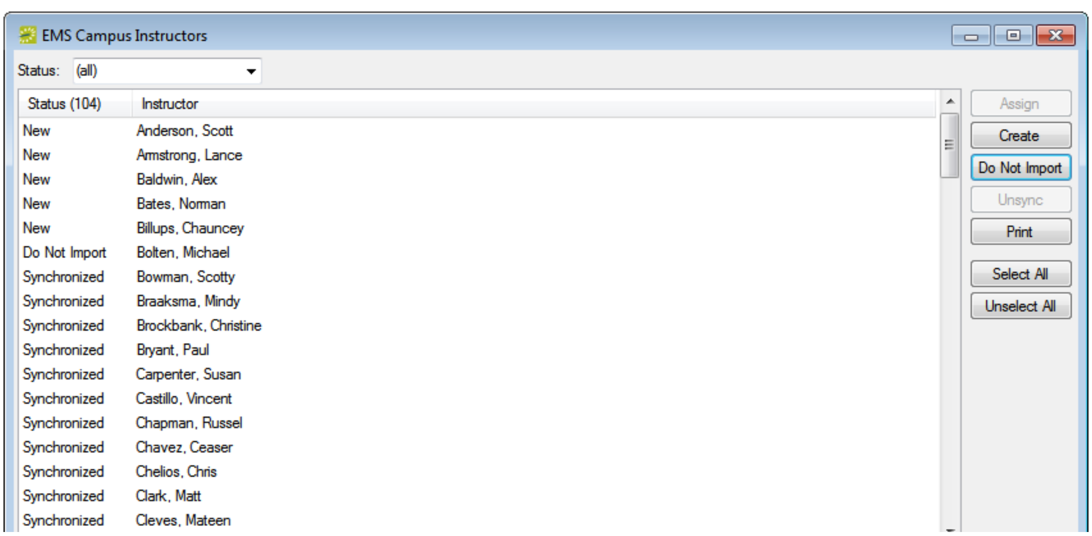
Before you can carry out synchronization, the Campus Planning Interface must be installed and configured. Refer to the EMS Installation instructions for details.

Campus-specific data synchronization

When you import your campus-specific SIS data, all the SIS data items are flagged with a status of New. To create these items in your EMS database, you select the items, click Create, and then Process. After you create these items in your EMS database, the status of the items is set to Synchronized to indicate that the SIS data has been synchronized. If you do not want to create the SIS data item in your EMS database (for example, you are importing an Instructors list and an instructor is on sabbatical and unavailable to teach classes), then you can select the item and click Do Not Import. Previously synchronized items can be unsynchronized by selecting the item or items, and then clicking Unsynch.

You can select a single data item at a time for processing, you can select multiple items for processing using the CTRL-click or SHIFT-click functions, or you can select all items in a single step by clicking Select All.

Figure 13-1: EMS Campus Instructors window showing SIS data

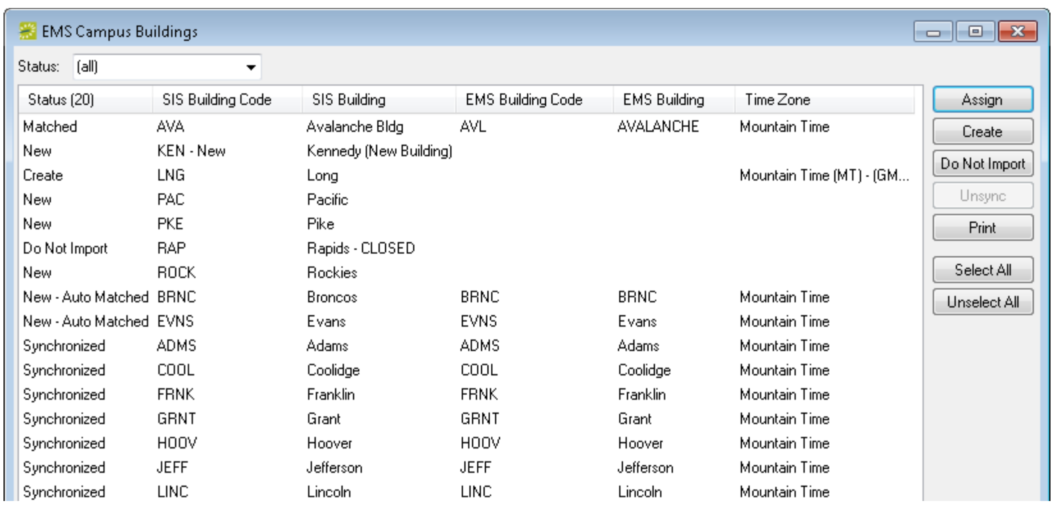


Facility data synchronization

When you import facility SIS data, the actions that you must carry out are different if you do not have the facility data (building, room type, or room) already configured in your EMS database versus if you do have the data already configured.

- If you have not configured the necessary data items in your EMS database, then all data items that are imported from your SIS are flagged with a status of New. To configure these items in your EMS database, you must select the item and then click Create. (Depending on the item that you select, another window might open with additional configuration options that are required to completely configure the item in your EMS database.) For example, in Figure 13-2 below, the PAC-Pacific building, the PKE-Pike building, the ROCK-Rockies building, and the LNG-Long building exist in the SIS, but not in the EMS database. The status of the PAC-Pacific building, the PKE-Pike building, the ROCK-Rockies building is therefore set to New. The status of the of the Long building was set to Create by selecting the building, and then clicking Create.

Figure 13-2: EMS Campus Buildings window showing SIS data



Status (20)	SIS Building Code	SIS Building	EMS Building Code	EMS Building	Time Zone
Matched	AVA	Avalanche Bldg	AVL	AVALANCHE	Mountain Time
New	KEN - New	Kennedy (New Building)			
Create	LNG	Long			Mountain Time (MT) - (GM...
New	PAC	Pacific			
New	PKE	Pike			
Do Not Import	RAP	Rapids - CLOSED			
New	ROCK	Rockies			
New - Auto Matched	BRNC	Broncos	BRNC	BRNC	Mountain Time
New - Auto Matched	EVNS	Evans	EVNS	Evans	Mountain Time
Synchronized	ADMS	Adams	ADMS	Adams	Mountain Time
Synchronized	COOL	Coolidge	COOL	Coolidge	Mountain Time
Synchronized	FRNK	Franklin	FRNK	Franklin	Mountain Time
Synchronized	GRNT	Grant	GRNT	Grant	Mountain Time
Synchronized	HOOV	Hoover	HOOV	Hoover	Mountain Time
Synchronized	JEFF	Jefferson	JEFF	Jefferson	Mountain Time
Synchronized	LINC	Lincoln	LINC	Lincoln	Mountain Time

- If you have configured the necessary data items in your EMS database, and you have named *and/or* coded them consistently between your EMS database and your SIS, then these data items are automatically matched and flagged with a status of New—Auto Matched. For example, in Figure 13-2 above, the Evans building and the Broncos building were configured in the EMS database prior to synchronization. Because the Evans building was named *and* coded identically as the same building in the SIS, EMS auto-matched the record for this building. Even though the Broncos building was named differently, it was coded identically as the same building in the SIS, and therefore, it was auto-matched as well.

  Auto-matching can occur only if each SIS facility data item can be matched to one and only one EMS data item. For example, if Softball Field and Soccer Field are separate buildings in the SIS, they cannot both be synchronized with Fields in the EMS database.

Likewise, if Discussion Room and Conference Room are separate room types in the SIS, then the both cannot be synchronized to Meeting Room in the EMS database. In this case, the data items that are imported are with a status of New, and you must select each New item and assign it to the appropriate corresponding item in your EMS database. (See the bullet below.)

- If you have configured the necessary data items in your EMS database, but you have not named or coded these items consistently between your EMS database and your SIS, then the data items in your SIS are imported and also flagged with a status of New. You must select each New item and assign it to the appropriate corresponding item in your EMS database to set the status to Matched. For example, in Figure 13-2 on page 464, the Avalanche building was imported from an SIS. The corresponding building in the EMS database was neither named nor coded identically. As a result, when it was imported, its status was set to New. After the record was selected and Assign clicked, and the building matched to an existing building in the EMS database, the status was set to Matched. When you manually match items, as is the case with Auto-Matching, each SIS facility data item can be matched to one and only one EMS data item.
- Just as with campus-specific data, you can also flag items from the SIS with a status of Do Not Import if you do not want the item to be configured in your EMS database, for example, a building on campus that has been permanently closed or a dormitory building that does not have space that can be scheduled. For example, in Figure 13-2 on page 464, the RAP (CLOSED) - Rapids building has been permanently closed, so its status was set to Do Not Import. After a status has been set for all facility data, (New - Auto Matched, Matched, Create, or Do Not Import), you must click Process to complete synchronization. If you do not click Process, then the data items are not configured in your EMS database. After you create these items in your EMS database, the status of the items is set to Synchronized to indicate that the SIS data has been synchronized.

You must synchronize your facility data in the following order—Buildings, Room Types, and Rooms. The synchronization process does not update existing facility records after they have been imported and linked. For example, if a room's code, description, or capacity is changed in the SIS after it has been imported and linked, this information is not changed in the EMS database. Previously synchronized items can be unsynchronized by selecting the item or items, and then clicking Unsynch. You must unsynchronize items in the reverse order in which they were synchronized. For example, you cannot unsynchronize buildings if the buildings have rooms that are still synchronized. You must first unsynchronize the rooms, and then you can unsynchronize the buildings. Likewise, you cannot unsynchronize room type if rooms are still synchronized with the room type. You must first unsynchronize the rooms, and then you can unsynchronize the room types. In addition, you cannot unsynchronize any facility data if courses that are synchronized use the buildings or rooms.

Synchronizing Campus-Specific Data

When you synchronize your campus specific SIS data (Instructors, Course Types, Subjects, and Terms), all the SIS data items are flagged with a status of New. To create these items in your EMS database, you select the items, click Create, and then click Process.

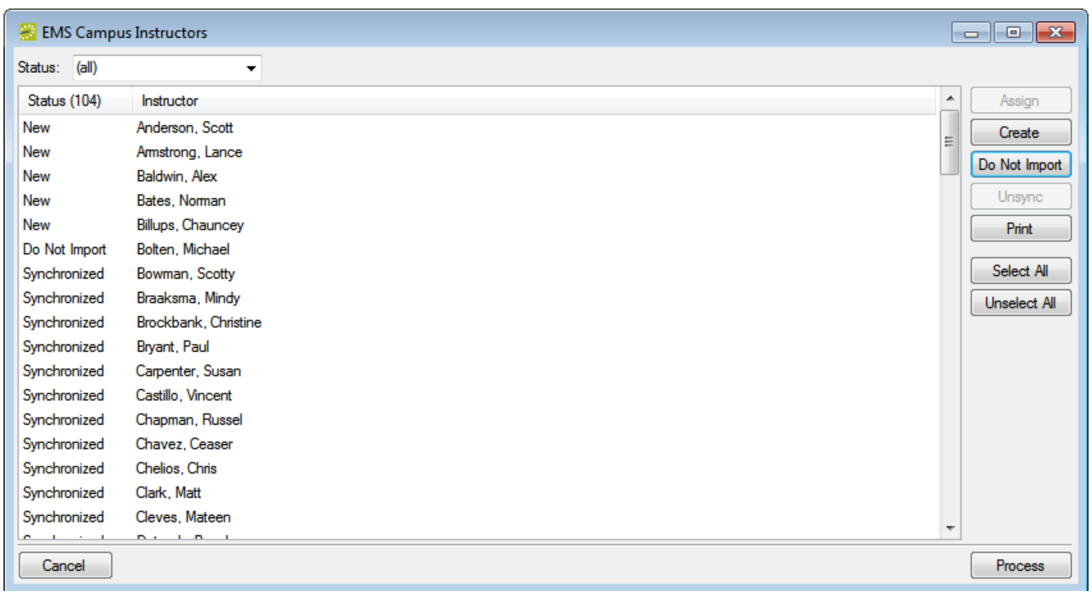
To synchronize campus-specific data

The following procedure is written from the perspective of synchronizing Instructors, but, by analogy, you can follow this procedure to synchronize course types, subjects, and terms.

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Synchronize Instructors.

   The EMS Campus Instructors window opens.

Figure 13-3: EMS Campus Instructors window



2. Select the SIS data item, or CTRL-click to select the multiple data items that you are creating in your EMS database, click Create, and then click Process.

If you do not want to create an SIS data item in your EMS database, select the item, and then click Do Not Import.

A message opens indicating that the data items were successfully processed.

3. Click OK to close the message and return to the EMS Campus Instructors window.

   The status of the data items is set to Synchronized to indicate that the SIS data has been synchronized.

4. Click Cancel or Close (x) to close the window.

Synchronizing Facility Data

You must synchronize your facility data in the following order—Buildings, Room Types, and Rooms. The synchronization process does not update existing facility records after they have been imported and linked. For example, if a room's code, description, or capacity is changed in the SIS after it has been imported and linked, this information is not changed in the EMS database.

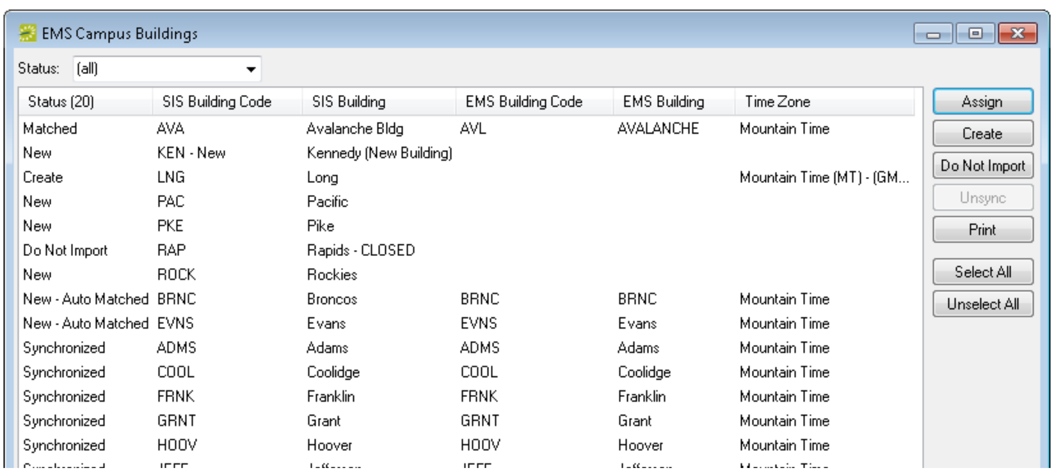
To synchronize buildings

When you synchronize buildings, the values for Building Code and Description in the SIS are used for any new buildings that are configured in your EMS database. You can edit these values if needed in EMS. (See "Configuring Buildings" on page 91.)

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Synchronize Buildings.

   The EMS Campus Building window opens.

Figure 13-4: EMS Campus Buildings window



2. Set the status of the imported buildings (New - Auto Matched, Matched, Create, or Do Not Import) as described in "Facility data synchronization" on page 464.

   A window opens that requires you to select a time zone for the referenced buildings.

3. Select the correct time zone, and then click Close to return to the EMS Campus Buildings window.

4. Click Process.

   A message opens indicating that the buildings were successfully processed.

5. Click OK to close the message and return to the EMS Campus Buildings window.

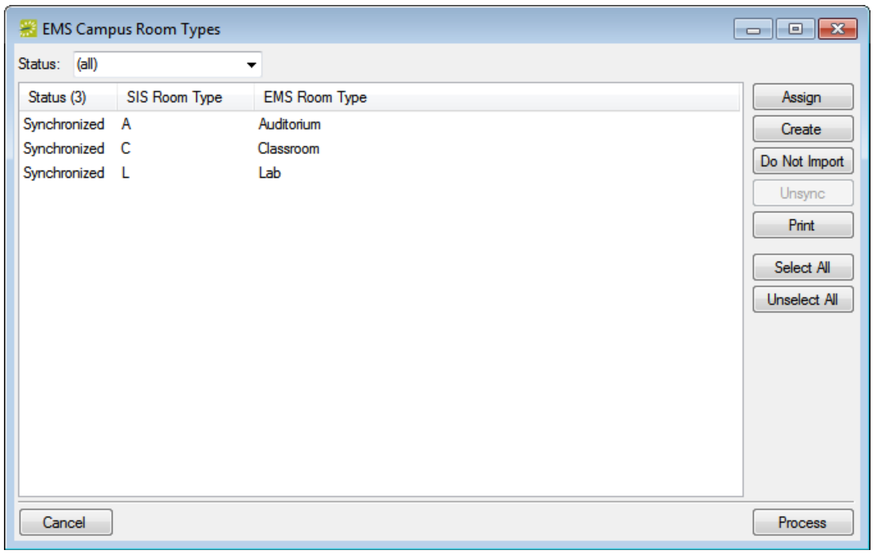
6. Click Cancel or Close (x) to close the window.

To synchronize room types

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Synchronize Room Types.

   The EMS Campus Room Types window opens.

Figure 13-5: EMS Campus Room Types window



2. Set the status of the imported room types (New - Auto Matched, Matched, Create, or Do Not Import) as described in “Facility data synchronization” on page 464.
3. Click Process.

   A message opens indicating that the room types were successfully processed.
4. Click OK to close the message and return to the EMS Campus Room Types window.
5. Click Cancel or Close (x) to close the window.

After you have synchronized the room types, you can edit the names as needed. See “Configuring Room Types” on page 89.

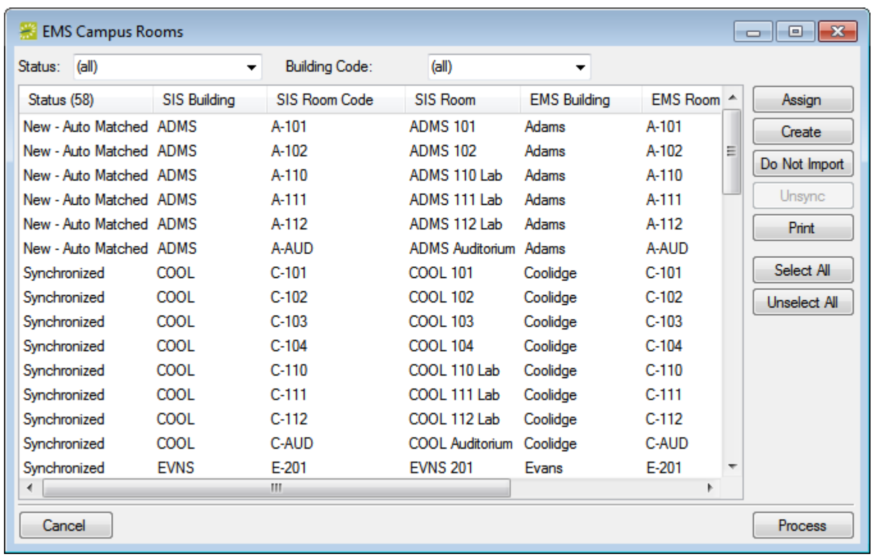
To synchronize rooms

Before you can synchronize room data, at least one setup type must be configured in your EMS database (for example, academic setup), or the synchronization process cannot correctly import the room capacity. To configure a setup type, or confirm that one already has been configured in your EMS database, see “Configuring Setup Types” on page 87. After you have configured or confirmed this setup type, set the value for the following EMS system parameter (Area: Campus, Description: Default Setup Type) to this setup type. See “Editing System Parameters” on page 311.

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Synchronize Rooms.

   The EMS Campus Rooms window opens.

Figure 13-6: EMS Campus Rooms window



2. Set the status of the imported rooms (New - Auto Matched, Matched, Create, or Do Not Import) as described in “Facility data synchronization” on page 464.
3. Click Process.

   A message opens indicating that the rooms were successfully processed.
4. Click OK to close the message and return to the EMS Campus Rooms window.
5. Click Cancel or Close (x) to close the window.

After you synchronize the rooms, you can edit the names as needed. See *“To configure one room at a time” on page 110.*

Configuring Domains

A *domain* is a level of organization within an institution that defines scheduling responsibility. Functions such as synchronizing, optimizing, and running reports are carried out on a per domain basis. When you configure your domain, you must identify the subjects that are offered in the domain and you must also specify the rooms that are controlled by the domain. The subjects that are defined within a domain determine the courses listed for the domain. The rooms that are defined within a domain determine all spaces that are potentially scheduled by the courses. Subjects can belong to only one domain. Rooms can belong to multiple domains.

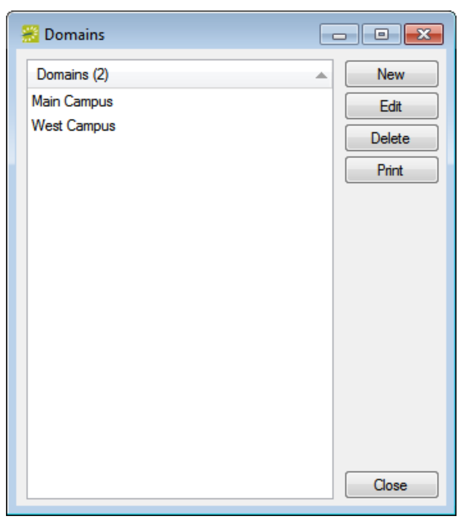
The term "domain" is controlled by an EMS system parameter (Campus: Domain Title Singular and Campus: Domain Title Plural), and it is often changed to Campus or School to better describe how course scheduling is divided. See *"Editing System Parameters" on page 311.*

To configure a domain

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Domains.

   The Domains window opens. This window lists all the domains that are currently configured in your EMS database.

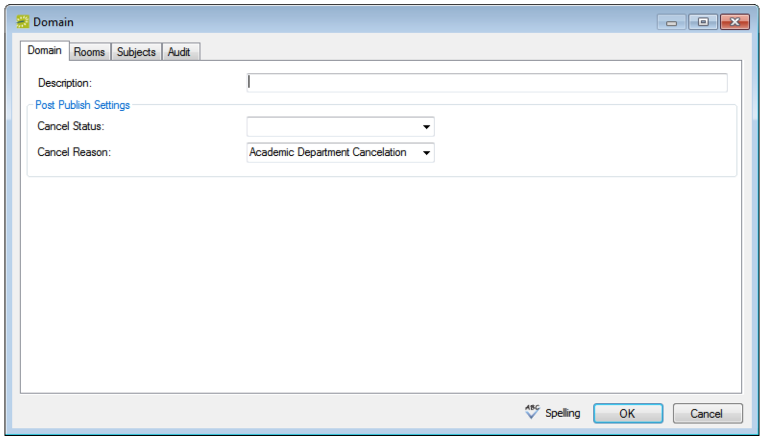
Figure 13-7: Domains window



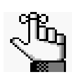
2. Click New.

   The Domain dialog box opens. The Domain tab is the active tab.

Figure 13-8: Domain dialog box, Domain tab



3. In the Description field, enter a name or description for the new domain.



The description can be a maximum of 50 characters, including spaces.

4. On the Cancel Status dropdown list, select the status that is to be used for canceling the room bookings in EMS when a course date is canceled in the SIS after publishing.
5. On the Cancel Reason dropdown list, select the reason that is to be used for cancellations after publishing.
6. Open the Rooms tab, and optionally do one or both of the following:
   - On the Building dropdown list, select (all) buildings, or select a specific building.
   - On the Room type dropdown list, leave the value set to (all), or select a specific room type.

   All rooms that meet your search criteria are displayed in the Available list.
7. On the Available list, select the room, or CTRL-click to select the multiple rooms that are controlled by the campus, and then click the Move (>) button to move the selected rooms to the Selected list.
8. Open the Subjects tab, and on the Available list, select the subject, or CTRL-click to select the multiple subjects that are offered by the campus, and then click the Move (>) button to move the selected subjects to the Selected list.
9. Optionally, click Spelling to spell check the domain before you save it.

10. Click OK.

    The Campus dialog box closes. You return to the Domains window the newly configured domain automatically selected.

Configuring Academic Units

An *academic unit* is a level of organization within an institution that defines responsibility for making schedule requests for a portion of a domain. Academic units are used when assigning permissions to academic users and when filtering reports. When you configure your academic units, you must specify the event type that is to be used when you publish your courses in EMS, the group for which the course reservation is to be made, the rooms that the units control, and the subjects that are associated with the units. The rooms that are defined within an academic unit give the unit the ability to require these spaces during optimization. The subjects that are defined within an academic unit determine the courses that are listed when filtering by the unit. Both subjects and rooms can belong to more than one academic unit.

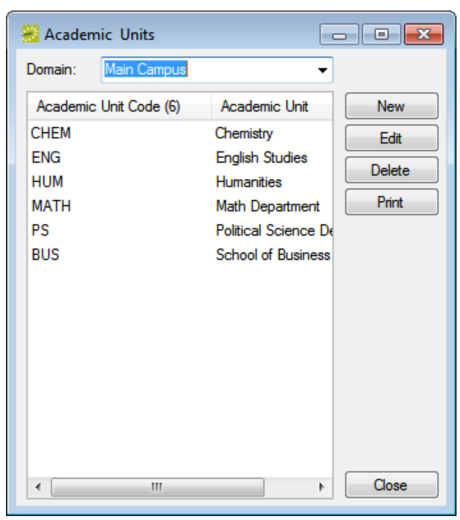
The term "domain" is controlled by an EMS system parameter (Campus: Academic Unit Title Singular and Campus: Academic Unit Title Plural), and typically, it is changed to Department or Division to better describe how course scheduling requests are divided. See *"Editing System Parameters" on page 311.*

To configure academic units

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Academic Units.

   The Academic Units window opens. This window lists the units that are associated with a specific domain.

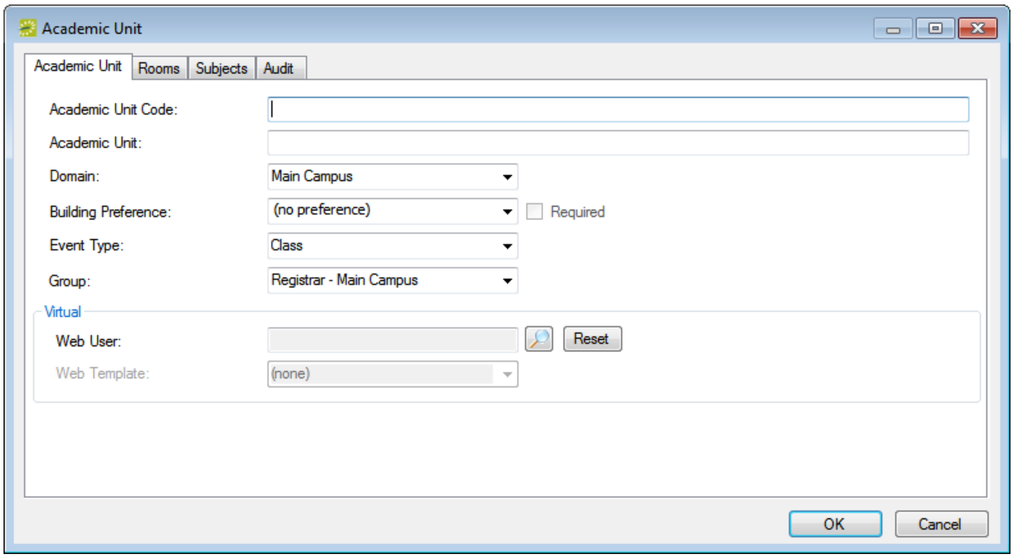
Figure 13-9: Academic Units window



2. On the Domain dropdown list, select the domain for which you are configuring the units, and then click New.

   The Academic Unit dialog box opens. The Academic Unit tab is the active tab.

Figure 13-10: Academic Unit dialog box, Academic Unit tab



3. Enter the information for the new academic unit.

Option	Description
Academic Unit Code	Required field. Abbreviated text that conveys the unit name or description. For example, if a unit is named Department of Life Science, then a code for the unit could be LIFESCI. **Note:** The code can be a maximum of 10 characters, including spaces.
Academic Unit	Required field. The name of the unit. **Note:** The name can be a maximum of 30 characters, including spaces.
Domain	The domain with which the units are associated. **Note:** The value that is displayed here is the value that you selected in Step 2 but you can select a different value if needed.
Building Preference	You can leave the building preference set to the default value of (no preference), or you can select a specific building, area, or view. If you select a specific building, area, or view, then this specific building, area, or view is set to the default value for all courses that are held in this academic unit during Set Preferences mode, but a user can select a different value if needed. If you select Required, then the specific building, area, or view is the only value that is allowed for all courses that are held in this academic unit during Set Preference modes.

Option	Description
Event Type	The event type that is to be used for the room bookings when publishing your courses in EMS for the unit. **Note:** You can also specify the event type at the course type level. The event type specified here is used if you choose not to associate course types with event types. See "Configuring Course Types" on page 481.
Virtual	
Web User Web Process Template	Optionally, you can select a web user for this academic unit and a default web process template. After the term is published, this web user will see the courses that are associated with this academic unit in the View My Requests section of VEMS. To select a web user, click the Search icon to open the Web Users dialog box and search from a list of registered web users. • You can search by User Name or Email Address. • To search a list of all available web users, leave the Search field in the Web Users dialog box blank, and then click Display. • To search for a specific web user, enter a search string in the Search field, and then click Display. **Note:** The string is not case-sensitive, but your search is limited to the exact order of characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of **bob** returns **bob**.worth@emssoftware.com but not dbobbett@emssoftwarew.com. To return these fields to their default values at any time, click Reset.

4. Open the Rooms tab, and optionally do one or both of the following:
   - On the Building dropdown list, select (all) buildings, or select a specific building.
   - On the Room type dropdown list, leave the value set to (all), or select a specific room type.

   All rooms that meet your search criteria are displayed in the Available list.
5. On the Available list, select the room, or CTRL-click to select the multiple rooms to which the academic unit should have access, and then click the Move (>) button to move the selected rooms to the Selected list.
6. Open the Subjects tab, and on the Available list, select the subject, or CTRL-click to select the multiple subjects that are associated with the academic unit's schedule, and then click the Move (>) button to move the selected subjects to the Selected list.

   The Academic Unit dialog box closes. You return to the Academic Units window the newly configured academic unit automatically selected.

Configuring Instructors

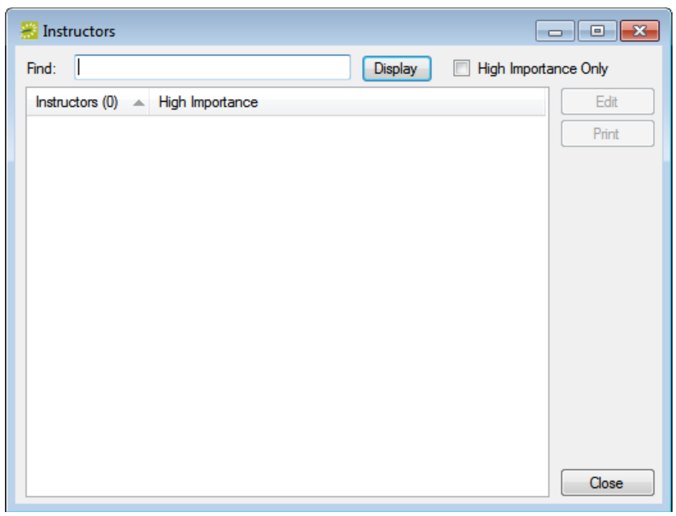
When you configure the instructors for your courses, you have the option of designating an instructor as one of “High Importance.”

To configure instructors

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Instructors.

   The EMS Campus Instructors window opens.

Figure 13-11: EMS Campus Instructors window



2. Optionally, do one or more of the following:

   - To display a list of all your synchronized instructors, click Display.
   - To filter the list by instructor name (last name, then first name), in the Find field, enter a search string.
   - To filter the list by instructor status, select High Importance Only.

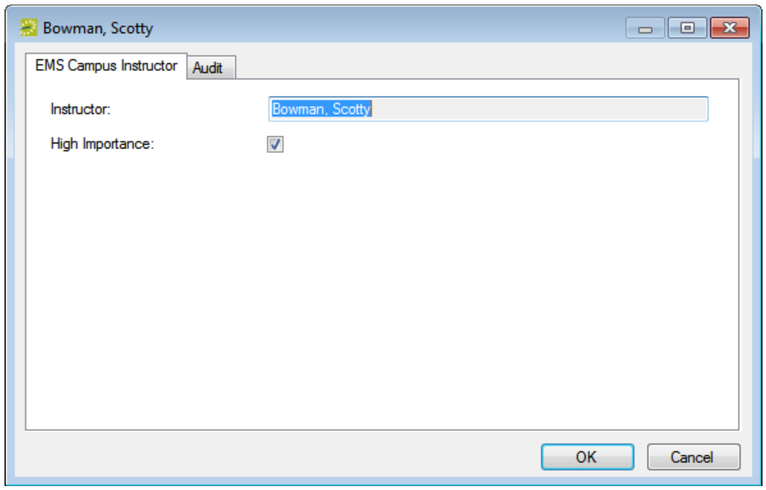
The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of ***Scott*** *returns* ***Scott****, Todd, but not Bowman, Scott.*

The optional “High Importance” designation is used during optimization. Courses that are taught by instructors with this designation have the potential to be given room preference priority.

3. Select the instructor whom you are configuring, and then click Edit.

   The Instructor dialog box opens. The Instructor field displays the name of the selected instructor and you cannot edit this value.

Figure 13-12: Instructor dialog box



4. Select or clear the High Importance option for the instructor as appropriate, and then click OK.

   The Instructor dialog box closes. You return to the EMS Campus Instructors window with the newly configured instructor automatically selected.

Configuring the Primary Academic Unit for a Subject

Typically, a subject is associated with a single academic unit; however, there might be times when you must assign a subject to multiple academic units, or departments. For example, you might need to assign a History class to a department in the College of Arts and Sciences and to a department in the College of Liberal Arts. In this case, you must configure a *primary* academic unit for the subject. A primary academic unit for a subject ensures the following:

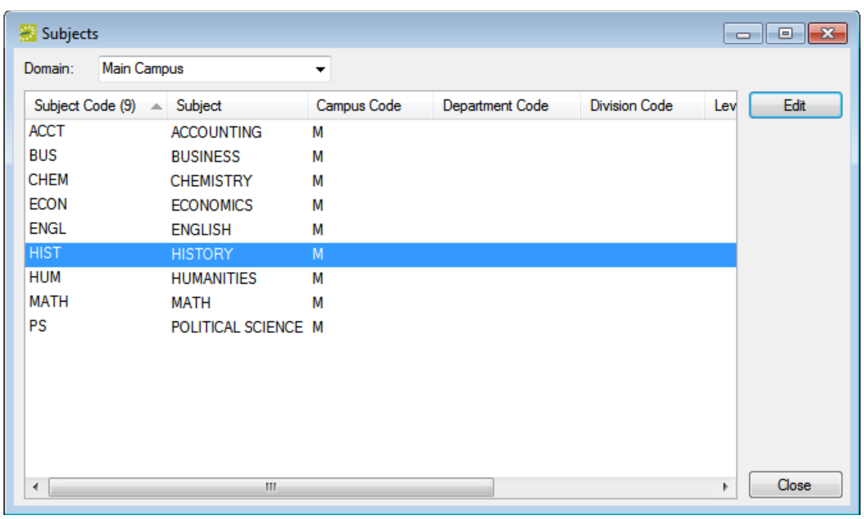
- When EMS assigns a building preference to a course that belongs to a shared subject, it uses the building preference for the primary academic unit.
- When EMS publishes a course that belongs to a shared subject, it uses the Group, Event Type, and Reservation Source for the primary academic unit.
- When a course that belongs to a shared subject is displayed in the Navigator or Course Navigator, the primary academic unit for the course is displayed on the Course Info tab.

To configure a primary academic unit for a subject

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Subjects.

   The Subjects window opens. This window lists all the subjects that are currently configured in your EMS database for the indicated domain.

Figure 13-13: Subjects window

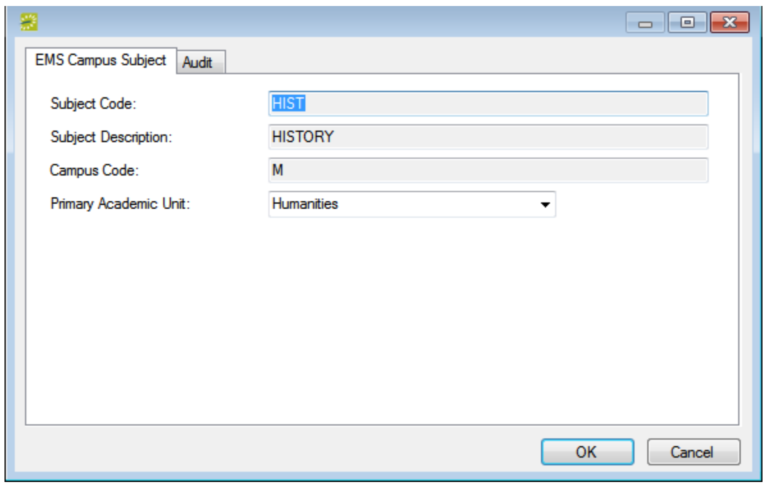


2. On the Domain dropdown list, select the domain for which you are configuring the subject, select the appropriate subject, and then click Edit.

   The Subject dialog box opens. This dialog box lists the code and description for the selected subject and the code for the selected domain.

This information was imported from your SIS and you cannot edit it.

Figure 13-14: Subject dialog box



3. Select the primary academic unit for the subject. (The default value is None.)
4. Click OK.

   The Subject dialog box closes. You return to the Subjects window with the newly configured subject automatically selected.

Configuring Course Types

When you configure your course types, you have the option of assigning an event type at the course type level. If you do not select an event type at the course type level, then the event type that you selected at the academic unit level will be assigned to room bookings that are created for courses scheduled in EMS.

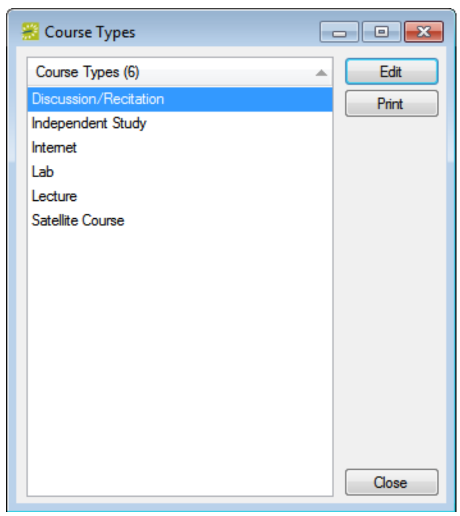
For information about event types at the academic unit level, see "Configuring Academic Units" on page 474.

To configure course types

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Course Types.

   The Course Types window opens. This window lists all your synchronized course types.

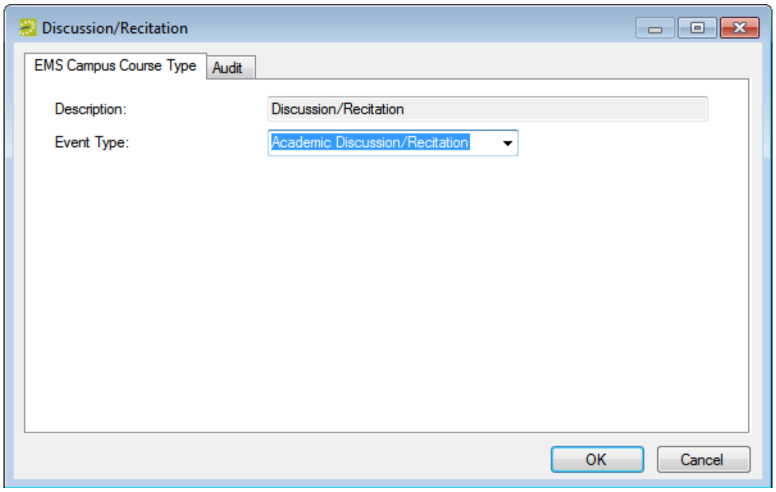
Figure 13-15: Course Types window



2. Select the course type that you are configuring, and then click Edit.

   The Course Type dialog box opens. The Description field displays the description for the selected course type, and you cannot edit this value. See Figure 13-16 on page 482.

Figure 13-16: Course Type dialog box



3. On the Event Type dropdown list, select the event type for the course type, and then click OK.

   The Course Type dialog box closes. You return to the Course Types window with the newly configured course type automatically selected.

If the appropriate event type is not available, you can configure it. See *"Configuring Event Types" on page 43.*

Configuring Course Types/Room Types Matches

When you configure course types/room types matches, you are indicating what room types are appropriate for what course types. For example, a laboratory room type is appropriate for a laboratory class, but not for a general lecture class. The matches that you configure are used for the optimization process. When you are configuring course type/room type matches, you can approach it from either end—that is, you can select a specific course type and then select the room types that are appropriate for the course type, or you can select a specific room type and then select the course types that are appropriate for the room type.

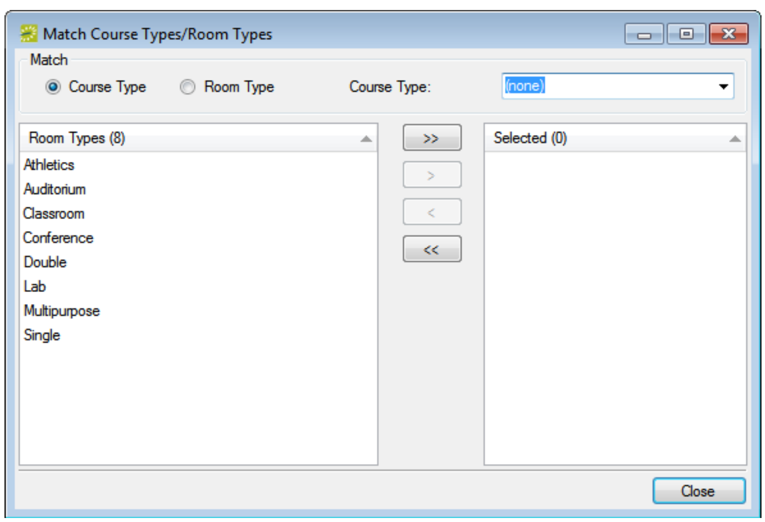
To configure course types/room types matches

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Match Course Types/Rooms Types.

   The Match Course Types/Room Types dialog box opens. By default, Course Type is selected and all the active room types that are currently configured in your EMS database are displayed in the Room Type list.

If the appropriate room type is not available, you can configure it. See *“Configuring Room Types” on page 89.*

Figure 13-17: Match Course Types/Room Types dialog box



2. Do one of the following:
   - To match a course type to one or more room types:
     - Select the course type on the Course Type dropdown list.
     - On the Room Types list, select the room type, or CTRL-click to select the multiple rooms types that are appropriate for the selected course type.
     - Click the Move (>) button to move the selected room types to the Selected list. For example, if you select Discussion/Recitation for the Course Type, then appropriate room types could be Classroom or Conference Room.
   - To match a room type to one or more course types:
     - Click Room Type, and on the Room Type dropdown list, select the room type.
     - On the Course Types list, select the course type, or CTRL-click to select the multiple course types that are appropriate for the selected room type.
     - Click the Move (>) button to move the selected course types to the Selected list. For example, if you select Classroom as the room type, then appropriate course types could be Discussion/Recitation, Lecture, or Independent Study.
3. Click Close.

Working with Time Block Templates

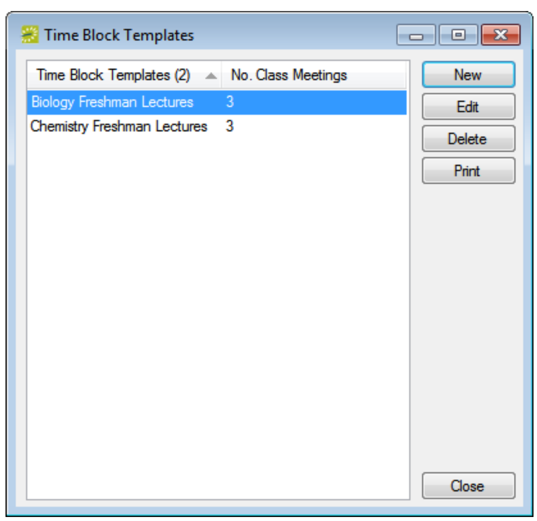
A *time block template* is an aggregate of individual, unique meeting patterns for a course, for example, MWF from 2:00 to 2:50 pm, TR from 1:30 to 2:50 pm, and M from 1 to 3:50 pm. You can use time block templates to limit the meeting patterns that are available during Define & Edit mode or Dual mode, to add weight to courses that comply with the template during optimization, and in academic reporting. You can manually configure time block templates, or if time block patterns from a previously configured term meet your needs, then you can import these time patterns and make a new template. During the configuration of time block patterns, or after importing time block patterns, if any of these patterns are the ones that are the most frequently requested and/or used for courses, then you can designate these patterns as *prime time*.

To work with time block templates

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Time Block Templates.

   The Time Block Templates window opens. This window lists all the time block templates that are currently configured in your EMS database. The window also shows the total number of class meetings possible for each template according to the time block (day and time) pattern for the template.

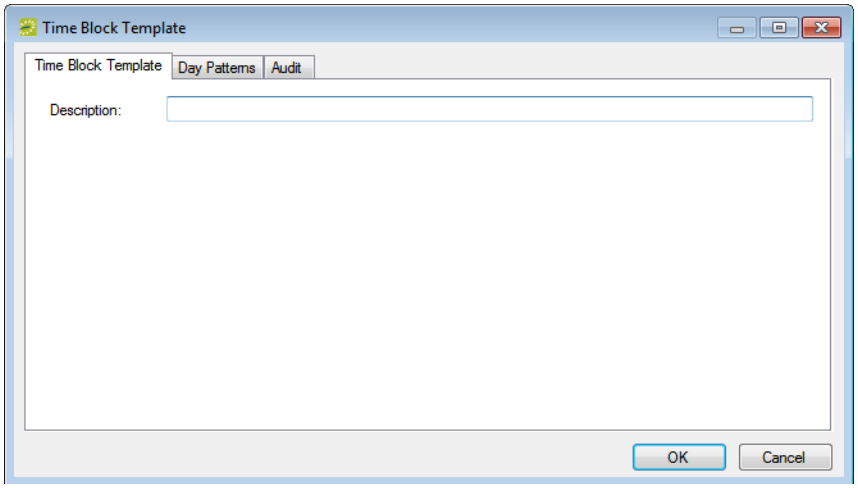
Figure 13-18: Time Block Templates window



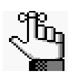
2. Click New.

   The Time Block Template dialog box opens. The Time Block Template tab is the active tab.

Figure 13-19: Time Block Template dialog box, Time Block Template tab



3. In the Description field, enter a name or description for the new time block template.



The description can be a maximum of 50 characters, including spaces.

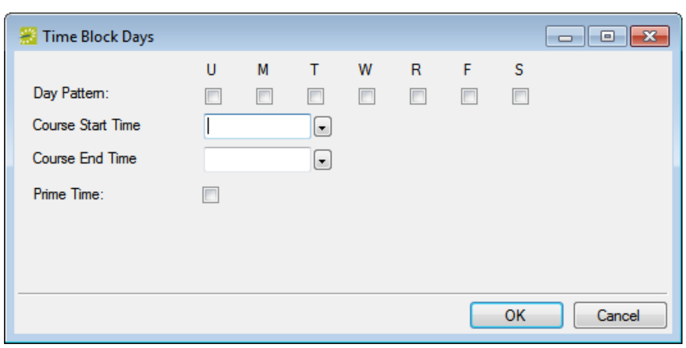
4. Continue to one of the following:
   - "To configure time block templates" below.
   - "To import time block patterns for a template" on page 488.

To configure time block templates

1. Open the Day Patterns tab, and then on the tab, click New.

   The Time Block Days dialog box opens.

Figure 13-20: Time Block Days dialog box



2. On the Time Block Days dialog box, select the day pattern for the course, and then select a start time and an end time.

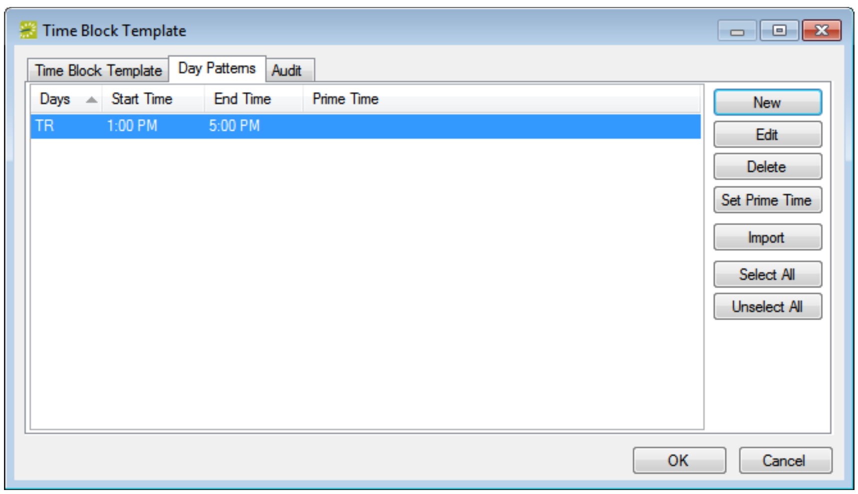
3. Optionally, if the day and time pattern that you are configuring is one that is the most commonly requested and/or used for courses, then select Prime Time.

As described here, you can individually specify a day and time pattern as Prime Time, or after you configure multiple patterns for a course, you can select them on the Day Patterns tab and mark them all as Prime Time in a single step. See Step 6.

4. Click OK.

   The Time Block Days dialog box closes. You return to the Day Patterns tab with the newly configured pattern automatically selected.

Figure 13-21: Time Block Template dialog box, Day Patterns tab



5. Repeat Step 1 through Step 4 until you have configured all the needed time block patterns.

6. Optionally, if multiple patterns that are displayed on the Day Patterns tab are ones that are the most commonly requested and/or used for courses, and you want to set these courses as Prime Time, go to Step 7; otherwise, go to Step 9.

7. CTRL-click to select these patterns, and then select Set Prime Time.

   A message opens, asking you if it is OK to set the selected days as Prime Time.

8. Click OK.

   The message closes and you return to the Day Patterns tab.

9. Click OK.

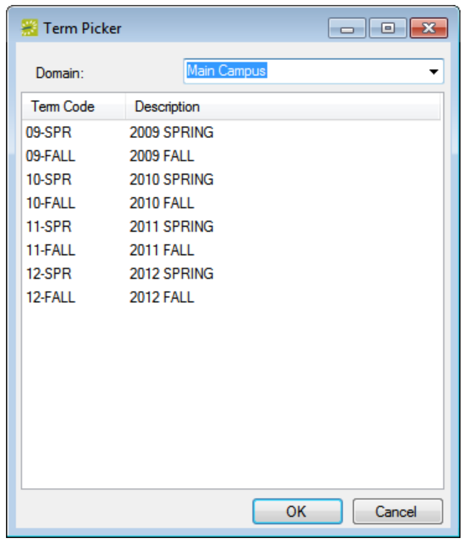
   The Time Block Template dialog box closes. You return to the Time Block Templates window with the newly configured time block template automatically selected.

To import time block patterns for a template

1. Open the Day Patterns tab, and on the tab, click Import.

   The Term Picker dialog box opens. This dialog box lists all active terms by domain.

Figure 13-22: Term Picker dialog box



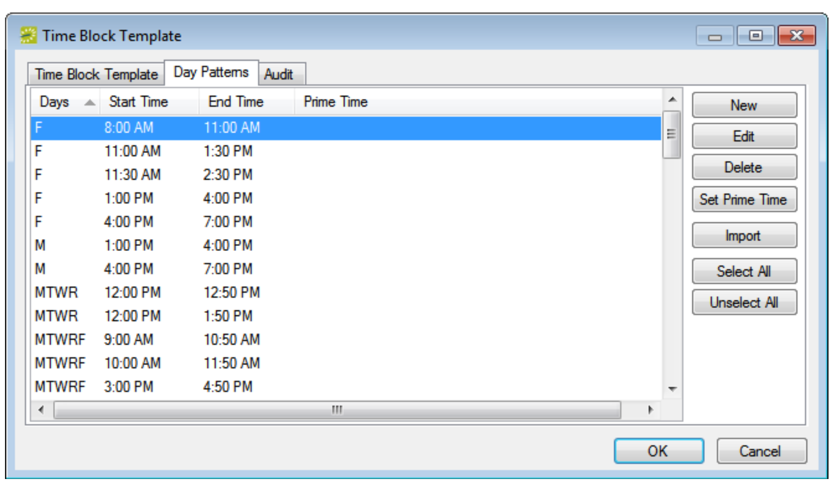
2. On the Domain dropdown list, select the appropriate domain, select the term for the domain that contains the time block patterns that you are importing, and then click OK.

   A message opens indicating that the import was successful.

3. Click OK to close the message and return to the Day Patterns tab.

   The time block template is created. All the imported time patterns for the template are displayed on the tab.

Figure 13-23: Time Block Template dialog box, Day Patterns tab



4. Optionally, do one or both of the following:
   - If any of the patterns that are displayed on the Day Patterns tab are ones that are not needed for the template that you configuring (for example, a non-standard pattern), and you want to delete these patterns, then do the following:
     - Select the pattern, or CTRL-click to select multiple patterns, and then click Delete.

       A message opens asking you if it is OK to delete the selected patterns.
     - Click Yes to delete the selected patterns.

       The message closes and you remain on the Day Patterns tab.
   - If any of the patterns that are displayed on the Day Patterns tab are ones that are the most commonly requested and/or used for courses, and you want to set these courses as Prime Time, then do the following:
     - Select the pattern, or CTRL-click to select multiple patterns, and then click Set Prime Time.

       A message opens, asking you if it is OK to set the selected days as Prime Time.
     - Click Yes to set the selected patterns as Prime Time.

       The message closes and you remain on the Day Patterns tab.
5. Click OK.

   The Time Block Template dialog box closes. You return to the Time Block Templates window with the newly configured time block template automatically selected.

Appendix A
System Parameters

This appendix details the EMS system parameters, the VEMS system parameters, and the EMS Kiosk system parameters that you can configure as the EMS administrator.

This appendix covers the following topics:

EMS System Parameters

Table A-1: EMS System Parameters

Area	Description
Academic Import (Academic Import Module)	**Academic Import Days of the Week:** Indicates how EMS determines the days of the week in import data. **Note:** If a positional option is selected, then the system does not recognize standard day of the week abbreviations. For example, if Positional, Monday First is selected and the import data file contains MWF as the indicator for days of the week for a class, then the system interprets this as a Monday/Tuesday/ Wednesday class because there are no spaces between the characters. A Monday/Wednesday/Friday class is correctly indicated, in Positional, Monday First format as M_W_F, where the underscores represent spaces.
Billing	**Default Rounding Method for Hourly Pricing:** Allows you to specify the time increment, from one minute to sixty minutes, by which to round the time for hourly pricing.
Billing	**Determine Invoice Due Date by Adding "xx" Days:** Sets the number of days specified to determine the invoice due date, for example, 30 days.
Billing	**Service Order End Time if None Specified:** Select Event Time or Reserved Time as the Service Order End Time, unless otherwise specified.
Campus	**Academic Book Course Color:** Color used for courses displayed in the Academic Book.
Campus	**Academic Book Crosslisted Course Color:** Color used for cross-listed courses displayed in the Academic Book.
Campus	**Academic Unit Title Plural:** System-defined label for Academic Units. (Typically renamed to "Departments.")
Campus	**Academic Unit Title Singular:** System defined label for Academic Unit. (Typically renamed to "Department.")
Campus	**Accumulate Enrollment On Shared Space Courses (non-crosslisted only):** Accumulate enrollment on courses that share space instead of using the largest enrollment (which is the approach for crosslisted courses).
Campus	**Allow Cross-Domain Cross Listings**: If set to "Yes," this indicates that courses can be cross-listed across multiple domains.
Campus	**Allow Sync of Academic Units from SIS**: If set to "Yes," the Synchronize Academic Units option is enabled in Academic > Configuration.
Campus	**Auto Sync - Automatically Process Cancellations:** If auto-sync is enabled, then course cancellations in your SIS are automatically processed in EMS.
Campus	**Auto Sync - Automatically Process New Courses not assigned to a Room:** If auto-synch is set to "Yes," then new courses without a room in your SIS are automatically processed in EMS.
Campus	**Auto Sync - Automatically Process Room Capacity Violations:** If auto-synch is set to "Yes," if a new course is added in your SIS that violates room capacity, then the course is automatically processed in EMS.

Table A-1: EMS System Parameters (continued)

Area	Description
Campus	**Auto Sync User:** The EMS user account that is used by the auto-sync service for authentication.
Campus	**Course User Defined Field 01:** Maps an EMS user-defined field to a custom field in your SIS.
Campus	**Course User Defined Field 02:** Maps an EMS user-defined field to a custom field in your SIS.
Campus	**Course User Defined Field 03:** Maps an EMS user-defined field to a custom field in your SIS.
Campus	**Course User Defined Field 04:** Maps an EMS user-defined field to a custom field in your SIS.
Campus	**Course User Defined Field 05:** Maps an EMS user-defined field to a custom field in your SIS.
Campus	**Course User Defined Field 06:** Maps an EMS user-defined field to a custom field in your SIS.
Campus	**Course User Defined Field 07:** Maps an EMS user-defined field to a custom field in your SIS.
Campus	**Course User Defined Field 08:** Maps an EMS user-defined field to a custom field in your SIS.
Campus	**Course User Defined Field 09:** Maps an EMS user-defined field to a custom field in your SIS.
Campus	**Course User Defined Field 10:** Maps an EMS user-defined field to a custom field in your SIS.
Campus	**Day Label - First Day of the Week:** The default value is Sunday. Determines which day of the week is designated as the first day in various areas of EMS Campus such as the Academic Book. The other allowed value is Monday.
Campus	**Day Label 1 - Sunday:** Determines the label that indicates Sunday in various areas of EMS Campus such as the Time Block Template configuration area. The default value is U.
Campus	**Day Label 2 - Monday:** Determines the label that indicates Monday in various areas of EMS Campus such as the Time Block Template configuration area. The default value is M.
Campus	**Day Label 3 - Tuesday:** Determines the label that indicates Tuesday in various areas of EMS Campus such as the Time Block Template configuration area. The default value is T.
Campus	**Day Label 4 - Wednesday:** Determines the label that indicates Wednesday in various areas of EMS Campus such as the Time Block Template configuration area. Default value is W.
Campus	**Day Label 5 - Thursday:** Determines the label that indicates Thursday in various areas of EMS Campus such as the Time Block Template configuration area. Default value is R.
Campus	**Day Label 6 - Friday:** Determines the label that indicates Friday in various areas of EMS Campus such as the Time Block Template configuration area. Default value is F.

Table A-1: EMS System Parameters (continued)

Area	Description
Campus	**Day Label 7 - Saturday:** Determines the label that indicates Saturday in various areas of EMS Campus such as the Time Block Template configuration area. Default value is S.
Campus	**Default Cancel Reason:** Used for courses when publishing a term.
Campus	**Default Event Type:** Used for courses when publishing a term.
Campus	**Default Group:** Used for courses when publishing a term.
Campus	**Default Reservation Source:** Used for courses when publishing a term.
Campus	**Default Seat Fill Percentage:** Used to determine an appropriate room size for a class of a specific estimated enrollment (typically 100%).
Campus	**Default Setup Type:** Used to build a setup type and capacity (from the SIS) when synchronizing rooms (typically “classroom”).
Campus	**Domain Title Plural:** System defined label for Domains (typically renamed to “Campuses”).
Campus	**Domain Title Singular:** System defined label for Domain (typically renamed to “Campus”).
Campus	**Final Exam Event Type:** Used when creating a final exam booking.
Campus	**Include CRN in Reservation Event Name:** Include the Course Reservation Number (CRN) in front of the event name post-publish in all areas of EMS Campus where the event name is used.
Campus	**Keep Sibling Crosslisting Room Assignments in Sync:** A sibling cross-list describes a crosslist that has at least three courses and the two child courses have a meeting pattern that is not shared with the parent course. If set to “Yes,” then these sibling crosslist courses become a matched set and are placed in Crosslist status and not Conflict.
Campus	**Large Class Size (If More Than XX Students):** Used to determine what constitutes a “large” class for weighting by enrollment in the room optimization process. Explained in detail in the Room Optimization section of the EMS User’s Manual.
Campus	**Large Class Size Weight Adjustment:** Used to adjust the optimization weighting for a “large” class. Explained in detail in the Room Optimization section of the EMS User’s Manual.
Campus	**Lock Academic Unit Room Access:** Used during optimization process. If set to Yes, a room will be assigned to an Academic Unit' (i.e. Department) course only if that Academic Unit owns the room.
Campus	**Manually Update SIS/ERP System After Publishing:** If set to “No”, course location in the SIS will be automatically updated during the publishing process.
Campus	**SIS/ERP Title:** System defined label for SIS/ERP (typically “SIS”).
Campus	**Small Class Size (If Less Than XX Students):** Used to determine what constitutes a “small” class for weighting by enrollment in the room optimization process. Explained in detail in the Room Optimization section of the EMS User’s Manual.

Table A-1: EMS System Parameters (continued)

Area	Description
Campus	**Small Class Size Weight Adjustment:** Used to adjust the optimization weighting for a “small” class. Explained in detail in the Room Optimization section of the EMS User’s Manual.
Campus	**Subject Title Plural:** System defined label for Subjects (typically “Subjects”).
Campus	**Subject Title Singular:** System defined label for Subject (typically “Subject”).
Campus	**Sync Course Dates Without Start/End Times:** If set to No, Courses with incomplete course date records (i.e. missing start/end times or dates) will not be imported into EMS Campus.
Campus	**Web Service URL:** The URL to the Campus Planning Interface service.
Email	**Enable Email Support:** When set to **“**Yes,**”** you can, directly from EMS, email a Confirmation to the contact person for the group that is making a reservation.
Email	**SMTP — Save Email Attachments (Database Size Will Increase):** When set to “Yes,” an option is available to save all attachments (invoices, confirmations, and so on) when emailing a group and/or contact.
Email	**SMTP – Use SSL:** Used if your SMTP Server is enabled for SSL
Groups & Contacts	**Allow Change to External Reference:** When set to “Yes,” allows users to change external reference on groups and contacts.
Groups & Contacts	**Allow Search by External Reference:** When set to “Yes,” allows users to search groups and contacts by external reference.
Groups & Contacts	**Default Address Format as International:** Defaults the International checkbox to true when adding a new group or contact.
Groups & Contacts	**Default Country:** Defaults the Country field to the value that is specified when adding a new group or contact.
Groups & Contacts	**Default Pricing Plan For New Groups:** Used when a creating a new group record.
Groups & Contacts	**Default Require Contact:** Used when creating a new group record.
Groups & Contacts	**Group Bad Status Title:** Label used for “Bad” value on the Group Status dropdown list.
Groups & Contacts	**Group OK Status Title:** Label used for “OK” value on the Group Status dropdown list.
Groups & Contacts	**Group Warning Status Title:** Label used for “Warning” value on the Group Status dropdown list.
Groups & Contacts	**Offer Dropdown Selection of Groups:** When set to “Yes,” the system automatically populates the Group window with all active groups in your EMS database. A user can enter a search string in the Starts with field to and the list of groups that meet the search criteria is dynamically updated as the user enters the string. When set to “No,” users must manually search for groups.
Groups & Contacts	**Pricing Plan Required For Groups:** When set to “Yes,” users must specify a pricing plan for new groups and contacts.
Groups & Contacts	**Show Account Field on Group:** When set to “Yes,” an Account field is displayed on Group/Contact records.

Table A-1: EMS System Parameters (continued)

Area	Description
Groups & Contacts	**Web Users Linked to Groups via External Reference:** Links group and web user records if group records are defined as individual employees (i.e., not departments) in your system. When making a new reservation in EMS, the web user field is automatically populated based on the group selected.
Hoteling (EMS Workplace)	**Reservation Book "Checked-In" Color:** The color used when a group/ employee has checked in for the day.
Hoteling (EMS Workplace)	**Reservation Book "Checked-Out" Color:** The color used when a group/ employee has checked out for the day.
Hoteling (EMS Workplace)	**Reservation Book "Not-Checked-In" Color:** The color used when a group/ employee has not yet checked in for the day.
Labels	**1st Contact Title:** The label for the 1st Contact field.
Labels	**2nd Contact Title:** The label for the 2nd Contact field.
Labels	**Area Title Plural:** The plural label for the Area field.
Labels	**Area Title Singular:** The singular label for the Area field.
Labels	**Billing Reference Title Plural:** The plural label for the Billing Reference field.
Labels	**Billing Reference Title Singular:** The singular label for the Billing Reference field.
Labels	**Building Title Plural:** The plural label for the Building field.
Labels	**Building Title Singular:** The singular label for the Building field.
Labels	**Check Number Title:** The label for the Check No. field.
Labels	**Confirmation Grand Total Title:** The label for the Confirmation Grand Total field.
Labels	**Confirmation Subtotal Title:** The label for the Confirmation Subtotal field.
Labels	**Default Phone 1 Label:** The default label for the first phone-type number field.
Labels	**Default Phone 2 Label:** The default label for the second phone-type number field.
Labels	**Event Coordinator Title:** The label for the Event Coordinator field.
Labels	**External Reference Title:** The label for the External Reference field.
Labels	**Group Title Plural:** Plural of the term that is used in your organization's EMS system to refer to people who hold events in your facility (for example, employees, groups, clients, customers, and so on).
Labels	**Group Title Singular:** Singular of the term that is used in your organization's EMS system to refer to people who hold events in your facility (for example, employees, groups, clients, customers, and so on).
Labels	**Payment Type Title Plural:** The plural label for the Payment Type field.
Labels	**Payment Type Title Singular:** The singular label for the Payment Type field.
Labels	**Phone/Fax Labels List:** Specifies the options that are available in fields shown for phone numbers. Enter the text items, separated by semicolons, that you want to appear in the dropdown menu for phone-type numbers. The default is "Phone; Fax; Mobile; Pager; Other".

Table A-1: EMS System Parameters (continued)

Area	Description
Labels	**PO Number Title Plural:** The plural label for the PO Number field.
Labels	**PO Number Title Singular:** The singular label for the PO Number field.
Labels	**Room Size Title:** The label for the Room Size field.
Labels	**Room Title Plural:** Plural of the term that is used in your organization's EMS system refer to reservable spaces (e.g., rooms, fields, and so on).
Labels	**Room Title Singular:** Singular of the term that is used in your organization's EMS system refer to reservable spaces (e.g., rooms, fields, and so on).
Labels	**Sales Category Title Plural:** The plural label for the Sales Category field.
Labels	**Sales Category Title Singular:** The singular label for the Sales Category field.
Labels	**Salesperson Title:** The label for the Salesperson field.
Notifications	**Allow Users To Delete Notifications:** When set to "Yes," allows users to delete notifications.
Notifications	**Exclude Building Closures On Notifications:** When set to "No," building closures are not excluded from notification date calculations.
Notifications	**Exclude Weekends On Notifications:** When set to "No," weekends are not excluded from notification date calculations.
Notifications	**Ignore Building Closure/Weekend Notification Settings Beyond xx Days:** Specifies the number of days after which building closures and/or weekends are ignored for notification date calculations.
PAM	**Allow date/time changes on PAM Bookings in EMS Client:** If set to "No," then EMS users are prevented from making any changes to bookings created on VEMS using the PAM module. **Note:** Before enabling, please contact your DEA consultant to discuss.
PAM	**PAM Web Service URL:** The URL to the optional Plan A Meeting (PAM) module. Specify only if the optional PAM module is enabled in your environment.
Reports	**Calendar Inquiry Print Format:** The format that is automatically selected when the Print button is clicked for the Event Calendar report. **Note:** You select the format for the Event Schedule report as you run the report.
Reports	**Include Activities on Service Order Forms:** If set to "No," activities are not included on service order forms.
Reports	**Include Catering Details on Setup Worksheet:** If set to "Yes," catering details are displayed on the Setup Worksheet report.
Reports	**Include this Notes Category on Service Order Forms:** Allows you to select the notes category on service order forms.
Reports	**Reset Page Numbers by SO on Service Order Forms:** If set to "Yes," page numbers are reset by the service order on service order forms.
Reports	**Room Description Format:** Determines how room information is displayed in reports: as a code or as a description, with or without building code.

Table A-1: EMS System Parameters (continued)

Area	Description
Reservations	**Allow Bookings to Be Added to Outlook Personal Calendar:** If set to “Yes,” then EMS users can click an Outlook option to add bookings to their personal calendars.
Reservations	**Book Building Closed Color:** The color that is used in the Reservation Book to indicate building closures.
Reservations	**Book Holiday Color:** The color that used in the Reservation Book to designate holidays.
Reservations	**Book Weekend Color:** The color that is used in the Reservation Book to designate weekends.
Reservations	**Building Display:** Indicates how building information is to be displayed in reservations—by building code or building description.
Reservations	**Default Event Coordinator:** When set to “No,’ no default value is provided when a user is making a reservation in the Reservation Wizard.
Reservations	**Exclude Room Charge from Services Indicator:** In various EMS locations (the Reservation Book, the Navigator, the Edit Booking form, and so on) EMS provides an indication that services exist for a booking. If set to “Yes,” then a room charge category is excluded from displaying as a service on the booking.
Reservations	**Group Bookings by UTC times and keep together on Video Conferencing Reservations:** When set to “Yes,” then any changes that are made to a booking that belongs to video conference occurrence cascade to the other related bookings within the occurrence.
Reservations	**Lock Booking Details if Booking Is Locked:** If set to “No,” the booking details remain editable even when the booking is locked because of invoicing or its age.
Reservations	**Lock Bookings Older Than “xx” Days:** The number of days after a booking has occurred that is automatically locked and cannot be edited.
Reservations	**Lock Occurring/Past Reservations For Non-Administrators:** If set to “Yes,” then a reservation is locked for editing by non-administrator users after one booking in the reservation has occurred. EMS administrators have full editing capability.
Reservations	**Max Length for Event Name:** The maximum number of characters, including spaces, that a user can enter in the Event Name field when creating a new reservation.
Reservations	**Room Display:** Indicates how room information is to be displayed in reservations—by room code or room description.
Reservations	**Update Billing Information When Changing Group:** If set to “Yes,” automatically updates the billing information when a user selects a different group for a reservation.
Reservations	**Update Room Charge When Room Changes:** If set to “Yes,” automatically updates the room charge when a user selects a different room for a reservation.
Reservation	**Use Billing Reference Allocation:** Enables an EMS user to allocate reservation, booking, or service order charges across multiple Billing Reference numbers by percentage.

Table A-1: EMS System Parameters (continued)

Area	Description
Reservations	**Use Calendar Styles:** Select Yes or No to enable the use of calendar styles on the Event Schedule report and on the Event Calendar report.
Reservation	**Use PO Number Allocation:** Enables an EMS user to allocate reservation, booking, or service order charges across multiple PO Numbers by percentage.
Reservation	**Validate Billing Reference:** Validates the Billing Reference entered against the Billing Reference table. Specify No Validation, Valid Only, or Warning for Invalid (Blanks Are Invalid), or Warning for Invalid (Blanks are Valid).
Reservation	**Validate PO Number:** Validates PO Numbers entered against the PO Number table. Specify No Validation, Valid Only, or Warning for Invalid (Blanks Are Invalid), or Warning for Invalid (Blanks are Valid).
Reservations	**Validation of Building Hours:** Specify On Reserved Time or On Event Time.
Reservations	**Warn When Booking More Than “xx” Months in Future:** System warns user if they attempt to create a reservation that has bookings that will take place x number of months in the future.
Resources	**Check Inventory When Using Reservation Tools:** If set to “Yes,” the system automatically verifies resource availability when you copy details, copy reservations or change the date, time or room for multiple bookings.
Resources	**Use Resource Selector:** If set to “Yes,” a special resource selector window is used when adding detail to bookings.
Service Orders	**Auto Adjust Service Order Times:** If set to “Yes,” then Service Order Times are automatically adjusted when a booking is edited.
Service Orders	**Default Service Order Times and Count from Booking:** When creating a new service, sets the default service order times to the event/reserved time. If set to (none), no default service order times are set.
Service Orders	**Show External Service Option on Categories:** When Set to “Yes,” an External Service field is displayed on the Category dialog box for a Catering category or a Resource w/ Service Orders category.
System	**Dashboard Check Interval:** Indicates how frequently the Dashboard should check for updates. **Note:** Setting this for more frequent updates might impact application performance.
System	**Disable Online Help:** If set to “Yes,” then Online Help is not available for the EMS system. (The link Help > Contents is not displayed on the EMS main menu.)
System	**Hide Currency Indicator:** Hides the currency symbol (for example, $) on confirmations and invoices.
System	**Server Time Zone:** Sets the time zone for the server to the indicated value.
System	**Use Integrated Authentication Only:** If set to “Yes,” then EMS users are required to manually log-in and authenticate against LDAP.
System	**Virtual EMS URL:** The VEMS URL that is displayed in VEMS emails and EMS group notifications.

VEMS System Parameters

The default values for VEMS parameters are also applied as the default values for new web process templates; however, you can edit these values for the template.

Table A-2: VEMS System Parameters

Area	Description
Account Management	**Allow Web User to Opt Out of Automatic Emails:** Allows web users to specify if they want to receive any automatic emails (for example, confirmation, reminders, and so on) from VEMS.
Account Management	**Auto Create Web User Account (for Integrated Authentication):** A web user account is automatically created via the integrated authentication process if a new user “hits” the VEMS site.
Account Management	**Default Security Template for User:** The default VEMS Web Security template that is assigned to new web users.
Account Management	**Field Used to Authenticate Web User:** Indicates the field—Email Address, Network ID, or External Reference—that is used to authenticate a web user that logs in to VEMS.
Account Management	**Note Label on Account Management:** Label for the large text field on the Account Management window.
Account Management	**Security Status for User:** This entry becomes the default status (Active, Inactive, Pending) for new web users.
Account Management	**On Login Automatically Set Web User Time Zone to First Building’s Time Zone:** After a VEMS user logs in, the time zone for the user is set to the time zone for the first building that is stored in the EMS database. If this building, however, is not listed on the Facilities dropdown list, then the time zone is set to the first available time zone on the Time Zone dropdown list, but the user can always select a different value if one is available.
Authentication	**Portal Authentication Cookie Key:** See the Virtual EMS (VEMS) Integrated Authentication Configuration instructions.
Authentication	**Portal Authentication Method:** See the Virtual EMS (VEMS) Integrated Authentication Configuration instructions.
Authentication	**Portal Authentication Variable:** See the Virtual EMS (VEMS) Integrated Authentication Configuration instructions.
Book	**Display Setup/Teardown Times:** If enabled, setup/teardown bars are visible on reservations in the Reservation Book.
Book	**Ignore Room Display on Web Flag:** Ignores the Room Display on Web setting to determine if an event should be marked as ‘Private’.
Book	**Room Description Format in Book:** Determines how room information is formatted. Options are Room Description or Room Code.
Booking Details	**Make Add to Personal Calendar Link Appear:** If this option is set to Yes, the Add to Personal Calendar link is displayed when a web user views the details of an event.
Booking Details	**Show Social Networking Options:** If set to “Yes,” then displays links to various social networking sites when a user views the details of a booking.

Table A-2: VEMS System Parameters (continued)

Area	Description
Browse Events	**Browse Event Default Display Format:** Determines the initial format in which the Browse Events function displays information. Options are: Day, Week List, Month List, Week Calendar, and Month Calendar.
Browse Events	**Collapse Bookings into Reservations in Browse Events:** Specify No or Yes to collapse bookings into reservations.
Browse Events	**Drop Events from Daily View After They Occur:** Specify No or Yes to drop events from the daily view after the event occurs.
Browse Events	**Location Format:** Determines how location information is displayed in the list views of the Browse Events function.
Browse Events	**Maximum Number of Events/Day to Display:** Controls the number of events that are available for display, per day, in the daily views of the Browse Events function. **Note:** In some circumstances, you must click a link to see additional events.
Browse Events	**Maximum Number of Events/Day to Display in Monthly View:** Controls the number of events that are available for display, per day, in the monthly views of the Browse Events function. **Note:** In some circumstances, you must click a link to see additional events.
Browse Events	**Maximum Number of Events/Day to Display in Weekly View:** Controls the number of events that are available for display, per day, in the weekly views of the Browse Events function. **Note:** In some circumstances, you must click a link to see additional events.
Browse Events	**Secondary Event Sort (After Date/Time):** If date and time information for multiple events are identical, Location or Event Name is used to sort events on the calendar.
Browse Events	**Show End Time in Browse Events:** If this option is set to No, only start time is shown in Browse Events.
Browse Events	**Show Group Name in Browse Events:** If set to “Yes,” then the name of the group that is holding an event is shown in Browse Events.
Browse Events	**Show Group Type Filter in Browse Events**: If set to “Yes,” then the group type filter is an option in Browse Events.
Browse Events	**Show Location on Browse Events:** If set to “Yes,” then the event location is displayed in the calendar view on the Browse Events page.
Browse Events	**Show Room Type Filter in Browse Events:** If set to “Yes,” then a Room Type filter is displayed on the Browse Events page.
Browse for Space	**Description in Event Bar on Browse for Space:** Determines what information should show in the free/busy bar in the Book. Options include: None, Event Name or Group Name.
Browse for Space	**Number of Hours to Show on Browse for Space:** Determines the number of hours that are displayed on the grid. Options include: 12 Hours (optimized for a 800x600 display) and 16 Hours (optimized for a 1024 x768 display).
Browse for Space	**Start Time on Browse for Space:** Determines the start time for the grid.
Email	**Account to Use for Sending Email:** This is the email account against which outgoing email from VEMS is authenticated.

Table A-2: VEMS System Parameters (continued)

Area	Description
Email	**Allow Email My Password:** Allows web users to email their passwords to themselves.
Email	**Default Subject for Email:** This entry appears in the Subject line of email the reservation summary email that is generated when a web user submits a reservation.
Email	**Email Address of Sender:** This entry indicates the “From” email address in the reservation summary email that is generated when a web user submits a reservation.
Email	**Format for Request Summary:** Specify a detailed or summarized report for the reservation summary email that is generated when a web user submits a reservation.
Email	**Name of Email Sender:** This entry indicates the “From” name in the reservation summary email generated when a web user submits a reservation.
Email	**Name or IP Address of SMTP Server:** SMTP server used solely for VEMS.
Email	**Password of Email Account:** This entry indicates the password for the email account.
Email	**Send Request Summary upon Submit:** Determines whether reservation summary information is emailed to the web users when a reservation is submitted.
Email	**SMTP Server Port:** The default email port for your SMTP server.
EMS for Outlook	**Outlook Book Bookings Color:** Used for the EMS for Outlook module. Color used to designate “busy” times for rooms.
EMS for Outlook	**Outlook Book Bookings Conflict Color:** Used for the EMS for Outlook module. Color used to identify a conflict for a room selection.
EMS for Outlook	**Outlook Book Selected Booking Color:** Used for the EMS for Outlook module. Color used to designate room selection.
EMS for Outlook	**Show Attendees in Book:** If set to “Yes,” then the attendees for an event are displayed in the Grid view for the event.
EMS for Outlook	**Text to display under icon in for EMS for Outlook:** The text that is displayed for the EMS for Outlook desktop icon.
Floor Plans	**Floor Mapping Web Service URL:** Used for the Floor Plan module. URL address for the floor mapping web service.
Labels	**Event Title Plural:** This is the plural version of the label for “events.”
Labels	**Event Title Singular:** This is the singular version of the label for “event.”
Labels	**Label for Login box:** The label for the User ID field on the Login page.
Labels	**Label for “Private” in Book:** The default label for a private event entry in various windows, for example, Browse for Space page.
Reservations - Checkout	**Allow Billing Reference Lookup:** If set to “Yes,” then a user can look up pre-configured billing references when making a reservation in the Reservation Wizard.

Table A-2: VEMS System Parameters (continued)

Area	Description
Reservations - Checkout	**Allow PO Number Lookup:** If set to “Yes,” then a user can look up pre-configured PO numbers when making a reservation in the Reservation Wizard.
Reservations - Checkout	**Allow Temporary Contacts:** If set to “Yes,” then a user can specify a temporary contact for a group when making a reservation in the Reservation Wizard.
Reservations - Checkout	**Attachments Allowed Extensions:** The allowed attachment types for room requests.
Reservations - Checkout	**Billing Reference Validation:** Select from No Validation, Required But Not Validated, or Required and Validated.
Reservations - Checkout	**PO Number Validation:** Select from No Validation, Required But Not Validated, or Required and Validated.
Reservations - Checkout	**Require Contact Email:** Specify No or Yes to require contact email at checkout.
Reservations - Checkout	**Require Contact Phone:** Specify No or Yes to require a contact phone number at checkout.
Reservations - Checkout	**Reservation Comment Type on Checkout:** Select the reservation comment type that is to be displayed upon checkout.
Reservations - Checkout	**Show 2nd Contact:** If set to “Yes,” then the 2nd contact fields are displayed on the reservation upon checkout.
Reservations - Checkout	**Show Billing Reference on Reservation:** If set to “Yes,” then the billing reference is displayed on the reservation upon checkout.
Reservations - Checkout	**Show PO Number on Reservation:** If set to “Yes,” then the PO number is displayed on the reservation upon checkout.
Reservations - Checkout	**Attachments Allowed on Room Request:** If set to “Yes,” then a user can add attachments to a room request.
Reservations – Room Request	**Allow User to Change Setup Count in Selected Locations Area:** If set to “Yes,” then a user can change the setup count in the “cart” after adding a room.
Reservations – Room Request	**By Default, Enable Add to Calendar Checkbox (for PAM):** Defaults the Add to Calendar checkbox to Yes in the optional Plan-a-Meeting module.
Reservations – Room Request	**Default Pricing Plan:** Indicates the default pricing plan that is used to display pricing in VEMS.
Reservation – Room Request	**Default Room Availability View:** When a user searches for available rooms, this parameter drives the default display. Options are Grid, List or Floor Map.
Reservations – Room Request	**Default Value for Attendance:** A default value for attendance when users make a room request.
Reservations – Room Request	**Display Areas as Filter:** If set to “Yes,” areas are available as a filter. (Shown as a dropdown list.)
Reservations – Room Request	**Exclude Closures from Date Calculations:** If set to Yes, closures are not taken into account on booking rule date calculations.
Reservations – Room Request	**Exclude Weekends from Date Calculations:** If set to Yes, weekends are not taken into account on booking date calculations.

Table A-2: VEMS System Parameters (continued)

Area	Description
Reservations – Room Request	**Allow Single Day Requests for Unavailable Rooms (for PAM):** If set to "Yes," then a PAM user making a one day booking request can book an unavailable room.
Reservations – Room Request	**Hide Daily Recurrence Option:** Hide the daily recurrence option on the Room Request page.
Reservations – Room Request	**Hide Monthly Recurrence Option:** Hide the monthly recurrence option on the Room Request page.
Reservations – Room Request	**Hide Random Recurrence Option:** Hide the random recurrence option on the Room Request page.
Reservations – Room Request	**Hide Weekly Recurrence Option:** Hide the weekly recurrence option on the Room Request page.
Reservations – Room Request	**Number of Available Rooms upon Search:** Specify the number of available rooms that are displayed.
Reservations – Room Request	**Override Default Room Setup/Teardown Times:** If set to "Yes," the default setup/teardown times defined for a room are ignored and the Setup Time in Minutes for All Rooms and Teardown Time in Minutes for All Rooms parameters are used instead.
Reservations – Room Request	**Reservation Source for New Reservation:** Specify the only reservation source that a user can select for a reservation.
Reservations – Room Request	**Sequence of Available Rooms upon Search:** Select from Room Description or Book Sequence.
Reservations - Room Request	**Setup Time in Minutes for All Rooms:** If the Override Default Room Setup/ Teardown Times parameter is set to "Yes," this value is used for the setup time.
Reservations – Room Request	**Setup Type Validation Rule:** Determines how VEMS deals with the attendance specified in a request as compared to the capacity for a room. Four options are available: • **No Setup and No Validation:** Do not show the Setup Type field in the reservation process and do not validate the number in the Attendance field against room capacities (i.e., show all available rooms). • **Validate But Don't Show:** Do not show the Setup Type field but validate the number in the Attendance field against the default capacity (regardless of setup type) for each room. • **Show and Validate:** Show the Setup Type field and validate the attendance and setup type against setup type/capacity pairings for the rooms. • **Show But Don't Validate:** Show the Setup Type field but do not validate setup type or attendance.
Reservations – Room Request	**Show Additional Filters Initially:** If set to "Yes," then by default, the Availability Filters section is expanded.
Reservations – Room Request	**Show Attendance on Room Request:** Specify No or Yes to display the Attendance field in a Room Request.
Reservations – Room Request	**Show Check Availability on Classic Request:** If this option is set to Yes, the Check Availability option is displayed on the Room Request page (web process template mode = Request).

Table A-2: VEMS System Parameters (continued)

Area	Description
Reservations – Room Request	**Show Feature Filter:** Set to “Yes” to show the Feature list as a room request search option.
Reservations – Room Request	**Show Floor Filter:** Set to “Yes” to show the Floor list as a room request search option.
Reservations – Room Request	**Show Room Pricing:** Set to “Yes” to show the room’s price in a Room Request.
Reservations – Room Request	**Show Room Type Filter:** Set to “Yes” to show the Room Type list as room request search option.
Reservations – Room Request	**Show Room Drop Down on Classic Request:** If set to “Yes,” then the Rooms dropdown list is displayed on the Room Request page if the web process template mode = Request.
Reservations – Room Request	**Teardown Time in Minutes for All Rooms:** If the Override Default Room Setup/Teardown Times parameter is set to “Yes,” this value is used for the setup time.
Reservations – Room Request	**Validation of Building Hours:** Specify on Reserved Time or on Event Time.
Reservation – Room Request	**Warn User if Room Selected is Not Available for All Dates:** Specify Yes if you want a user to be notified if a selected room is not available for all requested dates.
Reservations – Summary	**Allow Add Booking to Reservation:** If set to “Yes,” users can add bookings to reservations.
Reservations – Summary	**Allow Edit UDFs on Reservation:** If set to “Yes,” users can edit their UDFs on the Reservation Summary page.
Reservations – Summary	**Allow Reservation Edits:** Specify Yes to allow a web user to edit his/her reservation information (group, contact, event name, and so on).
Reservations - Summary	**ICS File (Calendar Appointment) Status:** Specify Busy or Tentative as the default calendar appointment status.
Reservation Summary	**Require Cancellation Reason:** If set to “Yes,” then if a user cancels a reservation/booking, the user is required to supply a cancellation reason.
Reservations – Summary	**Show Service Availability:** Displays Service Availability link on the Reservation Summary page.
Services	**Adjust Service Order Times upon Booking Edit:** If set to “Yes,” then Service Order Times are automatically adjusted if the booking time is modified.
Services	**Allow Edit of Services:** If this option is set to “Yes,” users can edit the services they have added to events.
Services	**Maintain Inventory:** If this option is set to “Yes,” the system notifies the user if an attempt to reserve a resource would cause the resource to be overbooked. The user must then select a new quantity.
Services	**Populate Service Setup with Attendance:** If set to **“**Yes,**”** populates the service setup with the expected attendance number.
Services	**Restrict Service Order Times Within Event Times:** If set to “Yes,” then VEMS users cannot specify service order start/end times that fall outside the event start/end times.

Table A-2: VEMS System Parameters (continued)

Area	Description
Services	**Set Service Time Default from the Event Time:** If set to “Yes,” then the service start/end times are set by default to the event start/end times.
Services	**Show Resource Pricing:** Set to “Yes” to display the prices of resources.
Unauthenticated Requests	**Access to Classic Request for Unauthenticated Users:** Specify No or Yes to allow access to the Room Request page when the web process template mode = Request.
View My Requests	**Show Group Column on View My Requests:** Specify No or Yes to display the Group column in View My Requests.

EMS Kiosk System Parameters

Table A-3: Kiosk system parameters

Area	Description
Floor Plans	**Floor Plan Web Service URL:** The full URL for the web service used by the optional Floor Plan Configuration module. See "Configuring Floor Plans" on page 147.
Hoteling	**Allow Check In From Kiosk (EMS Workplace):** If set to **"**Yes,**"** allows a user to check in to a workspace from EMS Workplace.
Hoteling	**Enable Group Type Filtering on Make Reservation (EMS Workplace):** If set to **"**Yes,**"** enables feature filtering and/or room type filtering by group type on the Make a Reservation page.
Hoteling	**Group Type Filtering Space Label on Make Reservation (EMS Workplace):** The label used if group type filtering is enabled.
Make Reservation	**Conflict Status for New Reservation:** The status that is applied to bookings that are in conflict with an existing booking.
Make Reservation	**Default End Time for New Reservation:** The daily end time for new reservations. This setting is only used if the parameter Allow Start/End Time Editing is set to "No," or if multi-day bookings are allowed.
Make Reservation	**Default Event Name for New Reservation:** The default name for new reservations that are created through EMS Kiosk The %USER% text is a variable that is replaced with the group name. You can remove this variable.
Make Reservation	**Default Search=Floor Map on Make Reservation:** If set to **"**Yes," then when an EMS Kiosk user searches for available rooms, the floor plan view is used for the default results.
Make Reservation	**Default Start Time for New Reservation:** The default start time for new reservations that are created through EMS Kiosk. This setting is only used if the parameter Allow Start/End Time Editing is set to "No," or if multi-day bookings are allowed.
Make Reservation	**Display Start/End Time Drop Downs:** If set to "Yes," the Start Time and End Time dropdown lists are displayed on the Make Reservation page. If set to "No," the default start and end times are used for bookings.
Make Reservation	**Enable Web Process Security Template:** If set to "Yes," the user's web process templates in addition to the rooms that are configured in the kiosk profile are used to determine which rooms are displayed on the Make Reservation page.
Make Reservation	**Event Type for New Reservation:** The event type that is applied to reservations created through EMS Kiosk.
Make Reservation	**Number of Future Concurrent Days Allowed for New Reservations:** The number of days in the future that bookings can be made.
Make Reservation	**Reservation Source for New Reservation:** The reservation source that is applied to reservations created through EMS Kiosk.

Table A-3: Kiosk system parameters (continued)

Area	Description
Make Reservation	**Start Date Allowed for New Reservation (days):** The number of days after the current day's date that a reservation can be made through EMS Kiosk.
Make Reservation	**Status for new Reservation:** The status that is applied to reservations created through the EMS Kiosk.
Make Reservation	**Time Drop Down Increment:** The time increment that is used on Time dropdown menus.
Miscellaneous	**Browser Title:** The text that is displayed in the title bar of the Kiosk browser.
Miscellaneous	**Default Page:** The first page that first opens in EMS Kiosk or that is displayed when EMS Kiosk times-out.
Miscellaneous	**Disable Stand-by Mode on Timeout:** If set to "No," then EMS Kiosk goes into Standby-by Mode (a Stand By button is displayed) after timing out.
Miscellaneous	**Display Cancel Button for Group Searches:** If set to "Yes," the Cancel button is displayed for group searches, allowing the user to cancel a search.
Miscellaneous	**Location Format:** Select from Building Code, Room or Room Description or Building Description, Room or Room Description.
Miscellaneous	**Max Records Returned for Group Searches:** The maximum number of records returned when searching for a group.
Miscellaneous	**Max Booking/Availability Records Returned:** The maximum number of rooms that are displayed when making a reservation.
Miscellaneous	**Page Timeout (seconds):** The period of inactivity in EMS Kiosk, after which the default page is displayed.
My Reservations:	**Allow User to Cancel Bookings:** If set to "Yes," then users can cancel bookings from the Reservations page.
My Reservations:	**Allow User to End Bookings:** If set to "Yes," then users can end their bookings from the My Reservations page.
My Reservations:	**Cancel Status:** The status that is applied to canceled bookings.
My Reservations:	**Future Booking Cancellation Cutoff (days):** The number of days prior to a future booking that the booking can be canceled.
My Reservations:	**Same Day Booking Cancellation Cutoff (minutes):** Used in conjunction with the Allow User to Cancel Bookings parameter. A user can cancel an in-progress booking up to the number of indicated minutes before the booking occurs.
Security	**Group Field used for "Exact Match" Authentication:** The field that is compared with the ID that the user enters: External Reference, Badge Number, Personnel Number (all of these are group settings). This parameter is used in conjunction with the Primary User Authentication Type parameter, which must be set to Exact Match.

Table A-3: Kiosk system parameters (continued)

Area	Description
Security	**Primary User Authentication Types:** The options are as follows: • Standard - Partial names are enough for a match, and all groups that match are listed. • Exact Match - The ID entered must exactly match what is set in the parameter Group Field Used for "Exact Match" Authentication. • LDAP - Both the user's network ID and password must be entered.
Security	**Require Authentication for all Kiosk Functions:** Requires users to identify themselves before using EMS Kiosk. Used for kiosks in a public location where an exact user ID match is needed.
Security	**Require Timeout/Logoff to Terminate User Session:** If set to "Yes," then a user must "hit" the Log Off button to end their EMS Kiosk session.
Security	**Secondary User Authentication Types for Badge Authentication:** (Used only if "Badge" is primary security). Alternate authentication method that is used when a user doesn't have his/her badge.
Security	**Show 10 Key as Modal:** Used with the Use 10-Key Keyboard for Authentication parameter. Displays 10-key keyboard as a modal popup on the page.
Security	**Use 10-Key Keyboard for Authentication:** Uses a numeric 10-key numeric keyboard instead of the full keyboard.
Today's Events	**Display Building Drop Down:** If set to "Yes," users can filter by building on the Today's Events page.
Today's Events	**Display Event Name Search:** If set to "Yes," then the Search for Events button is displayed on the Today's Events page.
Today's Events	**Display Floor Drop Down:** If set to "Yes," users can filter by floor on the Today's Events page.
Today's Events	**Display Room Type Drop Down:** If set to "Yes," users can filter by room type on the Today's Events page.
Today's Events	**Drop Events in Past:** If set to "Yes," then events that occurred before the current day's time are not displayed on the Today's Events page.

Appendix B
Video Conferencing

This appendix details the configuration of the necessary features, resources, rooms, and web process templates to accommodate reservations or room requests that require video conferencing capability.

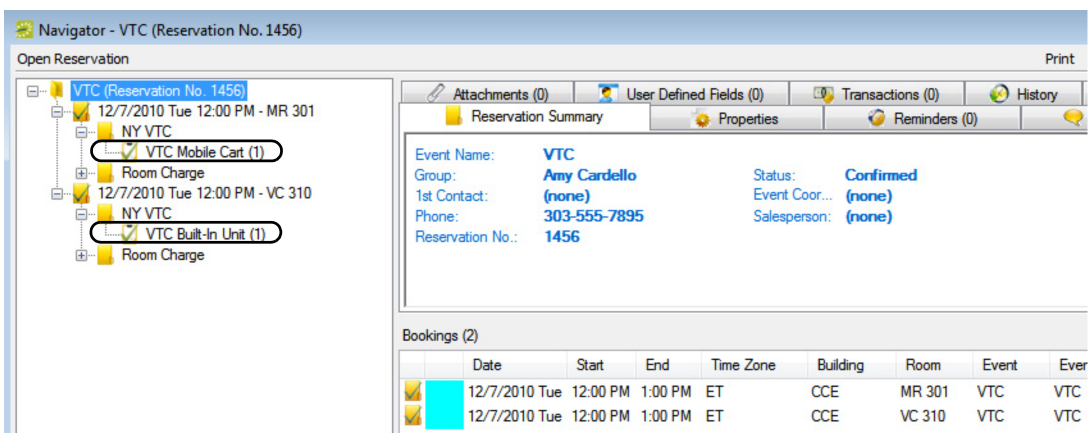
This appendix covers the following topics:

Video conferencing capabilities are available only in EMS Enterprise. They are not available in EMS Professional.

Overview of Video Conferencing Configuration

Standard EMS room configuration is suitable for organizations that use only built-in/fixed video conference rooms for video conferences. For environments that use video conference mobile carts, however, additional configuration options are available to simplify the video conference room/mobile cart request process. When configured properly, EMS searches for all rooms that have a built-in video conferencing feature and it searches for all rooms that can accommodate a mobile video conferencing cart. A room that has a built-in video conferencing feature is displayed in the search results only if the room is available. A room that can accommodate a mobile video conferencing cart is displayed in the search results only if the room is available *and* at least one mobile video conferencing cart is available for selection. The end result of this configuration is that after a reservation is complete, booking details are automatically created for a user. The user does not have to add them manually. If a user selects a room that has a built-in conferencing feature, then the feature is indicated for the room. If the user selects a room that uses a mobile video conferencing cart, then the mobile cart is automatically added to the booking. This information can be viewed like any other booking detail in the Navigator and on reports like the Setup Worksheet report.

Figure B-1: Reservation with video conferencing features automatically added to bookings



You must configure the following three types of rooms to provide enhanced searching capability for rooms that have a video conferencing feature:

- Meeting rooms with built-in video conference capability. Room availability for this type of room is based on the true availability of the room for the time slot selected. If a user selects one of these rooms, a booking detail (for example, “Built-in Video Conference Equipment”) is automatically created after the reservation is submitted. This provides indication that a user is requesting use of the video conferencing equipment in the room.
- Standard meeting rooms that can accommodate a mobile video conferencing cart. Room availability for this scenario is based on the availability of the room *and* on the availability of the mobile video conferencing cart resource pool. For a room to be displayed as available, at least one mobile video conferencing cart must be available for the time slot

selected. If a user selects one of these rooms, a booking detail for a mobile video conferencing cart is automatically added to the booking after the reservation is submitted.

- A room or other location that is not managed in EMS that can accommodate a mobile video conferencing cart. The room is configured as an Override Description room type. Room availability for this scenario is based only on the availability of the mobile video conferencing cart resource pool. If a user selects this room, the user is provided an option for entering a location. After the reservation is submitted, a booking detail for a mobile video conferencing cart is automatically added to the booking.

This behavior is driven in the EMS client by the selection of the video conferencing feature in the Reservation Wizard. In VEMS, after you correctly configure a web process template that has the Video Conference option selected, a VEMS user is not required to make any selections—the search for the feature is carried out automatically and the user can select from a list of available rooms that meet the search criteria.

Configuring Video Conferencing Capabilities

When you are configuring video conferencing capabilities you must first configure the necessary features and resources. After you configure the necessary features and resources, you can then configure the rooms, the override rooms, and the web process templates that are needed to accommodate reservations or room requests that require video conferencing capability. When you configure the rooms, one room type must use the built-in video conferencing resource and one room type must use the mobile video conferencing cart resource.

To configure features and resources

1. Configure a video conferencing feature, for example, one named as simply as Video Conferencing. When you configure this feature, you must select Tied to Resource. See "Configuring Features" on page 85.
2. Configure a category in which the video conferencing resources will be placed, for example, A/V, A/V Equipment, Video Conferencing, or so on. See "Configuring Categories" on page 155.
3. Configure two distinct video conferencing resources for the category that you just created. See "Configuring Resources for a Category" on page 206.
   - A resource for built-in video conferencing equipment, for example, Built-in Video Conference Equipment.

   Do not select the Maintain Inventory option when you are configuring this resource.

   - A resource for a mobile video conferencing cart, for example, Mobile Video Conferencing Cart.

   You must select the Maintain Inventory option when you are configuring this resource and you must enter a value in the Quantity Available field.

To configure a built-in video conference room

1. Search for a room for which the video conferencing feature that you defined in Step 1 of "To configure features and resources" is applicable. (See "To search for a room" on page 109.)
2. Select the room, and then click Edit.

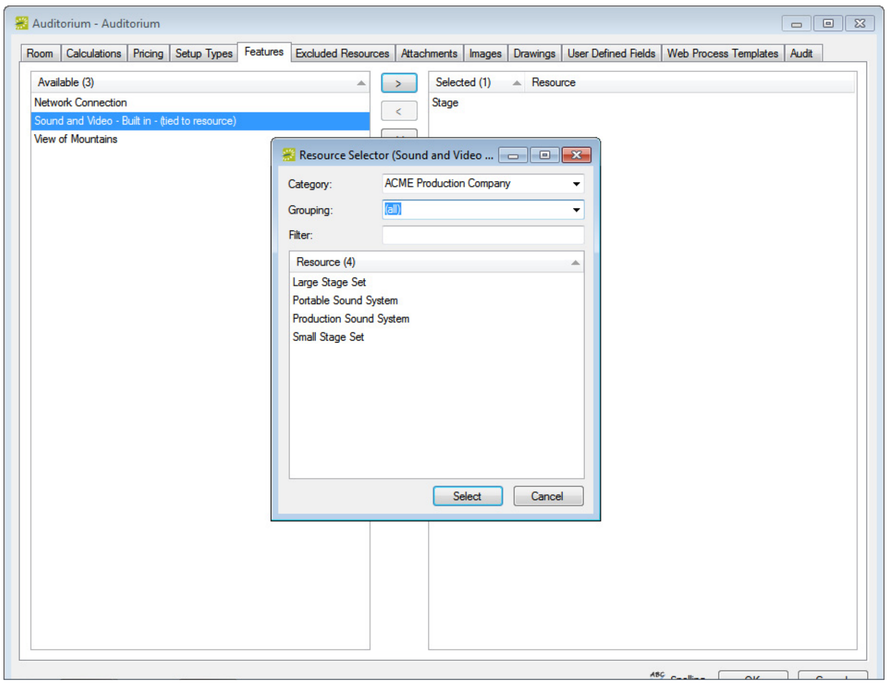
   The Room dialog box opens.

3. Open the Features tab on the Room dialog box, and on the Available list, select this video conferencing feature.

The feature is designated as being "tied to a resource."

The Resource Selector dialog box opens.

Figure B-2: Resource Selector dialog box



4. Select the resource that you designated for built-in video conferencing equipment.

   The Selected list on the Features tab is updated with the selected feature/resource combination.

5. Click OK to save your changes.

6. Repeat this procedure for every room in your organization that has built-in video conferencing features.

Remember, you can use the Room Configuration Wizard to mass assign a feature to multiple rooms in a single step. See *"Room Administration Wizard" on page 366.*

To configure a room that can accommodate a mobile video conferencing cart

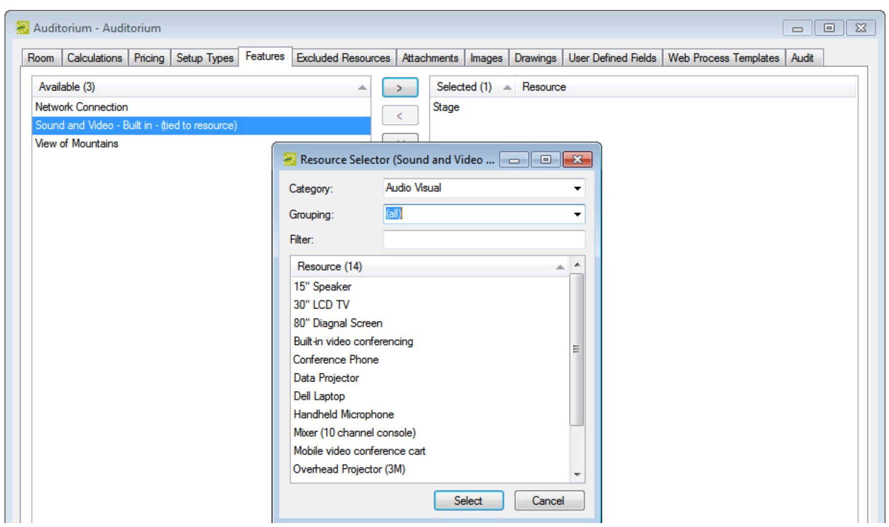
1. Search for a room for which the video conferencing feature that you defined in Step 1 of "To configure features and resources" is applicable. (See "To search for a room" on page 109.)
2. Select the room, and then click Edit.

   The Room dialog box opens.
3. Open the Features tab on the Room dialog box, and on the Available list, select this video conferencing feature.

The feature is designated as being "tied to a resource."

The Resource Selector dialog box opens.

Figure B-3: Resource Selector dialog box



4. Select the resource that you designated for the mobile video conferencing cart.

   The Selected list on the Features tab is updated with the selected feature/resource combination.
5. Click OK to save your changes.
6. Repeat this procedure for every room in your organization that can accommodate a mobile video conferencing cart.

Remember, you can use the Room Configuration Wizard to mass assign a feature to multiple rooms in a single step. See “Room Administration Wizard” on page 366.

To configure an override room that can accommodate a mobile video conferencing cart

1. Configure an override room (for example, “Other”). See “Configuring Rooms” on page 109.

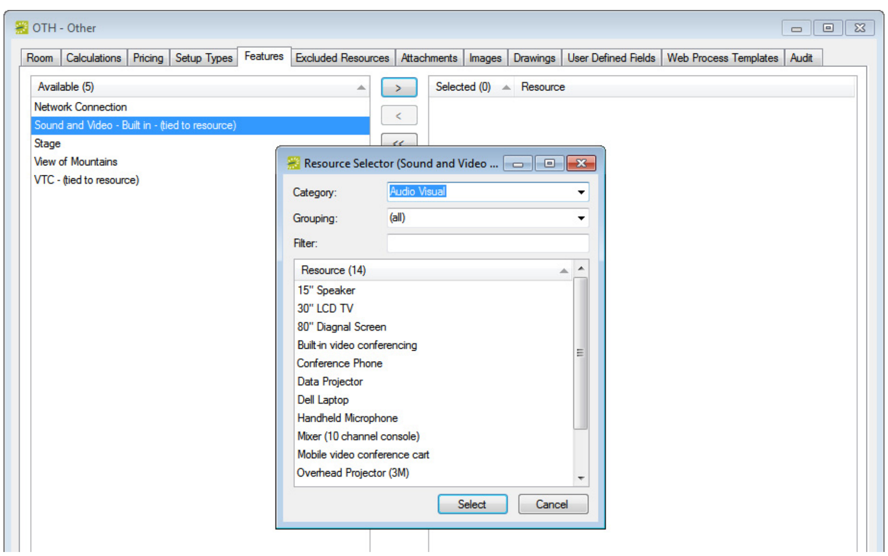
When you configure this room, make sure to select Override Description for the room classification.

2. On the Room dialog box, in the Available list, select the video conferencing feature that you defined in Step 1 of “To configure features and resources.”

The feature is designated as being “tied to a resource.”

The Resource Selector dialog box opens.

Figure B-4: Resource Selector dialog box



3. Select the resource that you designated for the mobile video conferencing cart.

   The Selected list on the Features tab is updated with the selected feature/resource combination.

4. Click OK to save your changes.

5. Repeat this procedure for every override room that can accommodate a mobile video conferencing cart at your organization.

Remember, you can use the Room Configuration Wizard to mass assign a feature to multiple rooms in a single step. See *"Room Administration Wizard" on page 366.*

To configure a web process template

1. Configure two video conferencing specific event types—one event type that is used to designate which of the bookings in the reservation is the host location (for example, "Host VC") and one event type that is applied to all the other bookings in the reservation (for example, "VC"). See "Configuring Event Types" on page 43.
2. Configure a web process template (see "To configure a web process template" on page 402) with the following characteristics:
   - The mode is Self Serve.
   - The Video Conference option is selected for the template.
   - The two Event Types that you created in Step 1 are selected for the template.
   - On the Video Conference tab:
     - On the Feature dropdown list, select the video conferencing feature that you defined in Step 1 of "To configure features and resources."
     - On the Host Event Type dropdown list, select the video conferencing host Event Type that you defined in Step 1.

Appendix C
Video Display Interface

This appendix details the purpose and implementation of the Video Display Interface, which is an optional, add-on component for EMS that exports meeting and event information to a video display system such as Janus, Target Vision, and so on.

This appendix covers the following topics:

- "Configuring the Video Display Interface" on page 523.

Configuring the Video Display Interface

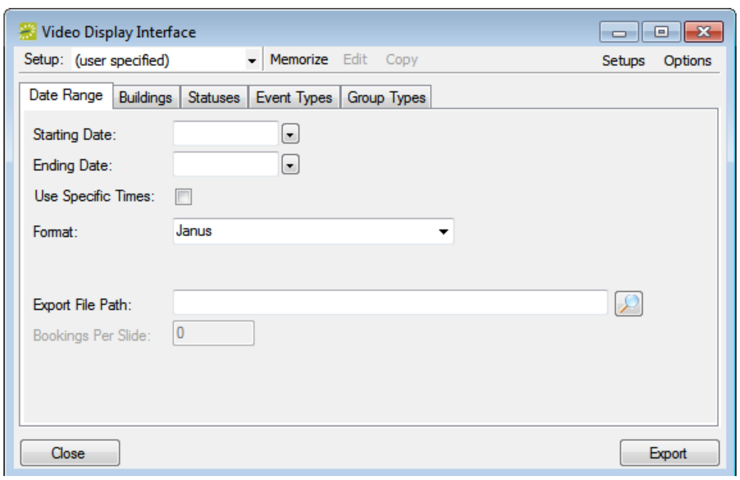
The *Video Display Interface* (VDI) is an optional, add-on component for EMS that exports meeting and event information to a video display system such as Janus, Target Vision, and so on. It does this by periodically saving booking information to a file which the video display system then retrieves and displays on video monitors. You use the windows-based Task Scheduler to set the frequency at which the EMS Video Display Interface program (EMS.exe) runs. This program stores the booking information and creates the export file. You set parameters in EMS that define the types of bookings that are to be included in the export file (based on buildings, statuses, and so on), where the exported file should reside, and other information. You must manually export the booking information once and create the export file before you can configure EMS to automatically export the information.

To configure the VDI

1. On the EMS menu bar, click System Administration > Tools > Video Display Interface.

   The Video Display Interface dialog box opens. The Date Range tab is the active tab.

Figure C-1: Video Display Interface dialog box



2. Specify the settings for exporting the booking information:

   - The first time you configure the VDI, or if you edit your VDI settings, you must specify a date range for the system to save the settings. Going forward, the system automatically exports the information only for the bookings that are taking place on the current day's date based on the frequency that you specify.
   - To export data for a different date or date range, on a one-time only basis, enter the date or range. If the export is to contain only bookings taking place in a particular time frame, check the Use Specific Times box and enter the starting and ending times. After this manual update, the system reverts to exporting data for the current day's date based on the frequency that you specify.

- In the Format field, select the pre-defined VDI export format. (If you select PowerPoint as the pre-defined VDI export format, then the Bookings for Slide fields is enabled. You must also indicate the number of bookings that are to appear on a slide.)
- In the Export File Path, click the Search icon to open Export File Path dialog box and browse to and select the file to which you are exporting the data, or you can manually enter the full path to the file with the file name and extension.
- On the Buildings tab, Statuses tab, Event Types tab, and Group Types tab, specify the building/room, status, event type, and group criteria by which to filter the booking information that you are exporting.

3. Click Export.

   A message opens indicating that the export file was created successfully.

If needed, after you configure your export settings, you can click Memorize to save the export settings as a memorized report so that you do not have to specify the export settings every time you export your meeting and event information. If you save the export settings as a memorized report, you can make the report public (available to all users in your EMS database) or private (available only to you.)

4. Click OK.

   After you have manually run the export once, you can set up the system to export events automatically. Following the steps outlined in your Windows operating system documentation, use the Task Scheduler to define a scheduled task that executes EMS.exe on a regular basis (typically once each day). The file is located in the folder in which the client portion of the EMS system is installed. (The default is C:\Program Files\ EMS [PRODUCT NAME and VERSION NUMBER]). Before existing the Task Scheduler, select “Open advanced properties for this task when I click Finish” and append /vdi to the end of the EMS path in the “Run” textbox, for example: “C:\Program Files\EMS [PRODUCT NAME and VERSION NUMBER]\EMS.exe”/vdi.

Appendix D
Academic Import Utility

This appendix details the purpose and implementation of the Academic Import Utility, which is an optional, add-on component for EMS that is designed to communicate with academic scheduling programs for one-off imports of course schedule data.

This appendix covers the following topics:

Configuring the Academic Import Utility

The Academic Import Utility (AIU) is an optional, add-on component for EMS that is designed to manually import from your Student Information System, or SIS. For each scheduled class that is being imported, a single reservation with multiple bookings is created. One booking is created for each date on which the class meets. All class reservations created by the import process are assigned to one Group (customer, client, and so on) that you have configured in your EMS database. The imported class data can be one of two formats, tab-delimited or fixed width.

All fields are required unless noted otherwise.

Table D-1: Tab-delimited format

Field	Field Sequence	Max Width	Type	Format	Example
Department	1	10	Alpha numeric	Left Justified	ACCT
Course	2	10	Alpha numeric	Left Justified	101
Section	3	10	Alpha numeric	Left Justified	1
CourseTitle	4	225	Alpha numeric	Left Justified	Intro to Accounting
Instructor	5	50	Alpha numeric	Left Justified	Bob Smith
Days	6	7	Alpha numeric	Left Justified	Parameter driven. Positional or specific text. e.g. “M W F” for Positional, Monday First
Building	7	10	Alpha numeric	Left Justified	AC
Room	8	20	Alpha numeric	Left Justified	101
BegTime	9	4	Numeric	Zero Filled (Numerics only)	1400

Table D-1: Tab-delimited format (continued)

Field	Field Sequence	Max Width	Type	Format	Example
EndTime	10	4	Numeric	Zero Filled (Numerics only)	1450
StartDate (Optional)	11	10	Date	Formatted (mm/dd/yyyy)	8/30/2007
EndDate (Optional)	12	10	Date	Formatted (mm/dd/yyyy)	12/17/2007
Attendance (Optional)	13	5	Numeric	Zero Filled (Numerics only)	35

All fields are required unless noted otherwise.

Table D-2: Fixed width format

Field	Column	Width	Field Type	Format	Example
Department	1	10	Alpha numeric	Left Justified, Trailing Spaces	ACCT
Course	11	10	Alpha numeric	Left Justified, Trailing Spaces	101
Section	21	10	Alpha numeric	Left Justified, Trailing Spaces	1
CourseTitle	31	225	Alpha numeric	Left Justified, Trailing Spaces	Intro to Accounting
Instructor	256	50	Alpha numeric	Left Justified, Trailing Spaces	Bob Smith
Days	306	7	Alpha numeric	Left Justified, Trailing Spaces	Parameter driven. Positional or specific text. e.g. “M W F” for Positional, Monday First

Table D-2: Fixed width format (continued)

Field	Column	Width	Field Type	Format	Example
Building	313	10	Alpha numeric	Left Justified, Trailing Spaces	AC
Room	323	20	Alpha numeric	Left Justified, Trailing Spaces	101
BegTime	343	4	Numeric	Right Justified, Zero Filled (numerics only)	0800
EndTime	347	4	Numeric	Right Justified, Zero Filled (numerics only)	1450
StartDate (Optional)	351	10	Date	Formatted (mm/dd/yyyy)	08/30/2007
EndDate (Optional)	361	10	Date	Formatted (mm/dd/yyyy)	12/17/2007
Attendance (Optional)	371	5	Numeric	Right Justified, Zero Filled (numerics only)	00035

Prior to using the AIU, you should have the following items configured in your EMS database:

Item	Description
Group	When reservations are created through the import process, one Group (client, customer, and so on) is the reservation holder for all reservations. You might want to define a group that is used specifically for the reservations that are created through the import process, for example, Registrar's Office.
New Bookings Status	When running the AIU, you must specify a status for the new bookings that are created. This status must of the “Book Space” status type. While you can use an existing status such as Confirmed, it is generally best to create a new status (for example, Academic - Confirmed) to denote the imported data.
Conflict Status	You must create a conflict status to give to the new bookings if the room they require is already booked. This status should have a status type of either “Info Only” or “Wait,” as those types of bookings can be created even if there is already a confirmed booking in the room. Academic - Conflict is a commonly used name for this status.
Cross List Status	You must create a status to apply to bookings when the system encounters conflicts within an import file (i.e., the same class with different names). This status should have a status type of either “Info Only” or “Wait.”

Item	Description
Override Status	You can configure the settings in an AIU session to allow AIU bookings to override existing bookings, if appropriate. The status is changed for the existing bookings and the room is reserved for the imported bookings. You must create an override status to apply to the bookings that have been bumped. This status should have a status type of either “Info Only” or “Wait.”

In addition, you might want to define a unique Event Type and Setup Type that is to be used solely for class reservations.

To import data, you must configure a session for each block of data (i.e., quarter or semester). After you have configured a session, AIU saves the settings for use in both the initial import and any subsequent re-import. When a session is re-imported, only events in the import file that have changed since the last import are recreated in the EMS database. This prevents the unnecessary re-import of unchanged events and the associated invalidation of large ranges of reservation numbers. After configuring a session, you import the data for the session.

Creating reservations can take an extended time and must be performed when no users are logged in to EMS. (To log off active users, see “Viewing and Emailing Logged-In Users” on page 383.) The time required to create reservations varies depending on the amount of data involved and the processing power of the computer making the reservations. After the import process completes, the system automatically displays a report listing booking conflicts, if any.

Reservations that were added to the EMS database using the AIU can be removed from the database using the AIU as well. Deleting a session removes all reservations created using the session.

Before you configure an AIU session, you should review the Academic Import Days of the Week setting in your system parameters. This setting dictates whether the AIU interprets days of the week based on their position within the data (with options for Sunday first or Monday first) or based on specific text entries (Su = Sunday, M = Monday, and so on). See Appendix A, “System Parameters,” on page 491.

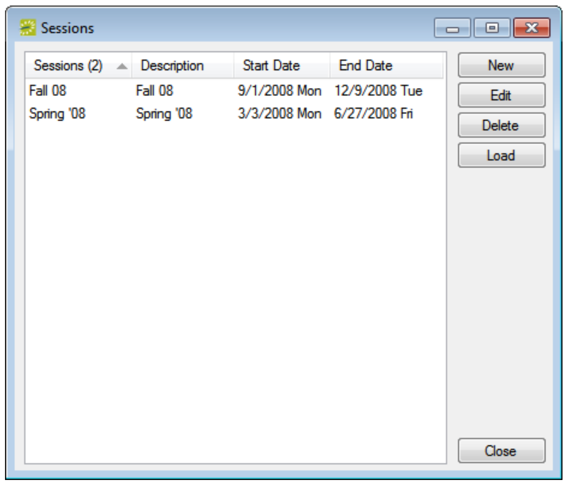
To configure an AIU session

This section describes the steps for configuring a new session for the AIU. If you simply need to load an existing session, then after opening the Sessions window, skip to *"To import the data into the session" on page 533.*

1. On the EMS menu bar, click Reservations > Academic Import > Academic Import Utility.

   The Sessions window opens. This window lists all the sessions that are currently configured in your EMS database.

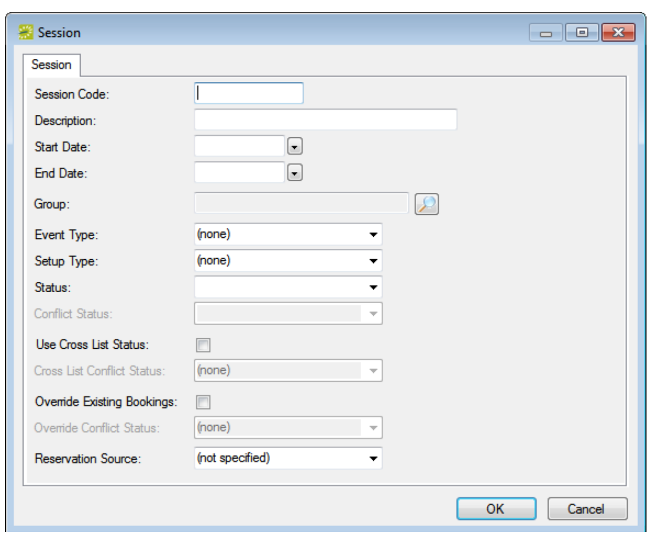
Figure D-1: Sessions window



2. Click New.

   The Session dialog box opens.

Figure D-2: Session dialog box



3. Enter the information for the new AIU session.

Field	Description
Session Code	A unique identifier for the session, for example, SPRING08.
Description	An expanded definition of the session code, for example, Spring Semester 2008. **Note:** The description can be a maximum of 50 characters, including spaces.
Start Date End Date	The start date and end date for the session, for example, 1/15/08 and 5/31/08.
Group	The reservation holder for all reservations in the session. For example, Registrar's Office. You can select a value from the Group dropdown list, or you can click the Search icon to open the Groups window and create the necessary group. See “Configuring Groups” on page 277.
Event Type	Select a value from the dropdown list. If none of the event types that are currently configured in your EMS database meets your needs, then you can configure a type (for example, Academic). See “Configuring Event Types” on page 43.
Setup Type	Select a value from the dropdown list. If none of the event types that are currently configured in your EMS database meets your needs, then you can configure a type (for example, Classroom). See “Configuring Setup Types” on page 87.
Status	The status for the new bookings that are created. **Note:** While you can use an existing status such as Confirmed, it is generally best to create a new status (for example, Academic - Confirmed) to denote the imported data. See “Configuring Statuses” on page 164.
Conflict Status	Available after you specify a Status. Select a value from the dropdown list. If none of the statuses that are currently configured in your EMS database meets your needs, then you can configure a status (for example, Academic - Conflict). See “Configuring Statuses” on page 164.
Use Cross List Status	Select this option if the system is to apply a special status to classes that are cross-listed in the import file. (The class appears twice in the file, with each occurrence having a different name.)
Cross List Conflict Status	Available if you select Use Cross List Status. The status that is to be applied to cross-listed classes. Select a value from the dropdown list. If none of the statuses that are currently configured in your EMS database meets your needs, then you can configure a status (for example, Academic - Cross List). See “Configuring Statuses” on page 164.
Override Existing Bookings	Select this option if the system is to give import file events precedence over existing events in the EMS database.
Override Conflict Status	Available if you select Override Existing Bookings. The status that is to be applied to existing events if they are overridden by imported events. Select a value from the dropdown list. If none of the statuses that are currently configured in your EMS database meets your needs, then you can configure a status (for example, Academic - Conflict). See “Configuring Statuses” on page 164.

Field	Description
Reservation Source	Select a source for the reservation. If none of the sources that are currently configured in your EMS database meets your needs, you can configure a source. See “Configuring Reservation Sources” on page 70.

4. Click OK.

   The Session dialog box closes. You return to the Sessions window with the newly configured session displayed in the window.

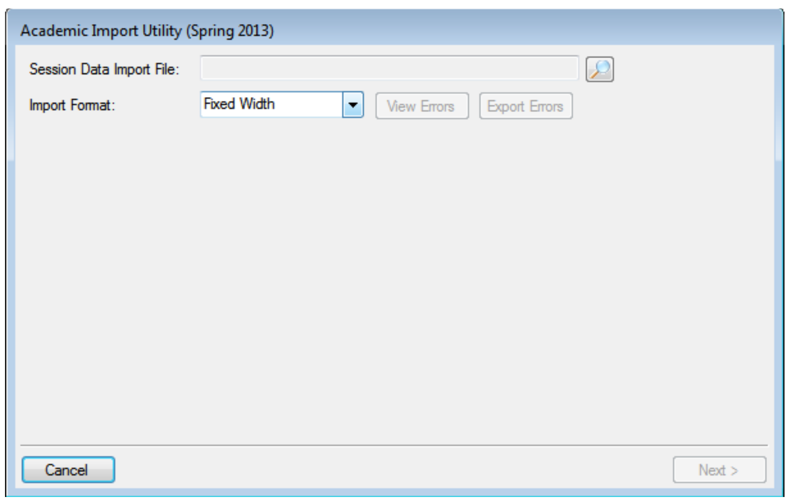
5. Continue to “To import the data into the session.”

To import the data into the session

1. Select the session into which you are importing the course information, and then click Load.

   The first of three AIU windows opens.

Figure D-3: AIU window #1



2. Click the Search icon  to browse to and select the file that you are importing.

3. On the Import Format dropdown list, select the format for the file (Fixed Width or Tab Delimited).

4. Click Next.

   Two results are possible:

   - If any of the records in the import file have any issues (missing data, data that is not in the correct format, data that falls outside the start and/or end dates, and so on) a message opens that details the issue and if applicable, the number that cannot be imported, and asking if you want to continue. You can click No in the message, and then correct the errors in the file before you load the file again, or you can click Yes in the message, and then click Next to continue.

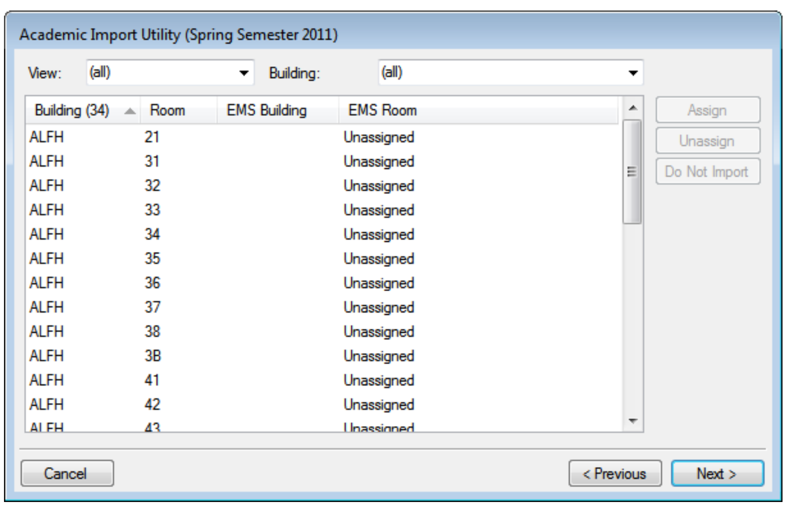
Optionally, you can also do one or both of the following:

- *You can click View Errors for more information.*
- *You can click Export Errors to export the errors in the import file an an XML format.*

   - The import file is complete and there are no issues with the file, so no message opens. Click Next to continue.

     The second of three AIU windows opens. This window lists the academic Building and the Room that are currently reserved for *all* the classes in the import file. For a new import file, the Building/Room combinations have a status of Assigned or Do not Import. Unassigned classes must be assigned to a room in EMS. Classes with a status of “Do Not Import” are not to be assigned to a room in EMS.

Figure D-4: AIU window #2

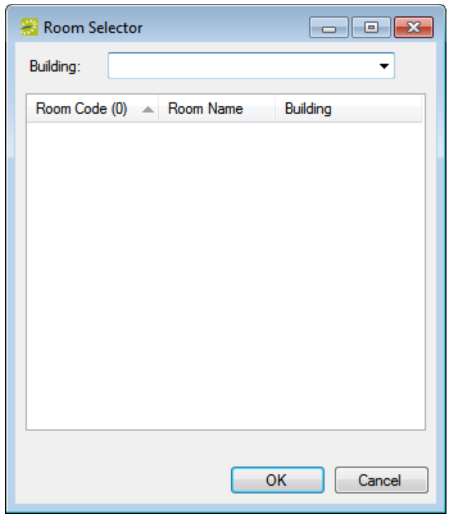


5. Optionally, select a different View option and/or a different Building option to filter the information that is displayed in the window. (The default display is all views (Assigned, Unassigned, and Do not Import) for all buildings.)

6. Select an unassigned class, or CTRL-click to select the multiple unassigned classes, and then click Assign.

   The Room Selector dialog box opens.

Figure D-5: Room Selector dialog box



7. On the Building dropdown list, select the building or view by which to filter the available rooms list.
8. On the Available rooms list, select the room to which the classes are to be assigned, and then click OK.

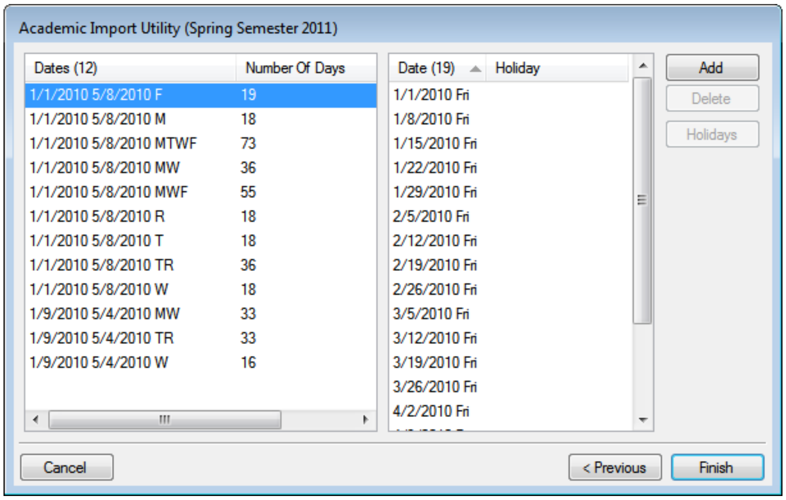
   Two results are possible:

   - If you selected a single class to assign to the room, then the class status is changed to Assigned in the AIU window. The EMS Building code and EMS room name are displayed for the class in the AIU window.
   - If you selected multiple classes to assign to the same room, then a message opens asking you if you are sure that you want to assign all the selected items to the same room. Click Yes in the message. The class status is changed to Assigned for all the selected classes in the AIU window. The EMS Building code and EMS room name are displayed for the classes in the AIU window.

9. Click Next.

   The third AIU window opens. In the right pane, the window lists the dates for which bookings will be created for the selected classes.

Figure D-6: AIU window #3

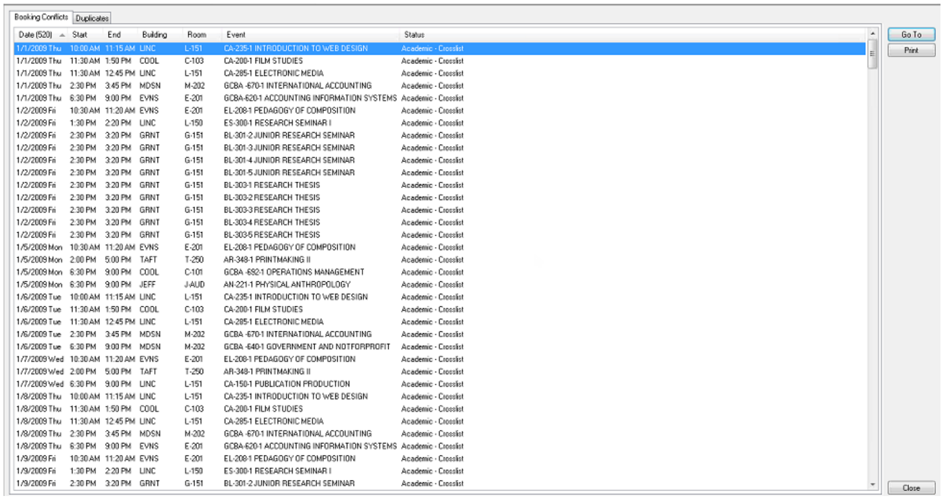


10. Optionally, do one or both of the following:
    - To add more booking dates, select the date in the left pane, and then click the Add button to open the Date Pattern dialog box and specify the date patterns for the bookings that should be created.
    - To delete booking dates, select the date in the right pane, and then click Delete.
11. After you have added or deleted the necessary booking dates, click Finish. Two results are possible.
    - A message opens indicating that the session was successfully imported. The reservations are created in the EMS database. Continue to Step 12.
    - One more conflicts, cross-listings, and/or duplicated courses exist in the import file. The Academic Import Unit Results window opens. Continue to "To resolve conflicts, cross-listings and duplicates in an AIU file" on page 537.
12. Click OK to close the message and return to the Sessions window.

To resolve conflicts, cross-listings and duplicates in an AIU file

If one or more conflicts, cross-listings, and/or duplicates (two identical course records) exist in the AIU text file, then after the file is imported, the Academic Import Unit Results window opens. The Booking Conflicts tab on the window lists all the courses in the file that are in conflict or cross-listed. The Status column displays the Conflict and Cross List statuses that you previously configured. The Duplicates tab lists all the duplicated courses.

Figure D-7: Academic Import Unit Results window



To resolve these issues, and successfully import the session information, do the following:

- To resolve courses that are in conflict, or are cross-listed, select the course on the Bookings Conflict tab, and then click Go To to open the reservation in the Course Navigator. Review the information for the course, and then decide how to resolve the issue either by changing the room for the course, changing the date/time for the course, and so on.

For detailed information about the steps that you can take to resolve conflict or cross-listing issues, see Reviewing Reservations and Resolving Room Assignments in the EMS User's Manual.

- To resolve duplicated courses, open the Duplicates tab to view and note the duplicated courses. You must then delete one of the entries for a duplicated course directly from the import text file, and then reimport the file. When you reimport the file, only the changes that you made, and not the entire file, are imported. (In this case, only the single entry that remains for a duplicated course is reimported.)

Appendix E
Import File Specifications

You have the option of importing a variety of data items into your EMS database from tab-delimited text files, including holidays, rooms, resources, groups, reservations, and course schedule patterns. This appendix details the import file specifications for each of these data items.

This appendix covers the following topics:

Holiday Import File Specifications

Field	Field Sequence	Max Width	Data Type	Format	Optional or Required	Example
Date	1	10	Date	mm/dd/yyyy	Required	11/27/2008
Description	2	30	Alphanumeric	Left Justified	Required	Thanksgiving Day
Notes	3	7000	Alphanumeric	Left Justified	Optional	Staff Holiday – No Events Allowed

Room Import File Specification

Field	Field Sequence	Max Width	Data Type	Format	Optional or Required	Example
Room Code	1	16	Alphanumeric	Left Justified	Required	BCR
Room Description	2	50	Alphanumeric	Left Justified	Required	Breckenridge Conference Room

Resource Import File Specification

Field	Field Sequence	Max Width	Data Type	Format	Optional or Required	Example
Grouping	1	50	Alphanumeric	Left Justified	Required	Beverages
Description	2	50	Alphanumeric	Left Justified. Must be a unique value.	Required	Coffee
Notes	3	7000	Alphanumeric		Optional	Decaf provided upon request
Price	4	2 decimal places	Decimal	(##.##)	Optional	10.00
Available On Web	5	5	Alphanumeric	True or False	Optional	True
Express Checkout	6	5	Alphanumeric	True or False	Optional	False
Serves	7	2 decimal places	Decimal	(##.##)	Optional	10
Min. Quantity	8	2 decimal places	Decimal	(##.##)	Optional	5

Group Import File Specifications

Field	Field Sequence	Max Width	Data Type	Format	Optional or Required	Example
Group Name	1	50	Alphanumeric	Left Justified	Required	Accounting Department
Address 1	2	50	Alphanumeric	Left Justified	Optional	834 Colorado Blvd.
Address 2	3	50	Alphanumeric	Left Justified	Optional	Box 286
City	4	50	Alphanumeric	Left Justified	Optional	Denver
State	5	2	Alphanumeric	Left Justified	Optional	CO
Zip Code	6	10	Alphanumeric	Left Justified	Optional	80111
Country	7	50	Alphanumeric	Left Justified	Optional	USA
Email Address	8	75	Alphanumeric	Left Justified	Optional	sales@organization.com
Phone 1	9	30	Alphanumeric	Left Justified	Optional	303-740-4428
Phone 2	10	30	Alphanumeric	Left Justified	Optional	303-740-4429
Billing Reference	11	50	Alphanumeric	Left Justified	Optional	10-24670

Reservation Import File Specifications

Field	Field Sequence	Max Width	Data Type	Format	Optional or Required	Example
Date	1	10	Date	mm/dd/yyyy	Required	11/15/2008
Event Start Time	2	4	Numeric	hhmm	Required	0800
Event End Time	3	4	Numeric	hhmm	Required	1300
Building	4	50	Alphanumeric	Left Justified	Required	Adams
Room	5	50	Alphanumeric	Left Justified	Required	Arapahoe Conference Room
Event Name	6	255	Alphanumeric	Left Justified	Required	Staff Meeting
Group Name	7	50	Alphanumeric	Left Justified	Required	Accounting Department
Contact Name	8	50	Alphanumeric	Left Justified	Optional	Mindy Braaksma
Setup Count	9	5	Numeric	##	Required	8
Reservation Reference	10	20	Alphanumeric	Unique identifier that is used to group bookings into one reservation	Optional	R1

Course Schedule Import File Specifications

Field	Field Sequence	Max Width	Data Type	Format	Optional or Required	Example
Day Pattern	1	7	Alphanumeric	UMTWRFS	Required	MWF
Start Time	2	4	Numeric	hhmm	Required	0800
End Time	3	4	Numeric	hhmm	Required	0900
Final Exam Day of Week	4	1	Alphanumeric	UMTWRFS	Required	M
Final Exam Start Time	5	4	Numeric	hhmm	Required	0800
Final Exam End Time	6	4	Numeric	hhmm	Required	1100

Booking Check In and Setup

EMS

EVENT MANAGEMENT SYSTEMS
Reserve • Register • Promote

Introduction

This document will give instructions on how to configure booking level check in as well as how to install the new email notification service associated with this functionality.

Customer Support

Unlimited toll-free customer support is available to EMS users who have a current Annual Service Agreement (ASA). If you are unable to resolve a problem or answer a question by reading the EMS documentation, contact us at:

Email:	**support@emssoftware.com**
Web:	**www.emssoftware.com**
Phone:	**(800) 288-4565**
Fax:	**(303) 796-7429**

Hardware and Software Requirements

A list of the system requirements is maintained on www.emssoftware.com

Obtaining the Latest Release of EMS

The latest release of EMS can be downloaded from the EMS Online Support Center.

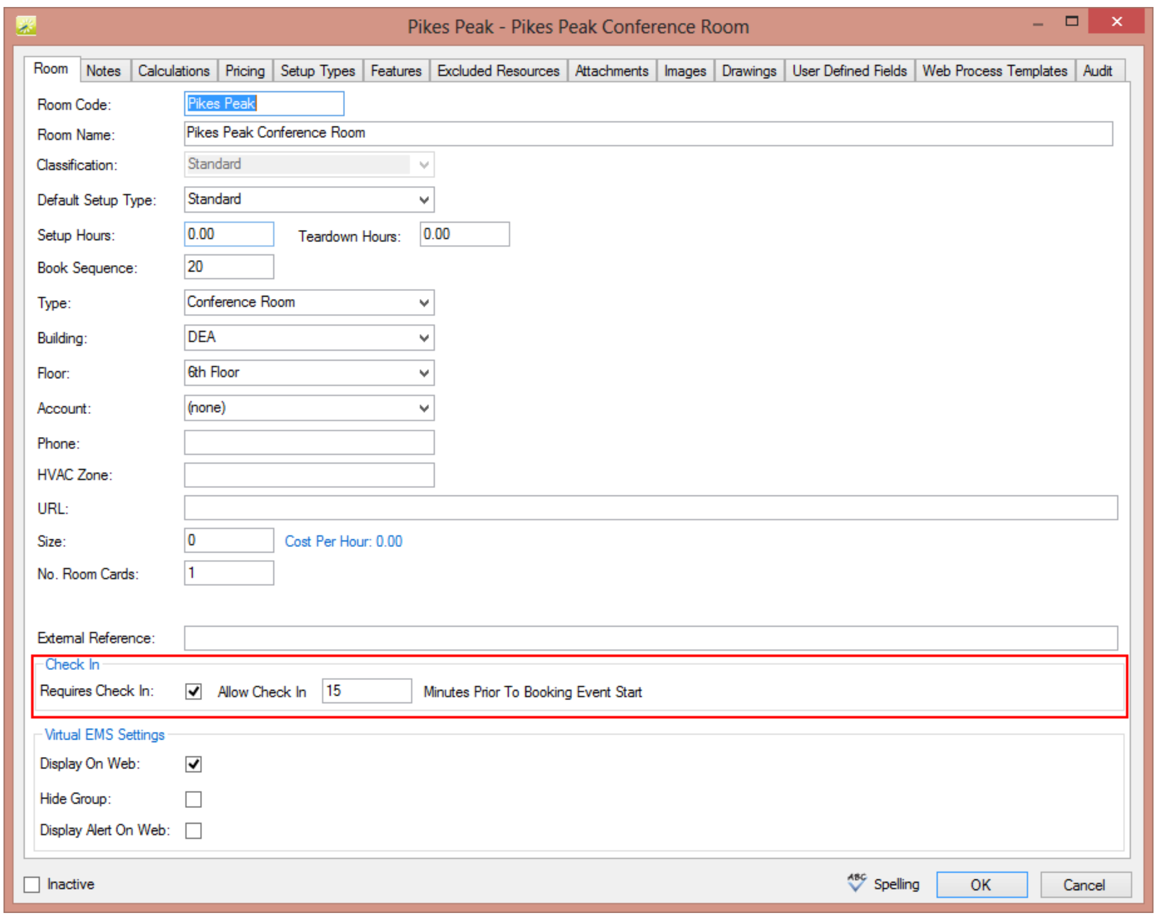
1. Go to www.emssoftware.com and enter your Email Address and Password in the Online Support Center area.
2. Click the Software downloads link.
3. Download the EMS Patch, Virtual EMS, EMS Web Client and the EMS Client. Required for both first time installations and upgrades.

Booking Level Check In

Booking level check in is used to help maintain room utilization levels and find accurate reporting on space. Check in at the booking level allows for users to check in to a single booking instead of the entire building for the day. Along with checking-in is the ability to have no show notifications trigger and free up spaces that aren't checked into.

Enabling Check In

1. On the EMS menu bar, click Configuration > Facilities > Rooms.
2. On the Building dropdown list, select one of the following to configure a room — (all) buildings, a specific building, a specific area, or a specific view.
3. Select and edit the room that booking level check in needs to be enabled for.
4. Check the box for Allow Check In. The minutes prior to booking event start is the amount of time before a booking in the specified room will be open for check in.



Note: This option can be added to multiple rooms at the same time using the Wizard on the Rooms screen.

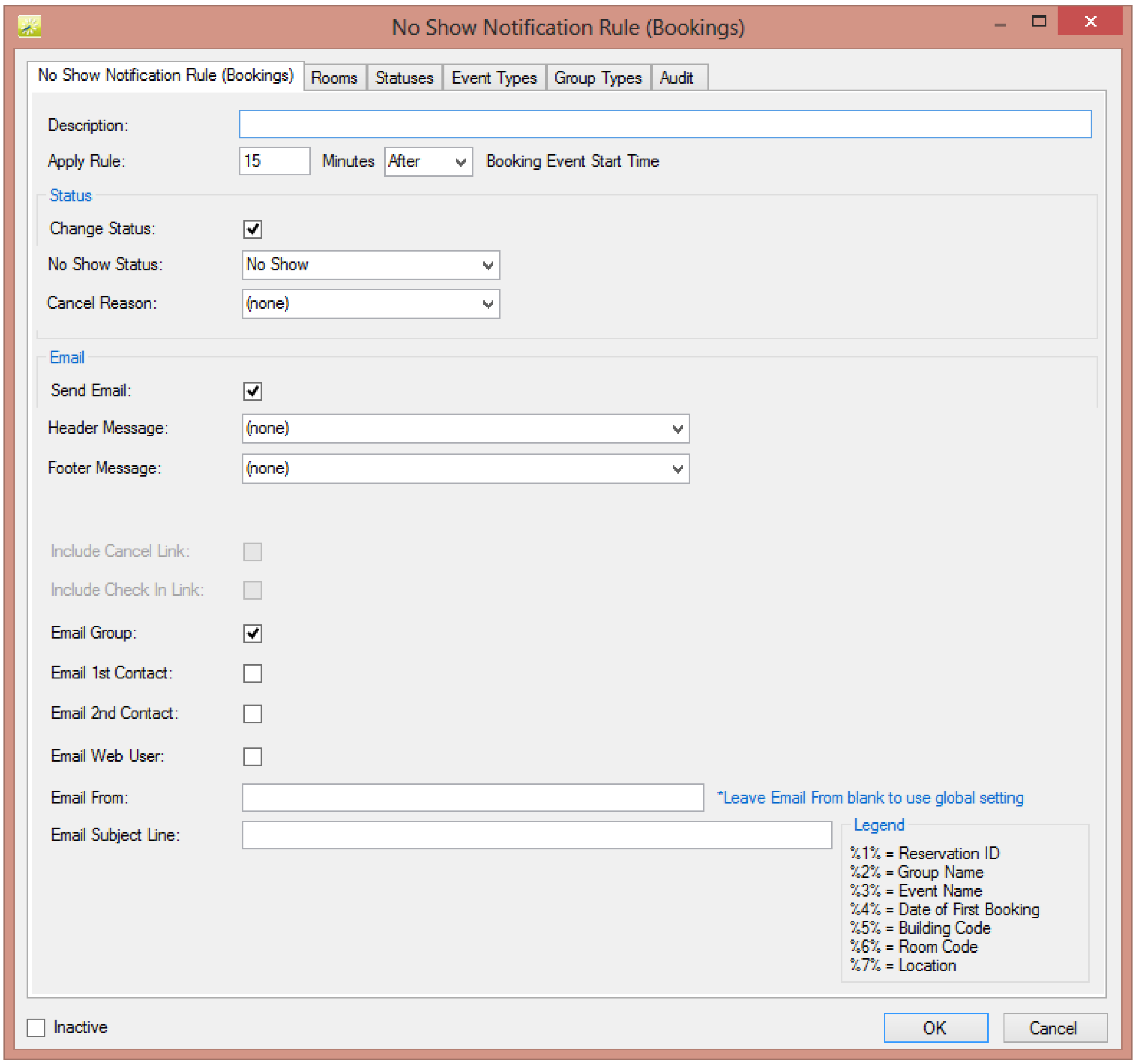
Note: Anyone with access to the desktop client can check in a booking earlier than the alloted time assigned to the room.

No Show Notification Rules

No show notification rules are created for bookings in rooms that require Check in. These rules can be used to notify users of check in times, allow them to check in and cancel bookings if a user does not check in within the appropriate amount of time.

Configuring No Show Notification Rules

1. On the EMS menu bar, click Configuration > Administration > No Show Notification Rules (Bookings)
2. Create a new rule or edit an existing rule.



3. Enter the information for the Now Show Notification Rule.

Option	Description
Description	The name or the description for the notification rule. **Note:** The description can be a maximum of 50 characters, including spaces.

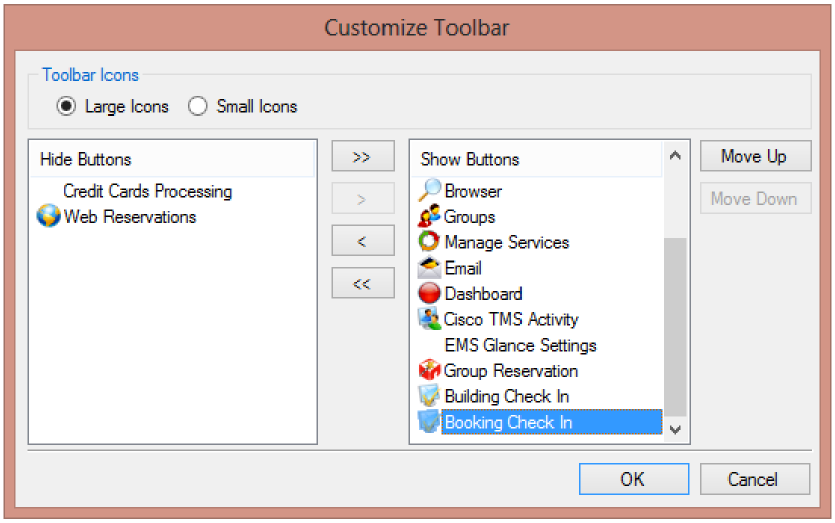
Option	Description
Apply Rule	Selecting when to apply the rule determines when the no show notification rule will be applied and trigger. This can be either before or after the event has started.
Change Status	Select this option if the group's bookings are to be changed to the status selected on the No Show Status dropdown list.
No Show Status	The status to which the group's bookings are changed if the group "no-shows."
Cancel Reason	Available only if the No Show Status is a Cancel Status type. Select a reason for cancelling the "no-show" group.
Send Email	If this box is checked it will send a notification email to the selected party/parties.
Header Message Footer Message	Select a header and/or footer message that is to be displayed on every No Show notification that is sent.
Include Cancel Link Include Check In Link	Available only if Change Status is not selected. Provides links in the notification email so that a user can cancel or check into the booking directly from the notification email.
Email Group Email 1st Contact Email 2nd Contact Email Web User	Select the appropriate options to indicate to whom the no show notification is to be sent.
Email From	Enter the email address that is to be displayed in the Email From field for the no show notification.
Email Subject Line	Enter the text that is to be displayed in the email subject line. Variables pull in selected data from the event for which the notification is being emailed. You can include variables as described in the Legend. For example, %2% is the code for the group name, so "Notification for %2%" would result in "Notification for Consumer Electronics Association" being displayed in the subject line.
Inactive	When this box is checked the no show notification will be made inactive and no longer send notifications for the selected rule.

Managing Check In

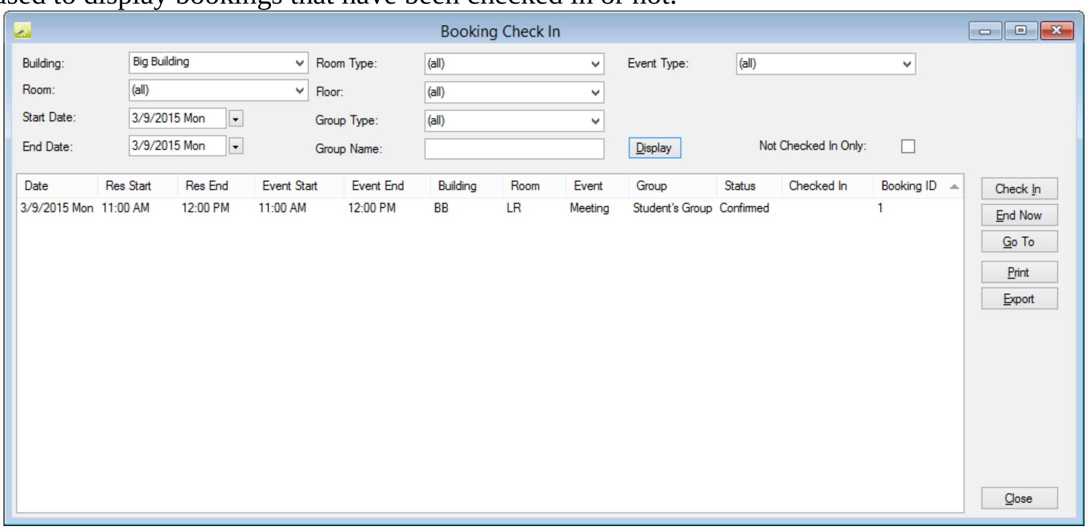
When check in is enabled for rooms there are multiple ways to check in to bookings that users can utilize. Included with booking level check in is a new booking check in dashboard. The dashboard is a place to manage bookings and the check in status for them. This dashboard is separate from the EMS Dashboard and the Group Check In Status dashboard that were previously available.

Booking Check In Dashboard

1. On the EMS menu bar, click Reservations > Other> Booking Check In to open the Booking Check In dashboard.
    a. Alternately this can be accessed through the Booking Check In icon on the Toolbar.
    - To add the Booking Check In icon to the Toolbar right click on the toolbar, select customize and move the Booking Check In to the Show Buttons side.



2. This area has multiple options for EMS administrators to help manage booking check in. It also is used to display bookings that have been checked in or not.

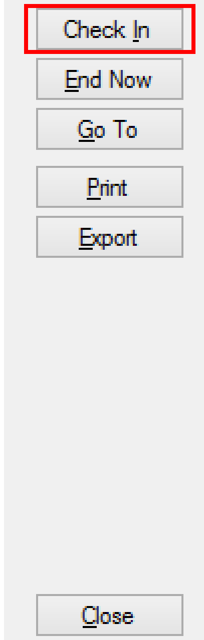


Option	Description
Group Name	Allows the user to search for a group to check in to their booking.
Display	Shows bookings in rooms that are set up for check in and match the filters.
Check In	This will check in a booking for a user that has not checked in using another method.
End Now	This will end a selected booking that is in progress, which will free the room up for another booking.
Go To	This will take the administrator to the navigator for the highlighted booking to view further information.
Print	This will print the information being displayed for the filters that are set above.

Check In Methods

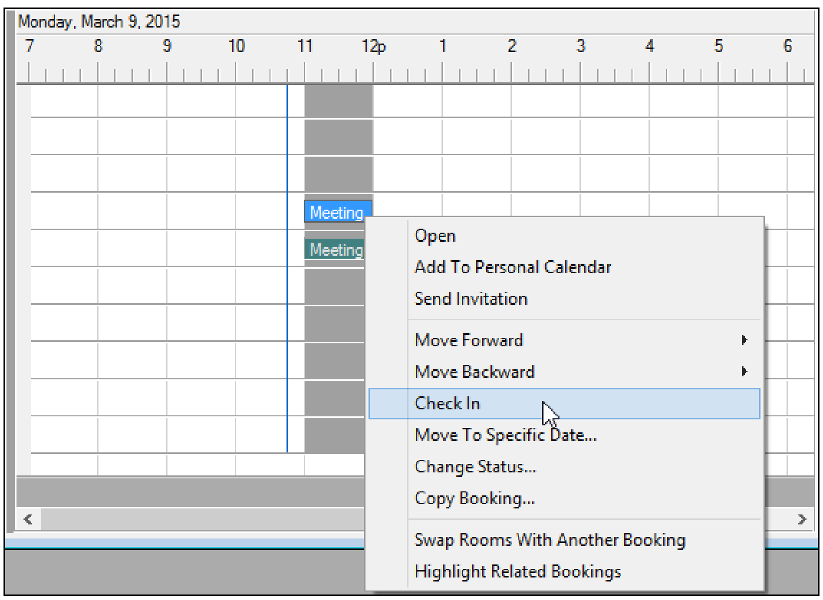
Booking Check In Dashboard

By going into the Booking Check In dashboard and entering the information into the filters, an administrative user can check in a booking by highlighting it and selecting check in.



Reservation Book

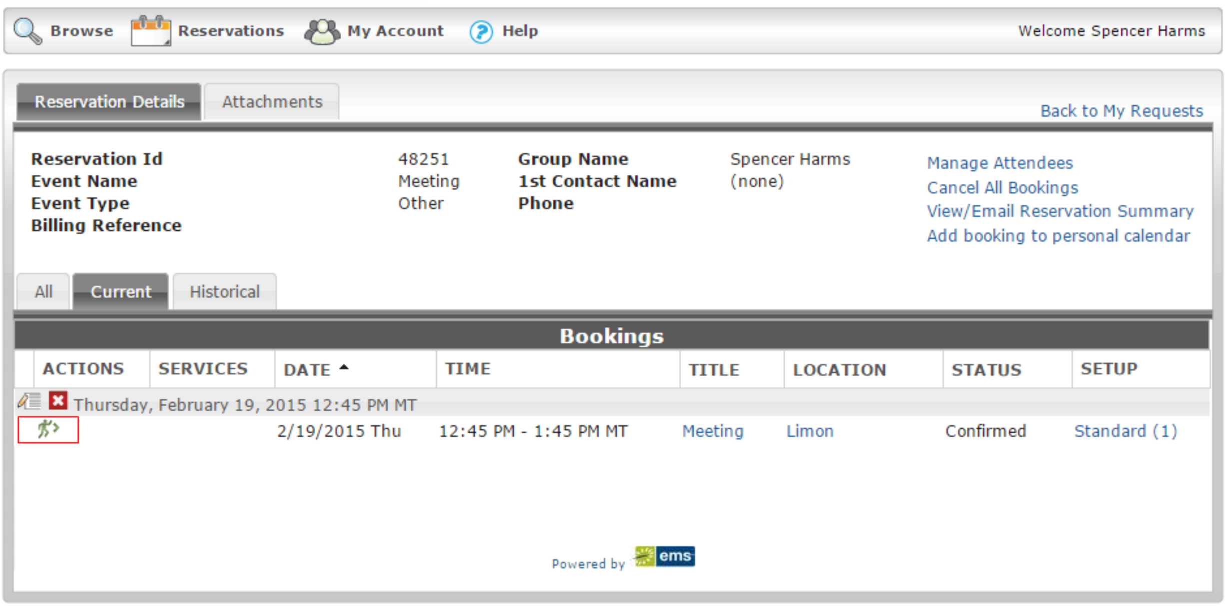
Bookings in the Reservation Book can be checked in to by right clicking on the booking and selecting Check In.



Virtual EMS

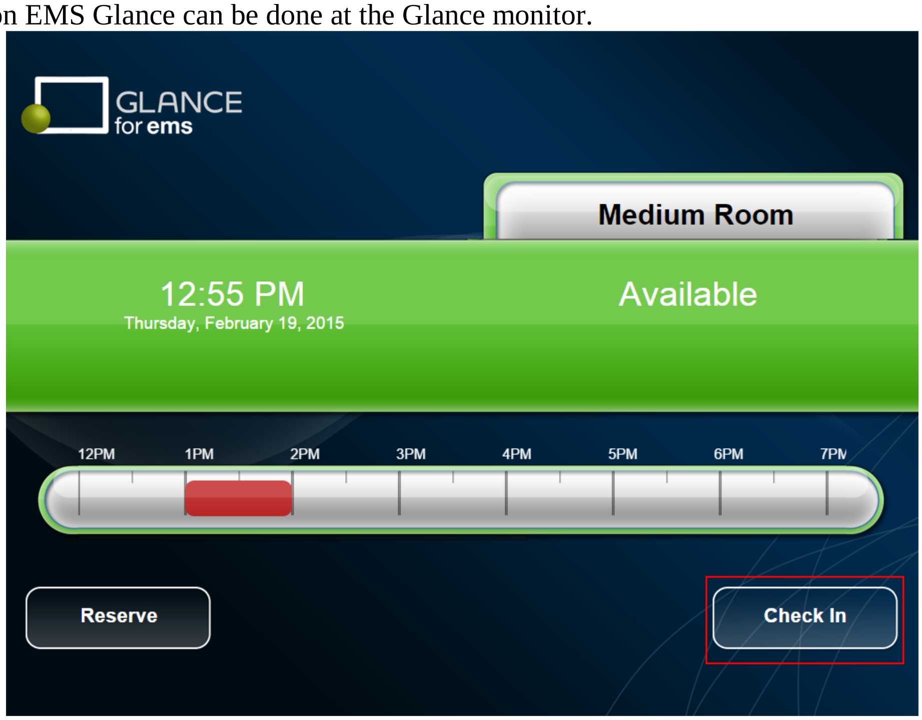
To check in through Virtual EMS it requires that the user have a Web Security Template that has the role for Check In/Check Out.

1. To add the role navigate to Configuration > Web > Web Security Templates then edit the template the role is to be added to.
2. Once the Web User has the role they can check into their bookings in the Reservation Summary screen.



EMS Glance

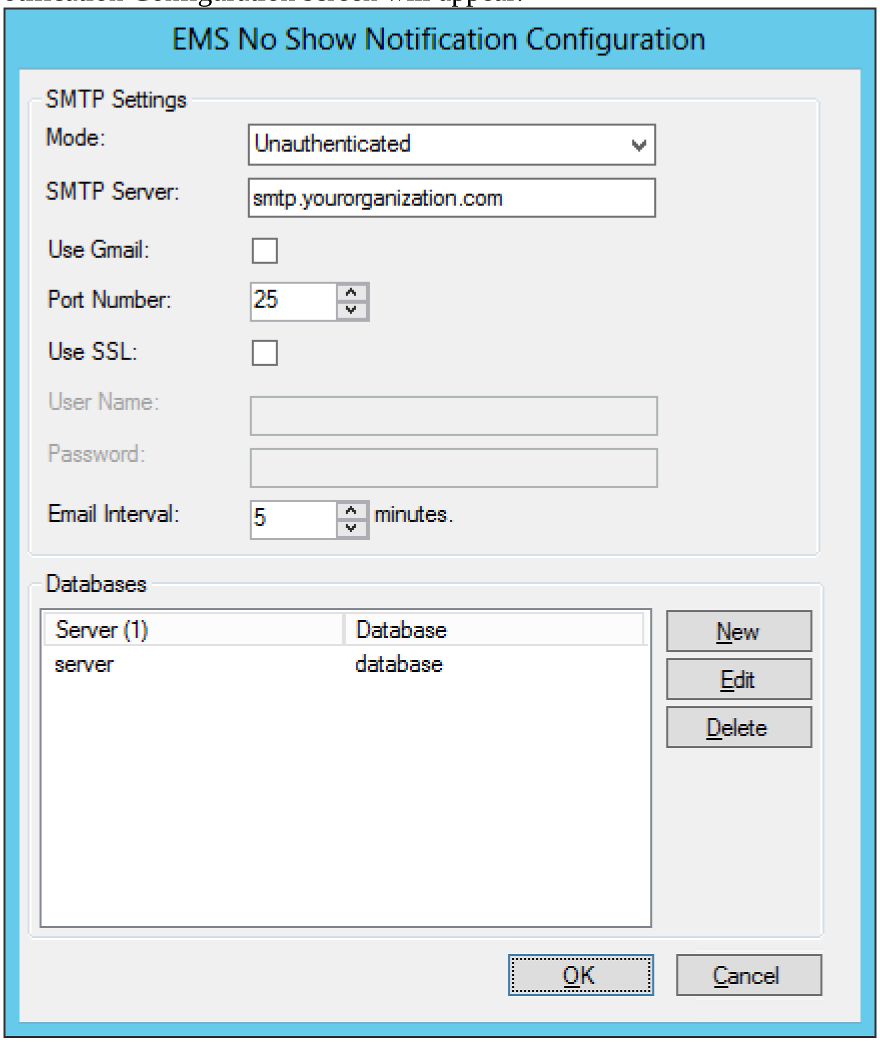
Checking in on EMS Glance can be done at the Glance monitor.



Installing EMS No Show Notification Service

To install the EMS Email Notification Service:

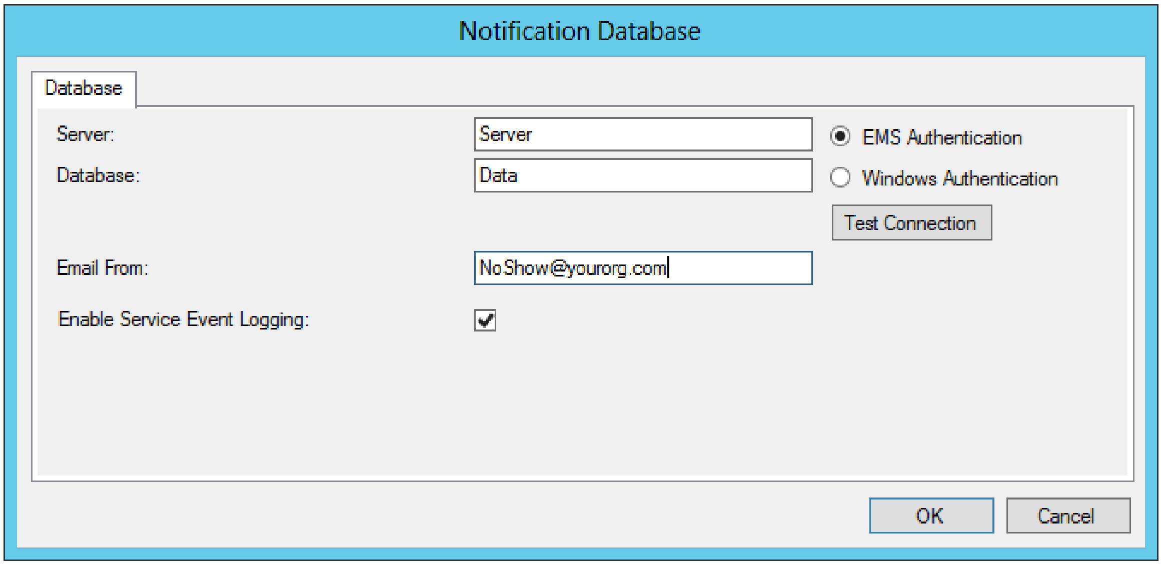
1. Verify that the prerequisite software is installed.
2. Download the **EMSNoShowNotificationSetup.msi** onto the server that will be running the service.
3. Double-click **EMSNoShowNotificationSetup.msi**. Follow the on-screen prompts. It is recommended that the defaults are accepted.
4. Within the Microsoft Windows Start menu, locate ***EMS No Show Notification service***. The EMS No Show Notification Configuration screen will appear.



5. Review and complete/change the following settings:
   - **Mode** – Type of authentication to the SMTP server.
   - **SMTP Server –** SMTP server name or IP address.
   - **Use Gmail –** Check this box if the organization uses Gmail as their mail server.
   - **Port Number –** SMTP port (default = 25)
   - **Use SSL –** Check this option if your SMTP server runs under SSL.
   - **User Name/Password** – Required if an authentication mode other than Unauthenticated is selected.

- **Email Interval –** The frequency with which the system will generate notification emails. If the interval is set to 0 minutes, the service will not function.

6. In the Databases section of the dialog box, you will see a sample database and server (named 'server' and 'database.') Select this entry, click **Edit**, and change the values to your EMS server and database name.



On the Database tab of the Notification Database dialog box, complete the following:

- **Server/Database** – EMS server and database name
- **EMS Authentication/Windows Authentication** – The method of authentication to this database.
- **Email From –** Email address that will be displayed in the From field of notification emails that are sent.
- **Enable Service Event Logging** – Activates Windows event logging.

8. After making your entries, click **OK**.
9. Click **OK** again to save your EMS Email Notification Configuration settings.

Note: If any issues are encountered starting the service, please visit the EMS Knowledge Base in the online Support Center for a possible solution or call Customer Support.

Preface

Welcome to the *EMS User's Manual*. The purpose of the *EMS User's Manual* is to answer your questions and guide you through the procedures necessary to use the EMS application efficiently and effectively.

Using the manual

You will find the *EMS User's Manual* easy to use. You can simply look up the topic that you need in the table of contents or the index. Later, in this Preface, you will find a brief discussion of each chapter to further assist you in locating the information that you need.

Special information about the manual

The *EMS User's Manual* has a dual purpose design. It can be distributed electronically and then printed on an as-needed basis, or it can be viewed online in its fully interactive capacity. If you print the document, for best results, it is recommended that you print it on a duplex printer; however, single-sided printing will also work. If you view the document online, a standard set of bookmarks appears in a frame on the left side of the document window for navigation through the document. For better viewing, decrease the size of the bookmark frame and use the magnification box to increase the magnification of the document to your viewing preference.

If you do print the document using a single-sided printer, you might see a single blank page at the end of some chapters. This blank page has been added solely to ensure that the next chapter begins on an odd-numbered page. This blank page in no way indicates that your book is missing information.

Conventions used in the manual

The *EMS User's Manual* uses the following conventions:

- The tab, field, and menu labels that are described in this User's manual are those used in the standard implementation of EMS. Your EMS administrator might have customized some of these labels to better suit your organization's business needs. Therefore, the labels that are referenced in this User's manual might be different than what you observe for your implementation.
- The colors that are shown in this User's manual for the windows and their components (for example, a reservation in the Reservation Book or the colors for the booking statuses) are those used in the standard implementation of EMS. Your EMS administrator might have customized some of these colors to better suit your organization's business needs.

Therefore, the colors that are shown in this User’s manual might be different than what you observe for your implementation.

- The fields (required and optional), categories, and dropdown list values that are described in this User’s manual are those used in the standard implementation of EMS. Your EMS administrator might have customized some of these values to better suit your organization’s business needs. Therefore, the fields, categories, and values that are referenced in this User’s manual might be different than what you observe for your implementation.
- The EMS application provides multiple ways of accessing the same EMS functions and although this manual does not address all these ways, you can use whatever method best suits your working needs.
- Information that can vary in a command—variable information—is indicated by alphanumeric characters enclosed in angle brackets; for example, <Room Type>. Do not type the angle brackets when you specify the variable information.
- A new term, or term that must be emphasized for clarity of procedures, is *italicized*.
- Page numbering is “online friendly.” Pages are numbered from 1 to x, *starting with the cover* and ending on the last page of the index.

Although numbering begins on the cover page, this number is not visible on the cover page or front matter pages. Page numbers are visible beginning with the first page of the table of contents.

- This manual is intended for both print and online viewing.
  - If information appears in blue, it is a hyperlink. Table of Contents and Index entries are also hyperlinks. Click the hyperlink to advance to the referenced information.

Assumptions for the manual

The *EMS User’s Manual* assumes that:

- You are familiar with windows-based applications and basic Windows functions and navigational elements.

Organization of the manual

In addition to this Preface, the *EMS User’s Manual* contains the following chapters and appendices:

- “Getting Started with EMS,” on page 27 details the procedures for opening and logging on to the EMS application as well as an overview of the major functional areas in the application, including the title bar, the main window, the toolbar, and the main menu.
- “Reservations and Bookings,” on page 41 details the two essential EMS components for meeting and event scheduling—reservations and bookings. It explains the structure of a reservation in EMS, it explains the concept of an event timeline for a reservation booking, and it describes the three ways to make a reservation in EMS.
- “The Navigator,” on page 77 details the Navigator, which is a window in EMS that you use to view and manage all aspects of a reservation including bookings and booking details. It also provides detailed procedures for using the Navigator to add one or more bookings to a reservation, edit and copy reservations, edit and copy one or more bookings, cancel one or more bookings, add comments to reservations and bookings, and to manage booking details and items.
- “Search Tools,” on page 195 details the variety of options that are available to you for searching for reservations and bookings in your EMS database, including the Browser, the Calendar, the Navigator, Groups, and Web Requests.
- “EMS Dashboard,” on page 227 details the EMS Dashboard, which is a window that centralizes critical information about reservations and web requests in a single location. The information that is displayed on this window provides you with the necessary input to manage your work in the EMS application.
- “Groups and Contacts,” on page 253 details the procedures for adding and editing groups and contacts in your EMS database. It also details the procedures for sending an email to a group or a contact, deleting a group or a contact, and printing and exporting group and contact information.
- “Confirmations,” on page 307 details a confirmation, which is a document that details the critical information for a reservation—the date, the time, the location, the scheduled resources, and so on. The chapter describes how to specify the settings for confirmations and how to generate a confirmation both manually and automatically. It also describes the procedures for printing a confirmation and for emailing a confirmation.

- “Reports and Queries,” on page 319 details the reports that are available in EMS, including daily reports, statistical reports, and exception reports.
- “Billing,” on page 361 details the functions that are available in EMS for working with invoices and transactions for reservations and bookings and for reporting on this information.
- “User Settings,” on page 401 details the preferences that are available to you for customizing some of the basic functions of your EMS user account.
- “Other Reservation Functions,” on page 411 details several miscellaneous standalone functions that are available in EMS to assist you in managing and maintaining reservations and bookings in your system as well as managing your general work requirements.
- “EMS Workplace,” on page 435 details the EMS Workplace module, which is a facility scheduling system for managing hoteling requirements, as well as the booking of meeting/event space and resources.
- "Academic Planning (EMS Campus),” on page 443 details the EMS Campus module, which is a a complete campus-wide space management package.

Getting Started with EMS

EMS is user-friendly room scheduling software that is designed to manage the meetings and events that take place in your facility. Standard features, which you use to create, manage, and report on events, include the following:

- The Reservation Wizard room booking tool
- A graphical reservation book
- The Browser and month-at-a-glance Calendar Inquiry
- Numerous daily, sales, and statistical reports

This chapter covers the following topics:

- "Starting EMS" on page 29.
- "The EMS Window" on page 31.
- "An EMS Browser Window" on page 35.

Starting EMS

After EMS has been installed on your desktop, a shortcut icon for the application is placed on your desktop. An option for the application is also available from your Start menu. You can double-click the desktop icon to launch the EMS application, or you can select the option from your Start menu.

To start EMS

The following procedure is written from the perspective of EMS Enterprise; however, it is applicable for any EMS product (EMS Professional, EMS Campus, and so on).

1. Do one of the following:

   - On your desktop, double-click the EMS icon 

.
   - Open the Windows start menu, in the Search field, enter EMS and then select the EMS Enterprise option.

Figure 1-1: EMS Login dialog box

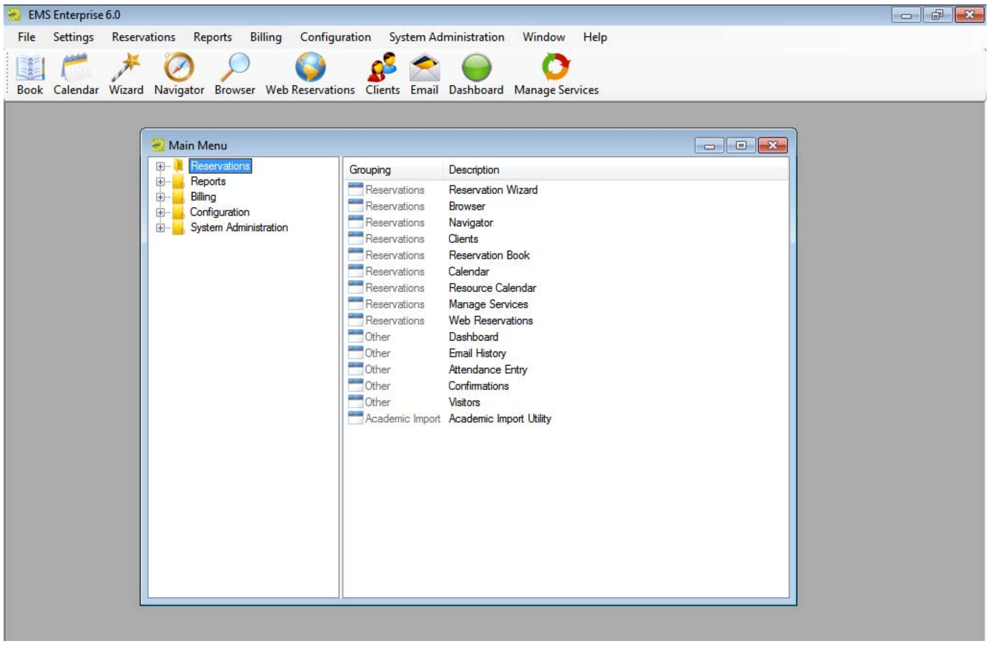
2. In the User ID field, enter your User ID.
3. In the Password field, enter your password.

If you do not know your User ID or password, contact your EMS administrator.

4. Click OK.

   The EMS Enterprise application opens. The main menu is open in the application.

Figure 1-2: EMS Enterprise main window with main menu

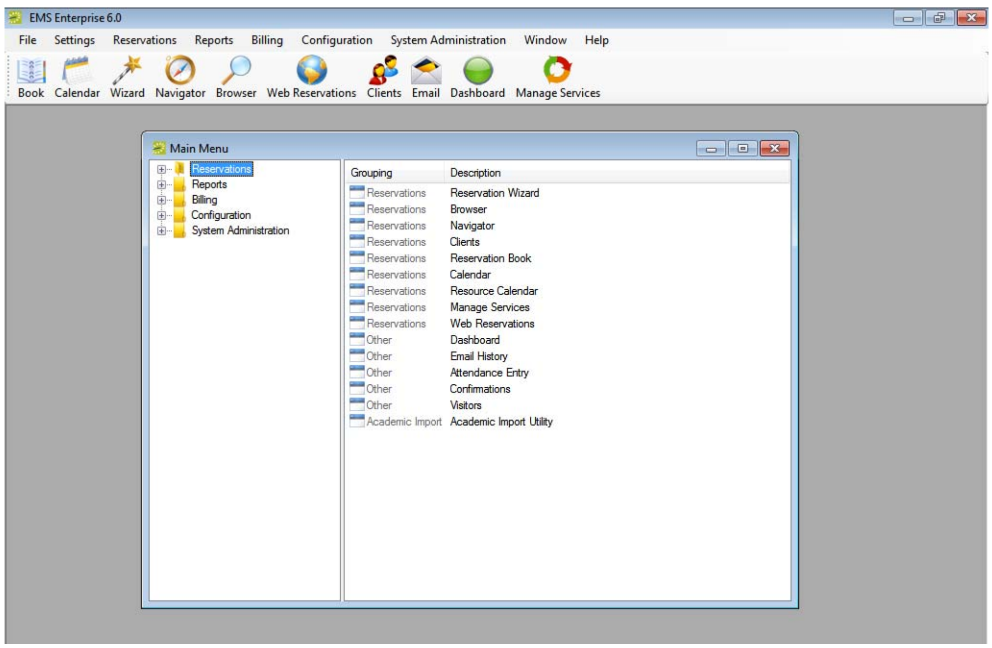


The EMS Window

The EMS main window is your starting point for the EMS application. The window provides quick access to all the EMS functions (Reservations, Reports, Configuration, and so on) and system tools. The EMS Main window has four major components:

- The title bar. See "Title bar."
- The menu bar. See "Menu bar" on page 32.
- The toolbar. See "Toolbar" on page 32.
- The main menu. See "Main menu" on page 33.

Figure 1-3: EMS main window with main menu

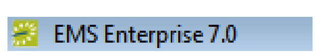


The following section is written from the perspective of EMS Enterprise; however, it is applicable for any EMS product (EMS Professional, EMS Campus, and so on).

Title bar

The name "EMS Enterprise" and the version number of the application appear in the title bar across the top of the EMS Enterprise main window.

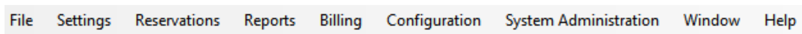
Figure 1-4: Title bar



Menu bar

The menu bar is set up in a standard Windows menu format with menu commands grouped into menus (File, Settings, Reservations, and so on) across the menu bar. Some of these menu commands are also available in the main menu.

Figure 1-5: Menu bar



Toolbar

The toolbar provides quick access to the most commonly used EMS functions. The toolbar buttons that are always displayed by default are the buttons for Book, Calendar, Wizard, Navigator, Browser, Web Reservations, Clients, Email, Dashboard, and Manage Services. Other buttons for other functions are also displayed by default depending on the version of EMS that you are running, for example, EMS Campus or EMS Workplace. Some of the functions that are available on the toolbar are also available from the main menu. You can customize the appearance of this toolbar to best suit your business needs.

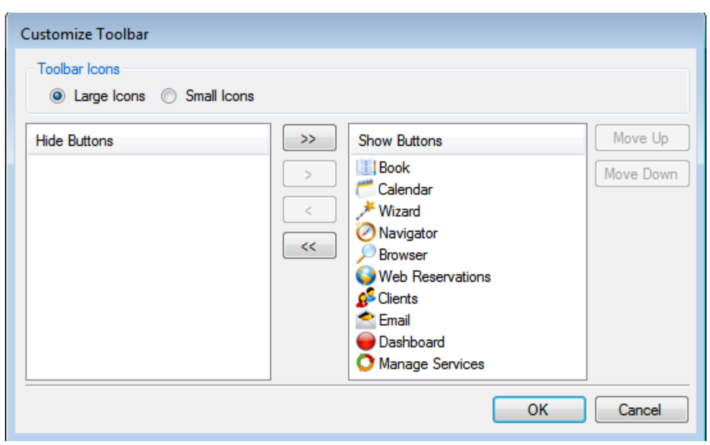
Figure 1-6: Toolbar

To customize the toolbar

1. Right-click the toolbar and click Customize.

   The Customize Toolbar dialog box opens.

Figure 1-7: Customize Toolbar dialog box



2. Do one or more of the following:

   - To display the toolbar icons as large icons, select Large Icons; otherwise, click Small Icons.
   - To hide an icon from the toolbar display, in the Show Buttons panel, select an icon, or CTRL-click to select multiple icons, and then click the Hide button (<). Conversely, to show an icon on the toolbar display, in the Hide Buttons panel, select an icon, or CTRL-click to select multiple icons, and then click the Show button (>).

You can also move a toolbar icon between the Hide and Show panels by double-clicking the icon. To move all icons from one panel to another in a single step, you do not have to select any icons. Instead, click the appropriate Hide All button (<<) or Show All button (>>).

   - To change the order (from left to right) in which the icons are displayed on the toolbar, select the icon, and then click Move Up or Move Down as needed.

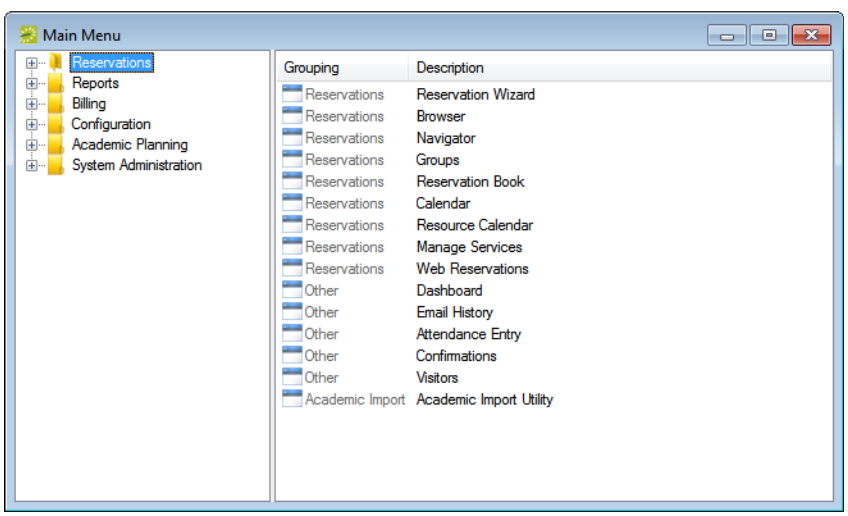
3. Click OK.

   The Customize Toolbar dialog box closes. The toolbar display is updated to reflect the changes that you made.

Main menu

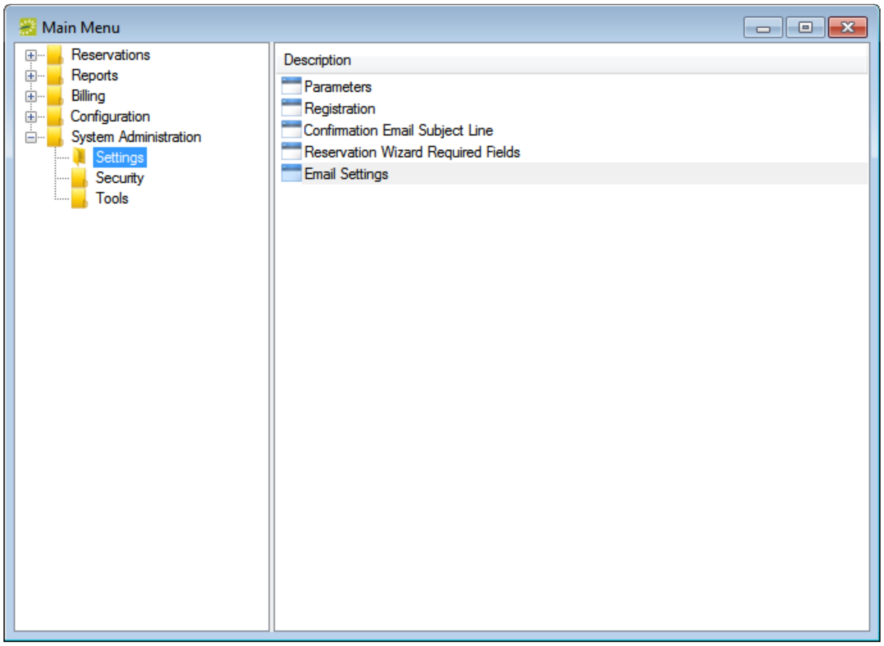
Every time you open EMS, the main menu opens in the EMS main window. You can access the primary EMS system functions—Reservations, Reports, Billing, Configuration, and System Administration—from the main menu.

Figure 1-8: EMS main menu



The main menu is arranged in a Windows Explorer-style folder structure. The top-level folders are the system functions of Reservations, Reports, Billing, Billing, Configuration, and System Administration. The available tasks for each top-level folder are further organized into subfolders. For example, to carry out a system administration task, you must first open the top-level System Administration folder, and then open the correct subfolder to view the list of available tasks.

Figure 1-9: Opening a System Administration subfolder



You can always close the main menu by clicking the Close button (x) in the upper right hand corner of the menu. To open the main menu again, on the menu bar, click File > Show Main Menu.

An EMS Browser Window

Many EMS functional areas use a *Browser* window. For example, the Groups window, the Query Builder window, and the Service Order Management window are all EMS Browser windows. You use an EMS Browser window to search for data, add new data, and edit and/or delete existing data. For example, in the Groups Browser window, you can search for groups or contacts, add new groups or contacts, and edit or delete existing groups or contacts. Regardless of the EMS functional area, all EMS Browser windows have the following features in common:

- A click and drag feature that you can use to group data by a specific column, rearrange the order of the data columns, or change the width of a column. See "To group data by columns in an EMS Browser window" on page 36, "To rearrange the columns in an EMS Browser window" on page 36, and "To change the width of the columns in an EMS Browser window" on page 37.

This feature is always indicated by the option to drag and group by a column header at the top of an EMS Browser window. If a window/window pane does not display this option, then the window/window pane is not an EMS Browser window.

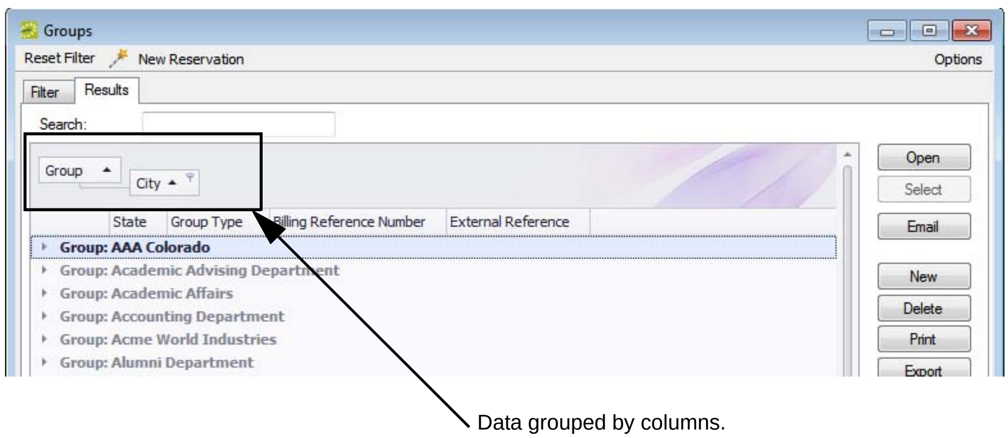
- A column context menu that has a multitude of options for sorting data, grouping data, sizing columns and so on. See "To use the context menu for data columns in an EMS Browser window" on page 37.
- A filtering feature that you can use to find and work with a subset of data in the window. See "To filter the data in an EMS Browser window" below.
- A column sorting feature that you can use to sort data by a specific column. See "To change the sort order of data in an EMS Browser window" on page 40.

The following examples are explained using the Groups window; however, the instructions are applicable for any Browser window in EMS.

To group data by columns in an EMS Browser window

In any browser window, you can drag a column header to the indicated location and group the data by the selected column. You can drag multiple column headers to the location. If you sort data by multiple columns, then the first column is the parent column. All other columns are placed as child columns, and the data is grouped accordingly in the browser window.

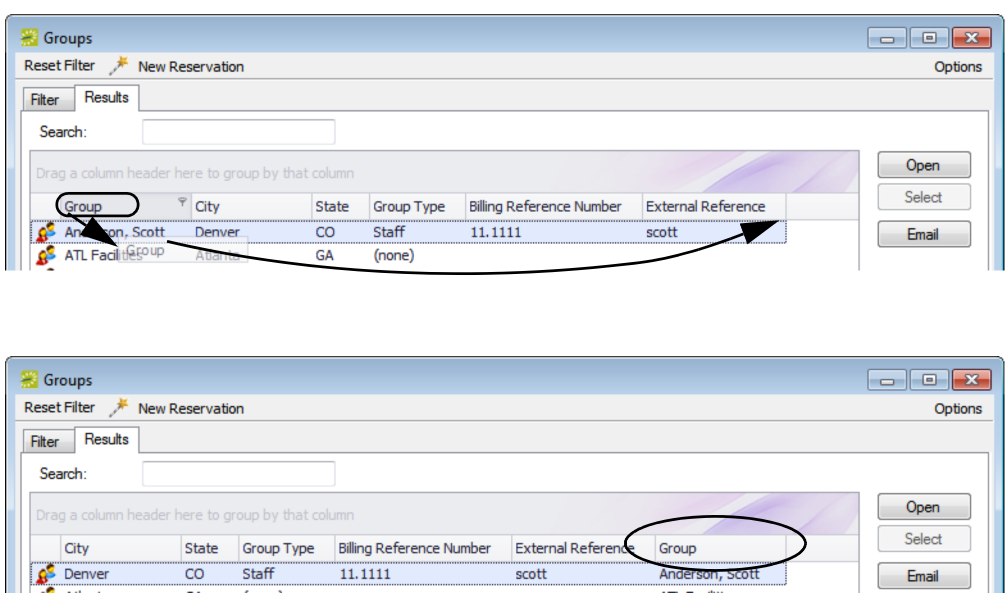
Figure 1-10: Grouping data by a column in an EMS Browser window



To rearrange the columns in an EMS Browser window

You can rearrange the column order by dragging a column to a new location using the column heading.

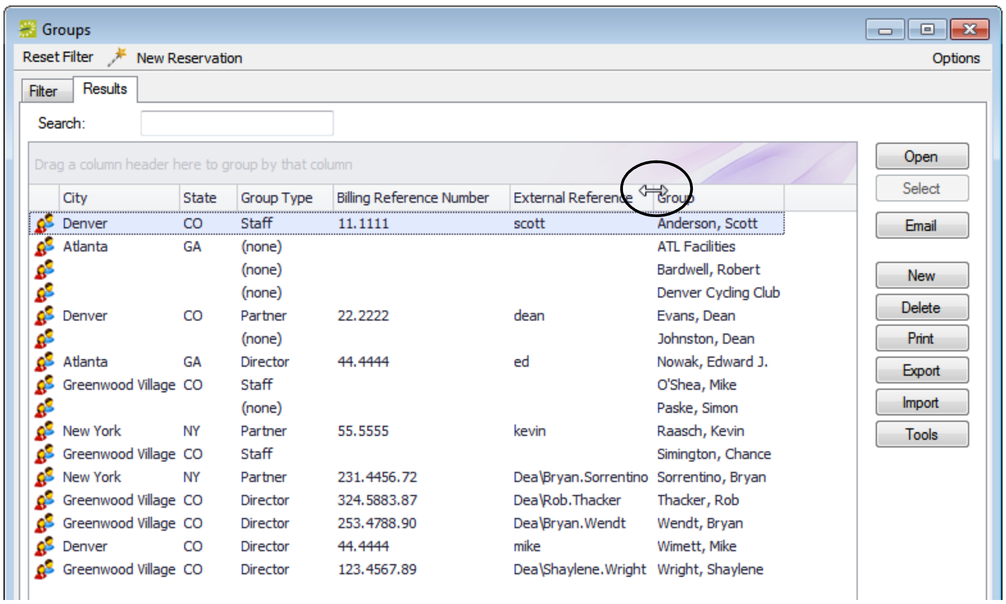
Figure 1-11: Rearranging columns in an EMS Browser window



To change the width of the columns in an EMS Browser window

You can change the width of a column by resting the mouse pointer on the right side of a column heading until the pointer changes to a double-headed arrow, and then dragging the boundary until the column is the width that you want.

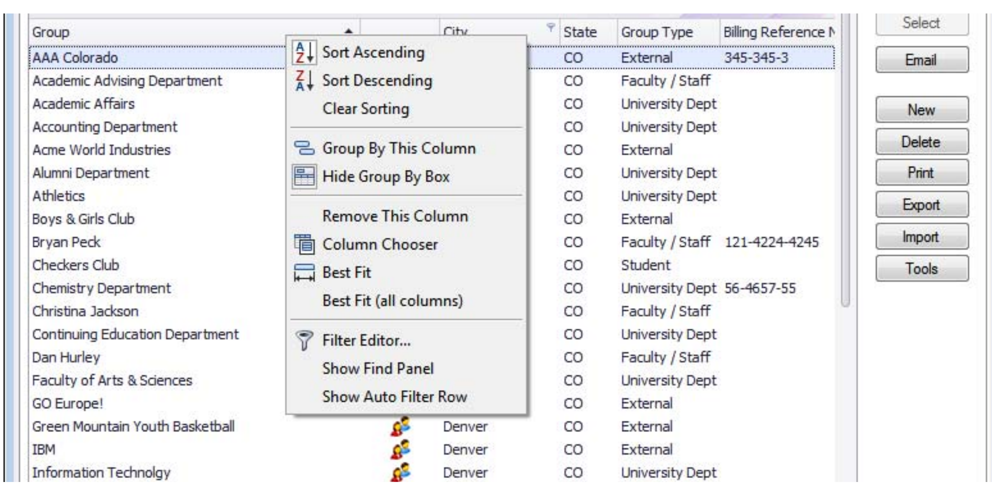
Figure 1-12: Changing the width of a column in an EMS Browser window



To use the context menu for data columns in an EMS Browser window

Right-click in any column in a browser window to open a context menu that has a multitude of options for sorting data, grouping data, sizing columns, and so on.

Figure 1-13: Context menu for a column in an EMS Browser window

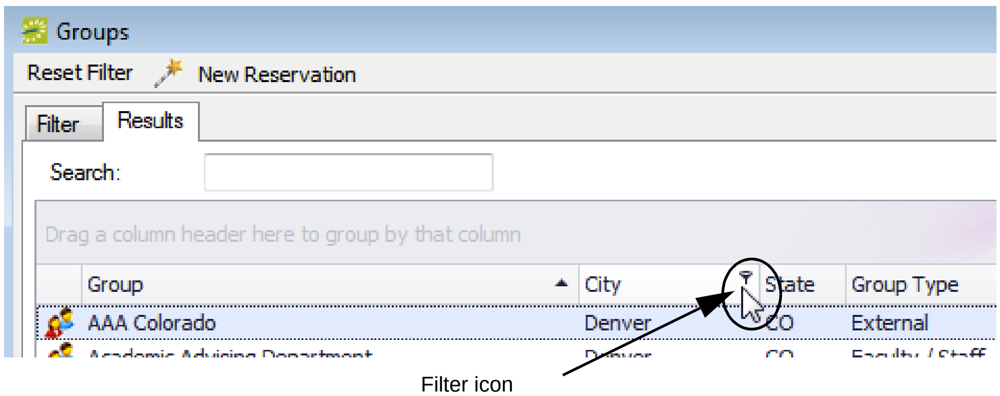


To filter the data in an EMS Browser window

1. Open a browser window, for example, the Groups window.
2. Place your cursor in the data column by which you want to filter the data. For example, to filter data based on the City for group records, place your cursor in the City column.

   A Filter icon is displayed in the column.

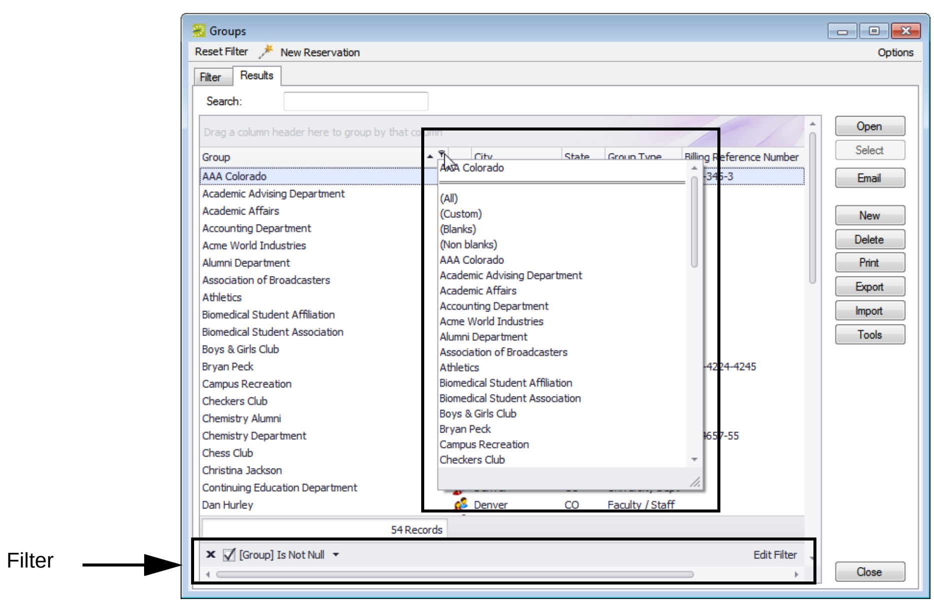
Figure 1-14: Filter icon displayed in a data column



3. Click the Filter icon to open a list of filter options, and then select the appropriate option for creating the filter.

Any filter that you create is always displayed in the bottom left corner of the browser window.

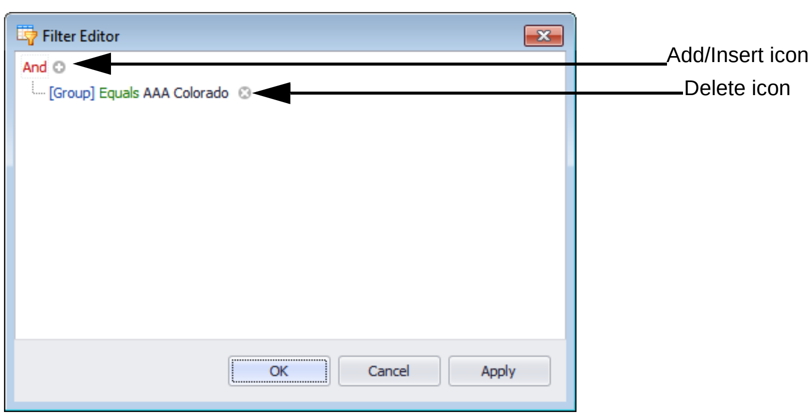
Figure 1-15: Example of filtering options in a browser window



Option	Description
Custom	Opens the Custom AutoFilter dialog box in which you can construct a custom data filter.
Blanks	Filters data based on NULL (blank) data for a field. For example, if you click on Blanks in the City column in the Groups window, then all group records for which the City field has a NULL (blank) value are displayed in the Groups window.
Non blanks	Filters data based on Not Null (not blank) data for a field. For example, if you click Non blanks in the City column in the Groups window, then all group records for which the City field does *not* have a NULL (blank) value are displayed in the Groups window.
<Specific Data Value>	A Filter list also displays each unique value that has been entered for the field. Select a value on this list to filter the data by the value. For example, select “Denver” in the City column of the Groups window to display only those group records that have “Denver” specified as the group’s city.

4. Optionally, click Edit Filter in the lower right corner of the browser window to open the Filter Editor dialog box and edit the current filter.
   - To add a new condition to a filter, click the Add/Insert icon.
   - To remove a condition from a filter, click the Delete icon at the end of the filter.
   - To apply a new filter, click Apply.
   - To close the Edit Filter dialog box and return to the browser window, click OK.

Figure 1-16: Edit Filter dialog box



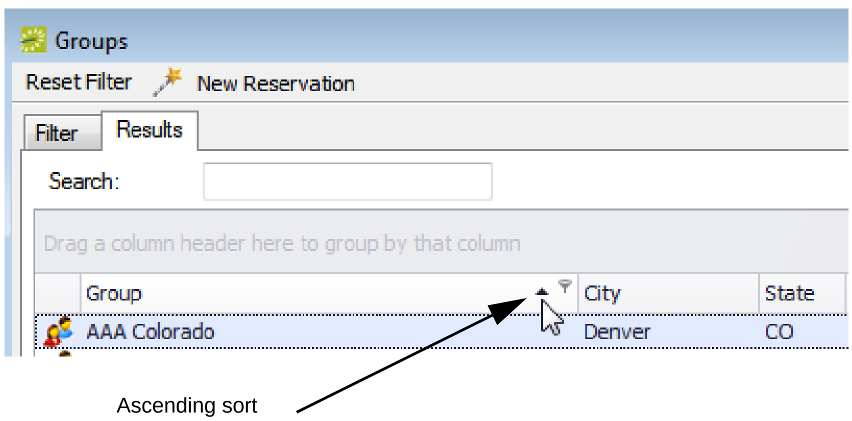
To change the sort order of data in an EMS Browser window

When a browser window first opens, data are sorted in ascending order based on the data in the *first* column of the window. For example, when the Groups window first opens, the group records are displayed on the Results tab alphabetically by Group name. To change the sort order of the data in a browser window:

1. Click once in any column header to display a Sort Order icon.

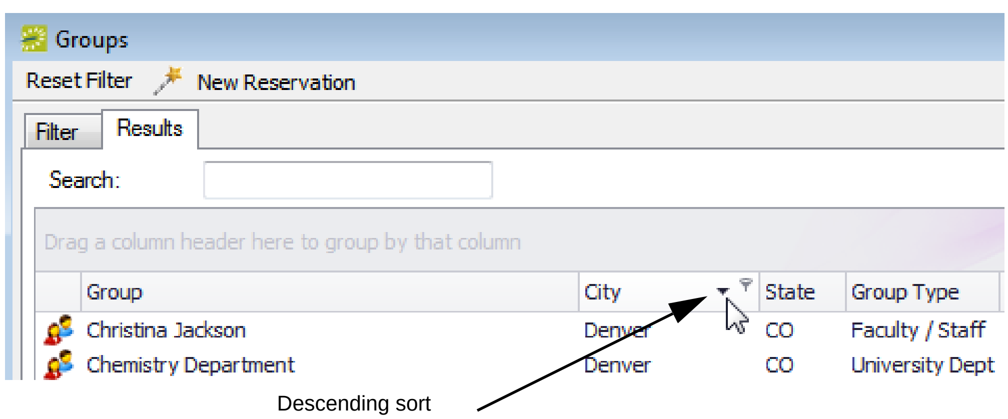
   The Sort Order icon is an “Up” arrow indicating that the data is sorted in ascending order.

Figure 1-17: Sorting by columns on the Groups window, Ascending sort



2. Click the Sort Order icon to sort the records in descending order by the data in the column.

Figure 1-18: Sorting by columns on the Groups window, Descending sort



3. Click the Sort Icon again to sort the records in ascending order.

Reservations and Bookings

The two essential EMS components for meeting and event scheduling are reservations and bookings. To use EMS efficiently and effectively, you must understand the structure of a reservation in EMS, you must understand the concept of an event timeline for a reservation booking, and you must know how to make a reservation.

This chapter covers the following topics:

- "Reservation Structure" on page 43.
- "Event Timeline" on page 44.
- "Making a Reservation Using the Reservation Wizard" on page 45.
- "Viewing and Editing Reservations in the Reservation Book" on page 62.

You can also make a reservation for a group by finding the group in EMS and then making a reservation for the group from the Groups window. In EMS Workplace, you can make a group reservation from the Group Reservation window. See "Working with Reservations for a Group" on page 295.

Reservation Structure

An event in EMS is comprised of the following:

- A reservation
- One or more bookings
- Booking details

These three components exist in a hierarchy—a reservation contains one or more bookings and each booking can have one or more details associated with it.

Reservation and bookings

A *reservation* is the who and the what of an event. For example, Group X (the who) can reserve some space for an Event Y (the what). A *booking* is the where and the when of an event. For example, Group X can schedule the conference room (the where) for a staff meeting on the second Monday in January (the when). Group X now has a single reservation with a single booking in EMS. If, however, Group X schedules the conference room (the where) for a staff meeting on the second Monday of each month for a calendar year (the when), then Group X now has a single reservation with twelve bookings in EMS.

Booking details

A booking can have one or more booking details associated with it. *Booking details* are the resources or services that are needed for an event, the notes for the event, the activities for the event, the room charges for the event, or any combination of these. For example, for Group X’s staff meeting, the resources could include the requested catering (coffee service, bagels and muffins, and so on) and the A/V equipment (a projector, a speaker’s podium, and so on).

Event Timeline

The following time designators are used for an event in EMS:

- Event Time: The time period during which the event actually takes place.
- Setup/Teardown Hours: The hours, or fractions of hours, that you add to the event time to allow staff to prepare a room for the event or to clean up after the event.
- Reserved Time: The total time for which the space (the where) is reserved. This time is the event time *plus* the setup/teardown time.

For example:

Variable	Time
Reserved Start Time	8:00 am
Setup Hours	1 hour
Event Start Time	9:00 am
Event End Time	4:00 pm
Teardown Hours	1.5 hours
Reserved End Time	5:30 pm
Reserved Time	9.5 hours

Making a Reservation Using the Reservation Wizard

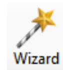
You use the Reservation Wizard to check for available space for an event and to make a reservation for the event. You can search for rooms that are available for a particular time on one day (a simple reservation with one booking) or on multiple days (a series reservation with multiple bookings). You can also create a series reservation by selecting one date and time, but multiple rooms. To make a reservation using the wizard, you must:

- Specify the event date and time information. See “To specify the event date” on page 46.
- Specify the event time and status. See “To specify the event time and status” on page 49.
- Select the event location. See “To select the event location” on page 50.
- Specify the event information. See “To specify the event information” on page 57.

The following procedure describes how to make a reservation by selecting values for the required and optional fields.

- *If your EMS administrator has configured reservation wizard templates, then a Reservation Wizard Template dropdown list is displayed at the top of the Reservation Wizard. You can facilitate the making of a reservation in the Reservation Wizard by selecting the appropriate template from the list, which automatically sets the default values for many of the fields in the Reservation Wizard.*
- *If your job entails making multiple reservations that require the same information, and you are not using reservation wizard templates, then you can set your own default values for many of the fields in the Reservation Wizard. See “Setting User Preferences and Default Values” on page 403.*

To specify the event date

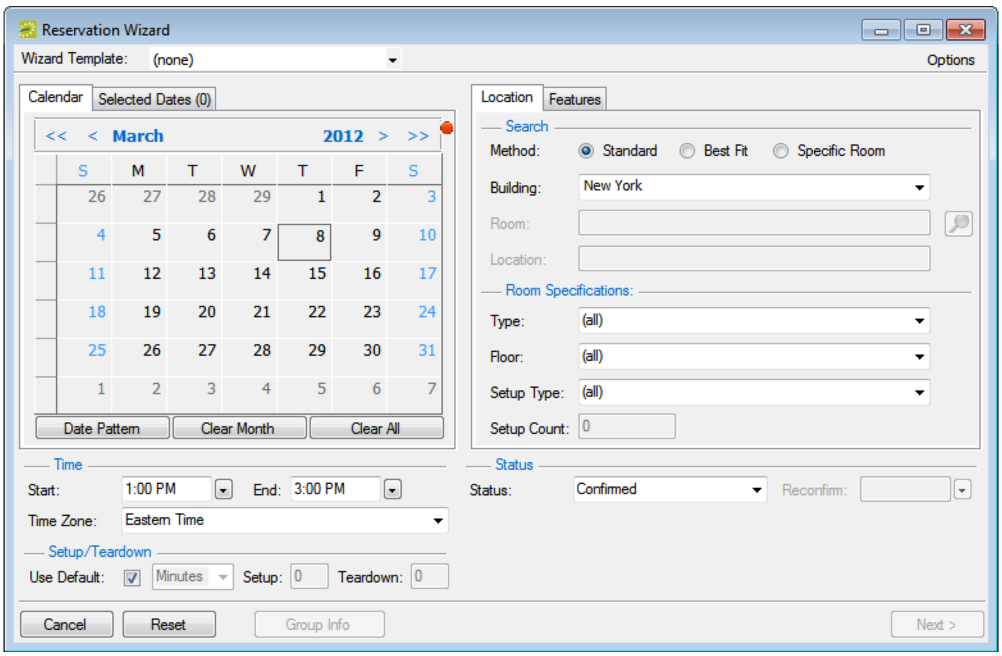
1. On the toolbar, click the Wizard icon 

.

   The Reservation Wizard opens.

All required fields in the wizard are marked with a red dot. Your EMS administrator configures the required fields.

Figure 2-1: Reservation Wizard



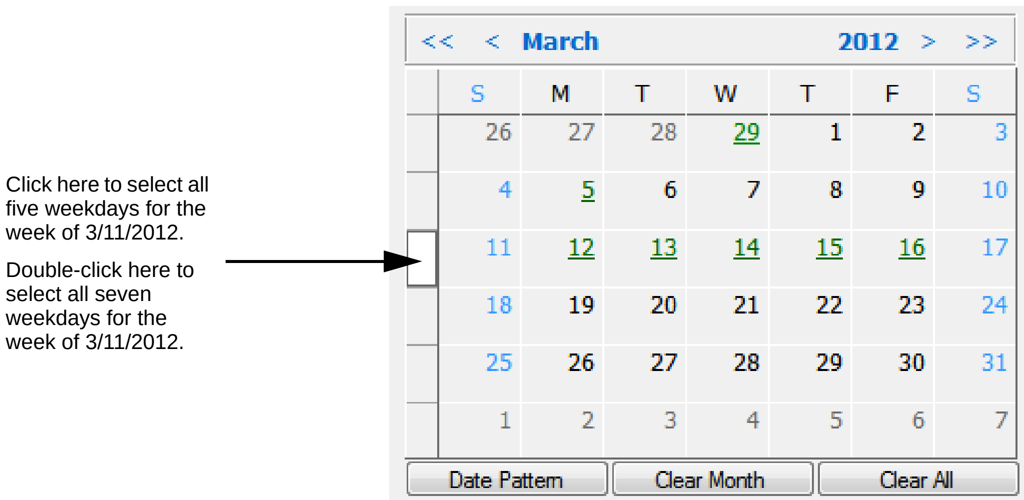
2. If needed, use the scroll features on the top of the Calendar to open the calendar for a different month (< or >) or for a different year (<< or >>).

You can also click a month at the top of the calendar to open a dropdown list from which you can select a different month and you can also click a year at the top of the calendar to open a dropdown list from which you can select a different year.

3. If the event dates do *not* follow a pattern, use one or more of the following options for entering a date; otherwise, go to Step 4.

    - Click on the dates on the calendar that the event is to take place.
    - To select all five days in a work week, click in the blank space that is to the left of the week.
    - To select all seven days in a week, double-click in the blank space that is to the left of the week.

Figure 2-2: Example of selecting the days of the week

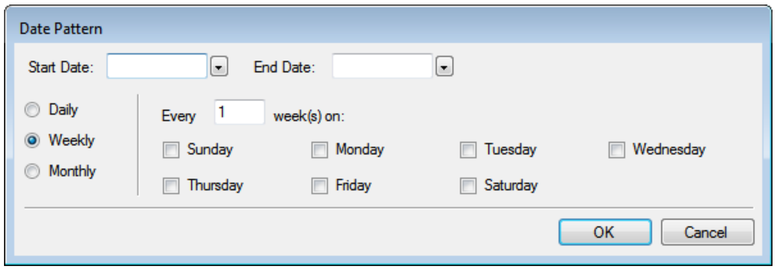


- To select every occurrence of a specific day of the week for the displayed month (for example, all Tuesdays in November, 2012), click the heading (S, M, T, and so on) for the day.
- To select every occurrence of a specific day of the week that is currently displayed onscreen (regardless if the day falls within the same month), double-click the heading (S, M, T, and so on) for the day.

If you need to clear a single selected date, click the date again. To clear multiple selected dates in a single step, click Clear Month to clear all currently selected dates for the currently displayed month or click Clear All to clear all currently selected dates regardless of month or year.

4. If the event dates do follow a pattern, (for example, the third Friday of every month), click Date Pattern to open the Date Pattern dialog box and enter your event date information.

Figure 2-3: Date Pattern dialog box



As you specify the event dates, the following occurs:

- The Selected Dates tab is automatically updated with the selected dates.
- If your EMS administrator has configured any of the dates that you selected as a holiday or as closed, then messages open indicating this.
- Dates that are closed are displayed in red on the Calendar tab and are linked to information about the closure. Dates that are holidays are displayed in green on the Calendar tab and are linked to information about the holiday.

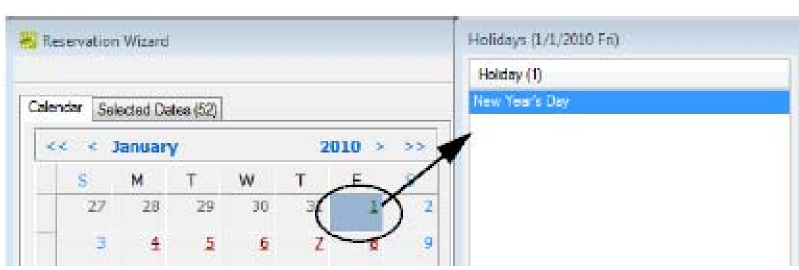
For any date, after you select the date on the Calendar tab, you can:

- Toggle between the Calendar tab and the Selected Date tab. Open the Selected Dates tab, select the date, and then click Go To Date.
- Remove the date from the list of selected dates. Open the Selected Dates tab, select the date, or CTRL-click to select multiple dates, and then click Remove.

When you make a reservation for multiple dates, the process is easier if you first remove all holidays or closed dates from the list of selected dates; however, be very careful when selecting dates for removal as you are not prompted to confirm your selection before you click Remove.

For dates that are configured as a holiday or as closed, you can click the link on the Calendar tab to open a dialog box that displays information about the date.

Figure 2-4: Viewing information about a holiday or closed date from the Calendar tab



In addition, for dates that are configured as holidays, after you select the date on the Calendar tab, you can:

- View information about the date from the Selected Dates tab. Open the Selected Dates tab, scroll to and select the date, and then click Holidays.

5. Continue to "To specify the event time and status" below.

To specify the event time and status

1. Do one of the following to specify the start time and end time for the event:
   - Select a time from the dropdown list for each field.
   - Manually enter the time in each field.

When you manually enter the time, you can use a shortcut. For example, for 9:00 am, you need to enter only "9a" and for 2:00 pm, you need to enter only "2p," and so on. If you enter an end time that is earlier than the start time, then the system assumes that the end time is the next day and the phrase "Next Day" is displayed to the right of the End time field.

2. Do one of the following to specify the Setup and Teardown times.
   - To use the default setup and teardown times that your EMS administrator has assigned to the rooms in your system, leave Use Default selected.
   - To override the default setup/teardown times, clear Use Default, select Minutes or Hours, and then enter your own setup and teardown times.

Remember, setup and teardown times are the hours, or fractions of hours, that you add to the event time to allow staff to prepare a room for the event or to clean up after the event. For example, for a 30 minute setup time, you can enter 30 minutes or 0.5 hours.

3. Select the status for the event.

Depending on the status that you select, for example, Tentative or Hold, you might be required to enter a reconfirm date. You can monitor reservations that must be reconfirmed on the Reconfirm Dates tab on the EMS Dashboard. See "EMS Dashboard," on page 227.

Time zone is discussed in "To select the event location" on page 50.

4. Continue to "To select the event location" on page 50.

To select the event location

You have three options for selecting the event location, which are indicated on the first window of the Reservation Wizard:

Search Method	Description
Standard	Use this option to display a list of all the available rooms that meet all the requested dates. See "To search for a standard room" below. **Note:** Standard search is required for Video Conference room assignments.
Best Fit	Use this option if no one room can meet all the requested dates. The system lists the available rooms along with the number of bookings for which you can reserve each room. You can piece together the entire reservation using Best Fit, or just part of it. See "To search for a best fit room" on page 53.
Specific Room	Use this option to confirm the availability and reserve of one specific room for the scheduled event. See "To search for a specific room" on page 55.

By default, EMS looks for an available room or rooms in only the first 50 rooms that it finds in the pre-configured Rooms list. To search more than 50 rooms, before you begin any search, click Options > Max. Number of Rooms to Search, and then select a different number of rooms to search.

To search for a standard room

By default, when you search for a standard room, rooms that are available all day are marked with an asterisk (*). To set or clear this option, click Options > Standard Search > Show Available All Day Indicator.

1. Select Standard.
2. Leave Building set to the default value of (all), or select a specific building, area, or view in which to search for a standard room.
3. If applicable, select the appropriate time zone for the event.

Your selection on the Building dropdown list determines the options that are available on the Time Zone dropdown list. If you select (all) buildings, then you can select a time zone. If you select a specific building, then by default, a time zone is selected for the building, and you cannot select a different value.

4. Do one or more or all of the following for room specifications:

    - *Type* is the class or category of the room, for example a meeting room, a workspace, and so on. Leave Type set to the default of (all) to search for all pre-configured room types or select a specific room type from the Type dropdown list.
    - *Floor* is optional information when you are searching for a room. Leave Floor set to the default value of (all) to search for all pre-configured floors or select the floor from the Floor dropdown list.
    - *Setup Type* is the physical layout or arrangement of a room, for example, rounds of 6 or theater-style. Leave Setup Type set to the default value of (all) to search for all pre-configured setup types or select the setup type from the Setup Type dropdown list.
    - *Setup count* is the anticipated attendance for the event. If you selected a specific setup type, then you must enter the setup count.

The selected setup type and setup count are applied to all the bookings that you add to this reservation. If any of the bookings require a different setup type or count, you can change this information after you complete the reservation. See “To edit a booking in the Navigator” on page 110 or “Editing Multiple Bookings in the Navigator” on page 112.

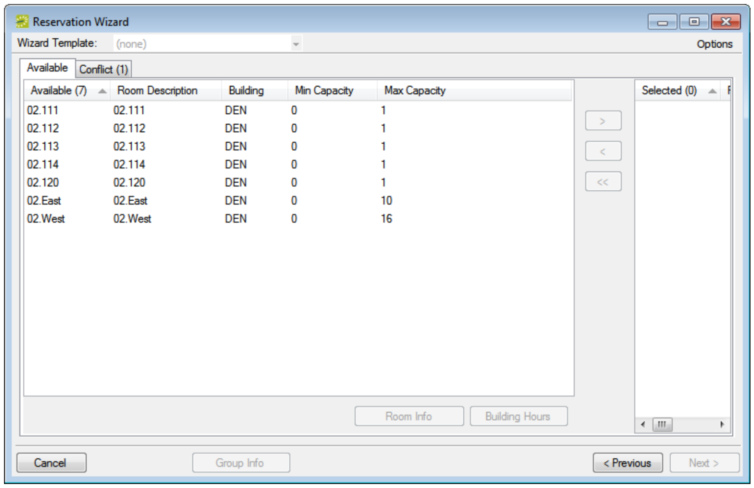
5. Optionally, open the Features tab, and then select the feature, or CTRL-click to select the multiple features that the room must have.
6. Click Next.

    Up to two tabs are displayed:

    - The Available tab, which is the active tab and is always displayed, lists all the rooms that meet *all* your event criteria.
        - If you have elected to show the Available All Day Indicator, the rooms that are available all day are marked with an asterisk (*).
        - By default, the available rooms are sorted alphabetically by room code. If your EMS administrator has configured the rooms for your EMS implementation with a book sequence, then under Options, select Sort Rooms by Book Sequence to sort the rooms from lowest to highest book sequence. (If two rooms have the same sequence, then the rooms are sorted alphabetically by name within the sequence.)
    - The Conflicts tab is displayed only if there are rooms that are not available for the requested dates/times. Optionally, you can open the Conflicts tab to view the list of rooms that were not available for scheduling as well as list of the events that are scheduled for each room.

    See Figure 2-5 on page 52.

Figure 2-5: Example of standard room search results



7. Select the room, or CTRL-click to select the multiple rooms that you are scheduling for the event.

If the reservation is for a video conferencing meeting, then you must select a minimum of two rooms. You must designate one of these rooms as the Host Location on the Video Conference tab on the last page of the Reservation Wizard.

8. Optionally, do one or both of the following; otherwise, go to Step 9.
   - Click Room Info to open the Room Info dialog box and view information about any bookings for the room, the room properties, its pricing, and/or to view an image of the room.
   - Click Building Hours to open the Building Hours dialog box which displays the hours that the selected room/building is open on the reserved date.
9. Click the Move button (>) to move the rooms to the Selected list.

If you select more than one room, all the selected rooms are booked for all the event dates.

10. Click Next to continue to "To specify the event information" on page 57.

To search for a best fit room

1. Select Best Fit.
2. Leave Building set to the default value of (all), or select a specific building, area, or view in which to search for a standard room.
3. If applicable, select the appropriate time zone for the event.

Your selection on the Building dropdown list determines the options that are available on the Time Zone dropdown list. If you select (all) buildings, then you can select a time zone. If you select a specific building, then by default, a time zone is selected for the building, and you cannot select a different value.

4. Do one or more or all of the following for room specifications:
   - *Type* is the class or category of the room, for example a meeting room, a workspace, and so on. Leave Type set to the default of (all) to search for all pre-configured room types or select a specific room type from the Type dropdown list.
   - *Floor* is optional information when you are searching for a room. Leave Floor set to the default value of (all) to search for all pre-configured floors or select the floor from the Floor dropdown list.
   - *Setup Type* is the physical *layout* or *arrangement* of a room, for example, rounds of 6 or theater-style. Leave Setup Type set to the default value of (all) to search for all pre-configured setup types or select the setup type from the Setup Type dropdown list.
   - *Setup count* is the anticipated attendance for the event. If you selected a specific setup type, then you must enter the setup count.

The selected setup type and setup count are applied to all the bookings that you add to this reservation. If any of the bookings require a different setup type or count, you can change this information after you complete the reservation. *See "To edit a booking in the Navigator" on page 110 or "Editing Multiple Bookings in the Navigator" on page 112.*

5. Optionally, open the Features tab, and then select the feature, or CTRL-click to select the multiple features that the room must have.

6. Click Next.

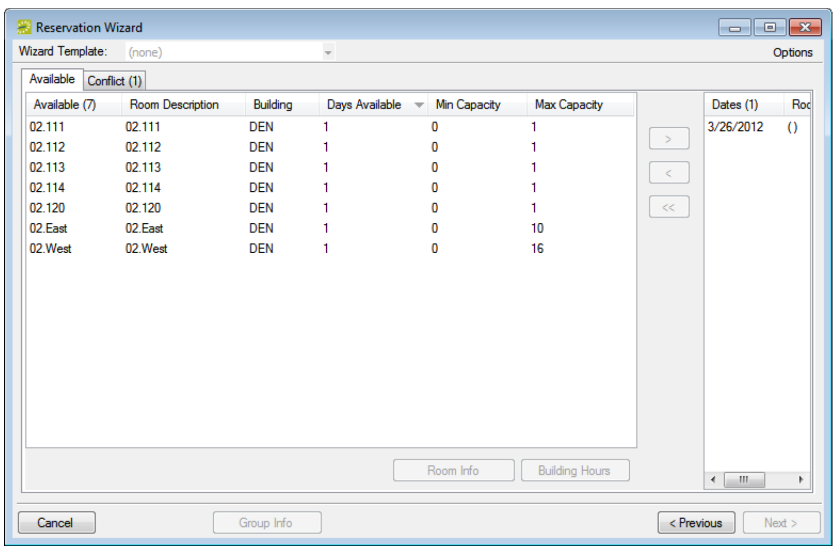
   Up to two tabs are displayed:

   - The Available tab, which is the active tab and is always displayed, has two lists. The list in the left pane is a list of all the rooms that meet *some or all* of your event criteria. The list in the right pane is a list of all the event dates that must be fulfilled.

By default, the available rooms are sorted alphabetically by room code. If your EMS administrator has configured the rooms for your EMS implementation with a book sequence, then under Options, select Sort Rooms by Book Sequence to sort the rooms from lowest to highest book sequence. (If two rooms have the same sequence, then the rooms are sorted alphabetically by name within the sequence.)

   - The Conflicts tab is displayed only if there are rooms that are not available for the requested dates. Optionally, you can open the Conflicts tab to view the list of rooms that were not available for scheduling for the event as well as list of the events that are scheduled for each room.

Figure 2-6: Example of best fit room search results



7. Optionally, do one or both of the following; otherwise, go to Step 8.

   - Select a room on the Available tab, and then click Room Info to open the Room Info dialog box and view information about any bookings for the room, the room properties, its pricing, and/or to view an image of the room.
   - Select a room on the Available tab, and then click Building Hours to open the Building Hours dialog box which displays the hours that the selected room/building is open on the reserved date.

8. Do one of the following:
   - If one is available, select the single room that is available for all the requested dates, and then click the Move button (>) to move the room to the Event Dates list.
   - If a single room is not available, select a room that is available for *some* of your requested dates, and then click the Move button (>) to move the room to the Event Dates list. Repeat this step as needed to fulfill all the event dates.
9. Click Next to continue to "To specify the event information" on page 57.

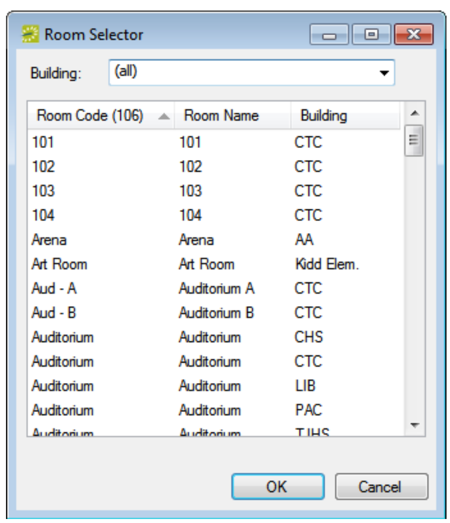
To search for a specific room

You can use the specific room search to book a standard EMS room or a room or area that is not managed in EMS. An *override room*, or "override description," is used to book an event in a space that has not been configured in your EMS system. For example, your EMS administrator might have configured an override room named "Other Area" in the Engineering building. To book an event in Dr. Wilson's office, which is a room that is not defined in EMS, in the Engineering building, you can select the "Other Area" room and specify "Dr. Wilson's Office" for the location. EMS does not track availability for events booked in override rooms; however, EMS reports on events that are scheduled in an override room just like any other event scheduled for any other room.

1. Select Specific Room.

   The Room Selector dialog box opens.

Figure 2-7: Room Selector dialog box



2. Do one of the following:

   - To select a room from a list of all rooms in all available buildings, select (all) on the Building dropdown list, select a room, and then click OK. If the room is configured as an override room, go to Step 3; otherwise, go to Step 4.

   - To select a room from a list of rooms in a specific building, area, or view, select the building, area, or view on the Building dropdown list, select the room, and then click OK. If the room is configured as an override room, go to Step 3; otherwise, go to Step 4.

3. In the Location field, enter the location of the override room, and then click Next to continue to "To specify the event information" on page 57.

4. Click Next.

   Two results are possible:

   - If the event is scheduled for a single date and the room is available, then continue to "To specify the event information" on page 57.

   - In all other cases, (for example, the event is scheduled for a single date but the room is not available or it is a multiple date event), the Available tab opens. This tab lists all the event dates for which the specific room is available. Continue to Step 5.

You can open the Conflicts tab to view the list of dates for which the specific room is not available as well as list of the events that are scheduled for the room.

5. Optionally, before you move a date to the Selected list, do one or both of the following; otherwise, go to Step 6.

   - Click Room Info to open the Room Info dialog box and view information about any bookings for the room, the room properties, its pricing, and/or to view an image of the room.

   - Click Building Hours to open the Building Hours dialog box which displays the hours that the selected room/building is open on the reserved date.

6. Do one of the following:

   - If the specific room is available for all the event dates, then click the Move All button (>>) to schedule the room for all the event dates.

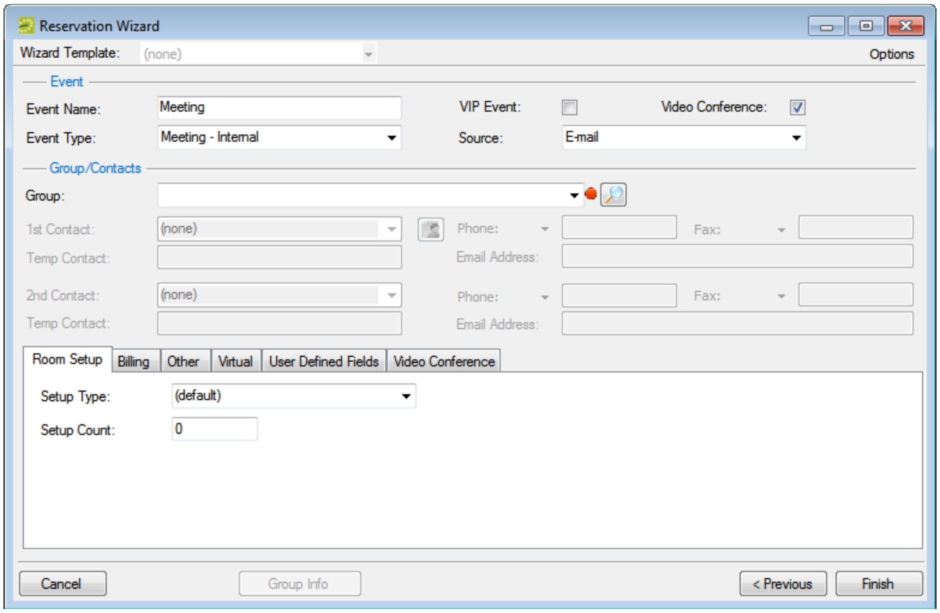
   - If the specific room is not available, try another approach such as reserving a different specific room, or using the Standard or Best Fit search method.

7. Click Next to continue to continue to "To specify the event information" on page 57.

To specify the event information

After you select an event location or locations, you must specify other information for the event. You must enter information in the required fields.

Figure 2-8: Event Information window



8. Enter the event information.

Field	Description
Event	
Event Name	A name or description for the event.
Event Type	The classification for the event.
VIP Event	Select this option to mark the event as a Very Important event.
Source	The reservation source.
Video Conference	Select this option for a video conference event.
Group/Contact	
Group	Dropdown list of all groups that are available in your system for hosting/ sponsoring an event. **Note:** If the pre-configured list of groups is too extensive to scroll, then click the Search icon  to open the Groups window and search for a specific group. See "To search for a group and/or contact" on page 255. If the group that you want to select for the reservation is not available on the pre-configured list, then you can add the group. See "To configure groups" on page 257. **Note:** Optionally, after you select a group for the event, you can click Group Info to open a dialog box that provides information (Properties, User Defined Fields, and Comments) about the group.

Field	Description
1st Contact Temp Contact	When you select a group, if a *default* contact has been defined for the group, then this field is automatically populated with the name of the contact; otherwise, the field is blank. You have several options for defining the 1st Contact for a reservation: • If the field is blank, but contacts have been configured for the group, you can select a contact from the pre-configured list. • If the field is populated with a default value, but other contacts have been configured for the group, you can select a different contact from the pre-configured list. • If the field is blank, and no contacts have been configured for the group, or the contact that you want to select for the group is not available on the pre-configured list, you can click the Contact icon to open the Contact dialog box and create a *permanent* contact for the group. See “To configure contacts” on page 278. • If you want to create a *temporary* contact just for this event, then select (temporary contact), and in the Temp Contact field, enter the name for the temporary contact. **Note:** If a default contact has been configured for the group, then any modifications that you make for the contact apply to this reservation only. The next time you or anyone else creates a reservation for this group, the 1st Contact field is again automatically populated with the name of the default contact.
Phone Fax Email Address	One more of these fields might be automatically populated depending on how a selected contact has been configured. You can manually edit these values if needed. **Note:** The Phone and Fax fields have a dropdown list available on which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label. **Note:** If default values have been configured for a selected contact, then any modifications that you make apply to this reservation only. The next time you or anyone else creates a reservation for the same contact, these fields are again automatically populated with the default information.
2nd Contact Temp Contact	Define if necessary for the event.
Room Setup tab	
Setup Type	If you selected a specific value for the setup type when searching for an event location, this value is carried forward to this field; otherwise, the field is set to (default). You can edit this value.
Setup Count	If you selected a specific value for the setup type when searching for an event location, this value is carried forward to this field; otherwise, the field is blank. You can enter a value in this field.

Field	Description
Billing tab	
Note: Depending on the group that you select, one or more of these fields on this tab might be automatically populated with default values. You can edit these default values but any modifications that you make apply to this reservation only. The next time you or anyone else creates a reservation for the same group, these fields are again automatically populated with the default billing information.	
Pricing Plan	Indicates what type of pricing is to be used for the event.
Billing Reference Number	The internal alphanumeric billing code that is associated with the group. You can manually enter a value in this field, or if a master list of billing reference numbers has been configured for the group, you can click the Search icon to open a Billing Reference Numbers dialog box, and select the appropriate value from this list. **Note:** To search for a specific billing reference number, enter a search string in the Find field, and then click Display. Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, if you enter **co** as the search string, the search results can include **CO**-123, and 123-**CO**.
Sales Category	How the group is sorted for purposes of tracking sales figures, for example, local, regional, national, and so on.
Payment Type	Indicates how the group paid for the event (cash, check, charged, and so on).
PO Number	The internal alphanumeric purchase order number that is associated with the group. You can manually enter a value in this field, or if a master list of PO numbers has been configured for the group, you can click the Search icon to open a PO Number dialog box, and select the appropriate value from this list. **Note:** To search for a specific billing reference number, enter a search string in the Find field, and then click Display. Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, if you enter **co** as the search string, the search results can include **CO**-123, and 123-**CO**.
Salesperson	The user who “sold” the event to the group.
Other tab	
Event Coordinator	The Event Coordinator who is assigned to the event.
Estimated Event Attendance	The estimated number of people who are expected to attend the event.
Calendar Style	Dropdown list of all the available formats for printing this event on the Event Calendar and Event Schedule reports.
URL	The event URL.

Field	Description
Virtual tab	
Web User	To specify the web users who can view/manage this reservation in VEMS, click the Search icon to open the Web Users dialog box and search from a list of registered web users. • You can search by User Name or Email Address. • To search a list of all available web users, leave the Search field in the Web Users dialog box blank, and then click Display. • To search for a specific web user, enter a search string in the Search field, and then click Display. **Note:** The string is not case-sensitive, but your search is limited to the exact order of characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of **bob** returns **bob**.worth@emssoftware.com but not dbobbett@emssoftware.com. • To return this field to the (no change) value at any time, click Reset.
Web Process Template	The web process template that defines the functions that are available for the selected web user. **Note:** A web user might be assigned to more than one web process template, so make sure to select the template that is applicable for this reservation.
User Defined Fields tab	
	User-defined fields are additional fields that store custom data for a reservation. Your EMS administrator configures the types of fields that are available as well as the allowed values for these fields. • To enter or edit a value for a field, select the field, and then click Set Value. • To clear a value for a field, select the field, and then click Clear Value. **Note:** If a user-defined field is not required here, you can always supply a value for it at a later date in the Navigator. See “Working with User Defined Fields in the Navigator” on page 181.
Video Conference tab	
	Displayed only if you selected the Video Conference option on this window. N/A for a Best Fit room or Specific Room meeting assignment. You identify the host endpoint for the video conference on this tab. **Note:** Not available in EMS Professional.

9. Click Finish.

   The Navigator window opens. The reservation information appears in the window. You use this window to add booking details and to make any needed modifications to the reservation and its bookings. See “The Navigator,” on page 77.

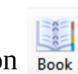
A reservation is not complete and rooms are not removed from the Available list until you click Finish. Although unlikely, it is possible for another user to select and reserve a room during the time period after you have selected the room but before you have finalized the reservation. If this occurs, after you click Finish, a message opens stating that your reservation conflicts with an existing reservation.

Depending on how your EMS administrator has configured your system, user defined questions (UDFs), comments, and/or reminders might be automatically displayed for the reservation in the Navigator. Contact your EMS administrator if you have any questions about this.

Viewing and Editing Reservations in the Reservation Book

The Reservation Book provides a graphical view of all the confirmed reservations (the reserved time as well as the room for which the reservation is scheduled) for your organization. (Cancelled bookings are not shown.) You use the Reservation Book to the view information for a reservation, to edit an existing reservation, and to make a new reservation. In addition, before you edit or make a reservation, you can change the Reservation Book display so that it better suits your working needs.

Reservation Book

To open the Reservation Book, on the EMS toolbar, click the Book icon 

. The *first* time that you open the Reservation Book for your EMS implementation, by default, the Room Filter dialog box opens on top of a blank Reservation Book. You can leave the room filtering criteria set to their default values, or you can select different values as needed, and then click OK. All reservations that meet the filtering criteria and that are scheduled for the current day's date are displayed in the book in the *Daily* view.

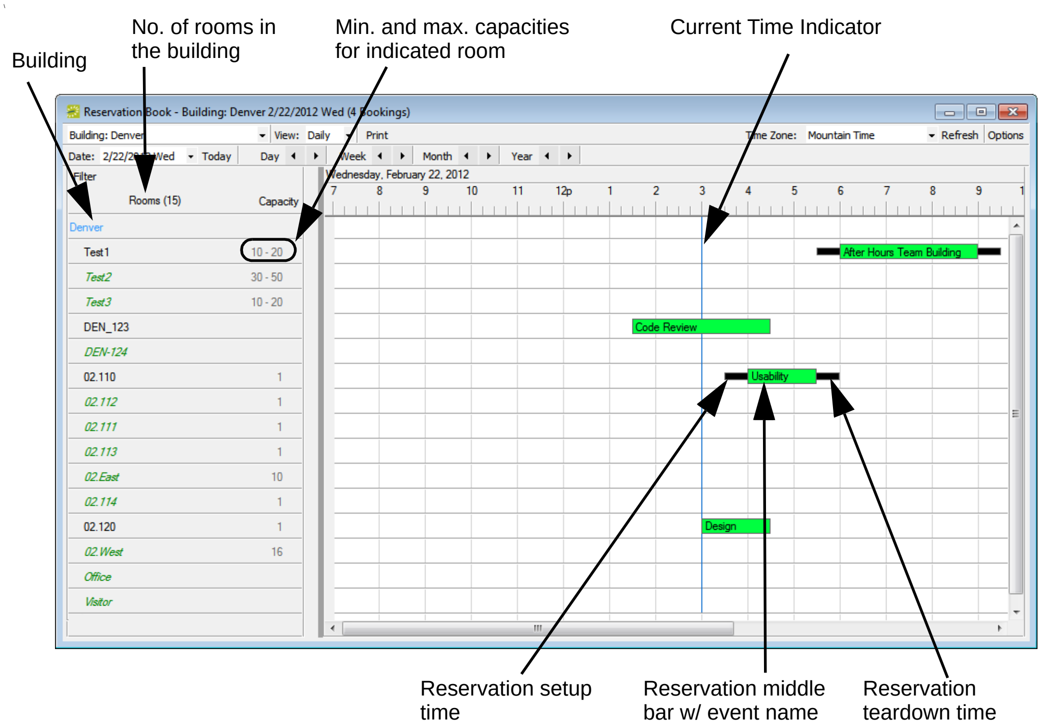
You might need to use the book's scroll features to scroll through all the reservations that are scheduled for the current day's date.

The Reservation Book has the following appearance:

- Minimum and maximum capacities are displayed next to room descriptions.
- The current time is shown by a vertical line in the grid, called the Current Time Indicator.
- If building hours have been configured for a building, then this information is displayed for the building.
- The reservations are displayed with three components:
  - A left bar that indicates the setup time.
  - A middle bar that indicates, by default, the event name.
  - A right bar that indicates the teardown time.

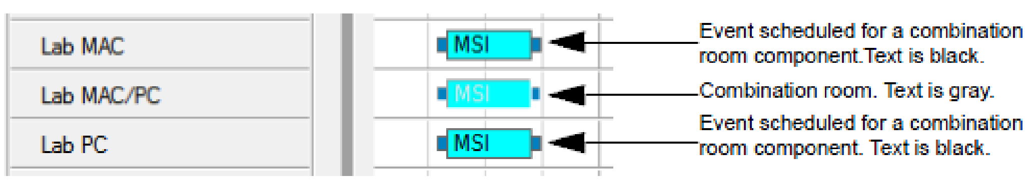
See Figure 2-9 on page 63.

Figure 2-9: Reservation Book, Daily view (default display)



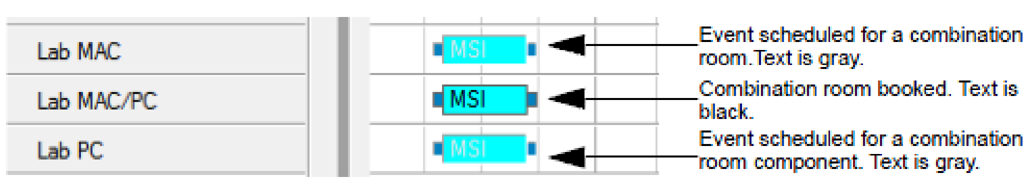
If an event is scheduled for a room that is a component of a combination room, then the reservation text is displayed in black. A duplicate reservation is also shown for the combination room; however, the reservation text is displayed in gray to indicate that a component of the combination room is currently booked for the indicated time and therefore, the combination room is not available.

Figure 2-10: Components booked and combination room unavailable



Conversely, if an event is scheduled for a combination room, then the reservation text for the combination room is displayed in black and the reservation text for each component is displayed in gray. This reversed color coding indicates that the component room is currently booked for the selected time and that none of the components is available.

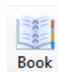
Figure 2-11: Combination room booked and components unavailable



You can carry out the following actions in the Reservation Book:

- Change the Reservation Book display. See “To change the Reservation Book display” below.
- View reservation information. See “To view reservation information” on page 70.
- Make a new reservation. See “To make a new reservation” on page 74.
- Edit an existing reservation. See “To edit an existing reservation” on page 74.

To change the Reservation Book display

1. On the toolbar, click the Book icon 

.

   The Reservation Book opens in the Daily view. See Figure 2-9 on page 63.

2. Optionally, you can do one or more of the following to change the Reservation Book display:

   - Change the list of rooms that are displayed in the Reservation Book based on room properties. See “List of Rooms (Room Properties)” on page 65.
   - Change the list of rooms that are displayed in the Reservation Book based on a specific room or rooms. See “List of Rooms (Specific Rooms)” on page 66.
   - Change the Reservation Book view. See “Reservation Book view” on page 66.
   - Change multiple display options for a reservation. See “Display Options” on page 67.
   - Select which items to include in the tooltip that opens when you place the cursor over an event in the Reservation Book. See “Tooltips” on page 69.
   - Change the display date using the calendar. See “Display Date (Calendar)” on page 69.
   - Change the display date using the Reservation Book scroll features. See “Display Date (Scroll Features)” on page 70.

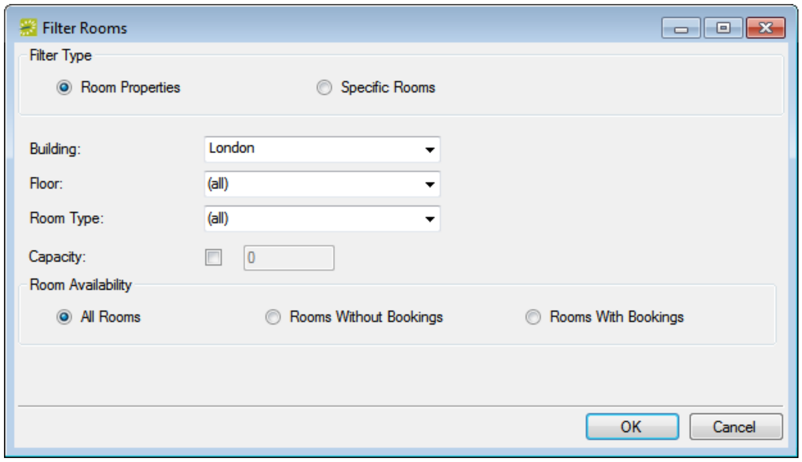
List of Rooms (Room Properties)

If the Filter Rooms dialog box is not already open, then above the Rooms list, do the following:

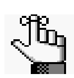
1. Click Filter.

   The Filter Rooms dialog box opens. The room filtering criteria is set to the following default values—Filter Type is Room Properties, Room Type is None, and Room Availability is All Rooms.

Figure 2-12: Filter Rooms dialog box, Room Properties selected



2. Select Room Properties, and then do one or more of the following
   - Leave the Building dropdown list set to the default value of (all) buildings, or select a specific building, area, or view.
   - Select a specific floor.
   - Select a specific room type.
   - Select Capacity and then enter a capacity.
   - Select Academic to limit the search to academic rooms. (This option is available only if you have an EMS Campus.)



The Academic option is available only in EMS Campus.

   - Select a Room Availability option.

3. Click OK.

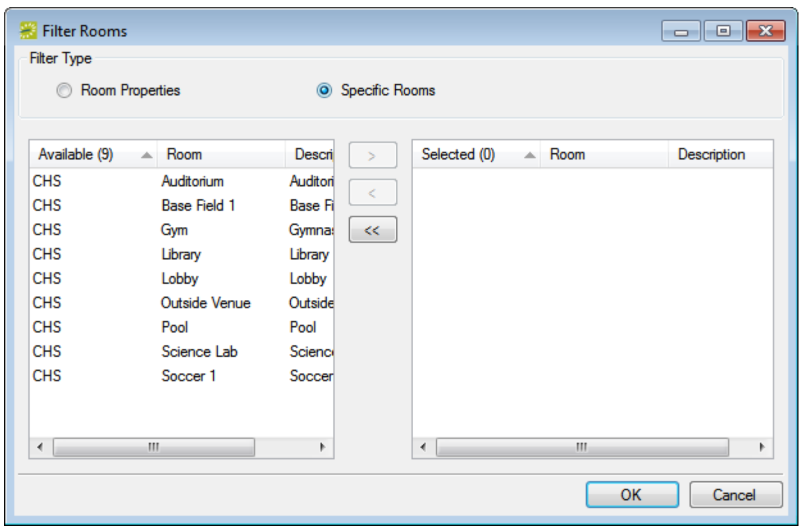
   The Filter Rooms dialog box closes. The room display in the Reservation Book is changed accordingly.

After you carry out a search, you can click Reset at the top of the Rooms list to reset all room filtering criteria (Filter Type, Room Type, and Room Availability) to their default values,

List of Rooms (Specific Rooms)

If the Filter Rooms dialog box is not already open, then above the Rooms list, click Filter to open the dialog box and select Specific Room. Select the room, or CTRL-click to select multiple rooms on the Available list, and then click the Move (>) button to move the selected rooms to the Selected list. The Reservation Book is updated to show bookings only for the selected rooms.

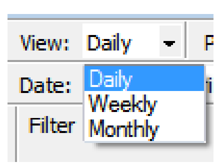
Figure 2-13: Filter Rooms dialog box, Specific Room selected



Reservation Book view

On the View dropdown list, select Daily, Weekly, or Monthly.

Figure 2-14: View dropdown list

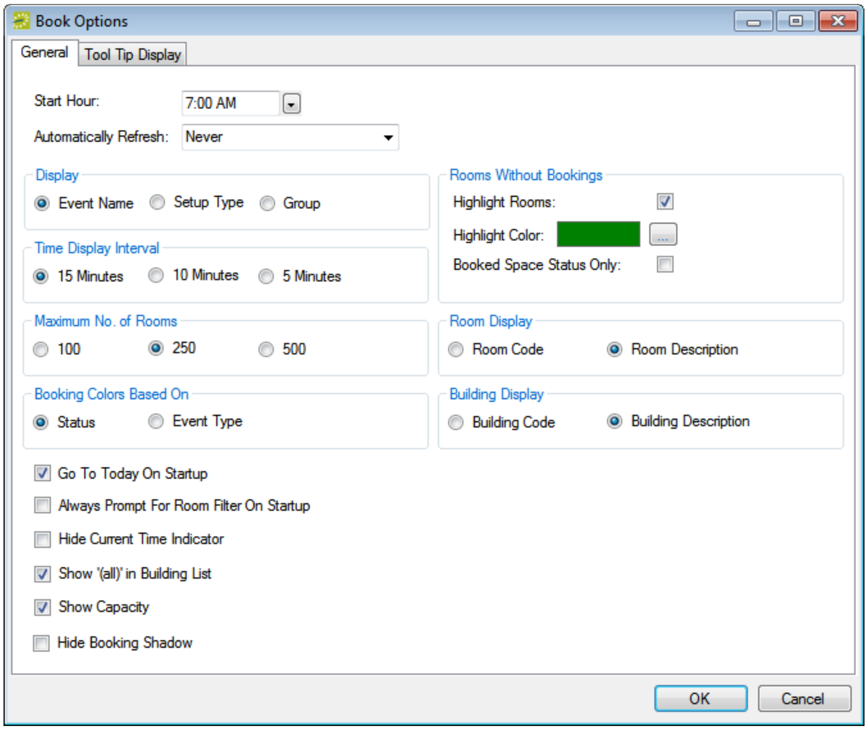


Although you can view currently scheduled reservations in either the daily, weekly, or monthly view, you can make a new reservation only in the daily view.

Display Options

Click Options (upper right hand corner of Reservation Book) to open the Book Options dialog box (the General tab is the active tab) and change multiple display options not only for the Reservation Book, but also a reservation in the book.

Figure 2-15: Book Options dialog box



Option	Description
Start Hour	The daily start time for the Reservation Book display.
Automatically Refresh	The time interval at which the Reservation Book display is automatically refreshed.
Display	The information that is displayed in the middle bar for a reservation.
Time Display Interval	Changes the granularity of the time display interval.
Maximum No. of Rooms	The maximum number of rooms to display in the Reservation Book.
Booking Colors Based On	The color of the bookings in the reservation. Select one: Status, Event Type, or Check-in Status (for EMS Workplace only.)
Rooms Without Bookings	Whether to highlight rooms without bookings and if so, the highlight color. If both Highlight Rooms and Booked Space Status Only are selected, then only those rooms that do *not* have a Booked Space status are highlighted.
Room Display	Display the room code or the room name for a reservation.
Building Display	Display the building code or the building name for a reservation.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Go To Today on Startup</td><td>If selected, the Reservation Book opens to the current day’s date; otherwise, it opens to the last date viewed.</td></tr>
<tr><td>Always Prompt for Room Filter on Startup</td><td>If Show ‘(all)’ in Building List is also selected, then when you open the Reservation Book, the Room Filter dialog box opens on top of the Reservation Book. You can select different options on this dialog box to display only specific reservations in the book, for example, bookings only for selected rooms. If you do not select any options on this dialog box, but instead simply close it, then all reservations for all rooms in all buildings are displayed in the book.</td></tr>
<tr><td>Hide Current Time Indicator</td><td>Show or hide the vertical bar that indicates the current time for current day.

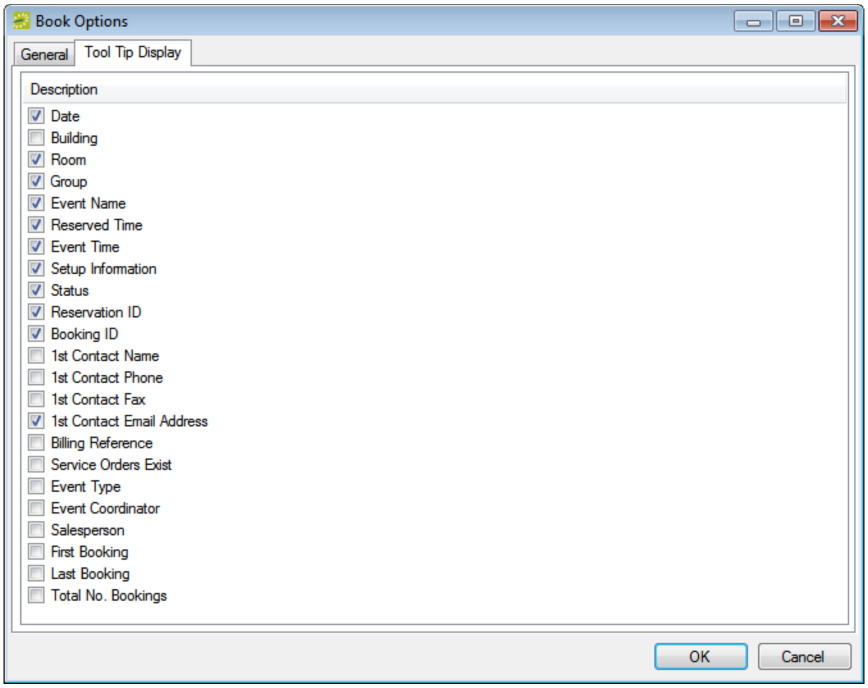
Note: The Current Time indicator is displayed only if the view is the Daily or Weekly view and the view includes the current day’s date.</td></tr>
<tr><td>Show ‘(all)’ in Building LIst</td><td>Show the “all” option on the Building dropdown list; otherwise, a user must select a specific building. If this option is selected in conjunction with Always Prompt for Room Filter on Startup, then when you open the Reservation Book, then the Room Filter dialog box always opens on top of the Reservation Book. If you are setting your Reservation Book options, and you do not want to the Room Filter dialog box to open on top of the Reservation Book when you open the book, then do the following:
• Clear Always Prompt for Room Filter on Startup.
• Clear Show (‘all’) in Building List.
• On the Building dropdown list in the Reservation Book, select any building, area, or view.

Note: The building, area, or view that you select is not important. This last step just clears the “all” building option from the Reservation Book cache and ensures that the Room Filter dialog box does not open on top of the Reservation Book. Going forward, you can always select all buildings, or any specific building, area, or view as needed when you are working in the Reservation Book.</td></tr>
<tr><td>Show Capacity</td><td>Show the minimum and maximum capacities next to the room description.</td></tr>
<tr><td>Hide Booking Shadow</td><td>Hide the vertical shadow bar that highlights the reserved and/or event start times and end times when a user moves a booking in the Reservation Book.</td></tr>
</table>

Tooltips

Click Options (upper right hand corner of Reservation Book) to open the Book Options dialog box, and then open the Tooltip Display tab and select which items to include in the tooltip that opens when you rest the mouse pointer on an event in the Reservation Book.

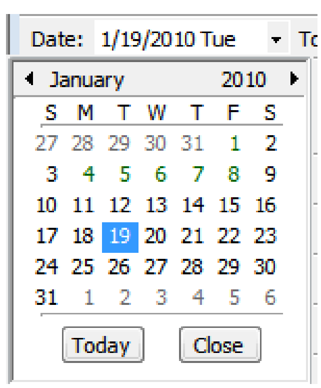
Figure 2-16: Book Options dialog box, Tooltip Display tab



Display Date (Calendar)

On the Date field, click the dropdown arrow to open the Calendar. Use the scroll features (< and >) at the top of the calendar to change the month or year. To select a different date for a month, click the date.

Figure 2-17: Reservation Book calendar

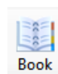


Display Date (Scroll Features)

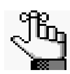
Use the scroll features at the top of the reservation book display to scroll to a different day, week, month, year, or any different combination of these.

Figure 2-18: Reservation Book calendar scroll features

To view reservation information

1. On the toolbar, click the Book icon  .

   The Reservation Book opens in the Daily view. See Figure 2-9 on page 63.



Optionally, when the Reservation Book first opens, before you view, edit or make a reservation, you can change the Reservation Book view so that it better suits your working needs. See *"To change the Reservation Book display" on page 64.*

2. Optionally, you can do one or more of the following to view the reservation information:

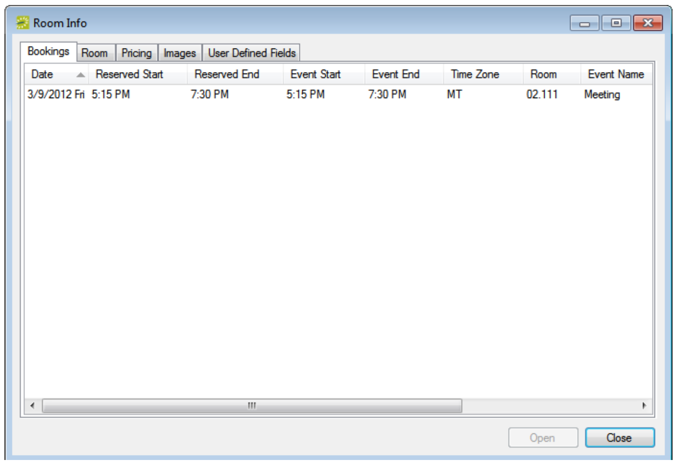
   - View the reservation in the Navigator by doing one of the following:
     - Double-click the middle bar for the reservation entry.
     - Right-click the reservation entry and on the context menu that opens, click Open.

     See "The Navigator," on page 77.
   - View the bookings for a room. See "Room Bookings" on page 71.
   - View the properties for a room. See "Room Properties" on page 71.
   - View the pricing for a booked room. See "Room Pricing" on page 72.
   - View any images of the room. See "Room Images" on page 72.
   - View the user defined fields (UDFs) that are associated with the room. See "Room UDFs" on page 73.
   - View the setup information, event information, or teardown information for a reservation. See "Room Information" on page 73.
   - Change the time zone in which to view all your bookings. See "Time Zone" on page 73.

Room Bookings

Click the room name or code in the Rooms list to open the Bookings tab for the Room Info dialog box. The tab on this dialog box lists all the bookings for the selected room based on the current view (Daily, Weekly, Monthly) and on the date that is shown in the Date field. To view a booking in the Navigator, select the booking, and then click Open.

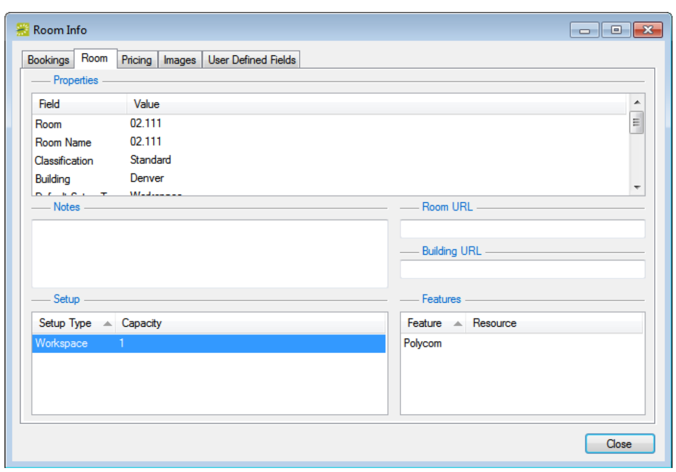
Figure 2-19: Room Info dialog box, Bookings tab



Room Properties

Click the room name or code in the Rooms list to open the Bookings tab for the Room Info dialog box, and then open the Room tab. The tab on this dialog box lists all the properties for the room, such as the room code, the room name, the room classification, and so on. It also lists the setup type and capacity for the room, and any notes that have been entered for the room.

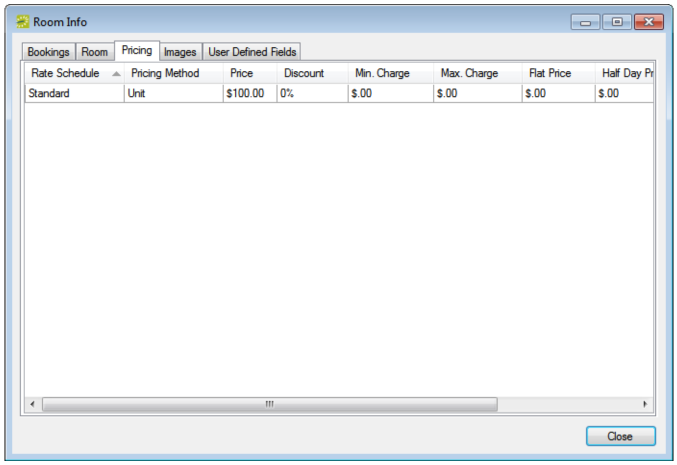
Figure 2-20: Room Info dialog box, Room tab



Room Pricing

Click the room name or code in the Rooms list to open the Bookings tab for the Room Info dialog box, and then open the Pricing tab. This tab displays any pricing information that was defined for the room.

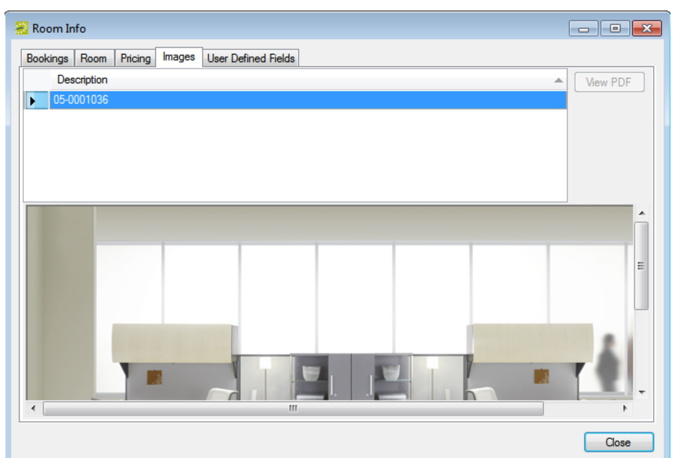
Figure 2-21: Room Info dialog box, Pricing tab



Room Images

Click the room name or code in the Rooms list to open the Bookings tab for the Room Info dialog box, and then open the Images tab. This tab displays any uploaded images of the room.

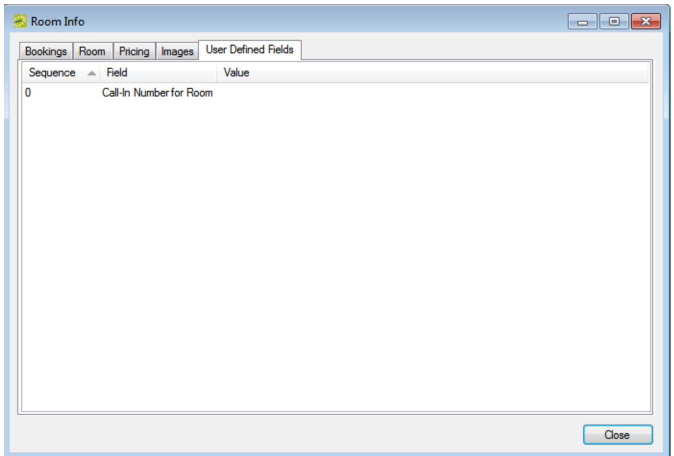
Figure 2-22: Room Info dialog box, Images tab



Room UDFs

Click the room name or code in the Rooms list to open the Bookings tab for the Room Info dialog box, and then open the User Defined Fields tab. This tab displays any UDFs that have been associated with the room.

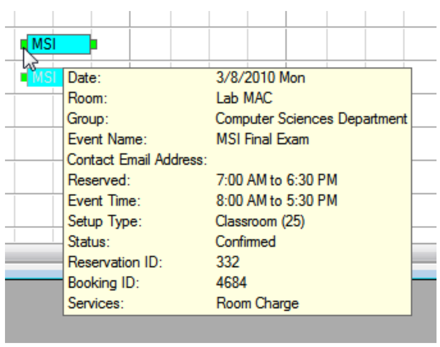
Figure 2-23: Room Info dialog box, User Defined Fields tab



Room Information

Rest the mouse pointer on the left bar, middle bar, or right bar for the reservation entry. A tooltip showing the respective setup, event, or teardown information opens.

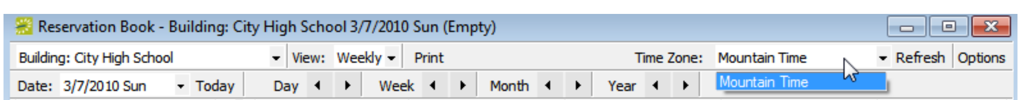
Figure 2-24: Viewing setup information



Time Zone

If buildings that are located in multiple time zones are currently displayed, you can specify the time zone in which to view all of your bookings.

Figure 2-25: Changing the time zone



To make a new reservation

1. On the toolbar, click the Book icon Book .

   The Reservation Book opens in the Daily view. See Figure 2-9 on page 63.

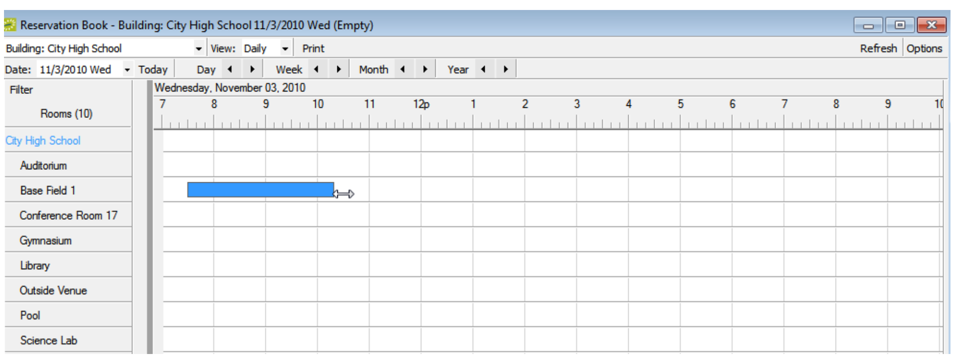
2. Change the display to show the room for which you are making the reservation.
3. Select the date for which you are making the reservation.

You must leave the Date view in the Daily display.

4. In the Time Grid next to the room, click and hold the left mouse button, drag the mouse to schedule the room and time, and then release the mouse button to open the Reservation Wizard.

As you drag the mouse, the cursor changes to a double-headed arrow and a blue horizontal bar is displayed.

Figure 2-26: Making a new reservation in the Reservation Book



5. Continue to “Making a Reservation Using the Reservation Wizard” on page 45.

To edit an existing reservation

1. On the toolbar, click the Book icon Book .

   The Reservation Book opens in the Daily view. See Figure 2-9 on page 63.

Optionally, when the Reservation Book first opens, before you view, edit or make a reservation, you can change the Reservation Book view so that it better suits your working needs. See “To change the Reservation Book display” on page 64.

2. Optionally, you can do one or more of the following to edit an existing reservation:

Step	Action
Change the setup time for a reservation	• Drag the left bar horizontally to a new time. • Click Yes in the Confirm Change dialog box.
Change the event time	• Drag the middle bar horizontally to a new time. • Click Yes in the Confirm Change dialog box.
Change the teardown time for a reservation	• Drag the right bar horizontally to a new time. • Click Yes in the Confirm Change dialog box.
Edit the reservation building, room, time, or both	• Drag and drop the reservation to a new room that is the same building or in a different building, and/or to a new time. • Click Yes in the Confirm Change dialog box.

3. Optionally, you can right-click on a reservation in the Reservation Book, and on the context menu that opens, select one of the following:

Option	Description
Open	Opens a reservation in the EMS Navigator.
Add to Personal Calendar	Adds the reservation to your personal calendar.
Move Forward	Move the reservation date forward by one day or one week.
Move Backward	Move the reservation date backward by one day or one week.
Move to Specific Date	Move the reservation to a specific date.
Change Status	Change the status of the reservation.
Copy Bookings	Opens the Copy Bookings wizard. See “Copying Multiple Bookings in the Navigator” on page 129.
Swap Rooms With Another Booking (EMS)	Swap the room assignments of two events. The swap option is applicable only for two events that have identical meeting patterns. To swap rooms: • Right-click on one of the two reservations that you are swapping, and on the context menu that opens, click Swap Rooms. • Click on the other of the two reservations that you are swapping. • Click Yes in the Confirm Change dialog box. **Note:** If the rooms that you are swapping have been configured with a default setup type, and the setup count is not within the capacity of one or both rooms, a message opens indicating this, but you are not prevented from swapping rooms.
Swap Rooms With Another Booking (EMS Campus)	Swaps only the two bookings selected for the indicated day. (Just like Swap Rooms With Another Booking in EMS.)

Option	Description
Swap Rooms With Another Course (EMS Campus)	If the meeting patterns of two courses are identical, then the swap is allowed and all bookings between the two courses for the entire term are swapped.
Highlight Related Bookings	Highlights the bookings that belong to the same reservation.

The Navigator

The Navigator is a window in EMS that you use to view and manage all aspects of a reservation including bookings and booking details.

This chapter covers the following topics:

- “Working with User Defined Fields in the Navigator” on page 181.
- “Working with Attachments in the Navigator” on page 184.
- “Working with Drawings in the Navigator” on page 188.
- “Running the Resource Utility Conflicts Tool” on page 192.

Navigator Overview

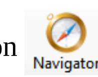
This section provides an overview of opening a reservation in the Navigator, the Navigator's layout and folder structure, and the commands that are available in the Navigator.

Opening a reservation in the Navigator

After you create a new reservation using the Reservation Wizard, the reservation opens automatically in the Navigator. You can also manually open the Navigator by:

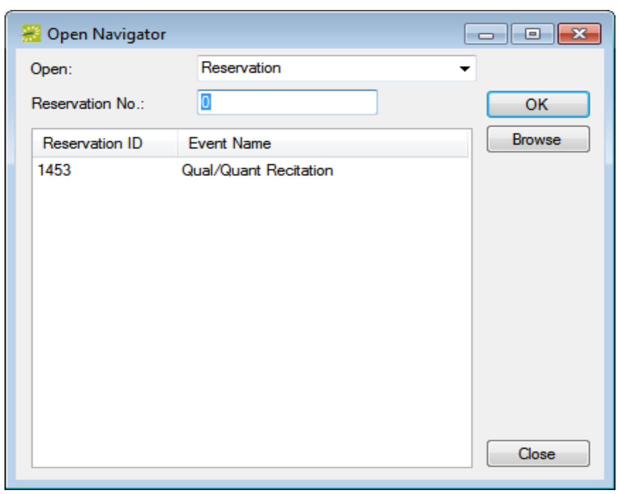
- Selecting a reservation, booking, or service order to open directly in the Navigator. See "Opening a reservation directly in the Navigator" below.
- Opening a reservation through the Reservation Book. See "Opening a reservation through the Reservation Book" on page 80.
- Opening a reservation through a group. See "Opening a reservation through a group" on page 80.
- Opening a reservation through a search. See "Opening a reservation through a search" on page 80.

Opening a reservation directly in the Navigator

1. On the toolbar, click the Navigator icon 

to open the Open Navigator dialog box.

Figure 3-1: Open Navigator dialog box



2. On the Open dropdown list, select the item that you are opening—reservation, booking, or service order.

3. Do one of the following:
   - In the No. field, enter the number for the reservation, service order, or booking, and then click OK.
   - To enter the last reservation, booking, or service order that you made during your *current* or *last* EMS session, double-click in the field, and then click OK.

If you do not know the reservation number, you can search for the reservation. On the Open Navigator dialog box, click Browse to open the Browser, and then continue to *"Searching with the Browser or with the Web Reservation Tool" on page 197.*

Opening a reservation through the Reservation Book

On the toolbar, click the Book icon Book to open the Reservation Book, and then in the Reservation Book, double-click a booking for the reservation to open the reservation in the Navigator. See "Viewing and Editing Reservations in the Reservation Book" on page 62.

Opening a reservation through a group

You can search for a reservation for a group and open the reservation in the Navigator from the group-specific window. See "Working with Reservations for a Group" on page 295.

Opening a reservation through a search

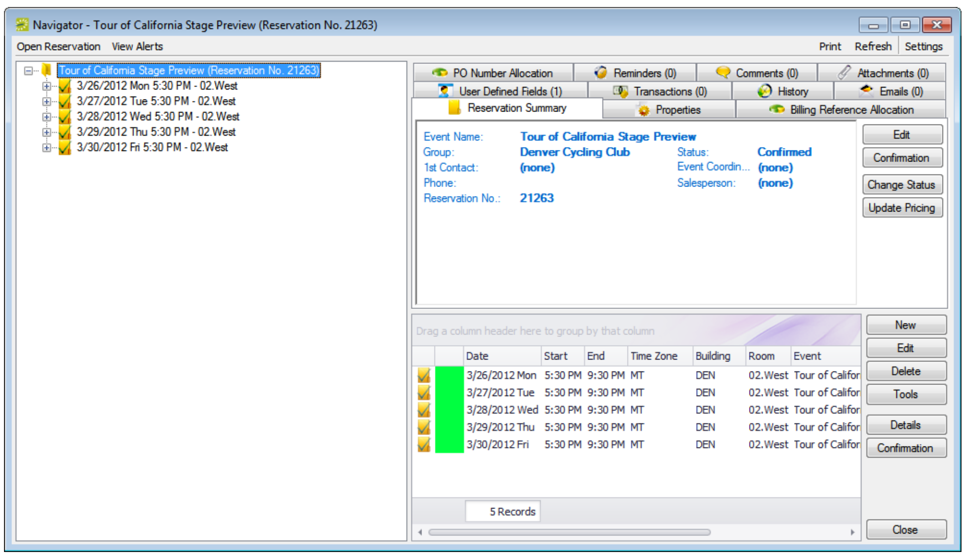
You can search for a reservation using the Browser, the Web Reservation Tool, and/or the Calendar, and then double-clicking the search result entry to open the reservation in the Navigator. See "Search Tools," on page 195.

You can also click Browse on the Open Navigator dialog box to open the Browser search tool.

Layout and folder structure

The Navigator has three panes—a left pane, a top right pane, and a bottom left pane. The left pane displays a selected reservation, all the bookings for the reservation, and the details for each booking in a Windows Explorer-style folder structure. The top-level folder is the *reservation folder.* The folders that are located beneath a reservation folder are the *booking folders*. The folders that are located beneath a booking folder are the *booking detail folders*. The top right pane of the Navigator displays different tabs and options depending on the folder or item that is selected in the left pane of the Navigator. The bottom right pane of the Navigator functions just like a browser window (see "Getting Started with EMS" on page 27), and it also displays different information and options depending on the folder or item that is selected in the left pane.

Figure 3-2: Navigator window with a reservation folder selected



Reservation folder

A reservation folder contains the *who* and the *what* information for the reservation. When you select a reservation folder in the left pane of the Navigator, the reservation number is displayed in the title bar of the Navigator, and the following tabs are displayed in the upper right pane of the Navigator:

- Reservation Summary tab—The Reservation Summary displays information about the selected reservation, including the event name, the group for which the reservation was made, the group contact name, the group contact phone number, and the reservation number.
- Properties tab—The Properties tab displays not only the same information as the Reservation Summary tab, but also information such as the event type, the second group contact, the date that the reservation was added, the date that the reservation was changed, and so on.

- Billing Reference Allocation tab—By default, the charge for a reservation is allocated to a single billing reference number. On the Billing Reference Allocation tab, you can allocate the charge for a reservation to multiple billing reference numbers by percentage. See “To allocate charges to multiple billing reference numbers and/or PO numbers” on page 83.

Your EMS administrator must enable the Use Billing Reference Allocation parameter for this tab to be displayed. See EMS System Parameters in the EMS Setup Guide.

- PO Number Allocation tab—By default, the charge for a reservation is allocated to a single purchase order (PO) number. On the PO Number Allocation tab, you can allocate the charge for a reservation to multiple billing PO numbers by percentage. See “To allocate charges to multiple billing reference numbers and/or PO numbers” on page 83.

Your EMS administrator must enable the Use PO Number Allocation parameter for this tab to be displayed. See EMS System Parameters in the EMS Setup Guide.

- Reminders tab—The Reminders tab displays any reminders that were created for the selected reservation. See “Working with Comments and Reminders in the Navigator” on page 175.
- Comments—The Comments tab displays any text entries that were made for the selected reservation. See “Working with Comments and Reminders in the Navigator” on page 175.
- Attachments tab—The Attachments tab displays any attachments (files) that have been saved with the reservation. See “Working with Attachments in the Navigator” on page 184.
- User Defined Fields—The User Defined Fields tab displays the additional fields that store custom data for a reservation. Your EMS administrator configures the types of fields that are available as well as the allowed values for these fields. See “Working with User Defined Fields in the Navigator” on page 181.
- Transactions—The Transactions tab displays any invoices that were generated for the selected reservation or any payments that were applied to the selected reservation. See “Billing,” on page 361 for detailed information about invoices and other financial transactions in EMS.
- History tab—The History tab displays the history for the reservation—the date that a change was made to the reservation, the ID of the user who made the change, the field that was changed, the old field value, and the new field value.
- Emails tab—The Emails tab displays any summarizing information for any emails that were sent via SMTP to the group for whom the reservation was made. See “Sending Email from EMS” on page 414.

Also, when you select a reservation folder:

- All the tabs in the upper pane of the window have some of the basic features of an EMS browser window. You can change the width of the data columns, you can sort the data columns on a tab in either ascending or descending sort order, and you can rearrange the column order by dragging a column to a new location using the column heading. See "An EMS Browser Window" on page 35.
- The bookings for the selected reservation are displayed in the Bookings pane (the lower right pane) of the Navigator. The colored rectangle to the left of a booking indicates the booking's status. If a booking has been canceled, a Canceled icon  is displayed on the booking folder in both the Reservation (left) pane and the Bookings pane.
- You can right-click in the upper pane and open a context menu with options for emailing the group for which the reservation was made, or the first contact for the group.

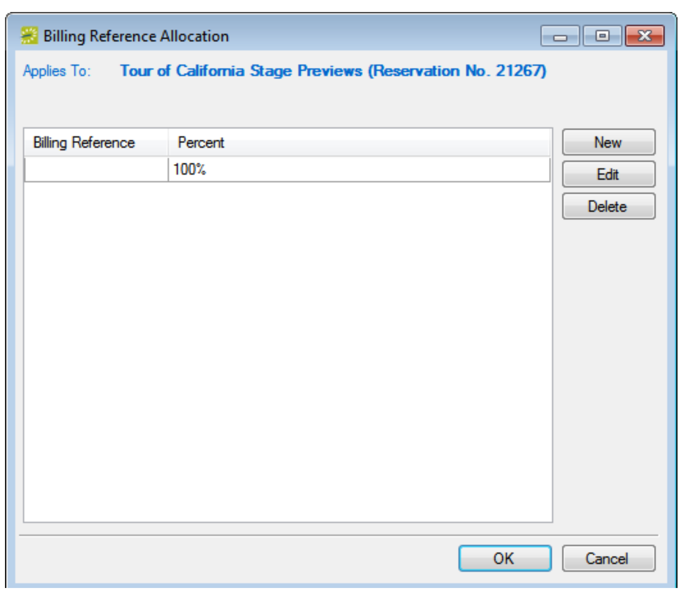
To allocate charges to multiple billing reference numbers and/or PO numbers

The following procedure details how to allocate a reservation charge to multiple billing reference numbers; however, by analogy, you can follow this procedure to allocate booking charges or booking detail charges to multiple billing reference numbers and/or PO numbers.

1. For a selected reservation, open the Billing Reference Allocation tab, and then click Edit.

   The Billing Reference Allocation dialog box opens. By default, when this dialog box first opens, it displays the charge for the reservation allocated 100% to a single billing reference number placeholder.

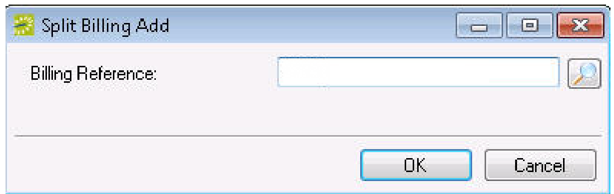
Figure 3-3: Billing Reference Allocation dialog box



2. Select the billing reference number placeholder, and then click Edit.

   The Split Billing Add dialog box opens.

Figure 3-4: Split Billing Add dialog box



3. Do one of the following:

   - Enter the billing reference number to which you are allocating the reservation charges, and then click OK.

     The Split Billing Add dialog box closes. You return to the Billing Reference Allocation dialog box with the newly added billing reference number allocated at 100%. Continue to Step 5.

   - Click the Search icon  to open a Billing References dialog box, and then do one of the following:

     - Select a billing reference number from the list, click Select, and then click OK.
     - In the Find field, enter a search string, and then click Display to display a list of all billing reference numbers that meet your search criteria. Select the appropriate billing reference number from the search results, click Select, and then click OK.

*Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive, and it can appear anywhere in the search results. For example, a search string of **445** returns both 123.**445**.678 and **445**.678.123.*

The Billing References dialog box closes. You return to the Split Billing Add dialog box with the selected billing reference number displayed in the dialog box. Continue to Step 4.

4. Click OK.

   The Split Billing Add dialog box closes. You return to the Billing Reference Allocation dialog box with the selected billing reference number allocated at 100%.

5. Do one of the following:

    - To allocate the reservation charges to only this single billing reference number, click OK.

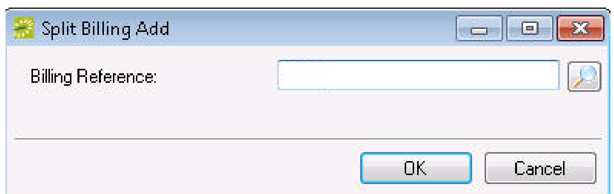
      The Billing Reference Allocation dialog box closes and you return to the Navigator. The newly added billing reference number, allocated at 100%, is displayed on the Billing Reference Allocation tab.

    - To allocate the reservation charges to multiple billing reference numbers, continue to Step 6.

6. Click New.

   The Split Billing Add dialog box opens.

Figure 3-5: Split Billing Add dialog box



7. Do one of the following:

    - In the Billing Reference field, enter a billing reference number., and then click OK.

    - Click the Search icon  to open a Billing References dialog box, and then do one of the following:

        - Select a billing reference number from the list, click Select, and then click OK.

        - In the Find field, enter a search string, and then click Display to display a list of all billing reference numbers that meet your search criteria. Select the appropriate billing reference number from the search results, click Select, and then click OK.

Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive, and it can appear anywhere in the search results. For example, a search string of ***445*** *returns both 123.**445**.678 and **445**.678.123.*

The Split Billing Add dialog box closes. You return to the Billing Reference Allocation dialog box with each of the newly added billing reference numbers displayed with a 0% allocation.

8. Repeat Step 6 and Step 7 until you have added all the needed billing reference numbers.

9. For each new billing reference number, double-click in the Percent field to select the percent, and then change the percent to the appropriate value.

The percentages must add up to 100%.

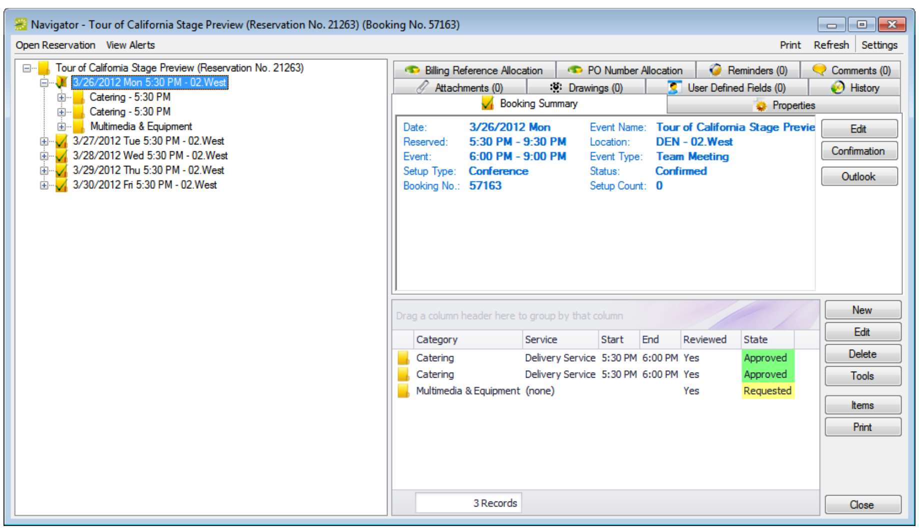
10. Click OK to close the Billing Reference Allocation dialog box and return to the Billing Reference Allocation tab.

    All the billing reference numbers and their percent allocations are displayed on the tab.

Booking folder

Booking folders contain the *where* and *when* information for the reservation. If you can expand a booking folder, this indicates that details have been added to the booking. The booking details for the selected booking are displayed in the Booking Details pane (the lower right pane) of the Navigator. A green background for a booking detail folder indicates that one or more booking detail items have been invoiced for the booking.

Figure 3-6: Navigator window with a booking folder selected



When you select a booking folder in the left pane of the Navigator, the booking number is displayed in the title bar of the Navigator, and the following tabs are displayed in the upper right pane of the Navigator:

- Booking Summary tab—The Booking Summary displays information about the selected booking, including the event date, the reserved time, the event time, and so on. If you use Outlook as your email program, you can do the following from this tab:
  - To add the selected booking to your personal calendar, click Outlook > Add to Personal Calendar.
  - To send invitations for the meeting to one or more contacts in your Outlook Address Book, click Outlook > Send Invitation.

- Properties tab—The Properties tab displays not only the same information as the Booking Summary tab, but also information such as the event type, the setup count, the date that the booking was added, the date that the booking was changed, and so on.
- Billing Reference Allocation tab—By default, the charge for a booking is allocated to a single billing reference number. On the Billing Reference Allocation tab, you can allocate the charge for a booking to multiple billing reference numbers by percentage. See "To allocate charges to multiple billing reference numbers and/or PO numbers" on page 83.

Your EMS administrator must enable the Use Billing Reference Allocation parameter for this tab to be displayed. See EMS System Parameters in the EMS Setup Guide.

- PO Number Allocation tab—By default, the charge for a booking is located to a single purchase order (PO) number. On the PO Number Allocation tab, you can allocate the charge for a reservation to multiple billing PO numbers by percentage. See "To allocate charges to multiple billing reference numbers and/or PO numbers" on page 83.

Your EMS administrator must enable the Use PO Number Allocation parameter for this tab to be displayed. See EMS System Parameters in the EMS Setup Guide.

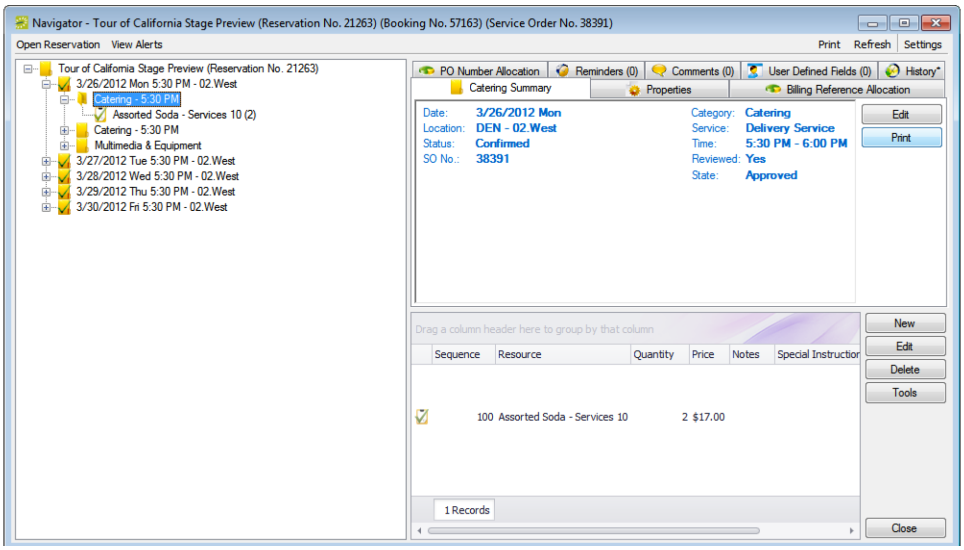
- Reminders tab—The Reminders tab displays any reminders that were created for the selected booking. See "Working with Comments and Reminders in the Navigator" on page 175.
- Attachments—The Attachments tab displays any attachments that were saved with the booking. See "Working with Attachments in the Navigator" on page 184.
- Comments—The Comments tab displays any comments that were made for the selected booking. See "Working with Comments and Reminders in the Navigator" on page 175.
- Drawings—The Drawings tab displays a list of files that were attached to the selected booking. See "Working with Drawings in the Navigator" on page 188.
- History—The History tab displays a list of changes made for the selected booking—the date the change was made to the booking, the user who made the change to the booking, and information (field) that was changed for the booking.

Also, when you select a booking folder, all the tabs in the upper pane of the window have some of the same basic features of an EMS browser window. You can change the width of the data columns, you can sort the data columns on a tab in either ascending or descending sort order, and you can rearrange the column order by dragging a column to a new location using the column heading. See "To group data by columns in an EMS Browser window" on page 36 and "" on page 39.

Booking detail folder

If you can expand a booking folder, this indicates that details have been added to the booking. *Booking details*, which are also called *categories*, are the services (catering, A/V equipment, and so on), notes, attendees, activities, and room charges that you can add to a booking.

Figure 3-7: Navigator window with a booking detail folder selected



Booking detail folders and booking detail items are discussed in *"Booking Details and Items Overview" on page 133.*

Navigator commands

The Navigator has two constant commands in the upper left hand corner—Open Reservation and View Alerts and three constant commands in the upper right hand corner—Print, Refresh, and Settings.

Command	Description
Open Reservation	Allows you to open and work with multiple reservations in the same Navigator session. See “Opening a reservation directly in the Navigator” on page 79.
View Alerts	Open and view any alerts that have been generated for the selected reservation, booking, or a booking detail that is a service order or catering category.
Print	• Printing an invoice or a confirmation at the *reservation level*. See “Confirmations,” on page 307. • Printing the Setup Worksheet for Reservation report, the Service Orders report, and the Banquet Event Order report. See “Reports and Queries,” on page 319. • Printing the Transaction report. See “Generating an EMS Billing Report” on page 394. • Printing the history of a reservation, all its bookings, and all its booking detail items.
Refresh	For refreshing the Navigator display based on the settings that you have specified in the Navigator Options dialog box. See “Navigator Options dialog box” on page 90.
Settings	• Options—Opens the Navigator Options dialog box in which you can specify such things as what is to be displayed in the Navigator, mouse actions in the Navigator, and so on. See “Navigator Options dialog box” on page 90. • Confirmation Settings—Opens the Confirmation Settings dialog box which provides a variety of options that you can specify for manual and automatic generation of a confirmation for a reservation or a booking. See “Confirmations,” on page 307.

All other navigator commands are available as buttons in the upper right pane and lower right pane of the Navigator.

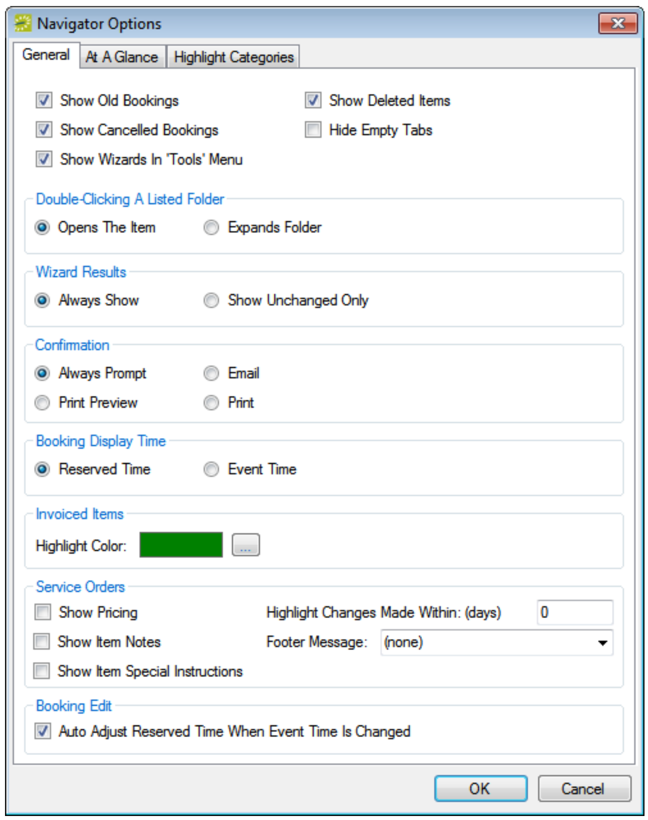
Navigator Options dialog box

The Navigator Options dialog box has three tabs—General, At A Glance, and Highlight Categories.

General tab

General tab—On the General tab, you select the options for such things as which types of bookings to show in the Navigator (old bookings and/or canceled bookings), the result of double-clicking a listed folder (opens the item or expands the folder), the booking time that is displayed (reserved time or event time), and the highlight color for invoiced items.

Figure 3-8: Navigator Options dialog box, General tab



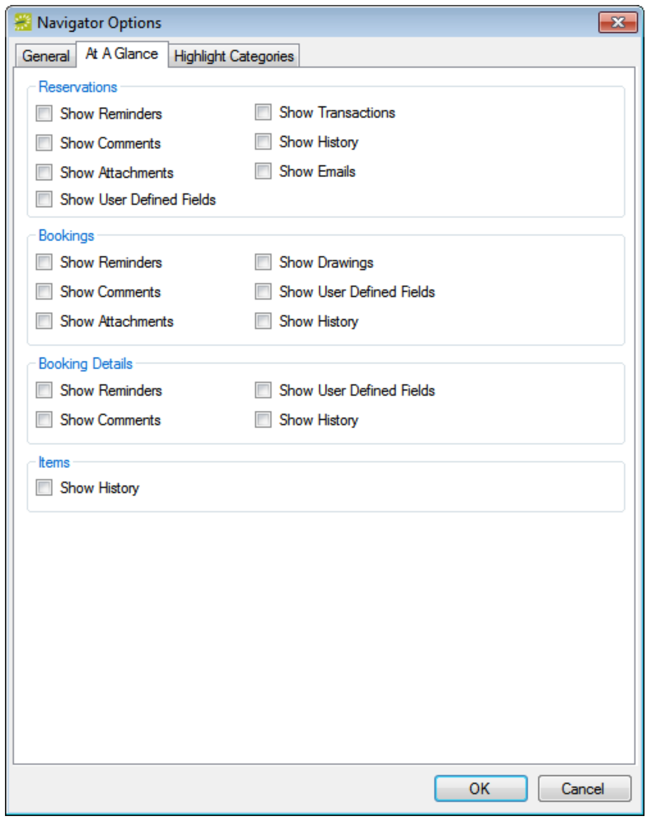
Field	Description
General	
Show Old Bookings	Show bookings in the Navigator that occurred before the current day's date.
Show Cancelled Bookings	Selected, show bookings in the Navigator with a canceled status.
Show Wizards in Tools menu	Show all on the Tools menu in the Bookings pane. If cleared, show only the "Wizards" option, which you must click to open a form from which you can select a tool.
Show Deleted Items	Show all deleted items (bookings, deleted resource items, and so on) for a reservation in the Navigator.

Field	Description
Hide Empty Tabs	Hide the tabs that do not have any data displayed on them for a selected reservation, booking, or booking detail.
Double-Clicking a Listed Folder	
Opens the item	Opens the item for editing.
Expands folder	Opens the next level of folders.
Wizard Results	
Always Show	Show a confirmation of all changes, regardless if they were successful, on a Wizard Results page.
Show Unchanged Only	Show only those changes that were not successful on a Wizard Results page.
Confirmation	
Always prompt	When you click Confirmation, opens a Confirmation filter which you can use to change the default filter options for a confirmation before generating it.
Print Preview	When you click Confirmation, opens an onscreen preview of the confirmation.
Email	When you click Confirmation, opens an email of the confirmation.
Print	When you click Confirmation, prints an immediate confirmation.
Booking Display Time	
Reserved Time	Show the total time for which the space is reserved. This time is the event time plus the setup/teardown times.
Event Time	Show only the event time for which the space is reserved.
Invoiced Items	
Highlight Color	The color with which invoiced items are highlighted in the Navigator window.
Service Orders	
Show Pricing	Show pricing on a service order.
Show Item Notes	Show item notes on a service order.
Show Item Special Instructions	Show special instructions for items on a service order.
Highlight Changes Made Within (days)	Highlight any changes that have been made to a service order within the specified number of days.
Footer Message	Show reconfigured blocks of text that appear in footer of a service order (for example, a Cancellation policy).
Booking Edit	
Auto Adjust Reserved Time When Event Time is Changed	If the reservation includes setup and/or teardown times, then automatically adjust the *total* time for the reservation (the event time plus the setup/teardown time) when the event time is changed.

At A Glance tab

On the At A Glance tab, you specify whether reminders, comments, attachments, and so on are to be displayed in the left pane of the Navigator when a reservation folder, booking folder, booking detail folder, and/or booking detail item is opened.

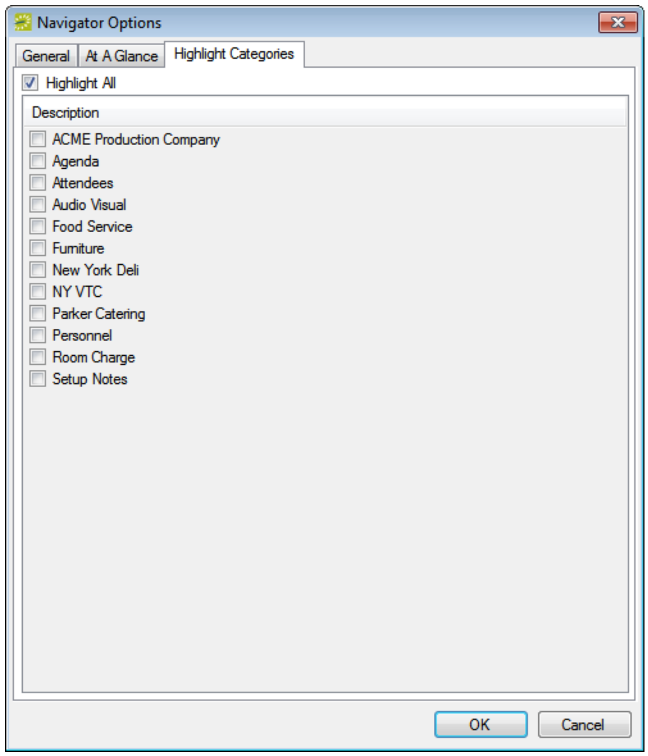
Figure 3-9: Navigator Options dialog box, At A Glance tab



Highlight Categories

On the Highlight Categories tab, you indicate whether a checkmark is to be displayed on all booking detail item folders for the selected booking detail. The default is to Highlight All, which means every booking detail item folder for every booking detail is denoted with a checkmark.

Figure 3-10: Navigator Options dialog box, Highlight Categories tab



Other Navigator commands

All other Navigator commands are available as buttons in the upper right pane and lower right pane of the Navigator. The buttons that are available are dynamically updated based not only on the folder or item that is currently selected in the left pane of the Navigator, but also on the tab that is open in the upper right pane of the Navigator.

Figure 3-11: Buttons available in the Navigator window with a reservation folder selected

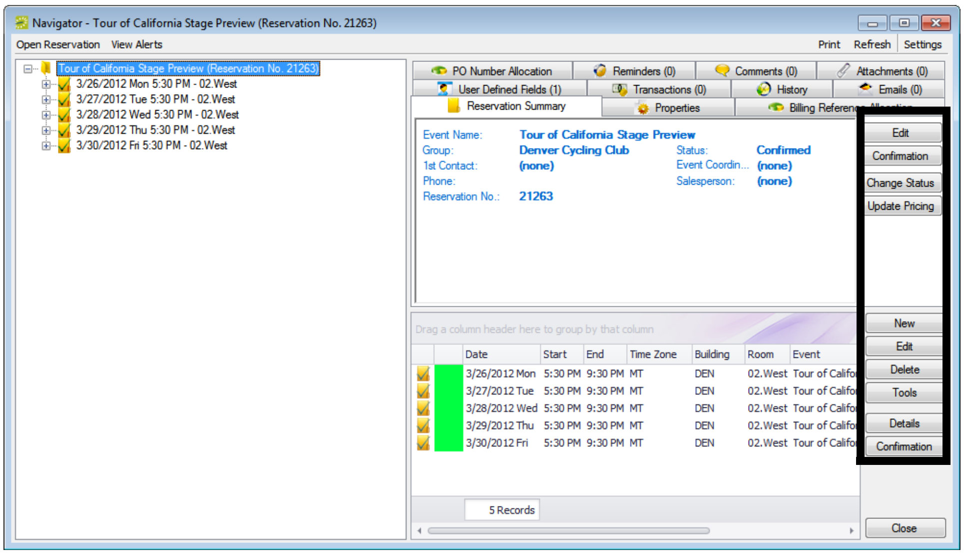


Figure 3-12: Buttons available in the Navigator window with a booking folder selected

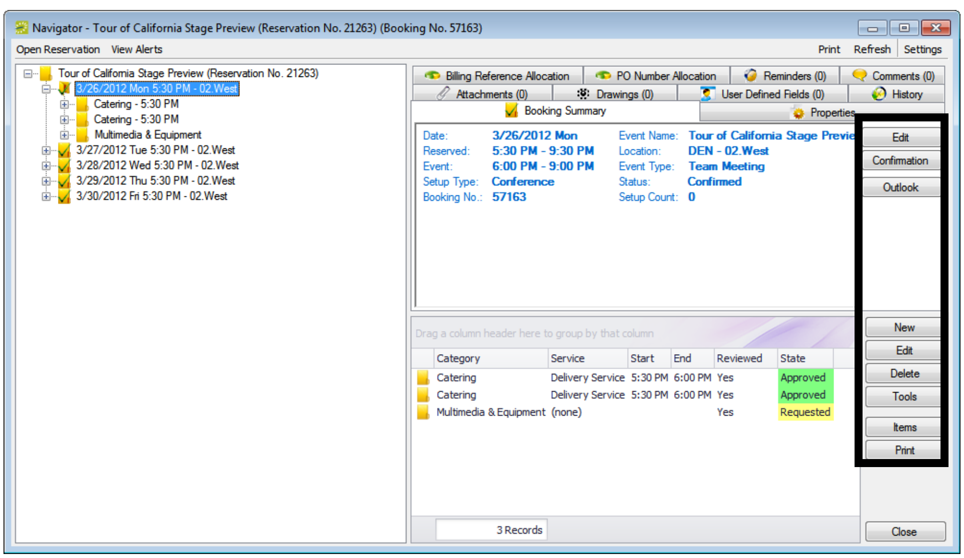
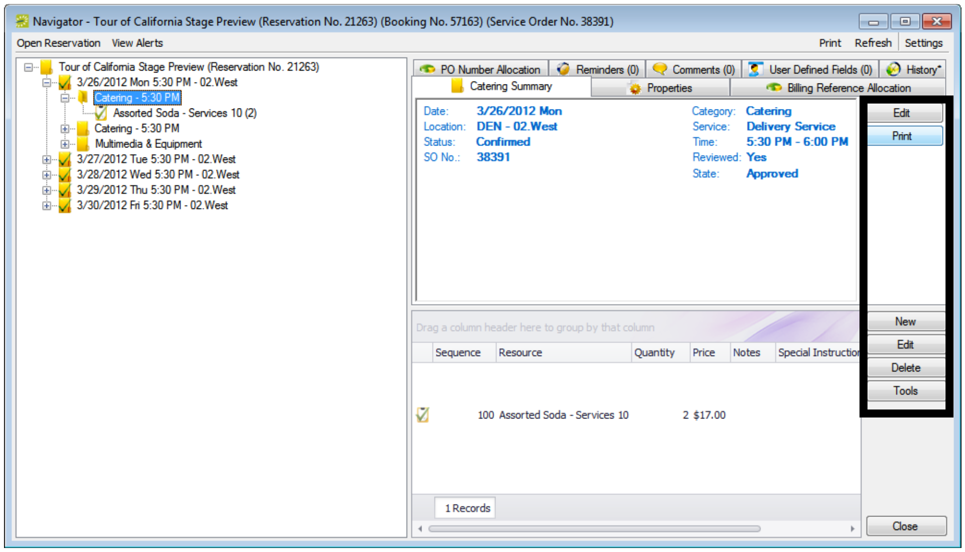


Figure 3-13: Buttons available in the Navigator window with a booking detail folder selected



Many of these same commands are also available on a context menu, which is a menu that opens when you right-click on a folder or item in the Navigator. All the context menus that are available in the Navigator offer a limited set of choices based on the folder or item that is selected in the Navigator. See Figure 3-14 below and Figure 3-15 on page 96.

Figure 3-14: Comparing context menus

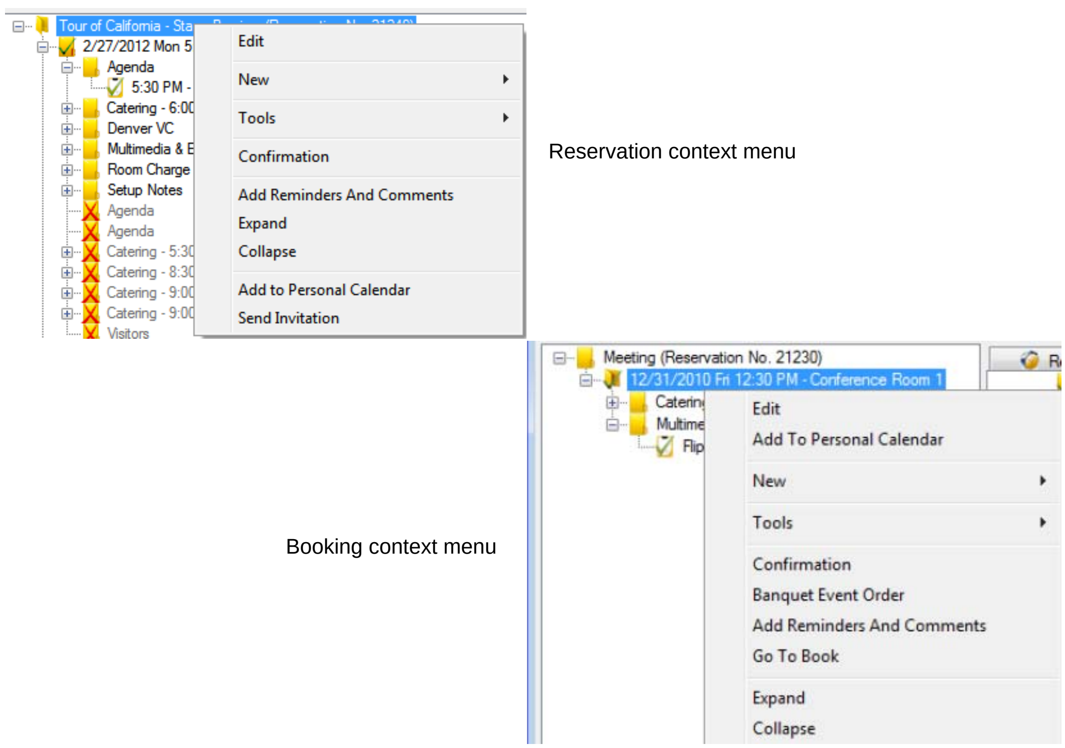
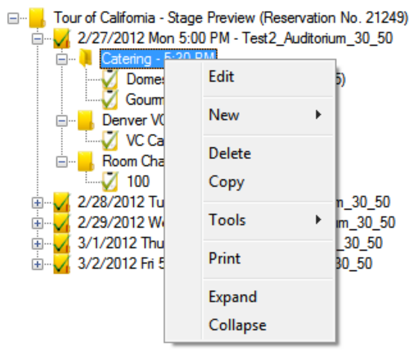
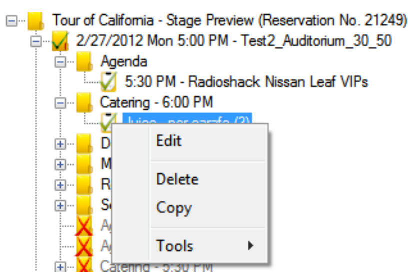


Figure 3-15: Comparing context menus



Booking Detail context menu



Booking Detail Item context menu

Adding Bookings to a Reservation in the Navigator

You can use the Navigator to add one or more bookings to an existing reservation.

To add bookings to a reservation

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 79.
   - "Opening a reservation through the Reservation Book" on page 80.
   - "Opening a reservation through a group" on page 80.
   - "Search Tools," on page 195.
2. In the left pane of the Navigator, select the reservation to which you are adding the bookings, and then in the Bookings pane, click New.
   The Reservation Wizard opens. See "Making a Reservation Using the Reservation Wizard" on page 45.

Editing a Reservation in the Navigator

When you edit a reservation in the Navigator, you are working with the *who* and the *what* information for the event—the event name, the group name, and so on. When you edit a reservation, you can edit the *reservation* information (event name, event coordinator, and so on), and you can edit the *billing* information (pricing plan, payment type, and so on).

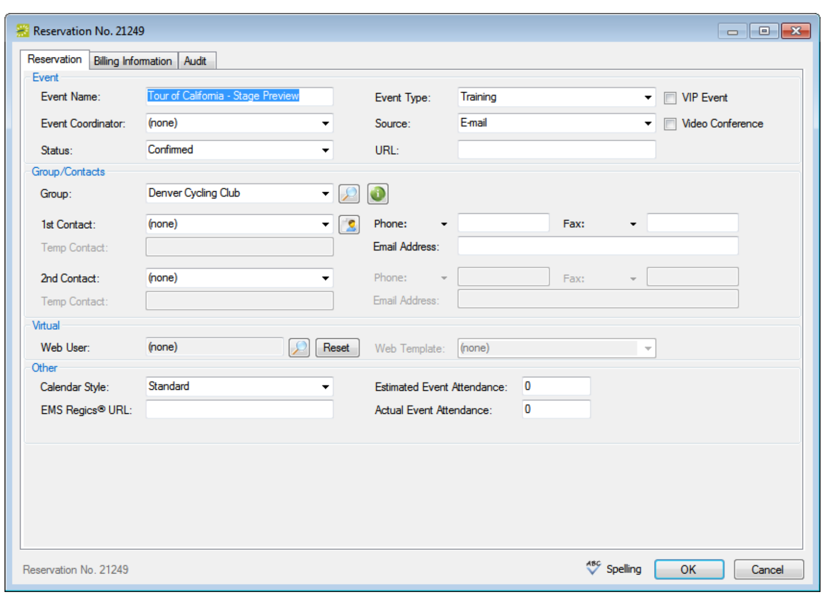
When you edit a reservation, if you select a different pricing plan, then the pricing plan is applied at the reservation level only. Categories and room charges are not automatically repriced. To reprice your categories or room charges based on a new pricing plan, you must use the Update Pricing Plan wizard. See *"Repricing Categories and Room Charges for a Reservation" on page 100.*

To edit a reservation in the Navigator

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 79.
   - "Opening a reservation through the Reservation Book" on page 80.
   - "Opening a reservation through a group" on page 80.
   - "Search Tools," on page 195.
2. In left pane the Navigator, select the reservation that you are editing, and then on the Reservation Summary tab or on the Properties tab, click Edit.

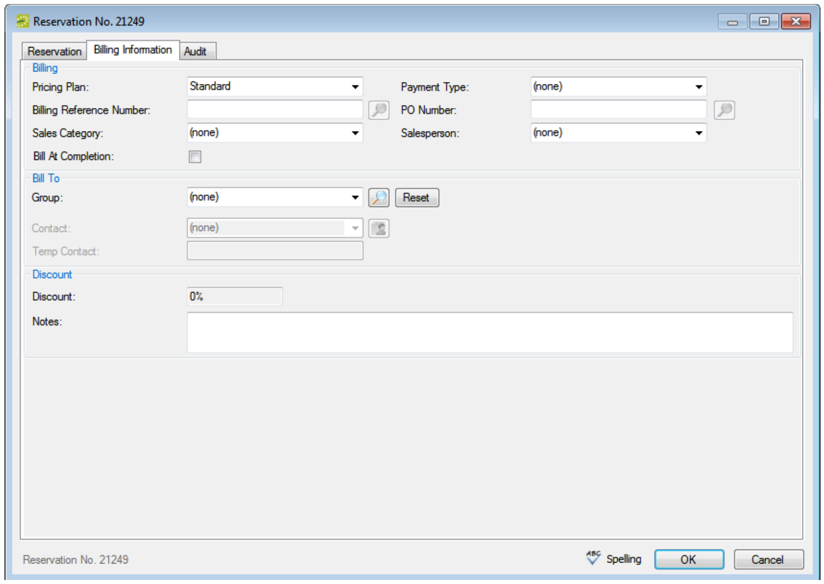
   The Reservation window opens. The Reservation tab is the active tab.

Figure 3-16: Reservation window, Reservation tab



3. Do one or both of the following:
   - On the Reservation tab, edit any and all the reservation information as needed.
   - Open the Billing tab, and then edit any and all the billing information as needed.

Figure 3-17: Reservation window, Billing tab



If you select a different pricing plan, then the pricing plan is applied at the reservation level only. Categories and room charges are not automatically repriced. To reprice your categories or room charges based on a new pricing plan, you must use the Update Pricing Plan Wizard. See *"Repricing Categories and Room Charges for a Reservation" on page 100.*

4. Click OK.

   The Reservation window closes and you return to the Navigator, which now shows the updated information for the reservation.

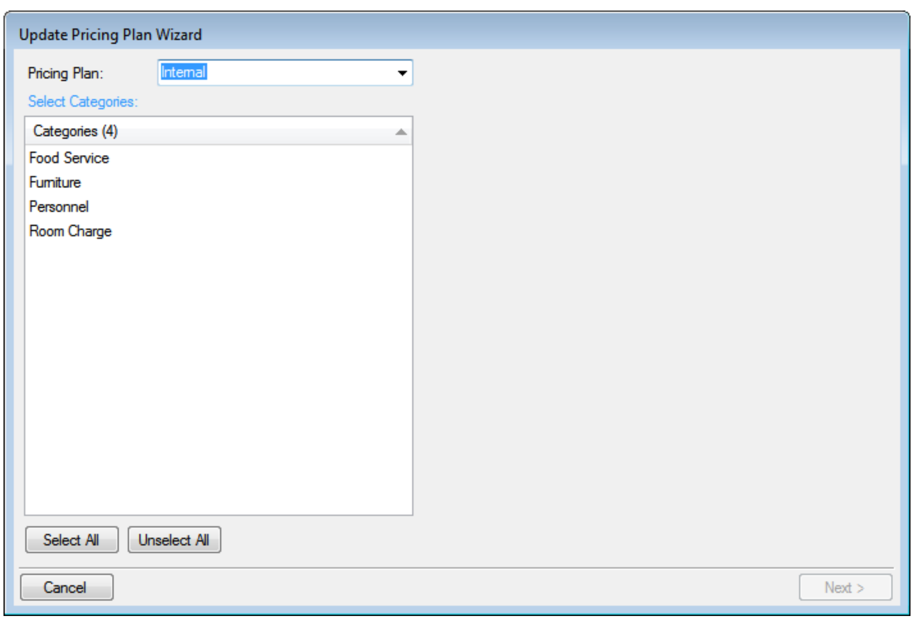
Repricing Categories and Room Charges for a Reservation

When you edit a reservation, if you select a different pricing plan, then the pricing plan is applied at the reservation level only. Categories and room charges are not automatically repriced. To reprice your categories or room charges based on a new pricing plan, then you must use the Update Pricing Plan Wizard.

To reprice categories and room charges for a reservation

1. Open the reservation in the Navigator. See:
   - “Opening a reservation directly in the Navigator” on page 79.
   - “Opening a reservation through the Reservation Book” on page 80.
   - “Opening a reservation through a group” on page 80.
   - “Search Tools,” on page 195.
2. In left pane of the Navigator, select the reservation that you are repricing, and then on the Reservation Summary tab, click Update Pricing.
   The Update Pricing Plan Wizard opens. The current pricing plan for the reservation is displayed in the Pricing Plan field. The window displays all the categories, including room charges, that can be repriced in one or more of the reservation bookings.

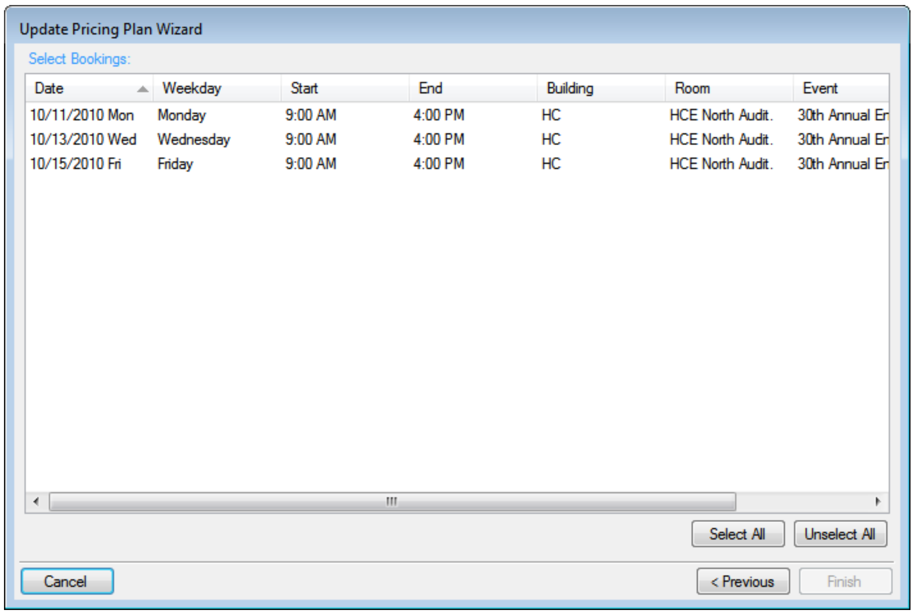
Figure 3-18: Update Pricing Plan Wizard



3. Select the category, or CTRL-click to select the multiple categories that you are repricing for the reservation.
4. Click Next.

   The Select Bookings window opens. This window lists all the bookings with one or more of the selected categories that can be repriced.

Figure 3-19: Update Pricing Plan Wizard, Select Bookings window



You can reprice a room charge for a booking only if the room charge has not been invoiced. To reprice a room charge that has been invoiced, you must first void the invoice. See *"To void an invoice" on page 372.*

5. Select the booking, or CTRL-click to select the multiple bookings for which you are repricing the categories and/or room charges, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.
6. Click OK to close the message and return to the Navigator.

Changing the Status for a Reservation from the Reservation Summary tab

Even though the Change Booking Status Wizard is available for changing the status of multiple bookings in a reservation, most reservationists who approve reservations that are submitted from VEMS do so by using the Change Status function that is available on the Reservation Summary tab in the Navigator. This is because unlike the Change Booking Status Wizard, when you use the Change Status function in the Navigator to change the status of a reservation, an option is available for automatically generating and sending a confirmation to the group for whom the reservation was made.

Your EMS administrator must grant you the appropriate security access to change the status of a booking, which includes canceling a booking. If you want to change the status of a booking using the Change Booking Status Wizard, see "Editing Multiple Bookings in the Navigator" on page 112.

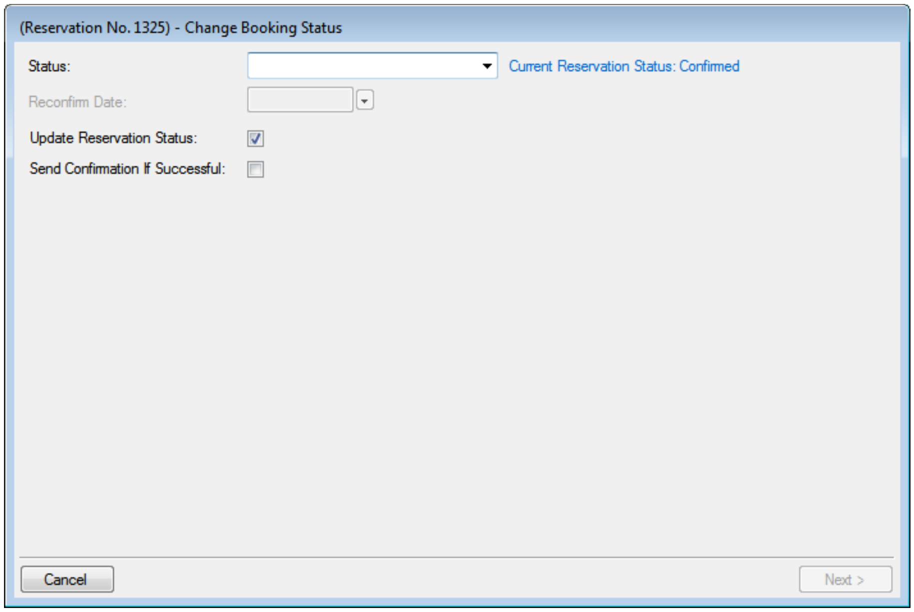
An email can be automatically generated and sent only if Email is selected for the Confirmation setting on the General tab of the Navigator Options dialog box, and if the group for which the reservation was made has an email address in its record. See "Navigator Options dialog box" on page 90 and "Searching for and Configuring Groups" on page 255.

To change the status for a reservation

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 79.
   - "Opening a reservation through the Reservation Book" on page 80.
   - "Opening a reservation through a group" on page 80.
   - "Search Tools," on page 195.
2. In left pane the Navigator, select the reservation that you are editing, and then on the Reservation Summary tab, click Change Status.

   The Change Booking Status window opens. See Figure 3-20 on page 103.

Figure 3-20: Change Booking Status window



3. On the Status dropdown list, select the new status for the bookings.

If you select any type of Canceled status, then three additional fields—Reason, Who Cancelled and Notes—are displayed on the Change Booking Status window. You must enter data in all three of these fields before you can continue in the Wizard.

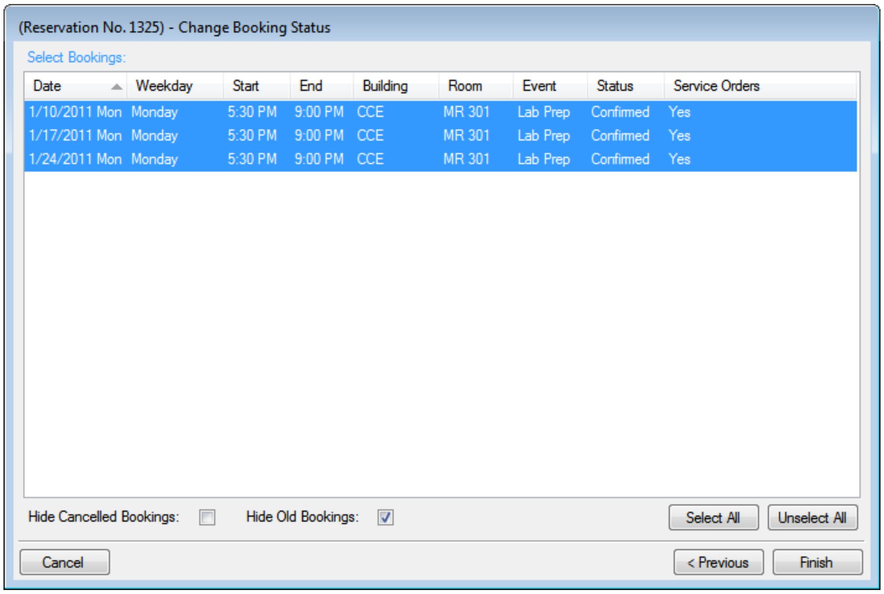
4. Enter a Reconfirm Date if it is required for the new status that you selected.
5. Optionally, do one or both of the following:
   - Leave Update Reservation Status selected to have the reservation-level status changed as well.
   - Select Send Confirmation If Successful to have an email automatically generated and sent to the group for whom the reservation was made.

The confirmation is generated based on the system confirmation settings that you have specified. See *"Specifying your Confirmation Settings" on page 308.*

6. Click Next.

   The Select Bookings window opens. This window displays all the bookings for the selected reservation with a date greater than or equal to the current day's date and that do not have invoiced items. By default, all the bookings are selected.

Figure 3-21: Select Bookings window

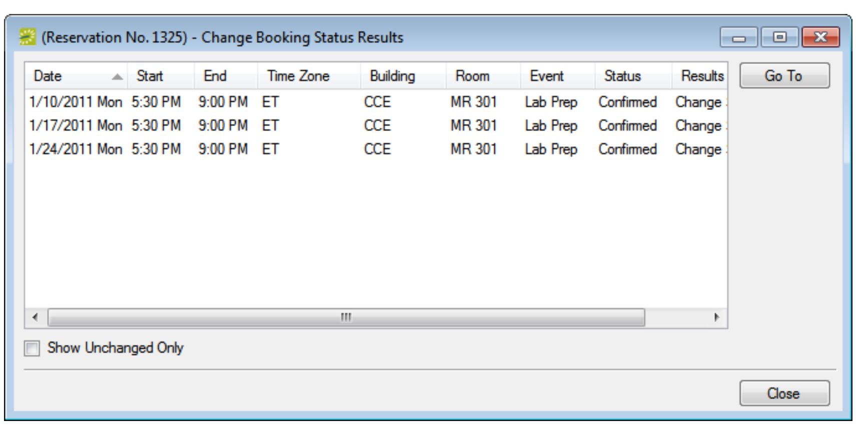


To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

7. Select the booking, or CTRL-click to select the multiple bookings for which you are changing the status, and then click Finish.

   The Change Booking Status Results window opens. This window lists all the bookings for the reservation, whether the status was successfully changed or not.

Figure 3-22: Change Booking Status Results window



Optionally, to view only the bookings for the selected reservation that were NOT successfully changed, select Show Unchanged Only. To view the details for a specific booking that was changed, select the booking, and then click Go To.

8. Click Close to close the Change Status Results window and return to the Navigator.

If you reserve a resource and then edit the date, time, location, or status of a booking, and there is a resource inventory conflict, a Resource Inventory Conflicts report opens onscreen. If you close this report, you can manually run a Resource Inventory Conflict check. In the Bookings folder of the Navigator, select Tools > Resource Inventory Conflict.

Copying a Reservation in the Navigator

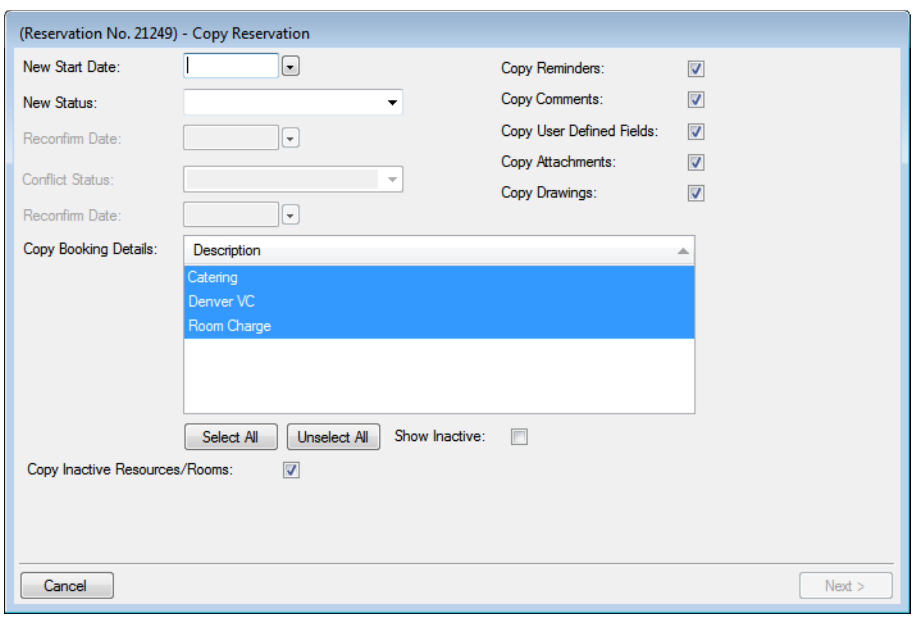
An easy way for you to make a new reservation in the Navigator is to copy an existing reservation and then make any necessary changes to the reservation. When you copy an existing reservation, you must provide a new start date and a new status; however, you can copy the existing reservation reminders, comments, user-defined fields, and drawings as is, and you can copy one or more or all the existing booking details.

To copy a reservation in the Navigator

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 79.
   - "Opening a reservation through the Reservation Book" on page 80.
   - "Opening a reservation through a group" on page 80.
   - "Search Tools," on page 195.
2. In the left pane of the Navigator, select the reservation that you are copying, and then in the Bookings pane, click Tools, and then click Copy Reservation Wizard.

   The Copy Reservation Wizard opens.

Figure 3-23: Copy Reservation Wizard



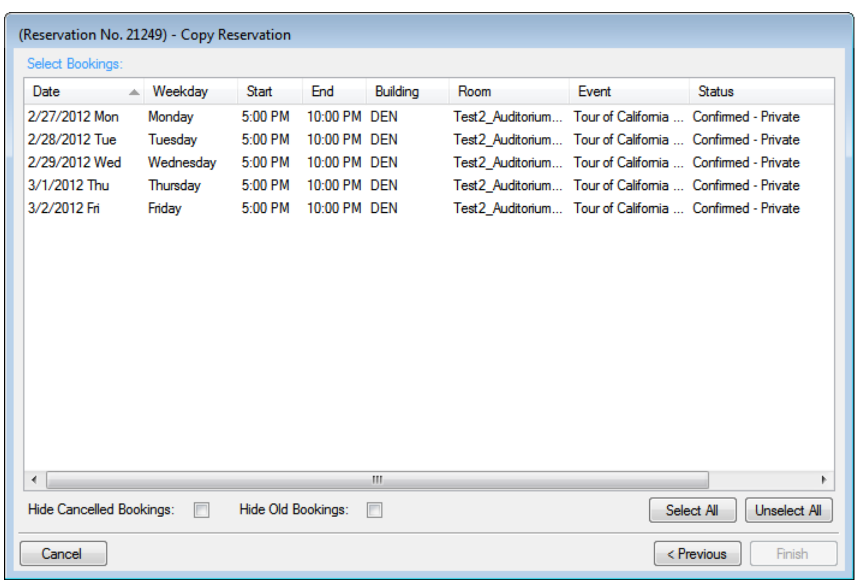
3. Enter the information for the new reservation.

Information	Description/Comments
New Start Date	The date of the first booking for the *new* reservation.
New Status	The status for the *new* reservation.
Reconfirm Date	You must enter a date if it is required for the new status that you selected.
Conflict Status	You must enter a conflict status in the event that the new bookings are in conflict with any existing bookings.
Reconfirm Date	You must enter a date if it is required for the new conflict status that you selected.
• Copy Reminders • Copy Comments • Copy User Defined Fields • Copy Attachments • Copy Drawings	Leave the appropriate options selected to copy the existing items as is, or clear the option for each item that is not to be copied to the new reservation.
Copy Booking Details	Select the booking details that are being copied (CTRL-click to select multiple details) or to select all the details for copying, click Select All. **Note:** By default, only active booking details are displayed. To show inactive booking details for copying, click Show Inactive.
Copy Inactive Resources/Rooms	Selected by default. Copies the inactive resource and/or rooms from the existing reservation to the new reservation. Clear this option if you do not want to copy the inactive resources and rooms.

4. Click Next.

   The Select Bookings window opens. This window displays all the bookings for the reservation that you are copying.

Figure 3-24: Copy Reservation Wizard, Select Bookings window



To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

5. Select the booking, or CTRL-click to select the multiple bookings that you are recreating in the new reservation, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.

The start date that you specified becomes the date of the first booking for the new reservation. In addition, the copied bookings are scheduled according to the same pattern as the existing reservation. For example, if the existing reservation has three bookings and each booking was scheduled every seven days (12/14, 12/21, and 12/28), and the start date for the new reservation is 12/15, then the new reservation has three bookings with dates of 12/15, 12/22, and 12/29.

When you copy multiple bookings, the bookings are simply copied and pasted as is—the bookings are not moved to a different location. If you need to move a booking to a different location, see "To edit the rooms for bookings" on page 118.

6. Click OK to close the message and return to the Navigator.

   Both the existing reservation and the new reservation are now displayed in the left pane of the Navigator. The new reservation is assigned a number based on the next available reservation number in the database. If any of the new bookings are in conflict with existing bookings, this conflict is indicated in the Navigator.

Editing a Booking in the Navigator

When you edit a booking in the Navigator, you are working with the *when* and *where* information for the event—the event time, the event location, and so on. To edit a booking, you must have the appropriate security access. For example, you cannot move a booking to a room if your EMS administrator has not granted you access to the room. Likewise, you cannot change the status for a booking from Tentative to Confirmed if your EMS administrator has not granted you access to the Confirmed status.

Under certain circumstances, bookings or booking details in EMS can become *locked*. Locked items are displayed in EMS, but you cannot edit or cancel the items. This locking can affect the basic booking information (date, time, room, and so on) or the details for the booking (catering, equipment, and so on). Locks are typically independent of one another. Just because one item is locked does not mean other items in the reservation are locked. Bookings can be locked in the following situations:

- Insufficient security—To edit a booking, you must have access to the room and status and as well as the correct security processes assigned to your user account.

Contact your EMS administrator for assistance.

- Old bookings—A booked event is locked a certain number of days after it has taken place. Your EMS administrator sets the value for this system parameter. Old bookings are locked to prevent you and other users from changing the facts for a past event, which could cause discrepancies between documents printed for the event and the information in EMS. When a booking is locked because it is old, all of its details are also locked. You cannot edit or delete existing details, and you cannot add new details.
- Invoiced bookings—When you create an invoice for a booking, you can bill for the entire booking (the room fee plus all the fees for all the booking details) or for only certain items that you choose (for example, the room fee and the equipment fees, but not the catering fees). In either case, if a booking has one or more invoiced items, the booking is locked. This means that you cannot edit or delete the booking, which includes changing the booking status, and editing and deleting invoiced resources. You can, however, still add more details to the bookings. For rooms, this means you cannot edit the room charge. You also cannot move bookings that are invoiced to a new or existing reservation. You can, however, still copy these bookings to a new or existing reservation.

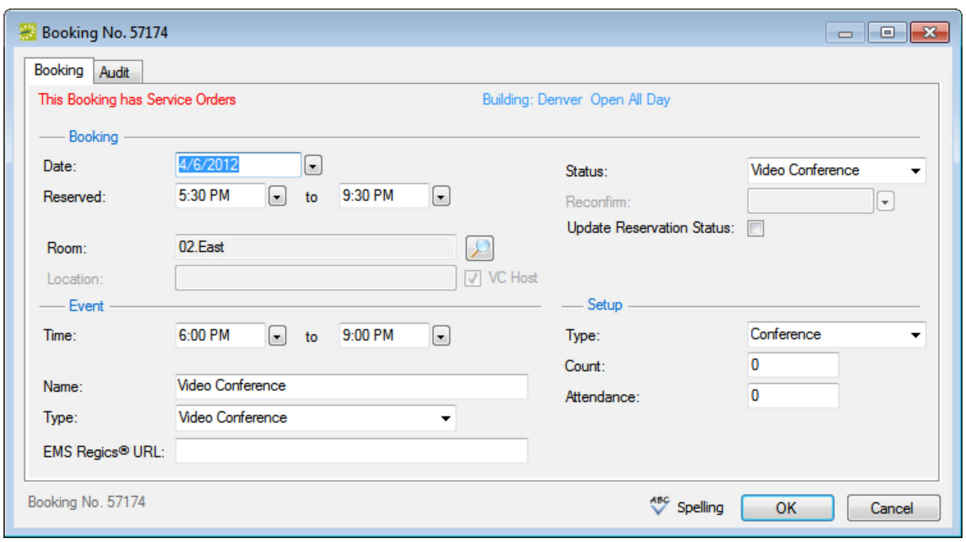
To edit billable information for a booking, see "Editing Booking Detail Item Charges for Multiple Items" on page 161.

Remember, you can also edit certain booking information in the Reservation Book. See "To edit an existing reservation" on page 74.

To edit a booking in the Navigator

1. Open the reservation in the Navigator. See:
    - “Opening a reservation directly in the Navigator” on page 79.
    - “Opening a reservation through the Reservation Book” on page 80.
    - “Opening a reservation through a group” on page 80.
    - “Search Tools,” on page 195.
2. In left pane of the Navigator, expand the folder structure for the reservation until the appropriate booking folder is visible.
3. Select the booking that you are editing, and then on the Booking Summary tab or on the Properties tab, click Edit.
   The Booking window opens. A message is displayed at the top of the window that indicates the hours for the building that contains the selected room. If the booking has any type of booking detail assigned to it, then “This Booking has Service Orders” is displayed at the top of the window.

Figure 3-25: Booking window



4. On the Booking tab, edit the information for the booking as needed, and then click OK.

If you have been granted the appropriate security access, you change the status of a booking, which includes cancelling a booking.

Two results are possible:

- If you edited anything other than the date, time, or location for a booking, the Booking window closes and you return to the Navigator, which now shows the updated information for the booking.

If you cancel a booking, a Cancel Status dialog box opens in which you must identify the user who canceled the booking and provide notes (for example, a cancellation reason) about the cancellation. If you change the status for a booking, you can select Update Reservation Status to have the reservation-level status changed as well.

- If you edited the date, time, or location for a booking, a dialog box opens, warning you that critical booking information has changed and asking you if you want to continue. Continue to Step 5.

5. Click Yes.

The Booking window closes and you return to the Navigator, which now shows the updated information for the booking.

If you edit a booking for a video conference event, then any date and time changes that you make to the booking automatically cascade to all related bookings.

If you reserve a resource and then edit the date, time, location, or status of a booking, and there is a resource inventory conflict, a Resource Inventory Conflicts report opens onscreen. If you close this report, you can manually run a Resource Inventory Conflict check. In the Bookings folder of the Navigator, select Tools > Resource Inventory Conflict.

Editing Multiple Bookings in the Navigator

Four Wizards are available for editing the *when* and *where* information for *multiple* bookings in a reservation:

- The Change Booking Date/Time Wizard
- The Change Booking Status Wizard (which includes canceling multiple bookings in a single step)
- The Change Rooms Wizard
- The Change Miscellaneous Booking Information Wizard (which includes type, setup type, and setup count)

To edit billable information for a booking, see “Editing Booking Detail Item Charges for Multiple Items” on page 161.

Remember, you can also edit certain booking information in the Reservation Book. See “To edit an existing reservation” on page 74.

To edit multiple bookings in the Navigator

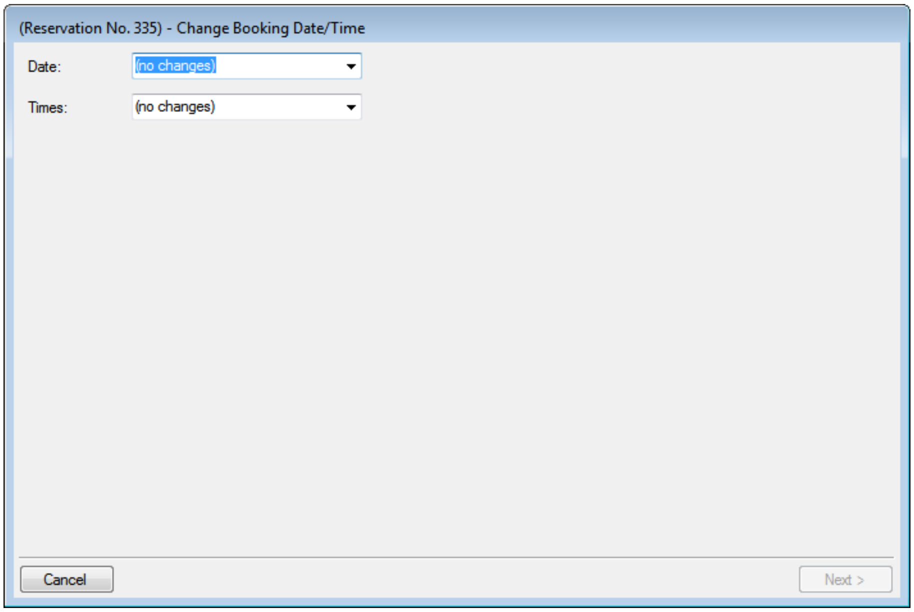
1. Open the reservation in the Navigator. See:
   - “Opening a reservation directly in the Navigator” on page 79.
   - “Opening a reservation through the Reservation Book” on page 80.
   - “Opening a reservation through a group” on page 80.
   - “Search Tools,” on page 195.
2. In the left pane of the Navigator, select the reservation for which you are editing the bookings.
3. Continue to the following as appropriate:
   - “To edit the booking date and/or time” on page 113.
   - “To edit the booking status” on page 116.
   - “To edit the rooms for bookings” on page 118.
   - “To edit miscellaneous booking information” on page 125.

To edit the booking date and/or time

1. In the Bookings pane, click Tools > Change Booking Date/Time Wizard.

   The Change Booking Date/Time Wizard opens.

Figure 3-26: Change Booking Date/Time Wizard



2. Select a different value for the date, time, or both.

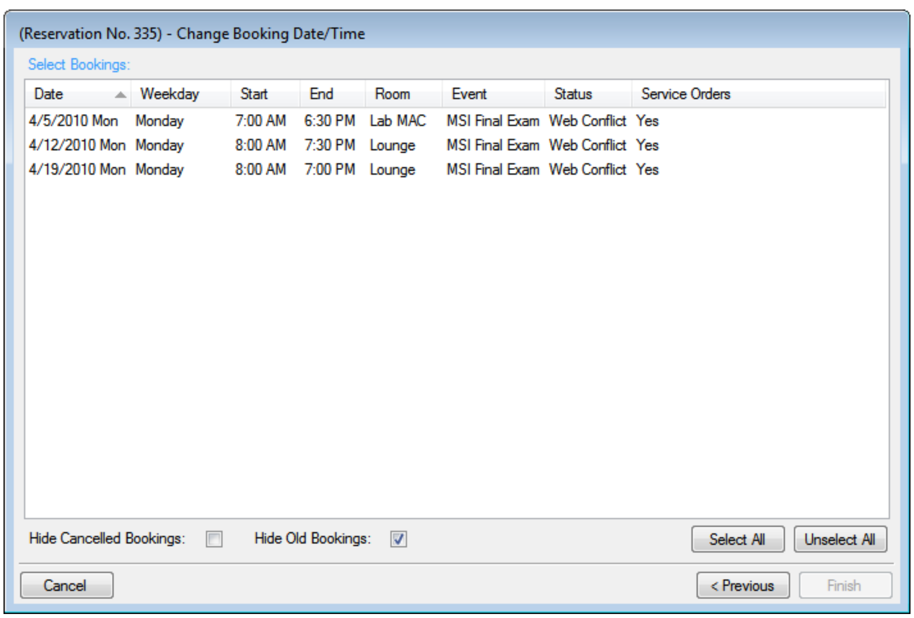
Value	Description
Date	
• (no changes)	• The default value.
• Reschedule Booking Earlier	• Reschedule the bookings to an earlier date that is based on the number of days that you specify.
• Reschedule Booking Later	• Reschedule the bookings to a later date based on the number of days that you specify.
• Reschedule Booking to Specific Date	• Reschedule the bookings to a new date that you specify.
Time	
• (no changes)	• The default value.
• End Booking Earlier	• Resets the event end time and the reserved end time to an earlier time, based on the number of hours that you specify.
• End Booking Later	• Resets the event end time and the reserved end time to a later time, based on the number of hours that you specify.
• Reschedule Booking Earlier	• Resets both the event start and end times *and* the reserved start and end times to an earlier time, based on the number of hours that specify.

Value	Description
• Reschedule Booking Later	• Resets both the event start and end times *and* the reserved start and end times to a later time, based on the number of hours that you specify.
• Reschedule Booking to Specific Time	• Resets the following values based on the specific times that you select: • Reserved Start • Event Start • Event End • Reserved End
• Set Setup/Teardown	• Resets the setup or teardown times based on the hours or minutes that you specify.
• Start Booking Earlier	• Resets the event start time and the reserved start time to an earlier time, based on the number of hours that you specify.
• Start Booking Later	• Resets the event start time and the reserved start time to a later time, based on the number of hours that you specify.

3. Click Next.

   The Select Bookings window opens. By default, this window displays all the bookings for the selected reservation with a date greater than or equal to the current day's date.

Figure 3-27: Change Booking Date/Time Wizard, Select Bookings window

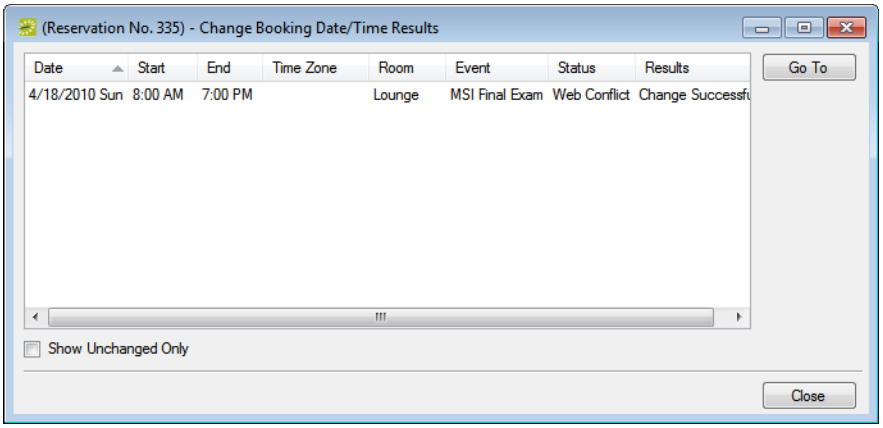


To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

4. Select the booking, or CTRL-click to select the multiple bookings that you are editing, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   The Change Booking Date/Time Results window opens. This window displays a list of all the selected bookings, whether the date/time change was successful or not.

Figure 3-28: Change Booking Date/Time Results window



Optionally, to view only the bookings for the selected reservation that were NOT successfully changed, select Show Unchanged Only. To view the details for a specific booking that was changed, select the booking, and then click Go To.

5. Click Close to close the Change Booking Date/Time Results window and return to the Navigator.

If you reserve a resource and then edit the date, time, location, or status of a booking, and there is a resource inventory conflict, a Resource Inventory Conflicts report opens onscreen. If you close this report, you can manually run a Resource Inventory Conflict check. In the Bookings folder of the Navigator, select Tools > Resource Inventory Conflict.

To edit the booking status

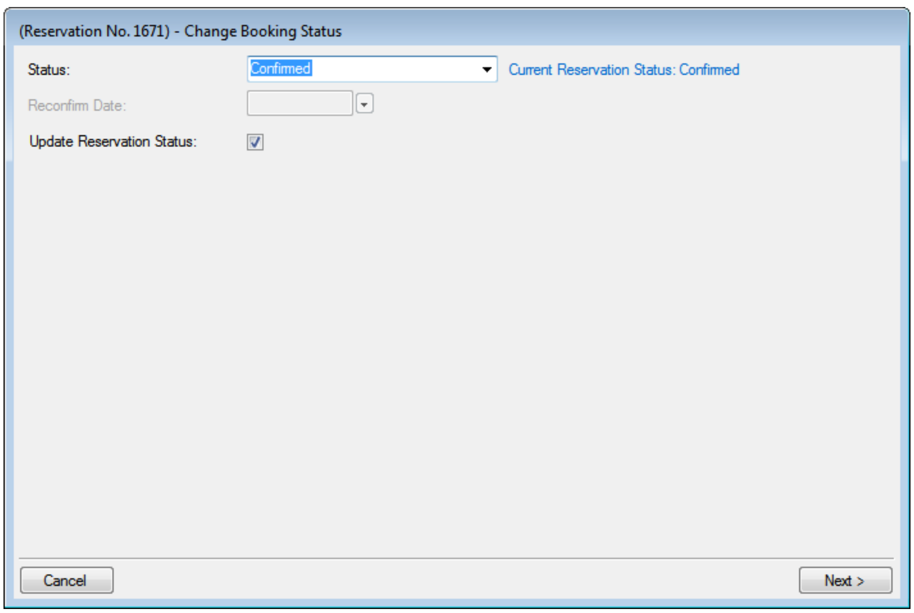
If your EMS administrator has granted you the appropriate security access, you can change the status of a booking, which includes canceling a booking. If you change the status for a booking, you can leave the option of Update Reservation Status selected to have the reservation-level status changed as well.

1. In the Bookings pane, click Tools > Change Booking Status Wizard.

   The Change Booking Status Wizard opens.

This is the same Wizard that opens if you select a reservation in the Navigator, and then on the Reservation Summary tab, click Change Status. See *"Changing the Status for a Reservation from the Reservation Summary tab" on page 102.*

Figure 3-29: Change Booking Status Wizard



2. On the Status dropdown list, select the new status for the bookings.

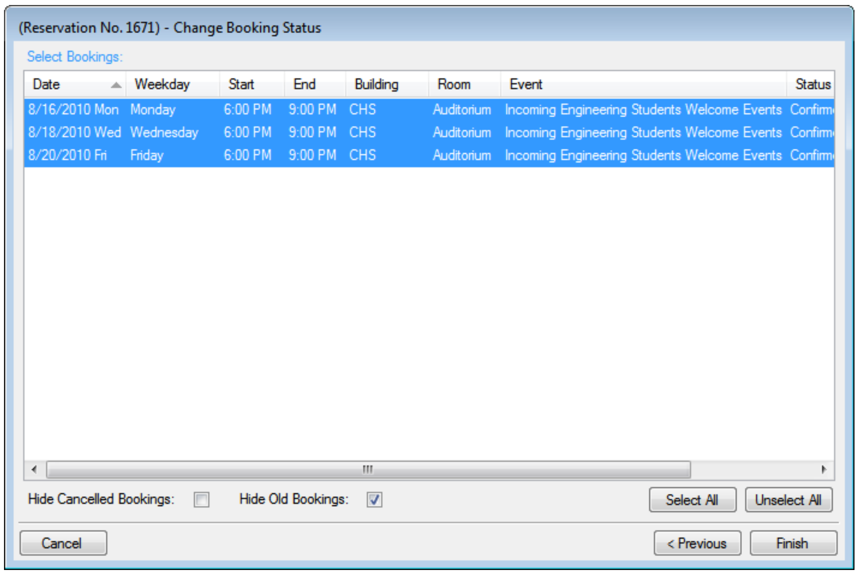
If you select any type of Canceled status, then three additional fields—Reason, Who Cancelled and Notes—are displayed on the Change Booking Status window. You must enter data in all three of these fields before you can continue in the Wizard.

3. Enter a Reconfirm Date if it is required for the new status that you selected.
4. Optionally, leave Update Reservation Status selected to have the reservation-level status changed as well.

5. Click Next.

   The Select Bookings window opens. This window displays all the bookings for the selected reservation with a date greater than or equal to the current day's date and that do not have invoiced items. By default, all the bookings are selected.

Figure 3-30: Change Booking Status Wizard, Select Bookings window

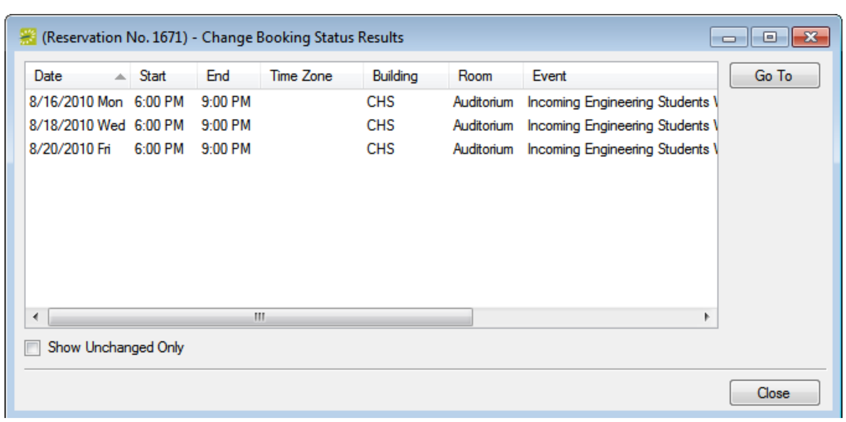


To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

6. Select the booking, or CTRL-click to select the multiple bookings for which you are changing the status, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   The Change Booking Status Results window opens. This window displays a list of all the selected bookings, whether the status change was successful or not.

Figure 3-31: Change Booking Status Results window



Optionally, to view only the bookings for the selected reservation that were NOT successfully changed, select Show Unchanged Only. To view the details for a specific booking that was changed, select the booking, and then click Go To.

7. Click Close to close the Change Status Results window and return to the Navigator.

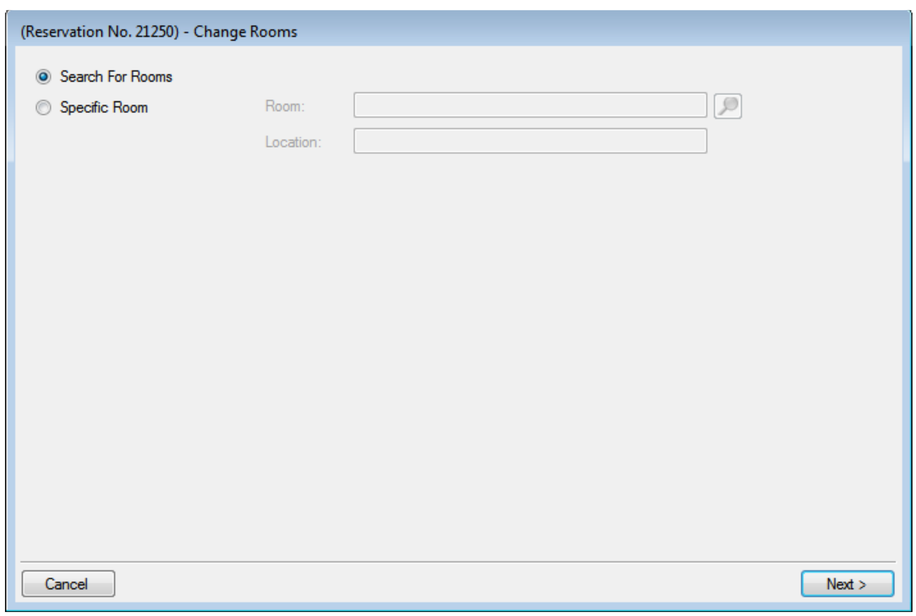
If you reserve a resource and then edit the date, time, location, or status of a booking, and there is a resource inventory conflict, a Resource Inventory Conflicts report opens onscreen. If you close this report, you can manually run a Resource Inventory Conflict check. In the Bookings folder of the Navigator, select Tools > Resource Inventory Conflict.

To edit the rooms for bookings

1. In the Bookings pane, click Tools > Change Room Wizard.

   The Change Room Wizard opens. Search for Rooms is selected by default.

Figure 3-32: Change Room Wizard



2. Do one of the following:

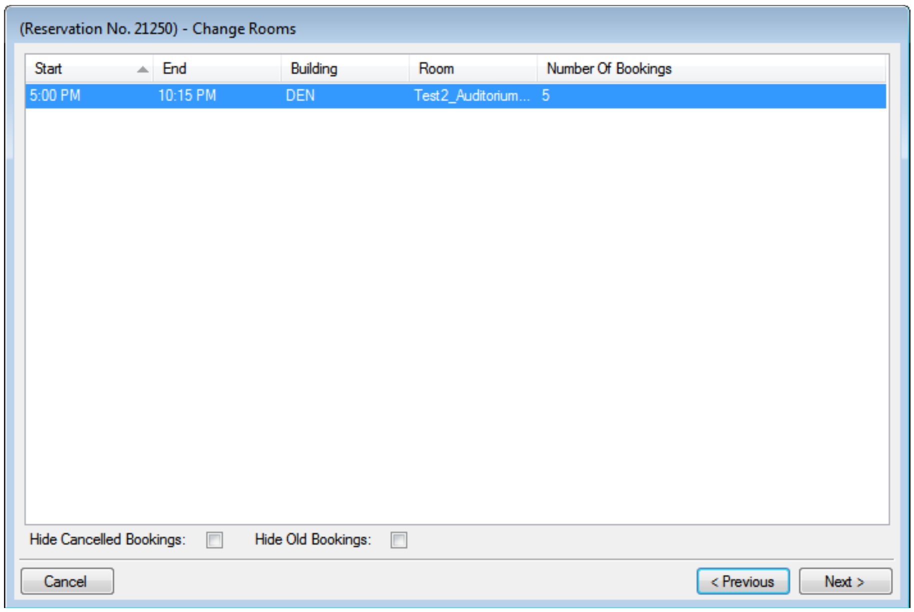
   - To search for rooms, continue to "To search for rooms" on page 119.
   - To select a specific room, select Specific Room, and then continue to "To select a specific room" on page 123.

To search for rooms

1. Click Next.

   The Change Room Wizard Select Bookings window opens with a list of all the bookings for the selected reservation with a date greater than or equal to the current day's date.

Figure 3-33: Change Room Wizard, Select Bookings window

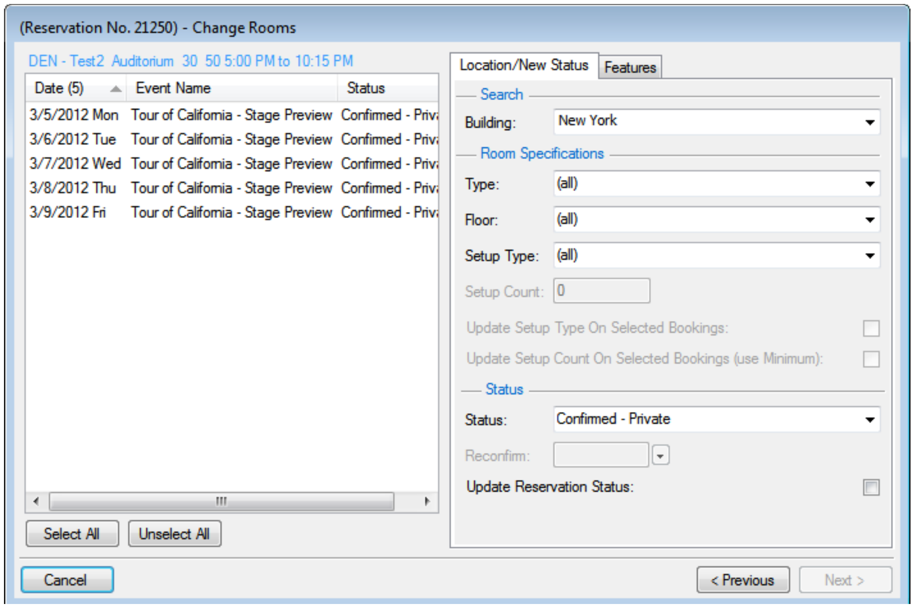


To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

2. Select the time/room combination with which to work, and then click Next. (For example, an 8 a.m. event and a 2 p.m. event in the same room are displayed as two separate items; however, multiple 10 a.m. bookings in the same room on different dates are displayed as a single item with the number of bookings indicated in the Number of Bookings field.)

   The Change Rooms window is refreshed with options for changing the building, the room, the status, or any combination of these. See Figure 3-34 on page 120.

Figure 3-34: Change Rooms Wizard with location and status options



3. In the left pane of the Change Rooms window, select the booking, or CTRL-click to select the multiple bookings that you are moving to a new room, or click Select All to select all the displayed bookings in a single step.
4. In the right pane, change the building, the room specifications, the status, the room features, or any combination of these as needed for the selected bookings, and then click Next.
5. If you did not select a specific Setup Type, then go Step 7; otherwise, in the Setup Count field, enter a new setup count.

Make sure that this count is the maximum that you expect the new room to hold.

6. Optionally, select one or both of the following to update the selected bookings with the following information for the new room:
   - Update Setup Type on Selected Bookings.
   - Update Setup Count On Selected Bookings (use Minimum).
7. Optionally, if you change the booking status, select Update Reservation Status to have the reservation-level status changed as well.

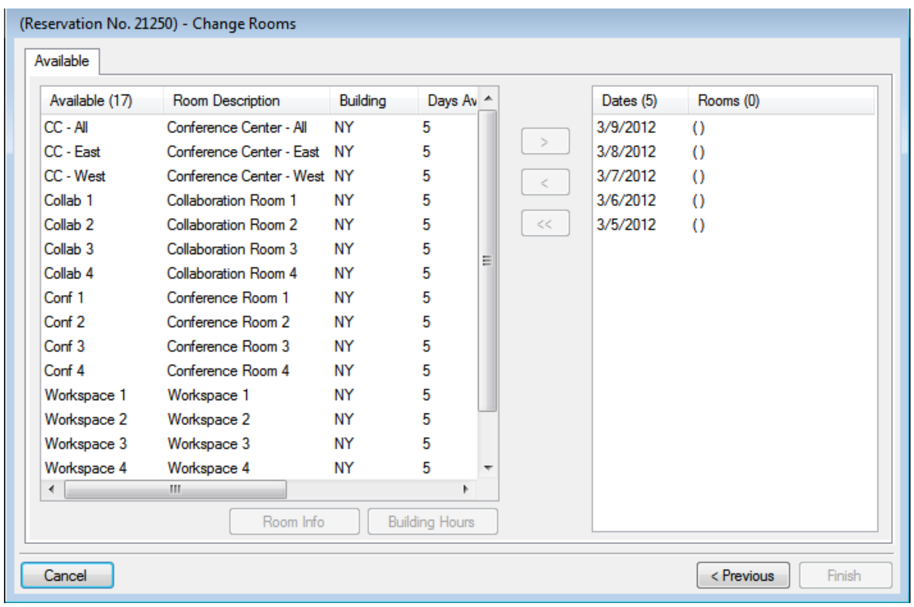
8. Click Next.

   The Change Room Wizard is refreshed with an Available tab, and if applicable, a Conflicts tab. The Available tab is always the active tab.

   - The Available tab contains two panes. The left pane lists all the rooms that meet *some or all* of your event criteria. The right pane lists all the event dates that must be fulfilled.
   - The Conflicts tab lists all the rooms that are not available for the requested dates. Optionally, you can open the Conflicts tab to view the list of rooms that were not available for scheduling for the event as well as list of the events that are scheduled for each room.

The Conflicts tab is displayed only if there are any rooms that are not available for the requested dates based on your room search specifications. If no rooms are in conflict, then the tab is not displayed.

Figure 3-35: Change Rooms Wizard, Available tab



9. Select the new room that you are scheduling for the event.
10. Optionally, do one or both of the following; otherwise, go to Step 11.
    - Click Room Info to open the Room Info dialog box and view information about the room properties, setup type, features, and pricing.
    - Click Building Hours to open the Building Hours dialog box which displays the hours that the selected room/building is open on the reserved date.

11. Click the Move button (>) to move the room to the Selected list.

    The selected room is displayed in the Rooms list in the right pane of the Available tab for every event date for which the room is available.

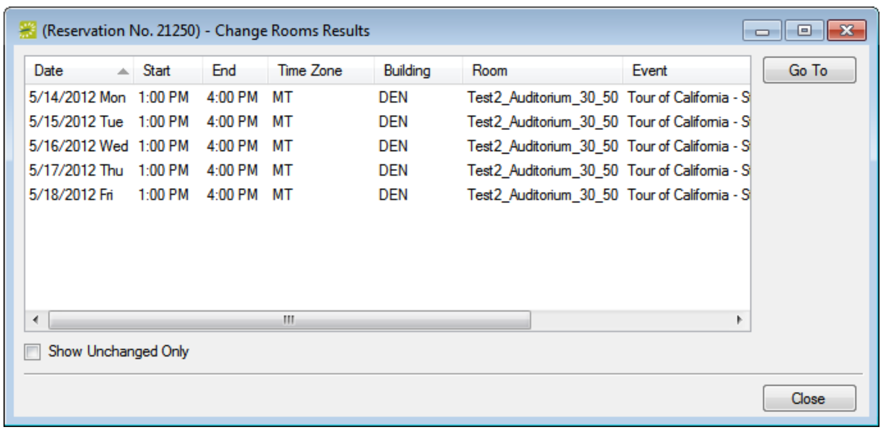
12. If all the event dates are fulfilled, click Finish; otherwise, repeat Step 9 through Step 11 until all the event dates are fulfilled, and then click Finish.

    A message opens, asking you if you want to change any more rooms.

13. Click Yes to repeat this procedure for any other bookings for the selected reservation; otherwise, click No close the message.

    The Change Rooms Results window opens. This window displays a list of all the selected bookings, whether the room change was successful or not.

Figure 3-36: Change Room Wizard, Results window



Optionally, to view only the bookings for the selected reservation that were NOT successfully changed, select Show Unchanged Only. To view the details for a specific booking that was changed, select the booking, and then click Go To.

14. Click Close to close the Change Room Results window and return to the Navigator.

If you reserve a resource and then edit the date, time, location, or status of a booking, and there is a resource inventory conflict, a Resource Inventory Conflicts report opens onscreen. If you close this report, you can manually run a Resource Inventory Conflict check. In the Bookings folder of the Navigator, select Tools > Resource Inventory Conflict.

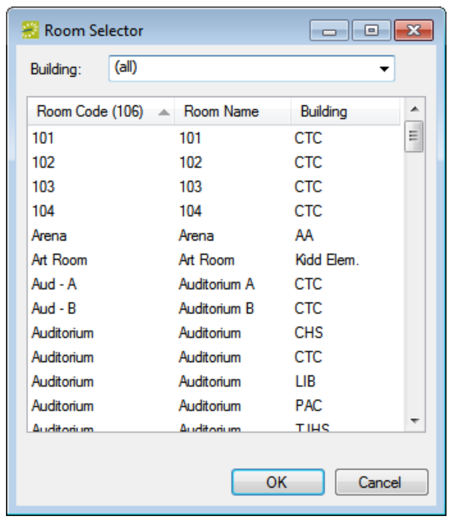
To select a specific room

When you search for a specific room, you can search for a room within your facilities, or you can search for an *override* room, which is a room that is within your facilities but is not typically scheduled for events or it is outside of your facilities. If you specify an override room for an event, you must manually specify the location for the event.

1. Click the Search icon .

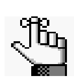
   The Room Selector dialog box opens. This dialog box lists all the rooms in all the buildings to which you have been granted access.

Figure 3-37: Room Selector dialog box



2. Do one of the following:

   - Open the Building dropdown list and select (all) buildings, or a specific building, area, or view.
   - Select the room, and then click OK.



If you are selecting an override room, make sure to select the appropriate room, for example, one named OVR.

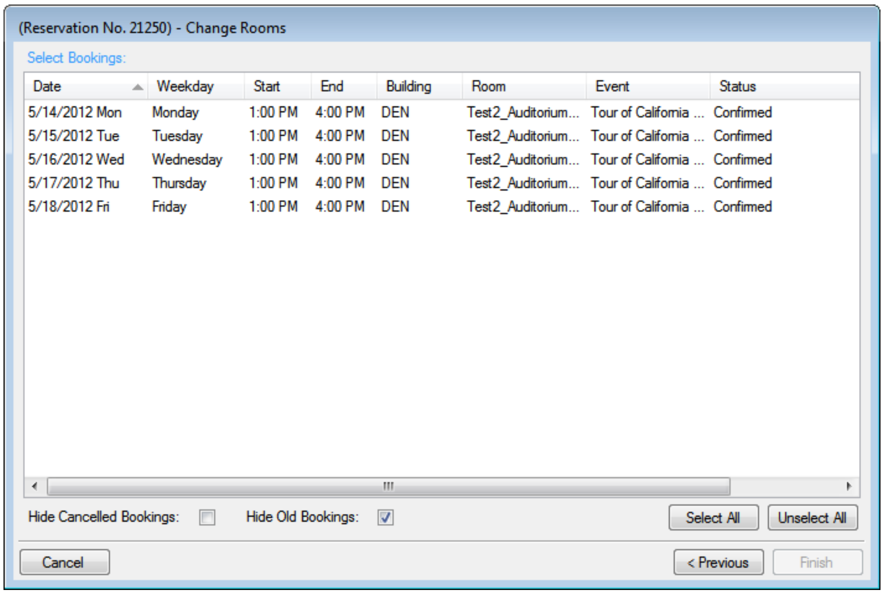
   - If you are selecting a standard room or a combo room, go to Step 4; otherwise, if you are selecting an override room, go to Step 3.

3. In the Location field, enter the location for/description of the override room.

4. Click Next.

   The Select Bookings window opens. This window displays all the bookings for the selected reservation with a date greater than or equal to the current day's date.

Figure 3-38: Change Room Wizard, Select Bookings window

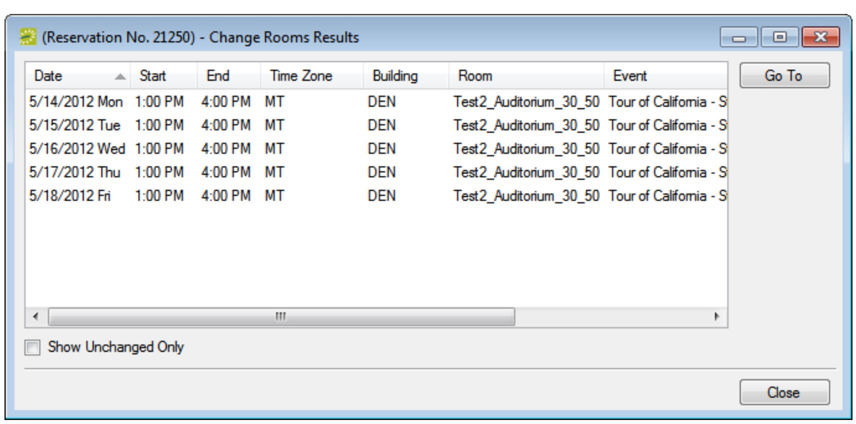


To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

5. Select the booking, or CTRL-click to select the multiple bookings that you are moving to a new room, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   The Change Rooms Results window opens. This window displays a list of all the selected bookings, whether the room change was successful or not.

Figure 3-39: Change Rooms Results window



Optionally, to view only the bookings for the selected reservation that were NOT successfully changed, select Show Unchanged Only. To view the details for a specific booking that was changed, select the booking, and then click Go To.

6. Click Close to close the Change Rooms Results window and return to the Navigator.

If you reserve a resource and then edit the date, time, location, or status of a booking, and there is a resource inventory conflict, a Resource Inventory Conflicts report opens onscreen. If you close this report, you can manually run a Resource Inventory Conflict check. In the Bookings folder of the Navigator, select Tools > Resource Inventory Conflict.

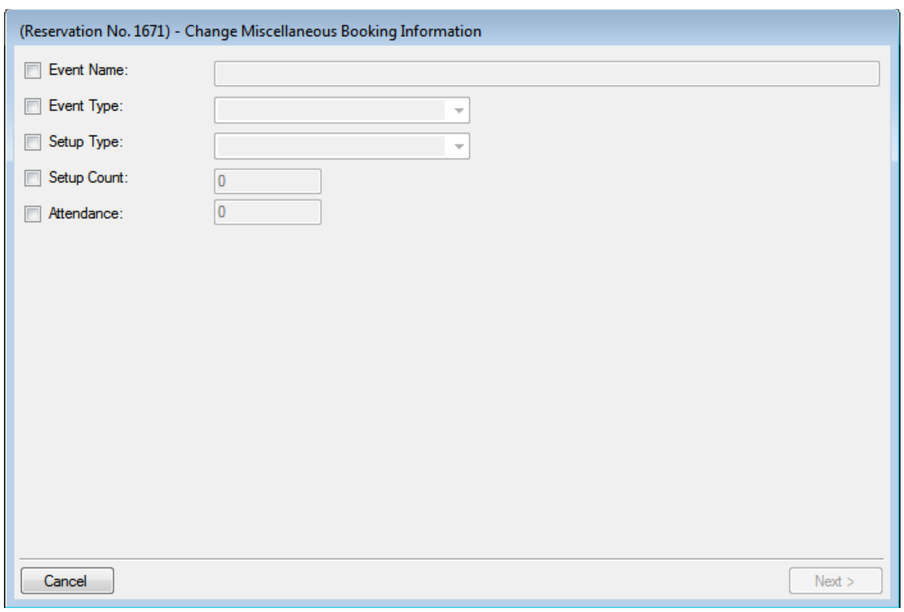
To edit miscellaneous booking information

Miscellaneous information that you can edit for multiple bookings includes the event name, the event type, the setup type, the setup count, and the attendance.

1. In the Bookings pane, click Tools > Change Miscellaneous Booking Information Wizard.

   The Change Miscellaneous Booking Information Wizard opens.

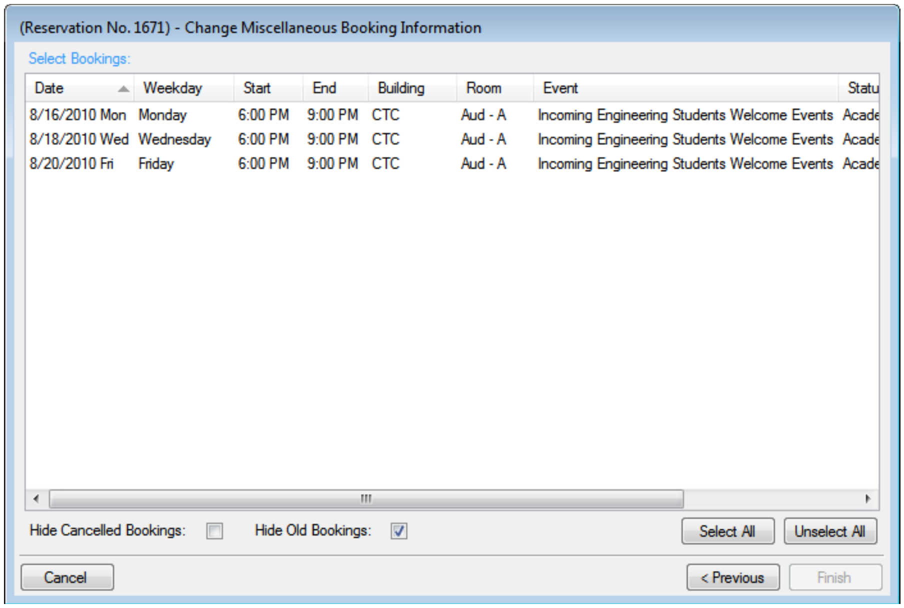
Figure 3-40: Change Miscellaneous Booking Information Wizard



2. Select the information that you are changing, enter the new value for the selected information, and then click Next.

   The Select Bookings window opens. This window displays all the bookings for the selected reservation with a date greater than or equal to the current day's date. See Figure 3-41 on page 126.

Figure 3-41: Change Miscellaneous Booking Information Wizard, Select Bookings window



To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

3. Select the booking, or CTRL-click to select the multiple bookings for which you are changing the information, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens, indicating that the changes were made successfully.

4. Click OK to close the message and return to the Navigator.

Moving Bookings to a Different Reservation

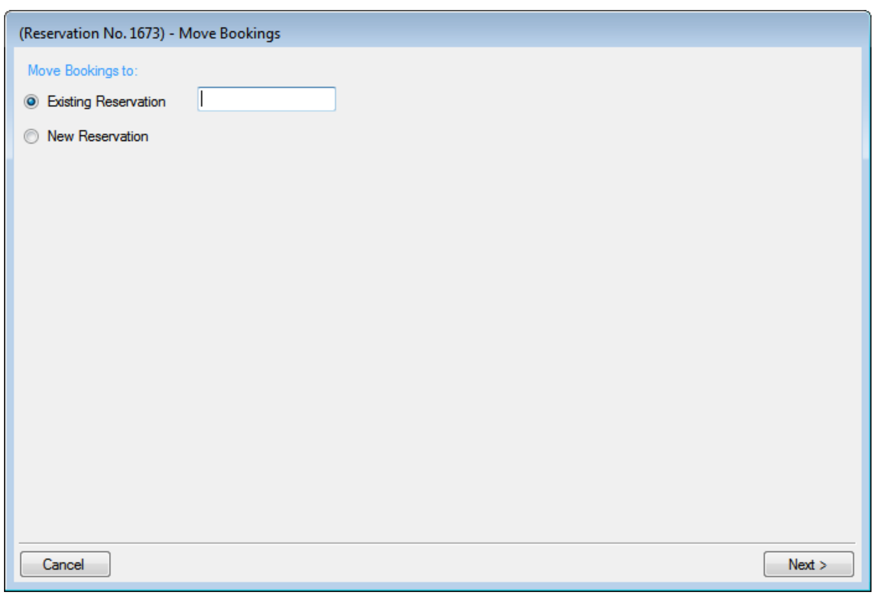
You use the Move Bookings reservation to move one or more bookings that *do not have invoiced items* from a selected reservation to an existing reservation or to an entirely new reservation. When you move a booking from a selected reservation, the booking and all its associated details are *removed entirely* from the selected reservation.

To move bookings to a different reservation

1. Open the reservation in the Navigator. See:
    - "Opening a reservation directly in the Navigator" on page 79.
    - "Opening a reservation through the Reservation Book" on page 80.
    - "Opening a reservation through a group" on page 80.
    - "Search Tools," on page 195.
2. In the left pane of the Navigator, select the reservation *from* which you are moving the bookings.
3. In the Bookings pane, click Tools, and then click Move Bookings Wizard.

   The Move Bookings Wizard opens. The option to move the bookings to an Existing Reservation is selected by default.

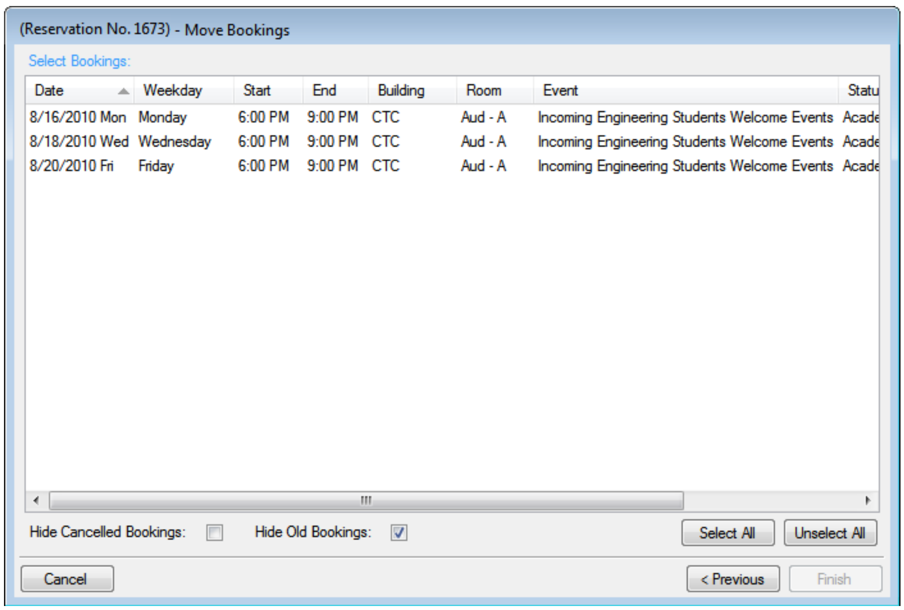
Figure 3-42: Move Bookings Wizard



4. Do one of the following:
   - In the Existing Reservation field, enter the reservation number for the existing reservation *to* which you are moving the bookings.
   - Click New Reservation.
5. Click Next.

   The Select Bookings window opens. This window lists all the bookings for the selected reservation that do *not* have invoiced items.

Figure 3-43: Move Bookings Wizard, Select Bookings window



To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

6. Select the booking, or CTRL-click to select the multiple bookings that you are moving to the new or existing reservation, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.
7. Click OK to close the message and return to the Navigator.

   Both the old reservation and the new or existing reservation are now displayed in the left pane of the Navigator. If you moved the bookings to a *new* reservation, then the new reservation that is created is assigned the next available reservation number in the database. If you moved the bookings to an *existing* reservation and any of the moved bookings are in conflict with bookings in the existing reservation, then this conflict is indicated in the Navigator.

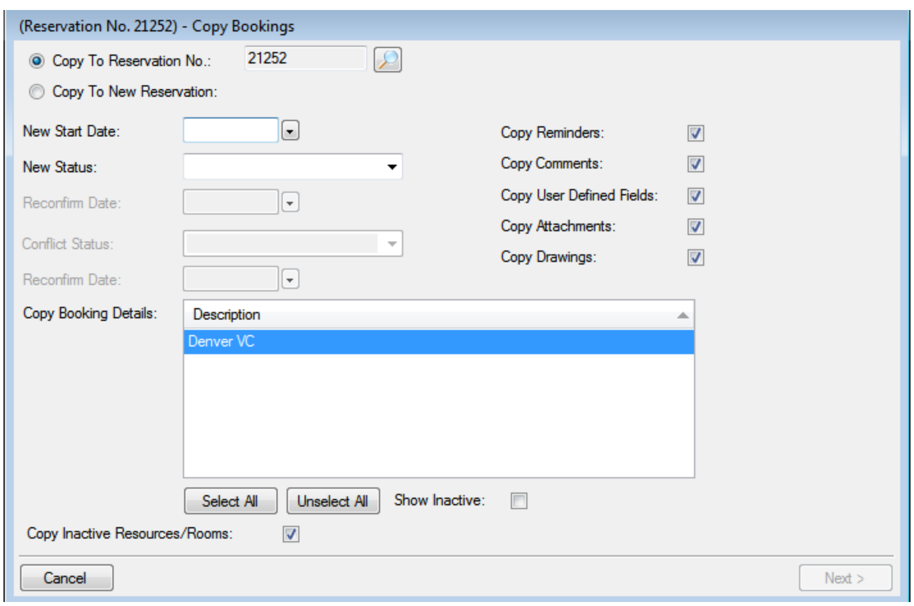
Copying Multiple Bookings in the Navigator

You use the Copy Bookings Wizard to copy one or more bookings to a new date or to a set of dates, either within the same reservation or to a new reservation.

To copy multiple bookings in the Navigator

1. Open the reservation in the Navigator. See:
   - “Opening a reservation directly in the Navigator” on page 79.
   - “Opening a reservation through the Reservation Book” on page 80.
   - “Opening a reservation through a group” on page 80.
   - “Search Tools,” on page 195.
2. In the left pane of the Navigator, select the reservation *from* which you are copying the bookings.
3. In the Bookings pane, click Tools, and then click Copy Bookings Wizard.
   The Copy Bookings Wizard opens. Copy to Reservation No. is selected by default and the number for the reservation from which you are copying the bookings is displayed in the field.

Figure 3-44: Copy Bookings Wizard



4. Do one of the following:

   - To copy the bookings to an existing reservation, click the Search icon to open the Open Navigator dialog box and search for the reservation. (See “Opening a reservation in the Navigator” on page 79.)
   - To copy the bookings to a new reservation, click Copy to New Reservation.

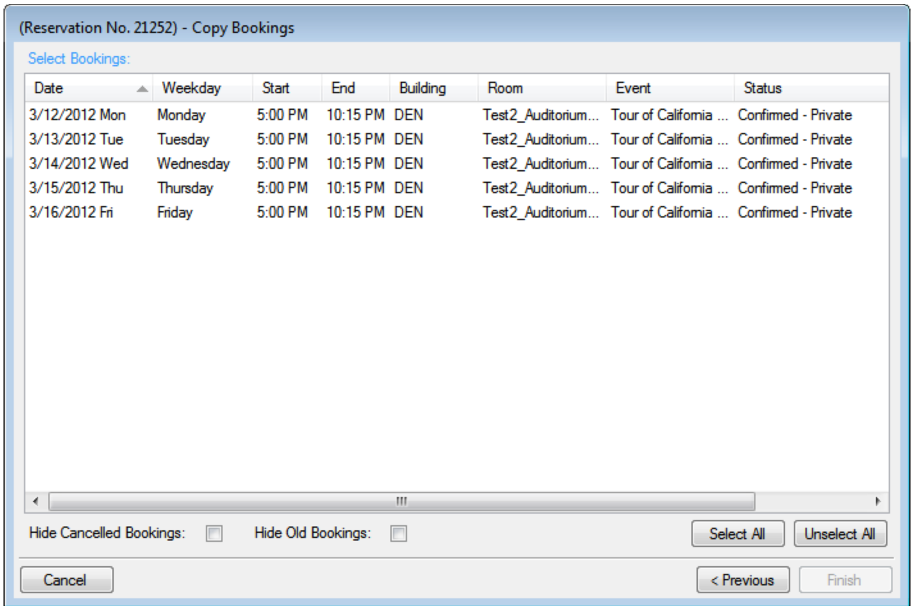
5. Enter the information for the reservation *to* which you are copying the bookings.

Information	Description/Comments
New Start Date	The date of the first booking for the new reservation.
New Status	The status for the new reservation.
Reconfirm Date	Enter if required for the new status that you selected.
Conflict Status	You must enter a conflict status in the event that the new bookings are in conflict with the existing bookings.
Reconfirm Date	Enter if required for the new conflict status that you selected.
• Copy Reminders • Copy Comments • Copy User Defined Fields • Copy Attachments • Copy Drawings	Leave the appropriate options selected to copy the existing items as is, or clear the option for each item that is not to be copied to the new reservation.
Copy Booking Details	Select the booking details that are being copied (CTRL-click to select multiple details) or to select all the details for copying, click Select All. **Note:** By default, only active booking details are displayed. To show inactive booking details for copying, click Show Inactive.
Copy Inactive Resources/Rooms	Selected by default. Copies the inactive resource and/or rooms from the existing bookings to the new bookings. Clear this option if you do not want to copy the inactive resources and rooms.

6. Click Next.

   The Select Bookings window opens. This window displays all the bookings for the copied reservation, regardless of the date or status. See Figure 3-45 on page 131.

Figure 3-45: Copy Bookings Wizard, Select Bookings window



To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

7. Select the booking, or CTRL-click to select the multiple bookings that you are recreating in the existing or new reservation, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.

The start date that you specified becomes the date of the first new booking. In addition, the copied bookings are scheduled according to the same pattern as the existing reservation. For example, if the existing reservation has three bookings and each booking was scheduled every seven days (12/14, 12/21, and 12/28), and the new start date for the first booking is 12/15, then the existing or new reservation has three bookings with dates of 12/15, 12/22, and 12/29.

When you copy multiple bookings, the bookings are simply copied and pasted as is—the bookings are not moved to different location. If you need to move a booking to a different location, see *"To edit the rooms for bookings" on page 118.*

8. Click OK to close the message and return to the Navigator.

   The reservation from which you copied the bookings and the reservation to which you copied the bookings are displayed in the left pane of the Navigator. If you moved the bookings to a new reservation, then the new reservation that is created is assigned the next available reservation number in the database. If any of the new bookings are in conflict with bookings in the existing reservation, this conflict is indicated in the Navigator.

Booking Details and Items Overview

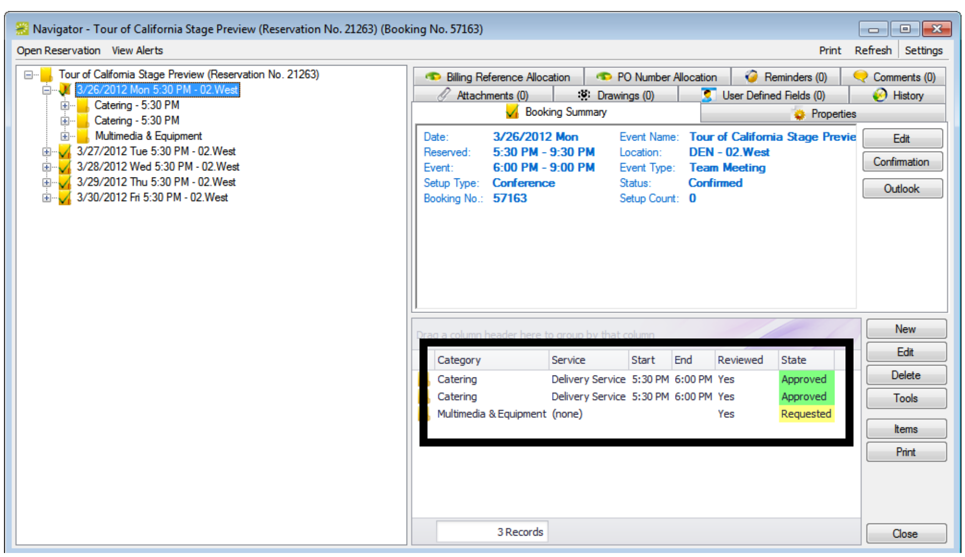
Booking details, which are also called *categories*, are the services (catering, A/V equipment, and so on), notes, attendees, activities, or room charges that you can add to a booking. *Booking detail items*, also called *resources*, are the individual items (coffee, sandwich, projector, and so on) that you add to a booking detail. When you add a resource to a booking, for example, coffee, various selections might be available or required, for example, regular, decaf, Italian roast, breakfast blend, and so on. Depending on how your EMS administrator has configured your categories, a resource might require service order times to be specified.

Your EMS administrator can configure buildings and categories so that a particular category can be used only in a particular building or buildings. This means that when you are adding booking details to a reservation, some booking details (categories) might not be displayed as an option.

The booking details for a selected booking are displayed in the Booking Details pane (the lower right pane) of the Navigator.

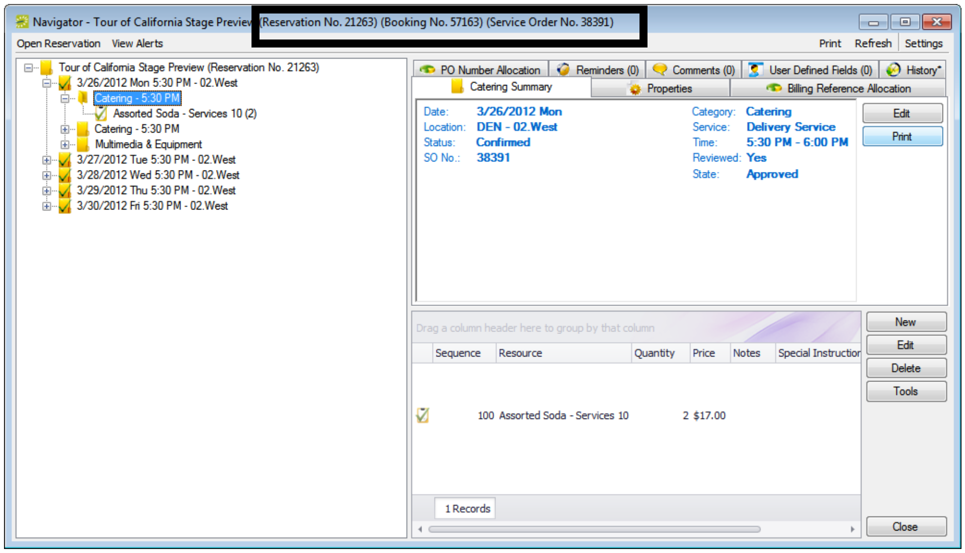
From this point on in the manual, categories that contain resources, but do not require service times are referred to as "resource categories." Categories that contain resources and that require service times are referred to as "service order categories." Categories that are used to manage food service are referred to as "catering categories." Categories that are used to manage miscellaneous notes (setup notes), agenda items, attendees/visitors, or room charges are referred to as "non-resource categories."

Figure 3-46: The Navigator window with a booking folder selected



If you select a booking detail folder that is for a Resource with Service Order category or a Catering category, then the service order number is displayed in the title bar of the Navigator.

Figure 3-47: The Navigator window with a booking detail folder selected



When you select a booking detail folder in the left pane of the Navigator, the tabs that are displayed in the upper right pane of the Navigator depend on the type of booking detail that you selected.

- <Booking Detail> Summary tab—The Summary displays information about the selected booking detail, including the event date, the event location, and the event status.
- Properties tab—The Properties tab also displays information about the booking detail, including the date that it was added to the booking, who added the detail, and, if applicable, the date that the detail was changed and who made the change.

If the booking detail has a price/charge associated with it, for example, a room charge, then the following two tabs are also displayed:

- Billing Reference Allocation tab—By default, the charge for a booking detail can be allocated to a single billing reference number. On the Billing Reference Allocation tab, you can allocate the charge for a reservation to multiple billing reference numbers by percentage. See “To allocate charges to multiple billing reference numbers and/or PO numbers” on page 83.

Your EMS administrator must enable the Use Billing Reference Allocation parameter for this tab to be displayed. See EMS System Parameters in the EMS Setup Guide.

- PO Number Allocation tab—By default, the charge for a booking detail can be allocated to a single purchase order (PO) number. On the PO Number Allocation tab, you can allocate the charge for a reservation to multiple billing PO numbers by percentage. See "To allocate charges to multiple billing reference numbers and/or PO numbers" on page 83.

Your EMS administrator must enable the Use PO Number Allocation parameter for this tab to be displayed. See EMS System Parameters in the EMS Setup Guide.

If the selected booking detail requires a service order or catering category, then the following four tabs are also displayed:

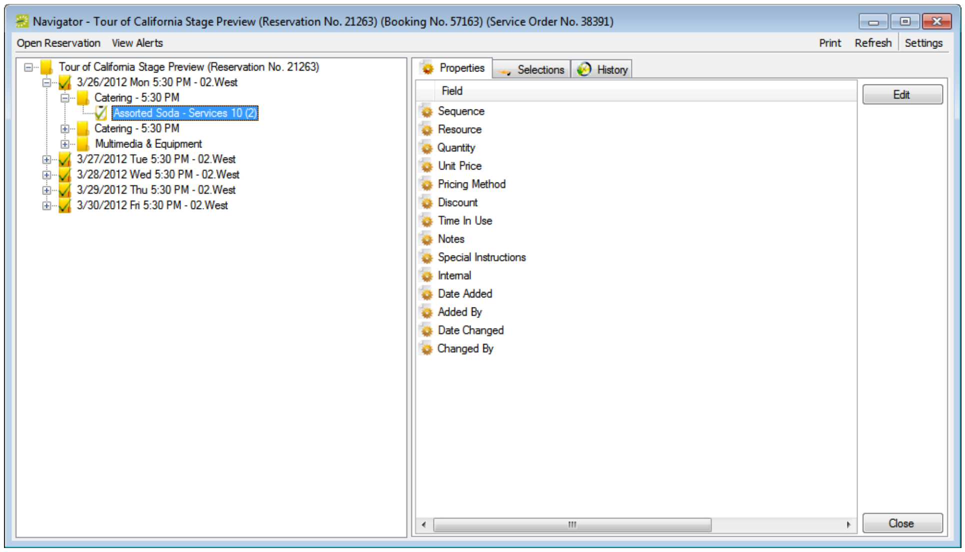
- User Defined Fields tab—The User Defined Fields tab displays the additional fields that store custom data for the booking detail. Your EMS administrator configures the types of fields that are available as well as the allowed values for these fields. See "Working with User Defined Fields in the Navigator" on page 181.
- Reminders tab—The Reminders tab displays any reminders that were created for the selected booking detail. See "Working with Comments and Reminders in the Navigator" on page 175.
- Comments tab—The Comments tab displays any comments that were made for the selected booking detail. See "Working with Comments and Reminders in the Navigator" on page 175.
- History tab—The History tab displays the history for the booking detail—the date that a change was made to the detail, the ID of the user who made the change, the field that was changed, the old field value, and the new field value.

Also, when you select a booking detail folder:

- Most of the tabs in the upper pane of the window have some of the basic features of an EMS Browser window. You can change the width of the data columns, you can rearrange the column order by dragging a column to a new location using the column heading, and you can sort the data columns in either ascending or descending sort order. See "An EMS Browser Window" on page 35.
- The booking detail items for the selected booking detail are displayed in the Items pane (the lower right pane) of the Navigator. A green check mark appears in front of each individual item that has been added to a booking. If the item is a package, then a green checkmark is displayed not only in front of the package, but also, in front of each individual item in the package. A red "x" is displayed in front of any booking detail and/or booking detail item that has been deleted from a booking. The Items pane has all the features of an EMS Browser window. See "An EMS Browser Window" on page 35.

If you select a booking details item in the left pane of the Navigator, then the entire right pane of the Navigator is refreshed with three tabs—a Properties tab that displays for the selected item, a Selections tab that displays the selections for the booking detail item (if applicable), and a History tab that details the history of the item.

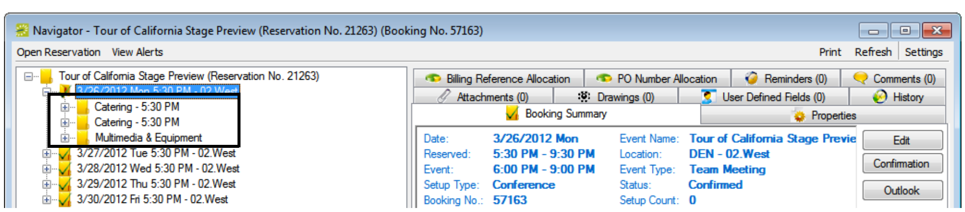
Figure 3-48: The Navigator window with a booking detail item selected



Service order

A booking detail might include a *service order.* A service order is a request to use the resource for a specified time period as opposed to using the resource for the entire event. For example, an event that meets from 10:00 am to 2:00 pm, might have food service from 11:00 am to noon. A service order consists of the service type, start and end times, and a unique, system-generated service order ID. For a catering booking detail, you can also indicate estimated count, guaranteed count, and actual count. You can create multiple service orders in the same booking. For example, you might have a number of catering services (breakfast, lunch, and afternoon refreshments) in the course of a one day training event. In this case, multiple folders are displayed under the booking folder on the left side of the Navigator window, with each folder representing a unique service order.

Figure 3-49: The Navigator window showing multiple service orders in the same booking



If you reserve an item from a category that does not require a service order, your only choices are to reserve the item for the event time or for the entire reserved time.

Your EMS administrator might have configured a default service type for some or all of your system's categories, but you can always select a different value. In addition, your EMS administrator might have configured states to manage your service order process. For detailed information about states, see Configuring Categories in the EMS Setup Guide.

Adding Booking Details and Items to Individual Bookings

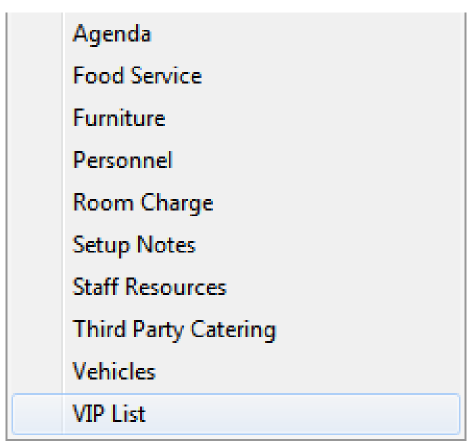
The steps that you follow to add booking details and items to individual bookings depend on the category type. Also, you can add multiple occurrences of a booking detail to a booking only if the booking detail is a Resource with Service Order category or a Catering category. If the booking detail is *not* a Resource with Service Order category or a Catering category, and the detail is already added to a booking, you cannot add the detail again to the booking. You can, however, add more items to the booking detail.

To add booking details and items to individual bookings

1. Open the reservation in the Navigator. See:
   - “Opening a reservation directly in the Navigator” on page 79.
   - “Opening a reservation through the Reservation Book” on page 80.
   - “Opening a reservation through a group” on page 80.
   - “Search Tools,” on page 195.
2. In the left pane of the Navigator, expand the folder structure for the reservation until the appropriate booking folder is visible.
3. Select the booking folder, and then in the Booking Details pane, click New.

   The Booking Details list opens.

Figure 3-50: Example of a Booking details List



4. Select the booking detail that you are adding to the booking.

   A dialog box opens.

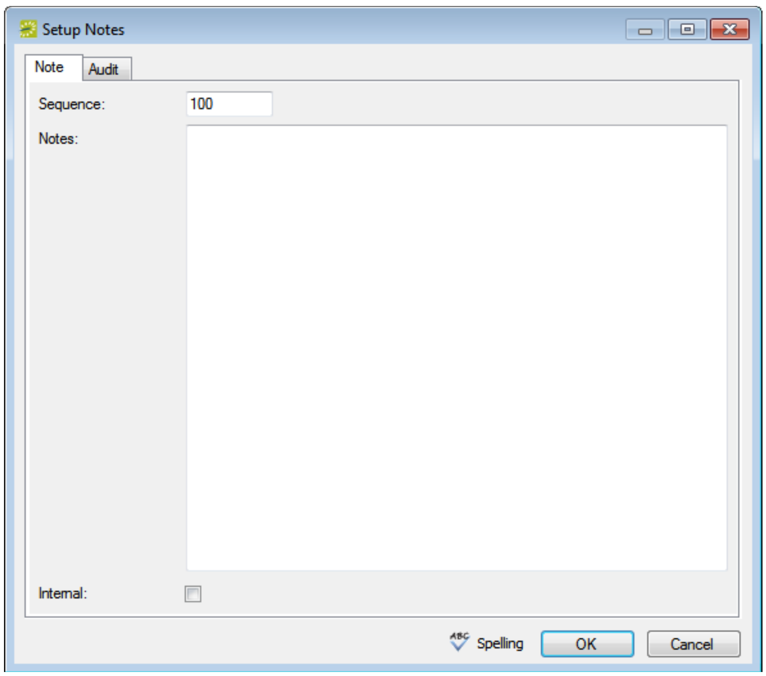
5. Continue to one of the following:
   - "To add a booking detail from a non-resource category" below.
   - "To add a booking detail from a resource, service order, or catering category" on page 144.

To add a booking detail from a non-resource category

A booking detail that is from a non-resource category can be setup notes, attendees, agenda (activities), or a room charge.

To add setup notes

Figure 3-51: Setup Notes dialog box



1. Enter the sequence number for the setup notes.

The sequence number determines the order in which the notes are displayed in the Items pane in the Navigator when the booking detail (Setup Notes) is selected for a booking.

2. Enter the appropriate notes or comments.
3. Optionally, if these notes are to be printed on internal reports only (the notes would be excluded from external reports like a confirmation), then select Internal.

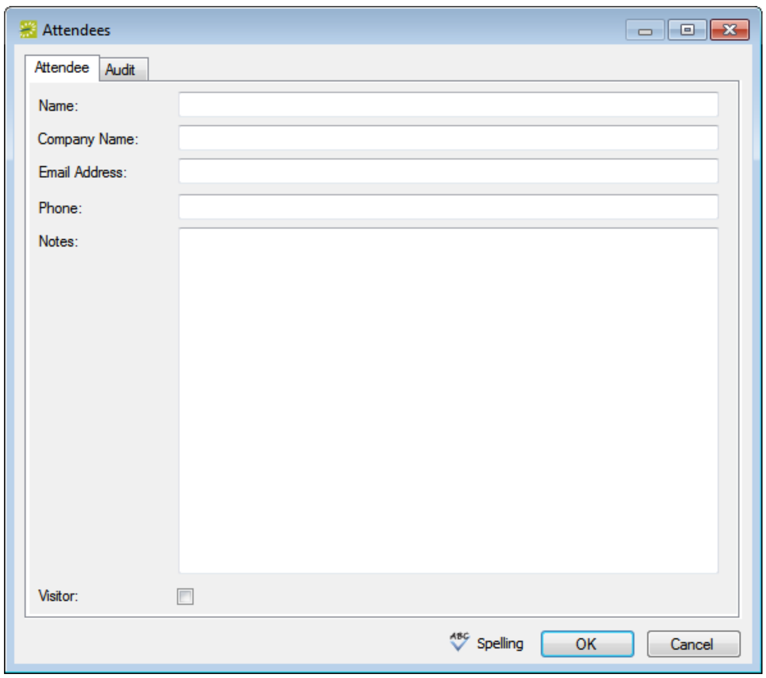
4. Click OK.

   The Setup Notes dialog box closes. The booking detail and its items are displayed as folders under the Booking folder in the Navigator window.

After you add setup notes for the first time to a booking, Setup Notes is no longer an available option on the Booking Details dropdown list. To add more setup notes to the booking, select the Setup Notes folder for the booking or click a Setup Note in the Items pane, and then click New.

To add attendees

Figure 3-52: Attendees dialog box



1. Enter the information for the attendee. At a minimum, you must enter the attendee name.
2. If the attendee is a visitor (that is, not registered for the event), then select Visitor.
3. Click OK.

   The Attendee dialog box remains open.

4. Repeat Step 1 through Step 3 until you have added all the needed attendees/visitors to the booking.

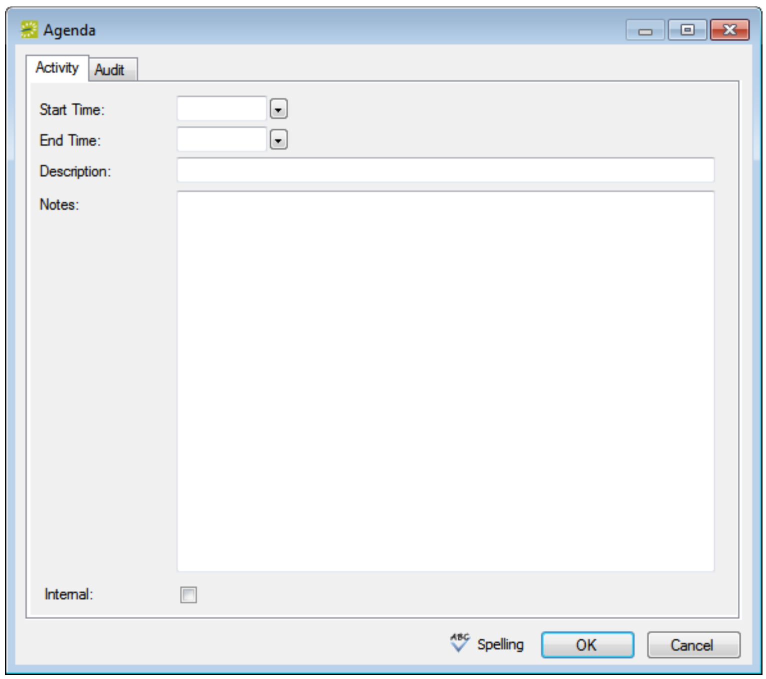
5. Click Cancel.

   The Attendees dialog box closes. The booking detail and its items are displayed as folders under the Booking folder in the Navigator window.

If you close the Attendees dialog box before you have added all the needed attendees/visitors to the booking, then Attendees is no longer an available option on the Booking Details dropdown list. To add more attendees/visitors to the booking, select the Attendees folder for the booking or click an attendee/visitor in the Items pane, and then click New.

To add an agenda (activities)

Figure 3-53: Agenda dialog box



1. Enter the start time, the end time, and a description for the agenda.
2. Optionally, in the Description field, enter a name or description for the agenda.

The description can be a maximum of 50 characters, including spaces.

3. Optionally, if these notes are to be printed on internal reports only (the notes would be excluded from external reports like a confirmation), then select Internal.
4. Click OK.

   The Agenda dialog box remains open.

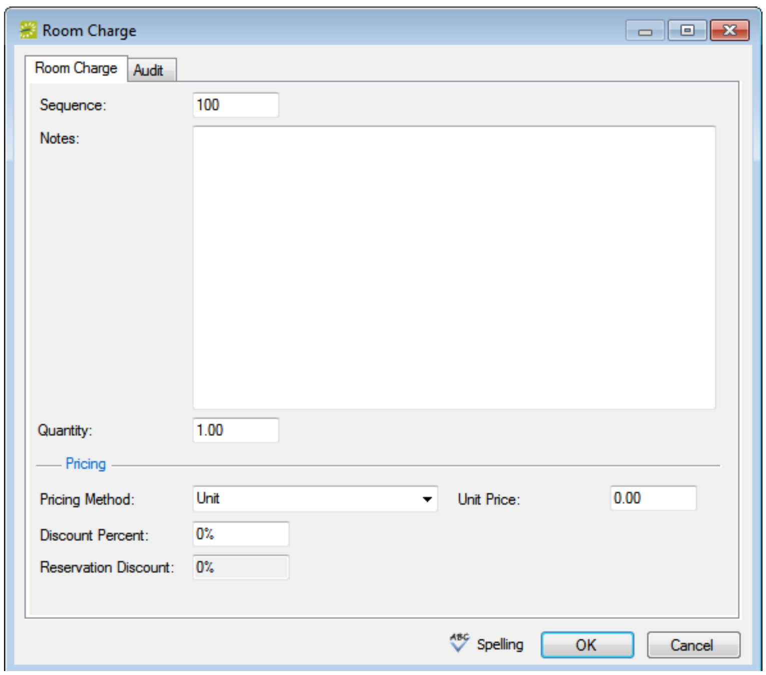
5. Repeat Step 1 through Step 4 until you have added all the needed agendas.
6. Click Cancel.

   The Agenda dialog box closes. The booking detail and its items are displayed as folders under the Booking folder in the Navigator window.

If you close the Agenda dialog box before you have added all the needed agendas/ activities to the booking, then Agenda is no longer an available option on the Booking Details dropdown list. To add more agenda/activities to the booking, select the Agenda folder for the booking or click an agenda in the Items pane, and then click New.

To add a room charge

Figure 3-54: Room Charge dialog box



1. Enter the sequence number for the room charge.

The sequence number determines the order in which the charges are displayed in the Items pane in the Navigator when the booking detail (Room Charge) is selected for a booking.

2. Optionally, enter notes or comments about the room charge.
3. If needed, edit the quantity.

4. Select the appropriate pricing method, and then enter any other additional information as needed after you select a pricing method.

Pricing Method	Additional Fields
Unit	• Unit Price
Half Day/Full Day (Event Time)	• Half Day Price • Full Day Price • Hours
Half Day/Full Day (Reserved Time)	• Half Day Price • Full Day Price • Hours
Hourly (Event Time)	• Hourly Price • Minimum Charge • Maximum Charge • Initial Flat Charge
Hourly (Reserved Time)	• Hourly Price • Minimum Charge • Maximum Charge • Initial Flat Charge
Hourly (Specific)	• Hourly Price • Minimum Charge • Maximum Charge • Initial Flat Charge

5. Optionally, enter a discount percent and/or a reservation discount.
6. Click OK.

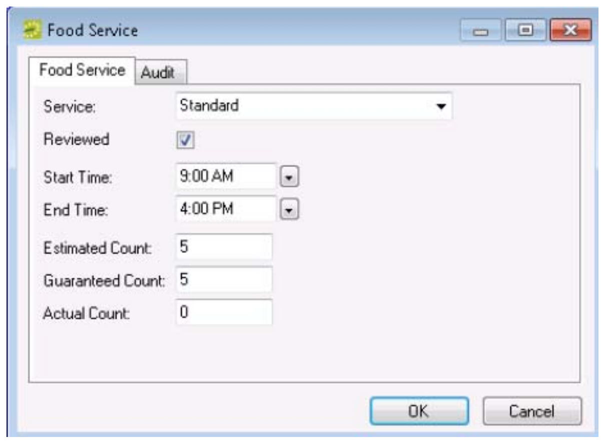
   The Room Charge dialog box closes. The booking detail and its items are displayed as folders under the Booking folder in the Navigator window.

If you must add multiple room charges to a booking, then after you add charges for the first time to a booking, Room Charge is no longer an available option on the Booking Details dropdown list. To add more charges to the booking, select the Room Charge folder for the booking or click a room charge in the Items pane, and then click New.

To add a booking detail from a resource, service order, or catering category

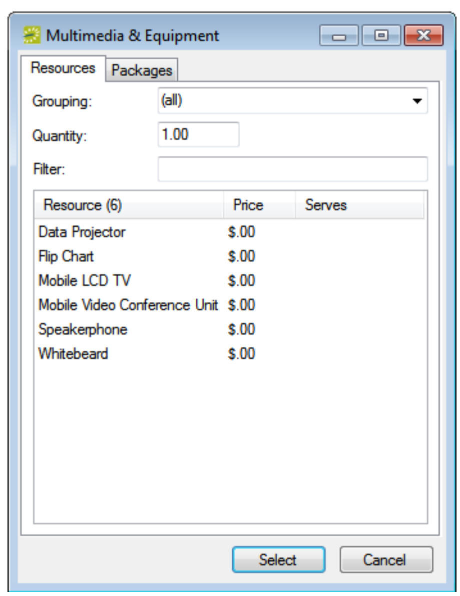
- If you select a service order or catering category, a Service Order dialog box opens with, at a minimum, options for Service, Reviewed, Service Start Time, and End Time. If a catering category is selected, additional fields for Estimated, Guaranteed and Actual Counts are displayed. Go to Step 1.

Figure 3-55: Example of a Service Order dialog box for a catering category



- If you select a resource category, then a Resource Selection dialog box opens. The Resources tab is the active tab. Go to Step 4.

Figure 3-56: Example of a Resource Selection dialog box, Resources tab



1. Select the service type.

2. Enter the start time, and optionally, the end time, estimated count, guaranteed count, and if applicable, select Reviewed and/or a state.

For more information about reviewing service orders and selecting states, see “Searching with the Service Order Management Browser” on page 222.

3. Click OK.

   A Resource Selection dialog box. The Resources tab is the active tab.

4. Do one of the following
   - To select one or more resources from the pre-configured list of resources, leave the Resources tab open, and then go to Step 5.
   - To add multiple resources to the booking in a single step, open the Packages tab, and then go to Step 7.

5. Do one of the following on the Grouping dropdown list:
   - Leave the default value of (all) as is to search for all items in all groupings.
   - Select a specific grouping to search for only those items in the grouping. For example, if the selected resource category is A/V Equipment, then available groupings could include Computer, Phone, Video, and so on. To search only for the available phones to add to a booking detail, select the Phones grouping.

6. Optionally, in the Filter field, enter a search string by which to filter your search.

Your search is limited to the exact order of the characters in the string, but the search string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of ***co*** *returns* ***co****ffee service,* ***co****nference phone, and mini-****co****pier.*

7. In the Quantity field, leave the default value of 1.00; otherwise, enter a new value.

If you change the quantity for a resource package, then the quantity for each individual resource that makes up the package is also changed.

8. Do one of the following:

    - For the Resources tab—On the Items list, select the resource item, or CTRL-click to select the multiple resource items that you are adding to the booking.

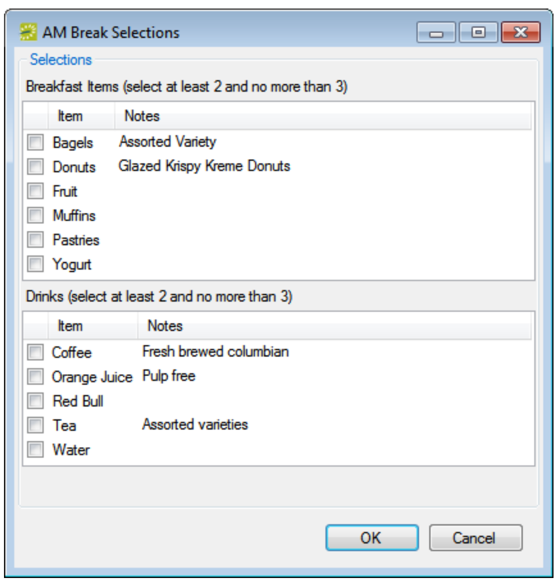
Your EMS administrator might have configured an override resource (also known as an override description) so that you can book a resource that has not been configured in your EMS database. For example, the administrator might have configured an override resource named "Other." If you select the "Other" resource, then a Description field is displayed on the Resource Selection dialog box. You must enter a description or name for the override resource before you can continue. EMS does not track availability of override resource items; however, EMS reports on override resource items just like any other resource item.

    - For the Package tab—Select the package that contains the multiple resources that you are adding to the booking.

9. Click Select.

    - For items on the Resources tab—If your EMS administrator configured selections for the resource, then either you might be required to make selections for the resource, or you have the option to make selections for the resource (see Figure 3-57 below); otherwise, go to Step 10.

Figure 3-57: Example of a Resource Selections dialog box



    - For packages on the Packages tab—The package is added to the booking. An entry for the package as well as entry for each item in the package is displayed in the Booking Detail Items pane of the Navigator.

10. Repeat Step 4 through Step 9 until you have added all the necessary booking detail items for the selected booking.

11. Click Close.

    The Resource Selection dialog box closes. The resource and its items are displayed as folders under the Booking folder in the Navigator.

If you close the Resource Selection dialog box before you have added all the needed resource items to the booking, and the booking detail is not from a catering or service order category, then the booking detail is no longer an available option on the Booking Details dropdown list. To add more resource items to the booking, you can select the Booking Detail folder for the booking or you can click a booking detail item in the Items pane, and then click New.

Adding Booking Details and Items to Multiple Bookings

You use the Add Booking Details Wizard to add booking details and items to multiple bookings in a single step. The steps that you follow depend on the category type. Also, you can add multiple occurrences of a booking detail to bookings only for service order and catering categories. If the booking detail is *not* a service order or catering category, and the detail is already added to the bookings, you cannot add the detail again to the bookings. (You can, however, add more items to the bookings. See “Adding Booking Detail Items to Multiple Bookings” on page 155.)

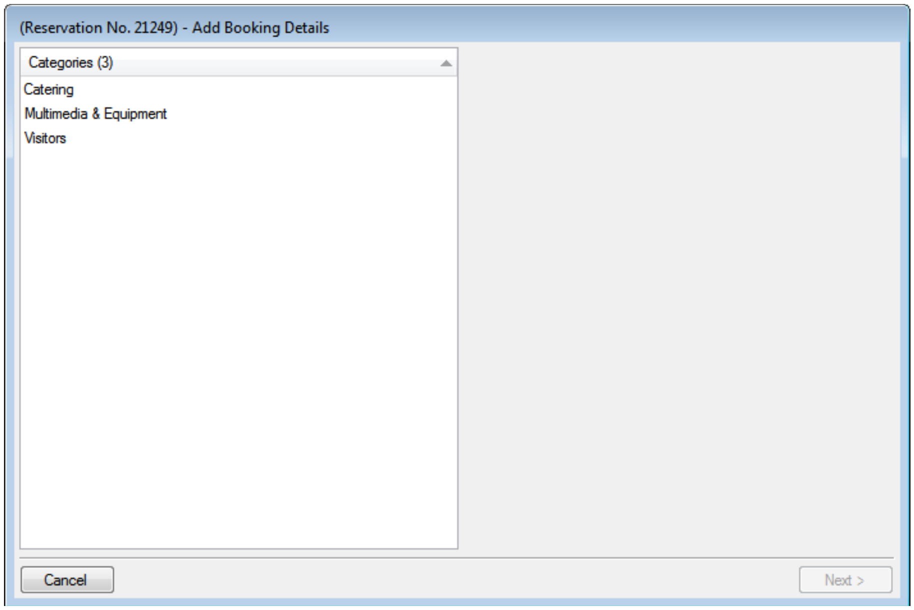
You can also manually copy booking details and items from one booking to another. To copy a booking detail, right-click on the booking detail that is being copied, and on the context menu that opens, click Copy. Right-click on the booking to which the booking detail is being copied, and on the context menu that opens, click Paste.

To add booking details and items to multiple bookings

1. Open the reservation in the Navigator. See:
   - “Opening a reservation directly in the Navigator” on page 79.
   - “Opening a reservation through the Reservation Book” on page 80.
   - “Opening a reservation through a group” on page 80.
   - “Search Tools,” on page 195.
2. In the left pane of the Navigator, select the reservation to which you are adding the booking details and items.
3. In the Bookings pane, click Tools, and then click Add Booking Details Wizard.

   The Add Booking Details Wizard opens. See Figure 3-58 on page 149.

Figure 3-58: Add Booking Details Wizard



4. Select the booking detail that you are adding to one or more of the bookings for the selected reservation, and then continue to one of the following:
   - "To add a booking detail from a non-resource category."
   - "To add a booking detail from a resource, service order, or catering category" on page 151.

To add a booking detail from a non-resource category

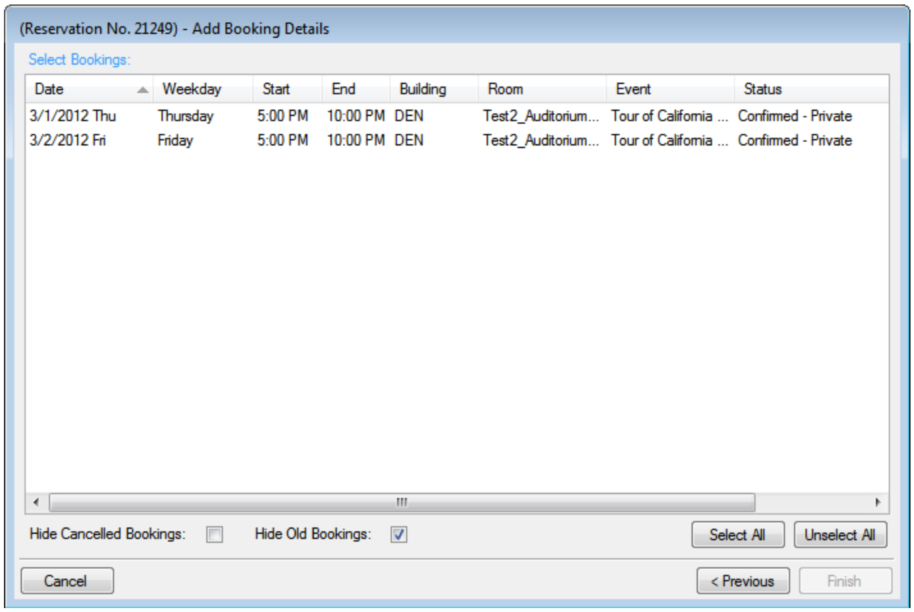
If you select a booking detail of any type other than resource, service order, or catering, (for example, attendees or setup notes), then to add the detail to the bookings, you follow the same general steps:

1. Select the booking detail.
2. Click Next, and then enter the information for the booking detail.
   - If you are adding setup notes, see "To add setup notes" on page 139.
   - If you are adding attendees/visitors, see "To add attendees" on page 140.
   - If you are adding an agenda or activities, see "To add an agenda (activities)" on page 141.
   - If you are adding room charges, see "To add a room charge" on page 142.

3. Click Next.

   The Select Bookings window opens. This window displays all the bookings for the selected reservation with a date greater than or equal to the current day's date, *and* that do not already have the selected booking detail added.

Figure 3-59: Add Booking Details Wizard, Select Bookings window



To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

4. Select the booking, or CTRL-click to select the multiple bookings to which you are adding the details, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens asking you if you want to add more booking details.

5. Do one of the following:

   - Click Yes to return to the Add Booking Details Wizard.
   - Click No.

     A message opens indicating that the changes were made successfully.

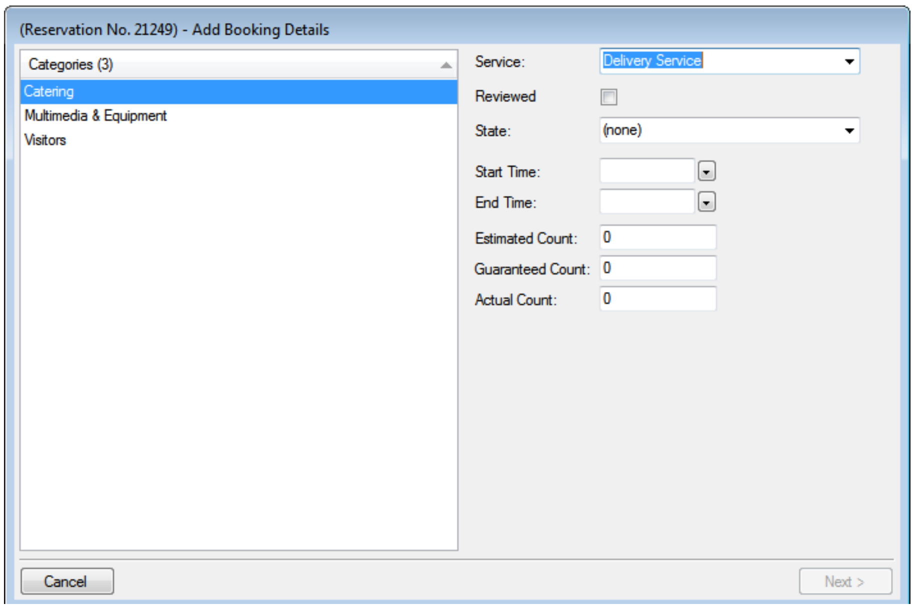
6. Click OK to close the message and return to the Navigator.

   The booking detail and its items are displayed as folders under the Booking folder in the Navigator window.

To add a booking detail from a resource, service order, or catering category

- If you select a service order or catering category, then the Add Booking Details Wizard is updated with, at a minimum, options for Service, Reviewed, Start Time, and End Time. If you select a catering category, additional fields for Estimated, Guaranteed and Actual Counts are displayed. In both cases, a State option might also be displayed. Go to Step 1.

Figure 3-60: Example of the Add Booking Details Wizard for a resource with a service order



- If you select a resource category, then two results are possible:
  - The Add Booking Details Wizard is updated with options for Reviewed and/or State. If applicable, select Reviewed and/or select a State, click Next to open the Add Booking Details Wizard, and then go to Step 3.

For more information about reviewing service orders and selecting states, see "Searching with the Service Order Management Browser" on page 222.

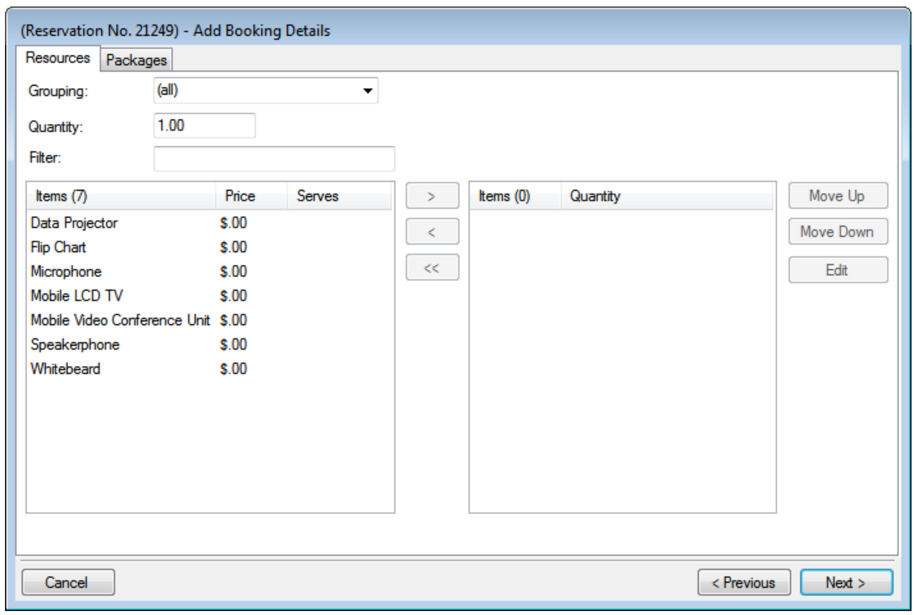
  - The Add Booking Details Wizard opens with two tabs—Resources and Packages. The Resources tab is the active tab. This tab displays a pre-configured list from which you can select one or more resources. Go to Step 3.

1. Select the service type.
2. Enter the start time, and optionally, the end time, estimated count, guaranteed count, and select Reviewed and/or a state.

For more information about reviewing service orders and selecting states, see "Searching with the Service Order Management Browser" on page 222.

3. Do one of the following:
   - To choose one or more resources from the pre-configured list of resources, leave the Resources tab open, and then go to Step 4.
   - To add multiple resources to the booking in a single step, open the Packages tab, and then go to Step 6.

Figure 3-61: Add Booking Details Wizard, Resources tab



4. Do one of the following on the Grouping dropdown list:
   - Leave the default value of (all) as is to search for all items in all groupings.
   - Select a specific grouping to search for only those items in the grouping. (For example, if the selected resource category is A/V Equipment, then available groupings could include Computer, Phone, Video, and so on. To search only for the available phones to add to a booking detail, select the Phones grouping.)
5. Optionally, in the Filter field, enter a search string by which to filter your search.

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*Your search is limited to the exact order of the characters in the string, but the string can is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **co** returns **co**ffee service, **co**nference phone, and mini-**co**pier.*

6. In the Quantity field, leave the default value of 1.00; otherwise, enter a new value.

If you change the quantity for a resource package, then the quantity for each individual resource that makes up the package is also changed.

7. Do one of the following:

   - For the Resources tab—On the Items list, select the resource item, or CTRL-click to select the multiple resource items that you are adding to the booking.

Your EMS administrator might have configured an override resource (also known as an override description) so that you can book a resource that has not been configured in your EMS database. For example, the administrator might have configured an override resource named "Other." If you select the "Other" resource, then a Description field is displayed on the Resource Selection dialog box. You must enter a description or name for the override resource before you can continue. EMS does not track availability of override resource items; however, EMS reports on override resource items just like any other resource item.

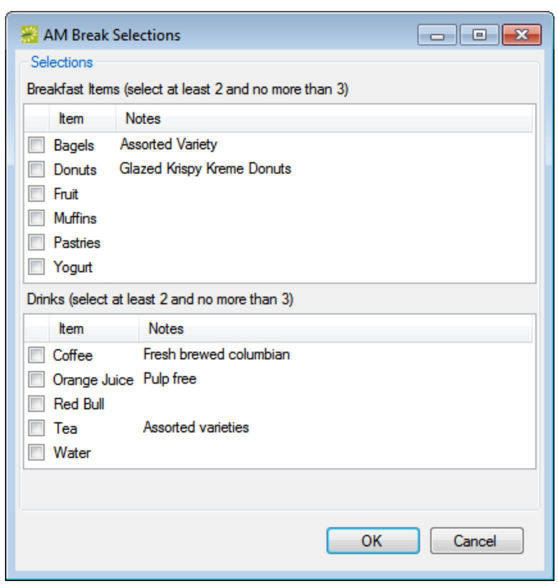
Use the Move Up and Move Down options to order the selected items. To edit a selected item before you add it to multiple bookings, select the item, and then click Edit.

   - For the Package tab—Select the package that contains the multiple resources that you are adding to the booking.

8. Click Next.

   - For items on the Resources tab—If your EMS administrator configured selections for the resource, then either you might be required to make selections for the resource, or you have the option to make selections for the resource (see Figure 3-62 below); otherwise, go to Step 9.

Figure 3-62: Example of a Resource Selections dialog box

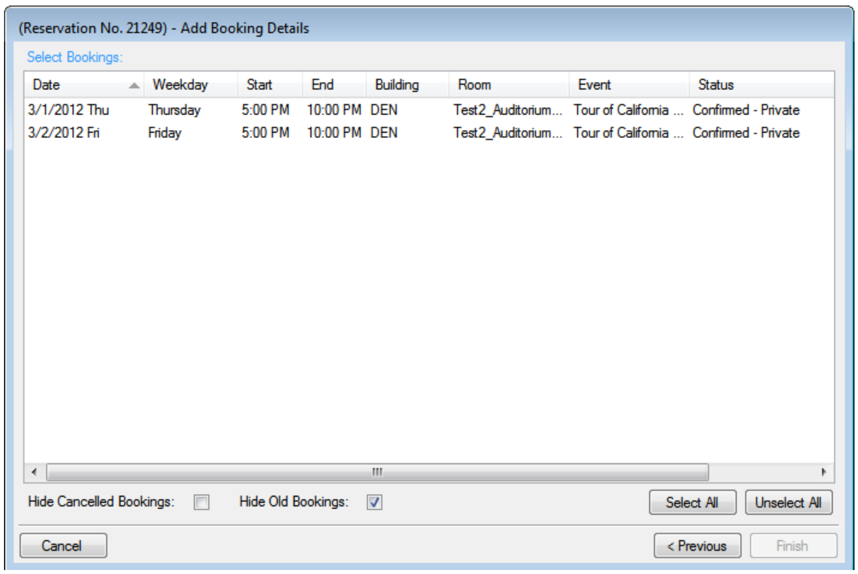


- For packages on the Packages tab—The package is added to the booking. An entry for the package as well as entry for each item in the package is displayed in the Booking Detail Items pane of the Navigator.

9. Click Next.

   The Select Bookings window opens. This window displays all the bookings for the selected reservation with a date greater than or equal to the current day's date, *and* that do not already have the selected booking detail added.

Figure 3-63: Add Booking Details Wizard, Select Bookings window



To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

10. Select the booking, or CTRL-click to select the multiple bookings to which you are adding the details, or click Select All to select all the displayed bookings in a single step, and then click Finish.

    A message opens asking you if you want to add more booking details.

11. Do one of the following:

    - Click Yes to return to the Add Booking Details Wizard.
    - Click No.

      A message opens indicating that the changes were made successfully.

12. Click OK to close the message and return to the Navigator.

    The booking detail and its items are displayed as folders under the Booking folder in the Navigator.

Adding Booking Detail Items to Multiple Bookings

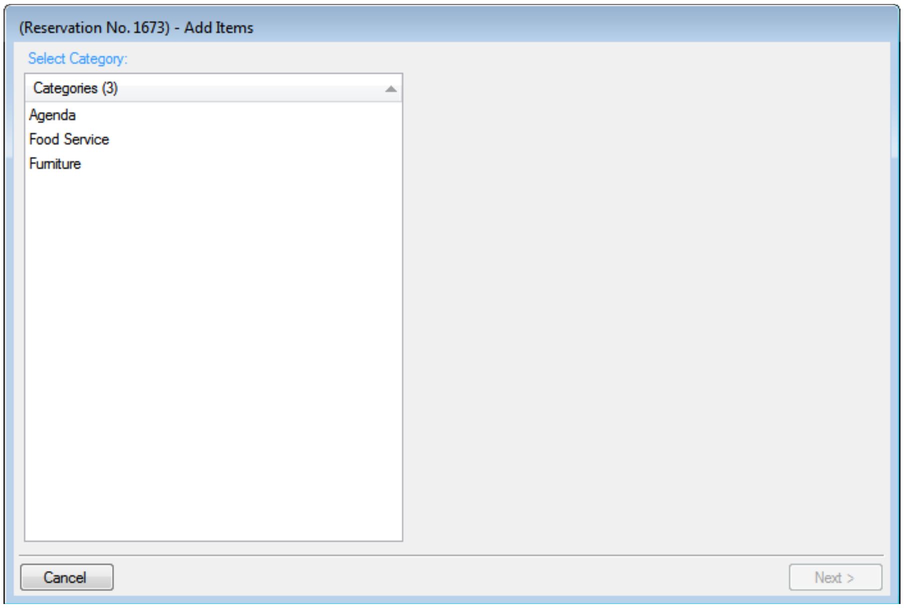
You use the Add Item Wizard to add booking detail items to multiple bookings for categories that *are already added* to the bookings. For example, you can use this Wizard to add food service items only if any of the bookings already has food service added as a booking detail.

To add booking details and items for categories that are not already in use, see “Adding Booking Details and Items to Multiple Bookings” on page 148.

To add booking detail items to multiple bookings

1. Open the reservation in the Navigator. See:
   - “Opening a reservation directly in the Navigator” on page 79.
   - “Opening a reservation through the Reservation Book” on page 80.
   - “Opening a reservation through a group” on page 80.
   - “Search Tools,” on page 195.
2. In the left pane of the Navigator, select the reservation to which you are adding the booking detail items.
3. In the Bookings pane, click Tools, and then click Add Item Wizard.
   The Add Item Wizard opens. The first window in this Wizard, the Select Category window, displays only those categories *that are already in use* for any of the bookings in the reservation. See Figure 3-64 on page 156.

Figure 3-64: Add Item Wizard



4. Select the category to which you want to add items.
5. Click Next.

   The steps that you now must follow depend on the category type. See:

   - “To add a booking detail from a non-resource category” on page 149.
   - “To add a booking detail from a resource, service order, or catering category” on page 151.

Editing Booking Detail Items for Individual Bookings

After you have added booking details and items to bookings for a reservation, you can edit any non-invoiced item on an individual basis.

To edit the pricing information for multiple non-invoiced items in a single booking, or for multiple non-invoiced items in multiple bookings, see "Editing Booking Detail Item Charges for Multiple Items" on page 161.

To edit booking detail items for individual bookings

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 79.
   - "Opening a reservation through the Reservation Book" on page 80.
   - "Opening a reservation through a group" on page 80.
   - "Search Tools," on page 195.
2. In the left pane of the Navigator, expand the folder structure for the reservation until the appropriate booking detail items folder is visible, and then do the following:
   - Select the booking detail folder that contains the items that you are editing.
   - In the Items pane, select the item that you are editing.

The item cannot be invoiced. If the item is invoiced, the Edit button is not available. To edit an invoiced item, you must first void the invoice. See "To void an invoice" on page 372.

3. Continue to one of the following:
   - "To edit a booking detail item from a non-resource category" on page 158.
   - "To edit a booking detail item from a resource, service order, or catering category" on page 158.

To edit a booking detail item from a non-resource category

1. Click Edit.

   The <Booking Detail> dialog box opens.

2. Edit the item as necessary, and then click OK to close the <Booking Detail> dialog box and return to the Navigator.

   For detailed information about editing a booking detail item from a non-resource category, see:

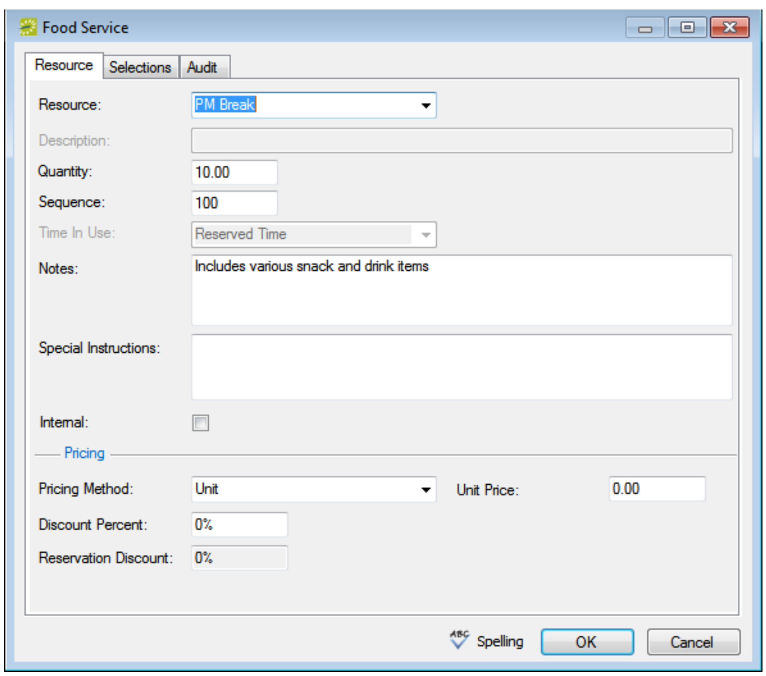
   - “To add setup notes” on page 139.
   - “To add attendees” on page 140.
   - “To add an agenda (activities)” on page 141.
   - “To add a room charge” on page 142.

To edit a booking detail item from a resource, service order, or catering category

1. Click Edit.

   The <Resource> dialog box opens. The Resource tab is the active tab. If selections are available for the resource, then the dialog box also has a Selections tab.

Figure 3-65: <Resource> dialog box, Resource tab



2. On the Resource tab, edit the information as necessary.
    - If applicable, select a completely different item for the resource.
    - The sequence number determines the order in which the items (for example, juice, muffins, and so on) are displayed in the list in the Items pane in the Navigator when the booking detail (for example, Catering) is selected for a booking. If needed, edit the sequence number.
    - The Time in Use indicates the time that the resource is to be available for the booking. If needed, edit the Time in Use.

For a definition of Event Time or Reserved Time, see “Event Timeline” on page 44.. You can edit the Time In Use only if the item is not from a resource from a service order or catering category. (The Time in Use is applied at the category level for these types of resources).

- If the notes are to be printed on internal reports only (the notes would be excluded from external reports like a confirmation), then select Internal.
- If you edit the pricing method, then make sure to enter any other additional information as needed.

Pricing Method	Additional Fields
Unit	• Unit Price
Half Day/Full Day (Event Time)	• Half Day Price • Full Day Price • Hours
Half Day/Full Day (Reserved Time)	• Half Day Price • Full Day Price • Hours
Half Day/Full Day (Service Time) **Note:** Available only for a resource with a service order.	• Half Day Price • Full Day Price • Hours
Hourly (Event Time)	• Hourly Price • Minimum Charge • Maximum Charge • Initial Flat Charge
Hourly (Reserved Time)	• Hourly Price • Minimum Charge • Maximum Charge • Initial Flat Charge

Pricing Method	Additional Fields
Hourly (Service Time) **Note:** Available only for a resource with a service order.	• Hourly Price • Minimum Charge • Maximum Charge • Initial Flat Charge
Hourly (Specific)	• Hourly Price • Minimum Charge • Maximum Charge

- If applicable, open the Selection tab, and edit the resource selections as needed.

3. Click OK.

   The <Resource> dialog box closes, and you return to the Navigator with the edited item still selected in the Items pane.

If you need to edit counts and/or times for individual items in a resource, service order, or catering, category, see *"Editing Count Information for a Booking" on page 163.*

Editing Booking Detail Item Charges for Multiple Items

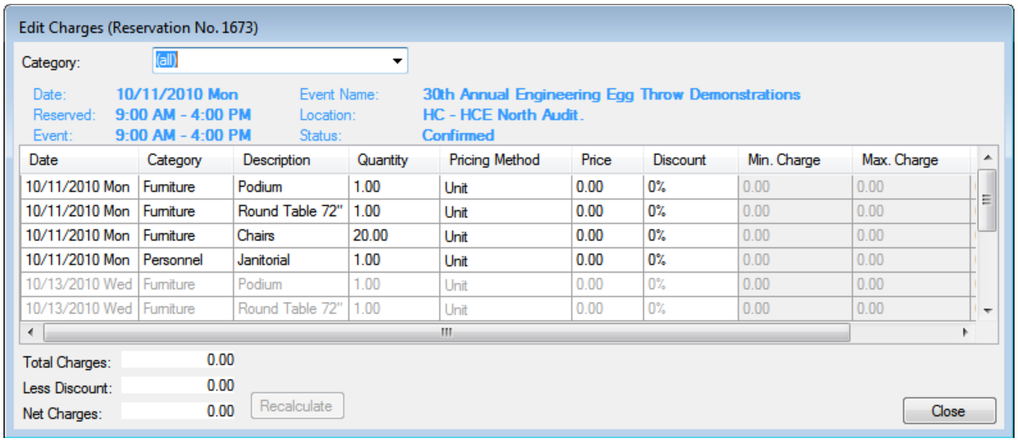
You can edit resource quantities and billing information (price, pricing method, and so on) for individual items (see "Editing Booking Detail Items for Individual Bookings" on page 157) or you can use the Edit Charges tool to edit this information for multiple *non-invoiced* items.

To edit the billing information for invoiced items, you must first void the invoice. See "To void an invoice" on page 372.

To edit booking detail item charges for multiple items

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 79.
   - "Opening a reservation through the Reservation Book" on page 80.
   - "Opening a reservation through a group" on page 80.
   - "Search Tools," on page 195.
2. In left pane of the Navigator, do one of the following:
   - To edit all billable items in all the bookings for a reservation, select the reservation.
   - To edit only the billable items in a selected booking, expand the reservation folder, and under the expanded reservation folder, select the booking that contains the items that you are editing.
3. In the Bookings/Booking Details pane, click Tools > Edit Charges.
   The Edit Charges window opens. If you selected a reservation, then all non-invoiced billable items in all the bookings for the selected reservation are displayed in the window; otherwise, only the non-invoiced billable items for the selected booking are displayed. See Figure 3-66 on page 162.

Figure 3-66: Edit Charges window



4. Optionally, on the Category dropdown list, select a category to narrow the list of items that are displayed.
5. To edit the quantity, pricing method, price, or discount percentage for an item, click in the appropriate field for the item and make the necessary edits.
6. Click Close.

   Any resulting recalculations are carried out automatically. The Edit Charges window closes and you return to the Navigator.

Editing Count Information for a Booking

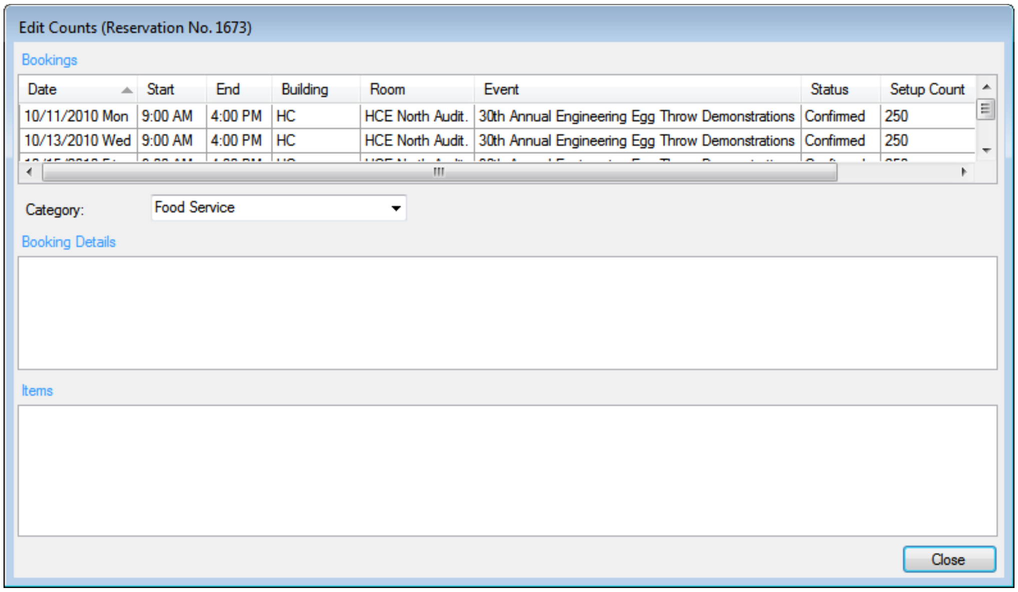
You use the Edit Counts tool to edit the count information for a booking, including the setup count and attendance count, the estimated count, guaranteed count, and actual count for a booking detail with a category type of catering, as well as the counts for *non-invoiced* booking detail items. You can edit the counts for all bookings in a reservation or for just a selected booking.

Much of the information that you can edit using the Edit Counts tool is also available for editing in other areas of the application. The purpose of this tool is simply to collate all the count information in a single location for editing.

To edit count information for a booking

1. Open the reservation in the Navigator. See:
    - "Opening a reservation directly in the Navigator" on page 79.
    - "Opening a reservation through the Reservation Book" on page 80.
    - "Opening a reservation through a group" on page 80.
    - "Search Tools," on page 195.
2. In the left pane of the Navigator, do one of the following:
    - Select the reservation.
    - Expand the reservation folder, and under the reservation folder, select a specific booking.
3. In the Bookings pane, click Tools, and then click Edit Counts.
   The Edit Counts window opens. If you selected the reservation, then the Bookings (top) pane of the window lists all the bookings for the selected reservation; otherwise, the pane lists just the selected booking. See Figure 3-67 on page 164.

Figure 3-67: Edit Counts window



4. Select the booking for which you are editing the count information.
5. On the Category dropdown list, select the booking detail (category) for which you are editing the count information.

   The Booking Details (middle) pane is refreshed with the information for the selected category. If the category is a resource with a service order, then the pane displays the service type and the start and end times for the category. If the category is catering, then the pane also displays the estimated count, guaranteed count, and actual count for the booking detail.
6. In the Booking Details pane, select the booking detail that contains the items for which you are editing the count information.

   The Items (lower) pane is refreshed with a list of all the non-invoiced items for the selected detail.
7. To Edit the count information for any booking detail or detail item, click in the appropriate field and make the necessary edits.
8. To edit the count information for multiple bookings, repeat Step 4 through Step 7 as needed for each booking.
9. Click Close.

   The edits are made. You return to the Navigator.

Applying a Reservation Discount

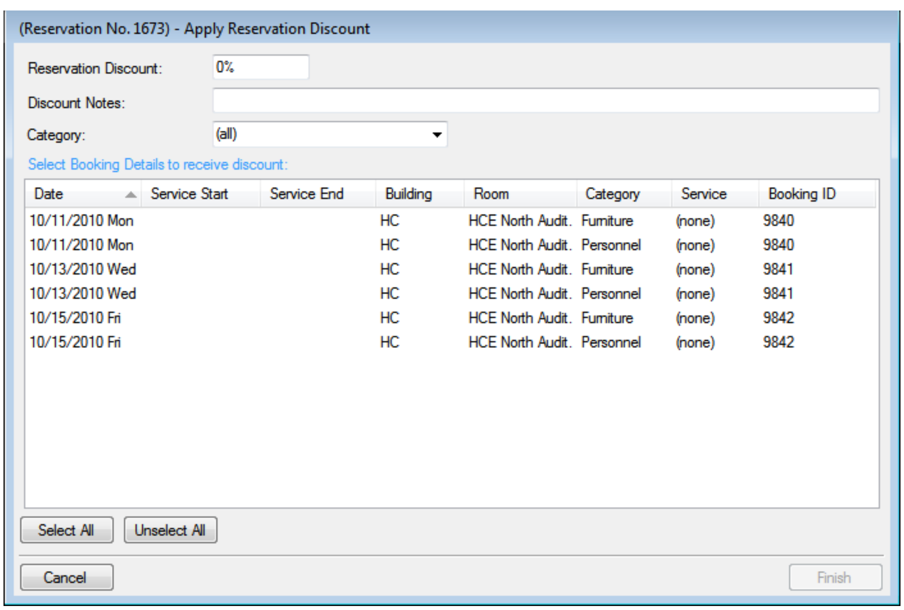
You use Apply Reservation Discount Wizard to apply a reservation discount to *non-invoiced* details in a booking. The discount is applied as a percentage of the total charge for an item and it is added to any existing discounts that have already been applied to the item.

To apply a discount to invoiced items, you must first void the invoice. See *"To void an invoice" on page 372.*

To apply a reservation discount

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 79.
   - "Opening a reservation through the Reservation Book" on page 80.
   - "Opening a reservation through a group" on page 80.
   - "Search Tools," on page 195.
2. In the left pane of the Navigator, select the reservation to which you are applying the discount.
3. In the Bookings pane, click Tools, and then click Apply Reservation Discount. The Apply Reservation Discount window opens. All the bookings for the selected reservation with their categories that have not been invoiced are displayed.

Figure 3-68: Apply Reservation Discount window



4. Leave the Category set to the default value of (all), or optionally, to apply a discount to all the items in a specific category, on the Category dropdown list, select a category.

   The Apply Reservation Discount window is updated with the bookings that have the selected category.

5. Enter the discount percentage.

6. Optionally, enter any notes that are relevant about the discount.

7. Select the booking, or CTRL-click to select the multiple bookings to which you are applying the discount, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.

8. Click OK to close the message and return to the Navigator.

After you apply a reservation discount, you can view it and/or edit it when you are editing the reservation on the Billing Information tab of the Reservation window in the Navigator. *See “Editing a Reservation in the Navigator” on page 98.*

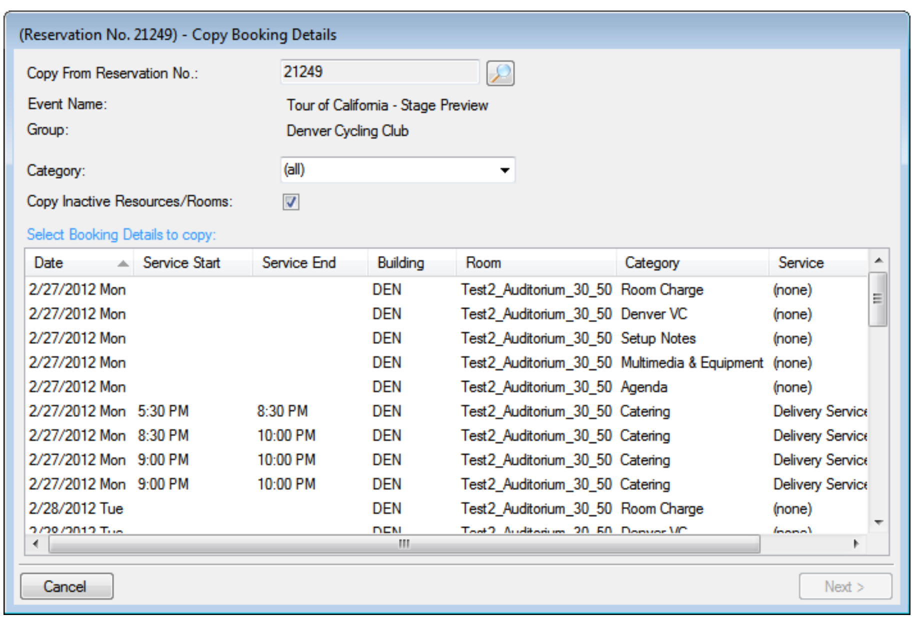
Copying Booking Details Between Bookings

You use the Copy Booking Details Wizard to copy the details from one booking in a reservation and paste them into other bookings for the same reservation.

To copy booking details between bookings

1. Open the reservation *to* which you are copying the booking details in the Navigator. See:
   - “Opening a reservation directly in the Navigator” on page 79.
   - “Opening a reservation through the Reservation Book” on page 80.
   - “Opening a reservation through a group” on page 80.
   - “Search Tools,” on page 195.
2. In the left pane of the Navigator, select the reservation *from* which you are copying the details.
3. In the Bookings pane, click Tools, and then click Copy Booking Details Wizard.
   The Copy Booking Details Wizard opens. The first window in this Wizard, the Select Booking Details to Copy window, displays all the bookings for the selected reservation, regardless of date. By default, the Copy From Reservation No. field displays the reservation number for the selected reservation.

Figure 3-69: Copy Booking Details Wizard, Select Booking Details to Copy window



4. Optionally, in the Copy From Reservation No. field, click the Search icon to open the Open Navigator dialog box and search for and select a different reservation *from* which to copy the booking details.

   The Select Booking Details to Copy window is refreshed with *all* the bookings details for the selected reservation.

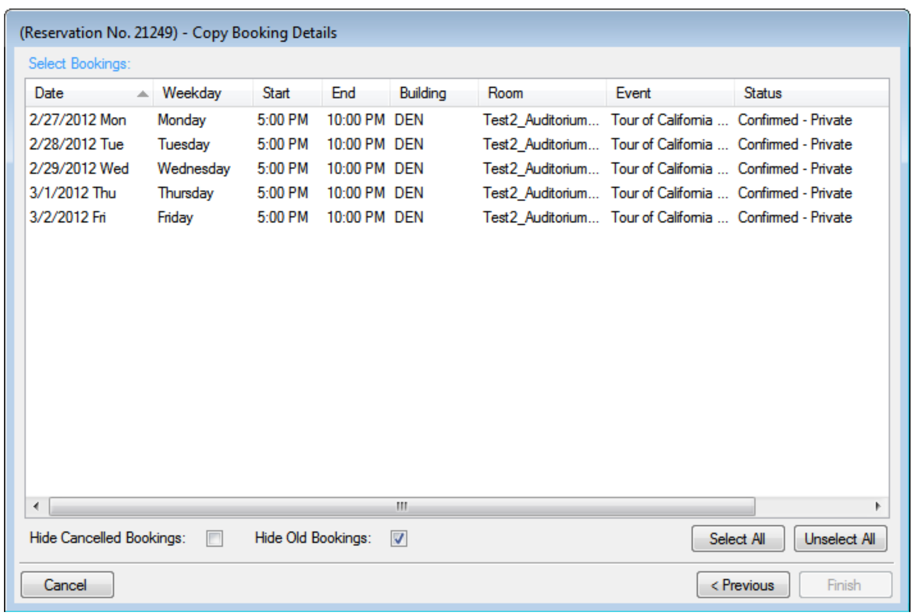
5. Optionally, do one or both of the following:

   - On the Category dropdown list, select a specific category of booking details to display on the Select Booking Details to Copy window.
   - Leave Copy Inactive Resources/Rooms selected to copy this information for the bookings. Clear this option if you do not want to copy this information.

6. Select the booking, or CTRL-click to select the multiple bookings *from* which you are copying the booking details, and then click Next.

   The Select Bookings window opens. This window displays all the bookings with a date greater than or equal to the current day's date *to* which you can copy the booking details.

Figure 3-70: Copy Booking Details Wizard, Select Bookings window



To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

7. Select the booking, or CTRL-click to select the multiple bookings to which you are copying the booking details, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.

8. Click OK to close the message and return to the Navigator.

Deleting Booking Detail Items from Multiple Bookings

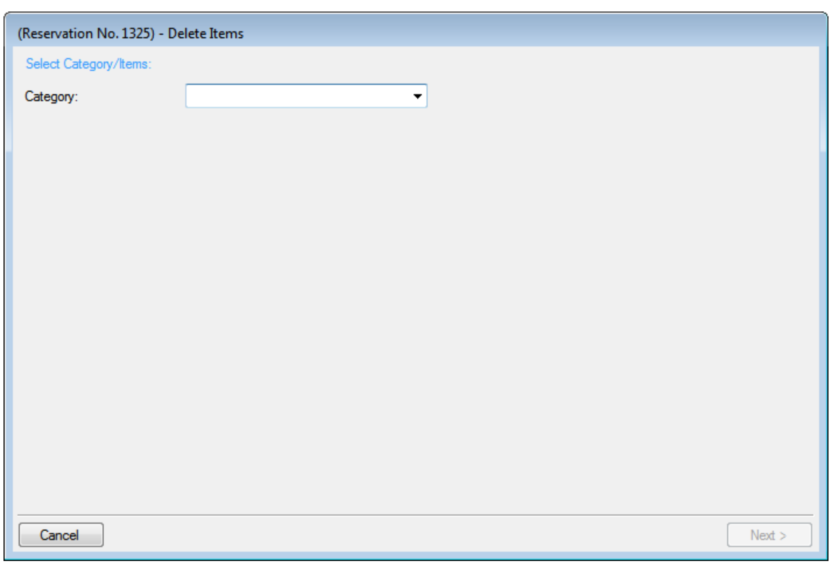
If you add booking detail items to bookings for a reservation in error, or a booking item is no longer valid for one or more bookings, and the item has not been invoiced, you can use the Delete Item Wizard to delete the item. You can delete each item on an individual basis, or you can delete all the items for a booking detail in a single step. If you delete an item at the package level, then the deletion cascades down to all the items in the package. You can also delete individual items from a package.

To delete booking detail items from multiple bookings

1. Open the reservation from which you are deleting the booking detail items in the Navigator. See:
   - “Opening a reservation directly in the Navigator” on page 79.
   - “Opening a reservation through the Reservation Book” on page 80.
   - “Opening a reservation through a group” on page 80.
   - “Search Tools,” on page 195.
2. In the left pane of the Navigator, select the reservation from which you are deleting the booking detail items.
3. In the Bookings pane, click Tools, and then click Delete Item Wizard.

   The Delete Item Wizard opens. The first window that opens is the Select Categories window.

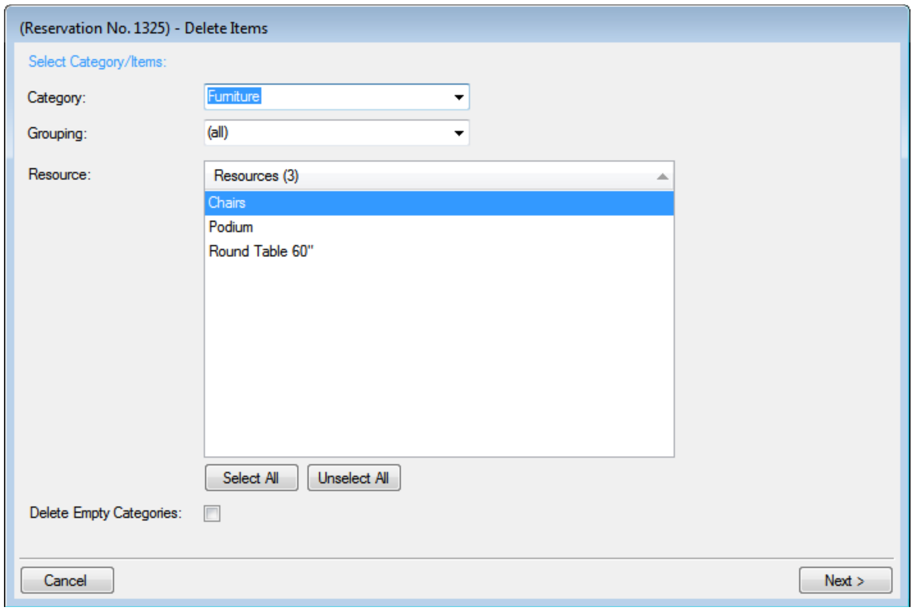
Figure 3-71: Delete Item Wizard, Select Categories window



4. Select the category (booking detail) from which you are deleting the items, and then click Next.

   The Select Categories/Items window opens.

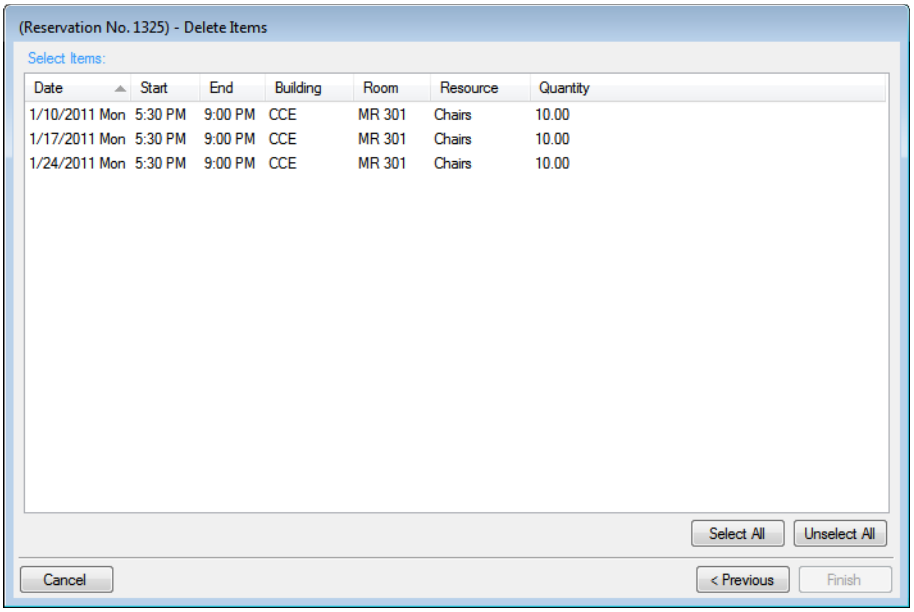
Figure 3-72: Delete Item Wizard, Select Categories/Items window



5. Optionally, do one or both of the following:
   - Select a specific grouping to limit the display to only those items in the grouping.
   - Select Delete Empty Categories to also delete a category after the last item is deleted from the category.
6. On the Resources list, select the resource item, or CTRL-click to select the multiple resource items that you are deleting.
7. Click Next.

   The Select Bookings window opens. This page lists all the bookings for the selected reservation with a date greater than or equal to the current day's date and that have the resource items that were selected for deletion. See Figure 3-73 on page 172.

Figure 3-73: Delete Item Wizard, Select Bookings window



8. Select the booking, or CTRL-click to select the multiple bookings from which you are deleting the resource items, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.

9. Click OK to close the message and return to the Navigator.

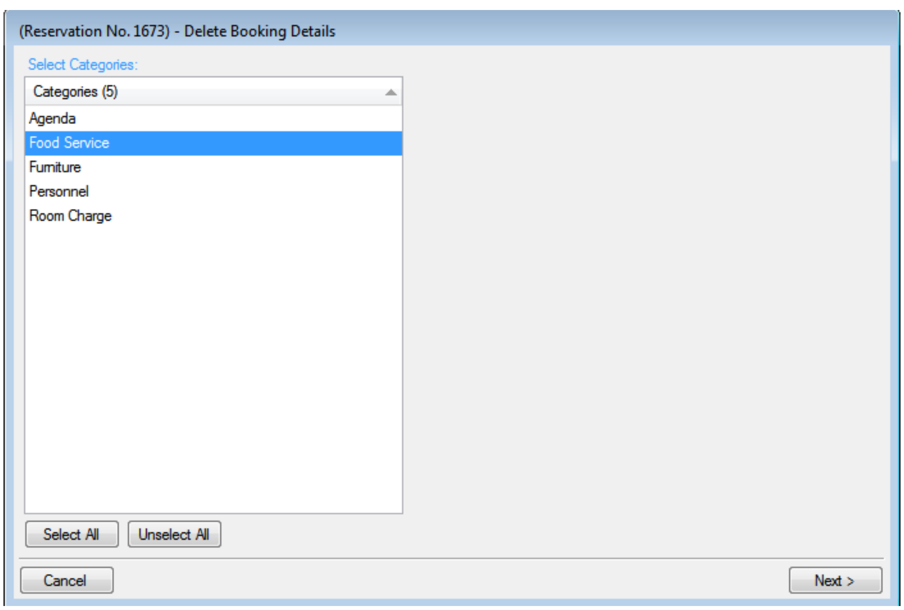
Deleting Booking Details from Multiple Bookings

You use the Delete Booking Details Wizard to delete one or more booking details that do *not* have invoiced items from multiple bookings in a single step. When you delete a booking detail from a booking, any items that have been added for the detail are also deleted.

To delete booking details from multiple bookings

1. Open the reservation from which you are deleting the booking details in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 79.
   - "Opening a reservation through the Reservation Book" on page 80.
   - "Opening a reservation through a group" on page 80.
   - "Search Tools," on page 195.
2. In the left pane of the Navigator, select the reservation from which you are deleting the booking details.
3. In the Bookings pane, click Tools, and then click Delete Booking Details Wizard. The Delete Booking Details Wizard opens. The first window in this Wizard, the Select Categories window, displays all the categories (booking details) *that are already in use* for any of the bookings in the selected reservation.

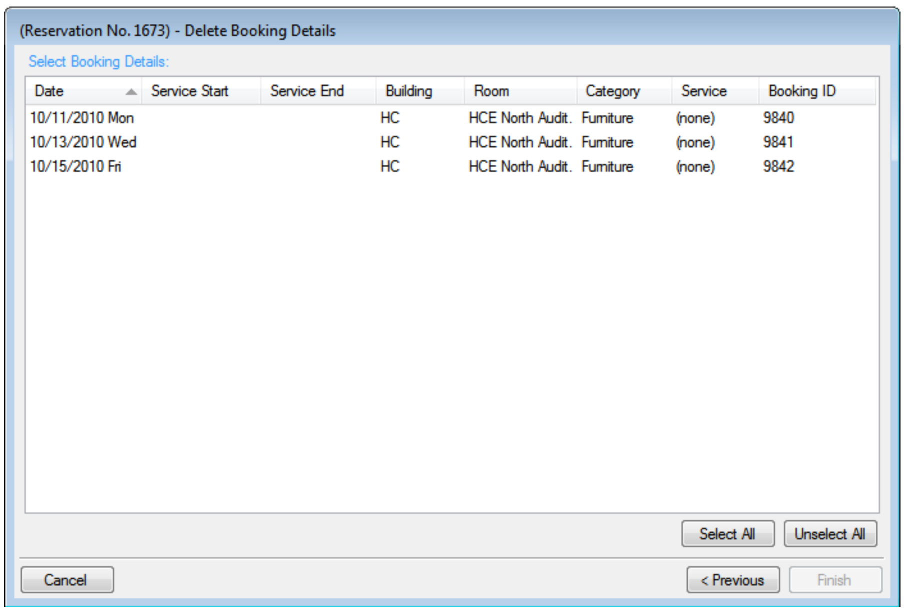
Figure 3-74: Delete Booking Details Wizard, Select Categories window



4. Select the category, or CTRL-click to select the multiple categories that you are deleting from the reservation, or click Select All to select all categories in a single step.
5. Click Next.

   The Select Booking Details window opens. This page lists all the bookings for the selected reservation with a date greater than or equal to the current day's date that have the categories (booking details) that were selected for deletion but do *not* have any invoiced items.

Figure 3-75: Delete Booking Details Wizard, Select Booking Details window



6. Select the booking, or CTRL-click to select the multiple bookings from which you are deleting the categories, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.
7. Click OK to close the message and return to the Navigator.

Working with Comments and Reminders in the Navigator

A *comment* is a text entry that explains or clarifies a reservation, a booking, a group, or a booking detail that is a service order. A *reminder* is a comment that has a due date associated with it, and if it is attached to a reservation, booking, group, or service order, then it is called an *attached reminder*. You can select from a pre-configured list of comment types and reminder types, or you can create a user-specified comment type or reminder type if none of the pre-configured types meets your working needs. You can add comments/reminders directly to a reservation, booking, or service order in the Navigator. You can also edit a comment/reminder, delete a comment/reminder, and view the history for a comment/reminder.

A reminder that you add to a reservation, booking, group, or booking details is called an attached reminder. To work with unattached reminders, see "Reminders Tab" in "Overview of the EMS Dashboard and Dashboard Options" on page 229.

To work with a comment or reminder in the Navigator

The following procedures are written from the perspective of working with a single comment. By analogy, you can follow these procedures to work with a single attached reminder. To add multiple comments and/or reminders to a reservation in a single step, see "Adding Multiple Comments and Reminders to a Reservation" on page 179.

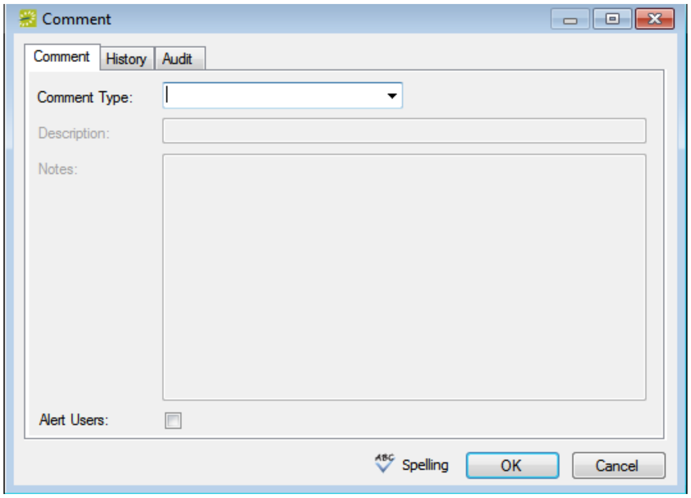
1. Open the reservation in the Navigator. See:
    - "Opening a reservation directly in the Navigator" on page 79.
    - "Opening a reservation through the Reservation Book" on page 80.
    - "Opening a reservation through a group" on page 80.
    - "Search Tools," on page 195.
2. In the left pane of the Navigator, select the reservation, booking, or service order, and then in the top right pane of the Navigator, open the Comments tab.
3. Continue to one of the following:
    - "To add a comment" on page 176.
    - "To edit a comment" on page 177.
    - "To delete a comment" on page 177.
    - "To view the history for a comment" on page 177.

To add a comment

1. Click New.

   The Comment dialog box opens.

Figure 3-76: Comment dialog box



2. On the Comment Type dropdown list, select the type of comment that you are adding; otherwise, if none of the pre-configured comment types meets your working needs, select (user-specified comment), and then in the Description field, enter a description for the comment type.
3. In the Notes field, enter the comment.
4. Optionally, do one or both of the following:
   - To alert any EMS user that opens this reservation, booking, or service order that this comment has been added, select Alert Users.
   - Click Spelling to spell check the comment before you add it to the reservation, booking, or service order.
5. Click OK.

   The Comment dialog box closes. The comment is added to the reservation, booking, or service order. The Comments tab remains open.

To edit a comment

1. Select the comment that you are editing, and then click Edit.

   The Comment dialog box opens, populated with the information for the selected comment.

2. Edit the comment as needed, including its type, description (if applicable), its Notes, and/or its Alert User status.

3. Optionally, click Spelling to spell check the comment before you save the edited comment.

4. Click OK.

   The Comment dialog box closes. The edited comment is saved for the reservation, booking, or service order. The Comments tab remains open.

To delete a comment

1. Select the comment that is you are deleting, and then click Delete.

   A message opens asking you if it is OK to delete the selected comment.

2. Click Yes.

   The selected comment is deleted from the reservation, booking, or service order. The Comments tab remains open.

To view the history for a comment

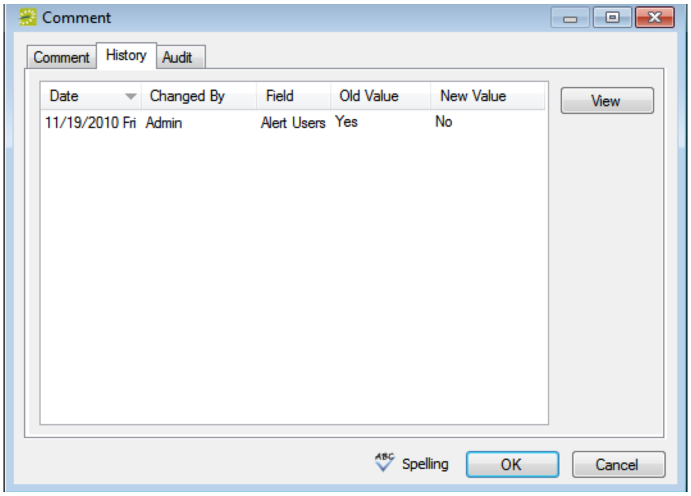
1. Select the comment for which you viewing the history, and then click Edit.

   The Comment dialog box opens populated with the information for the selected comment.

2. Open the History tab.

   The tab displays the following information for each change that was made to the comment—the date of the change, the login ID for the user who made the change, and the old and new values for the comment. See Figure 3-77 on page 178.

Figure 3-77: Comment dialog box, History tab



3. Click OK.

   The Comment dialog box closes. The Comments tab remains open.

Adding Multiple Comments and Reminders to a Reservation

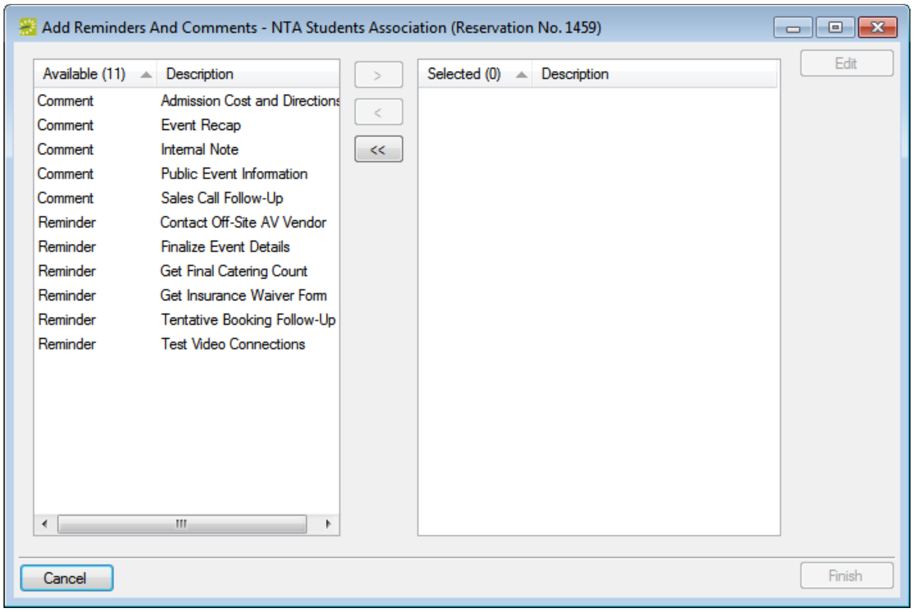
When you add a comment or a reminder to a reservation from the Comments tab or Reminders tab, respectively, then you can add only a single comment or reminder at a time. To add multiple comments or reminders to a reservation in a single step, you must use an option on the context menu for reservations in the Navigator.

When you add multiple reminders and comments to a reservation, your only option is to select from a pre-configured list of comment types and reminder types. To add a user-specified comment type or reminder type, you must add each comment or reminder individually. See “Working with Comments and Reminders in the Navigator” on page 175.

To add multiple comments and reminders to a reservation

1. Open the reservation to which you are adding multiple comments and/or reminders in the Navigator. See:
   - “Opening a reservation directly in the Navigator” on page 79.
   - “Opening a reservation through the Reservation Book” on page 80.
   - “Opening a reservation through a group” on page 80.
   - "Search Tools,” on page 195.
2. In the left pane of the Navigator, right-click the reservation, and on the context menu that opens, click Add Reminders and Comments.
   The Add Reminders and Comments window opens. This window lists all the available pre-configured reminder and comment types in the Available list. See Figure 3-78 on page 180.

Figure 3-78: Add Reminders and Comments window



3. In the Available list, select the comment/reminder type, or CTRL-click to select the multiple comment/reminder types that you are adding to the reservation, and then click the Move (>) button to move the selected comment/reminder types to the Selected list.
4. To enter the text for the selected comment/reminder types, select a comment/reminder type in the Selected list, and then click Edit.

   A Notes dialog box opens in which you can enter the text for the selected comment/ reminder type.
5. After you have entered the text for a selected comment/reminder type, click OK to close the Notes dialog box and return to the Add Reminders and Comments window.
6. Repeat Step 4 and Step 5 for each selected comment/reminder type.
7. Click Finish.

   A message opens indicating that the comment/reminder types were added successfully.
8. Click OK to close the message and return to the Navigator.

Working with User Defined Fields in the Navigator

The User Defined Fields tab displays the additional fields that store custom data for a reservation, booking, or a booking detail that is a service order. Your EMS administrator configures the types of fields that are available as well as the allowed values for these fields. You can add new user defined fields to a reservation or booking detail, edit the value for a user defined field, and delete user defined fields. You can also view the history for a user defined field.

To work with user-defined fields in the Navigator

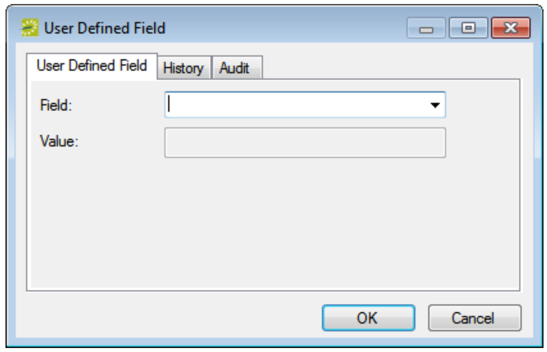
1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 79.
   - "Opening a reservation through the Reservation Book" on page 80.
   - "Opening a reservation through a group" on page 80.
   - "Search Tools," on page 195.
2. In the left pane of the Navigator, select the reservation or booking detail (remember, the booking detail must be a service order), and then in the top right pane of the Navigator, open the User Defined Fields tab.
3. Continue to one of the following:
   - "To add a user-defined field" on page 182.
   - "To edit a user-defined field" on page 182.
   - "To delete a user-defined field" on page 182.
   - "To the view history for a user-defined field" on page 183.

To add a user-defined field

1. Click New.

   The User Defined Field dialog box opens.

Figure 3-79: User Defined Field dialog box



2. On the Field dropdown list, select the type of field that you are adding.
3. On the Value dropdown list, select an allowed value for the field.
4. Click OK.

   The User Defined Field dialog box closes. The field is added to the reservation and the User Defined Fields tab remains open.

To edit a user-defined field

1. Select the user defined field that you are editing, and then click Edit.

   The User Defined Field dialog box opens. The field type and field value are displayed for the selected user defined field.
2. Edit the field type, field value, or both as needed.
3. Click OK.

   The User Defined Field dialog box closes. The edited field is saved for the reservation or booking detail and the User Defined Fields tab remains open.

To delete a user-defined field

1. Select the user-defined field that you are deleting, and then click Delete.

   A message opens asking you if it is OK to delete the selected field.
2. Click Yes.

   The selected field is deleted. The User Defined Fields tab remains open.

To the view history for a user-defined field

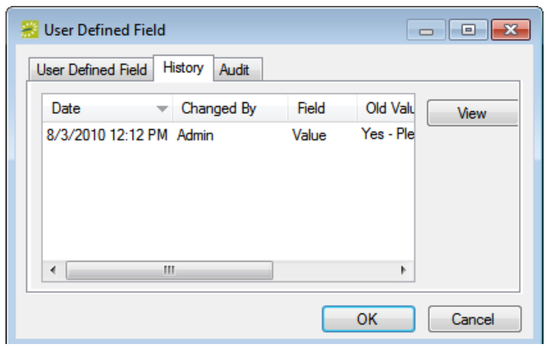
1. Select the user-defined field for which you are viewing the history, and then click Edit.

   The User Defined Field dialog box opens. The field type and field value are displayed for the selected user defined field.

2. Open the History tab.

   The tab displays the following information for each change that was made to the field—the date of the change, the login ID for the user who made the change, and the old and new values for the field.

Figure 3-80: User Defined Field dialog box, History tab



You can use the scroll feature at the bottom of the dialog box to view all the history for a selected change, or you can click a change, and then click View.

3. Click OK.

   The User Defined Field dialog box closes. The User Defined Fields tab remains open.

Working with Attachments in the Navigator

The term *attachment* is used to describe any file that you can add to or store on a reservation or booking. (Unlike a drawing, which is simply referenced, an attachment is actually stored in the EMS database with the reservation or booking record.) You can also delete an attachment from a reservation or booking, and view and edit an attachment.

You can also add an attachment to a group record. See "Configuring Additional Information for a Group" on page 263.

To work with attachments in the Navigator

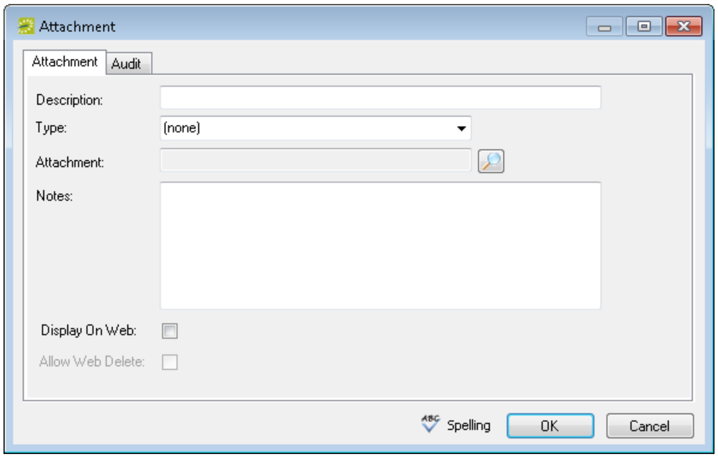
1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 79.
   - "Opening a reservation through the Reservation Book" on page 80.
   - "Opening a reservation through a group" on page 80.
   - "Search Tools," on page 195.
2. In the left pane of the Navigator, select the reservation or expand the folder structure for the reservation until the appropriate booking folder is visible, and then select the booking folder.
3. In the top right pane of the Navigator, open the Attachments tab.
4. Continue to one of the following:
   - "To add an attachment to a reservation or booking" on page 185.
   - "To edit an attachment for a reservation or booking" on page 186.
   - "To delete an attachment from a reservation or booking" on page 186.
   - "To view an attachment for a reservation or booking" on page 187.

To add an attachment to a reservation or booking

1. Click New.

   The Attachment dialog box opens.

Figure 3-81: Attachment dialog box



2. In the Description field, enter a name or description for the attachment.

The description can be a maximum of 50 characters, including spaces. If you leave this field blank, then the Description field is populated with the name of the file after you attach it to a reservation or booking.

3. On the Type dropdown list, select the attachment type.

4. Click the Search icon  to open the Find Attachment dialog box, and then browse to and select the attachment.

   The Find Attachment dialog box closes. The file name for the attachment is displayed in the Attachment field.

5. Optionally, do one or more of the following as needed:

   - If you left the Description field blank, then the name of the attached file is used by default for the file description, and you can edit this if needed.
   - If the attachment is to be displayed in VEMS when it is attached to a reservation or booking, then select Display on Web.
   - If a VEMS user is to be able to delete this attachment when it is attached to a reservation or booking, then select Allow Web Delete.
   - Enter any pertinent notes for the attachment.
   - Click Spelling to spell check the description before you attach the drawing to the booking.

6. Click OK.

   The Attachment dialog box closes. The attachment is added to the booking. The Attachments tab remains open.

To edit an attachment for a reservation or booking

1. Select the attachment that you are editing, and then click Edit.

   The Attachment dialog box opens populated with the information for the selected attachment.

2. Do any of the following as needed:

   - Edit the description.

The description can be a maximum of 50 characters, including spaces.

   - Click the Search icon to open the Find Attachment dialog box and scroll to and select a different attachment.
   - Edit the notes and/or web options.
   - Optionally, click Spelling to spell check the description.

3. Click OK.

   The Attachment dialog box closes. The Attachments tab remains open.

To delete an attachment from a reservation or booking

1. Select the drawing or CTRL-click to select the multiple attachments that you are deleting from the reservation or booking.
2. Click Delete.

   A message opens asking you if it is OK to delete the selected attachments.

3. Click Yes.

   The selected attachments are deleted from the reservation or booking. The Attachments tab remains open.

To view an attachment for a reservation or booking

Your computer must have the appropriate application installed to view attachments of a specific type. For example, to open a .docx that is attached to a booking, Microsoft Word must be installed on your computer.

1. Select the attachment that you are viewing, and then click Open.

   The file opens in the appropriate application.

2. Close the application after viewing the attachment, or if the application allows it, edit the attachment as needed, and then save the attachment.

   The next time you open the attachment in the Navigator, you can see the changes that you made.

Working with Drawings in the Navigator

The term *drawing* is used to describe a file (text-based or image file) that you can add to a booking. The file can stored on your organization's network, or you can create a drawing "on the fly," in the default drawing program on your EMS client, and then add it to a booking. Typically, a drawing is a setup diagram of the booking room. You can also detach a drawing from a booking, and view and edit a drawing.

To work with drawings in the Navigator

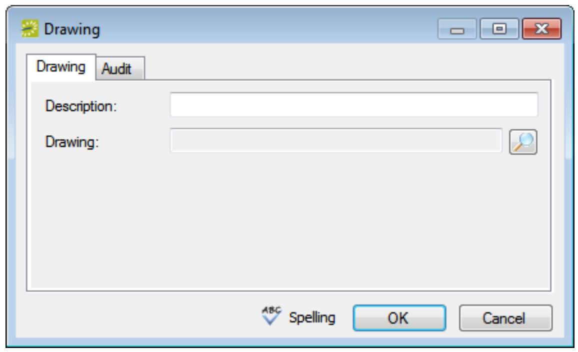
1. Open the reservation in the Navigator. See:
    - "Opening a reservation directly in the Navigator" on page 79.
    - "Opening a reservation through the Reservation Book" on page 80.
    - "Opening a reservation through a group" on page 80.
    - "Search Tools," on page 195.
2. In the left pane of the Navigator, expand the folder structure for the reservation until the appropriate booking folder is visible, and then select the booking.
3. In the right pane of the Navigator, open the Drawings tab.
4. Continue to one of the following:
    - "To attach a stored drawing to a booking" on page 189.
    - "To create a drawing "on the fly" and attach it to a booking" on page 190.
    - "To edit a drawing for a booking" on page 190.
    - "To detach a drawing from a booking" on page 190.
    - "To view a drawing for a booking" on page 191.

To attach a stored drawing to a booking

1. Click New > Attach.

   The Drawing dialog box opens.

Figure 3-82: Drawing dialog box



2. In the Description field, enter a name or description for the drawing.

The description can be a maximum of 50 characters, including spaces. If you leave this field blank, then the Description field is populated with the name of the file after you attach it to the booking.

3. Click the Search icon  to open the Find Drawing dialog box, and then browse to and select the drawing.

   The Find Drawing dialog box closes. The file name for the drawing is displayed in the Drawing field.

4. Optionally, do one or both of the following:

   - If you left the Description field blank, then the name of the attached file is used by default for the file description, and you can edit this if needed.

   - Click Spelling to spell check the description before you attach the drawing to the booking.

5. Click OK.

   The Drawing dialog box closes. The drawing is attached to the booking. The Drawings tab remains open.

To create a drawing "on the fly" and attach it to a booking

1. Click New > Create.

   The application that you have selected as your default drawing application for your EMS client opens, for example, Microsoft Paint.

You specify your default drawing application in your user preferences. See "Setting User Preferences and Default Values" on page 403.

2. Create and save the drawing.
3. Continue to "To attach a stored drawing to a booking" on page 189.

To detach a drawing from a booking

1. Select the drawing, or CTRL-click to select the multiple drawings that you are detaching from the booking.
2. Click Detach.

   A message opens asking you if it is OK to detach the selected drawings.
3. Click Yes.

   The selected drawings are detached from the booking. The Drawings tab remains open.

To edit a drawing for a booking

1. Select the drawing that you are editing, and then click Edit.

   The Drawing dialog box opens.
2. Do one or both of the following as needed:
   - Edit the description.

Remember, the description can be a maximum of 50 characters, including spaces.

   - Click the Search icon to open the Find Drawing dialog box and scroll to and select a different drawing.
3. Optionally, click Spelling to spell check the description before you attach the drawing to the booking.
4. Click OK.

   The Drawing dialog box closes. The Drawing tab remains open.

To view a drawing for a booking

Your computer must have the appropriate application installed to view drawings of a specific type. For example, to open a .vsd file that is attached to a booking, Microsoft Visio must be installed on your computer.

1. Select the drawing that you are opening, and then click Open.

   The file opens in the appropriate application.

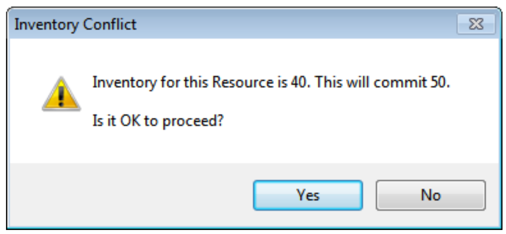
2. Close the application after viewing the drawing, or if the application allows it, edit the drawing as needed, and then save the drawing.

   The next time you open the drawing in the Navigator, you can see the changes that you made.

Running the Resource Utility Conflicts Tool

Resource conflicts can occur if bookings for the same date and time require the same resource, and there are insufficient quantities of the resource to accommodate all the bookings. When you reserve any resource for which the inventory is maintained (for example, equipment, personnel, and so on), EMS checks the available quantity and *automatically* notifies you in an Inventory Conflict message if there is an insufficient quantity of the selected resource to accommodate your event.

Figure 3-83: Inventory Conflict message



You have the option of dismissing this message and over-committing the resource; however, although you are aware that the resource has been over-committed, other users will not necessarily be aware of this fact. If you need to confirm that an over-commitment of resources does not exist *for a single reservation*, then you can manually run the Resource Inventory Conflicts tool from the Navigator to generate an onscreen report that lists the resources that are in conflict by booking for the reservation.

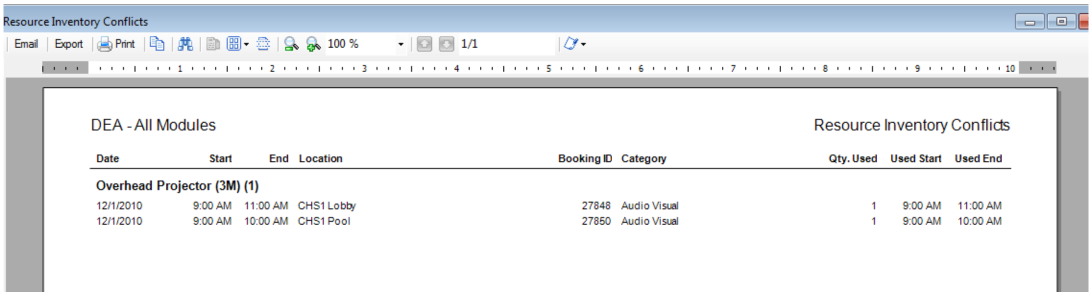
To confirm that an over-commitment of resources does not exist across multiple reservations, run any of the various resource usage reports that are available. See "Statistics reports" in "Generating an EMS Report" on page 321.

To run the Resource Utility Conflicts tool

1. Open the reservation in the Navigator. See
   - "Opening a reservation directly in the Navigator" on page 79.
   - "Opening a reservation through the Reservation Book" on page 80.
   - "Opening a reservation through a group" on page 80.
   - "Search Tools," on page 195.
2. In the Bookings pane, click Tools, and then click Resource Inventory Conflicts.

   The Resource Inventory Conflicts report opens onscreen. The report lists the resources that are in conflict by booking. See Figure 3-84 on page 193.
3. Optionally, edit the booking details for the involved bookings to resolve the conflict.

Figure 3-84: Resource Inventory Conflicts report


Resource Inventory Conflicts

DEA - All Modules

Resource Inventory Conflicts

Date	Start	End	Location	Booking ID	Category	Qty. Used	Used Start	Used End
Overhead Projector (3M) (1)								
12/1/2010	9:00 AM	11:00 AM	CHS1 Lobby	27848	Audio Visual	1	9:00 AM	11:00 AM
12/1/2010	9:00 AM	10:00 AM	CHS1 Pool	27850	Audio Visual	1	9:00 AM	10:00 AM

The onscreen preview of the Resource Inventory Conflict report contains options for printing a hard copy of the report, for emailing the report, and so on.

Search Tools

EMS has a variety of options available to you for searching for reservations, bookings, service orders, resources, and queries. These options include the Browser, the Web Reservation tool, the Calendar, the Navigator, a Group, the Web Request tool, the Resource Calendar, and the Service Order Management browser.

This chapter covers the following topics:

- "Searching with the Browser or with the Web Reservation Tool" on page 197.
- "Searching with the Calendar" on page 206.
- "Searching with the Resource Calendar" on page 215.
- "Searching with the Service Order Management Browser" on page 222.

Remember, a fast way to view and edit bookings is through the Reservation Book. See "Viewing and Editing Reservations in the Reservation Book" on page 62.

For information about searching with the Navigator, see "The Navigator," on page 77. For information about searching for reservations by group, see "Working with Reservations for a Group" on page 295. For information about searching with the Web Request tool, see "EMS Dashboard," on page 227.

Searching with the Browser or with the Web Reservation Tool

You can use the Browser to search for reservations, bookings, service orders, resources, web reservations, and queries. The results are displayed in a list view. When you carry out a search in the Browser, you can carry out a *basic search* or an *advanced search*. A *basic search* is based on the basic information that you specify for a reservation when you first create it, such as the starting date, the end date, the group for which the event was scheduled, the group contact name, and so on. An *advanced search* is a field level search that is carried out at the reservation level, the booking level, the booking detail level, the booking detail item level, the service order level, or any combination of these. For example, in an advanced search, you can specify criteria as granular as who added a specific booking detail item.

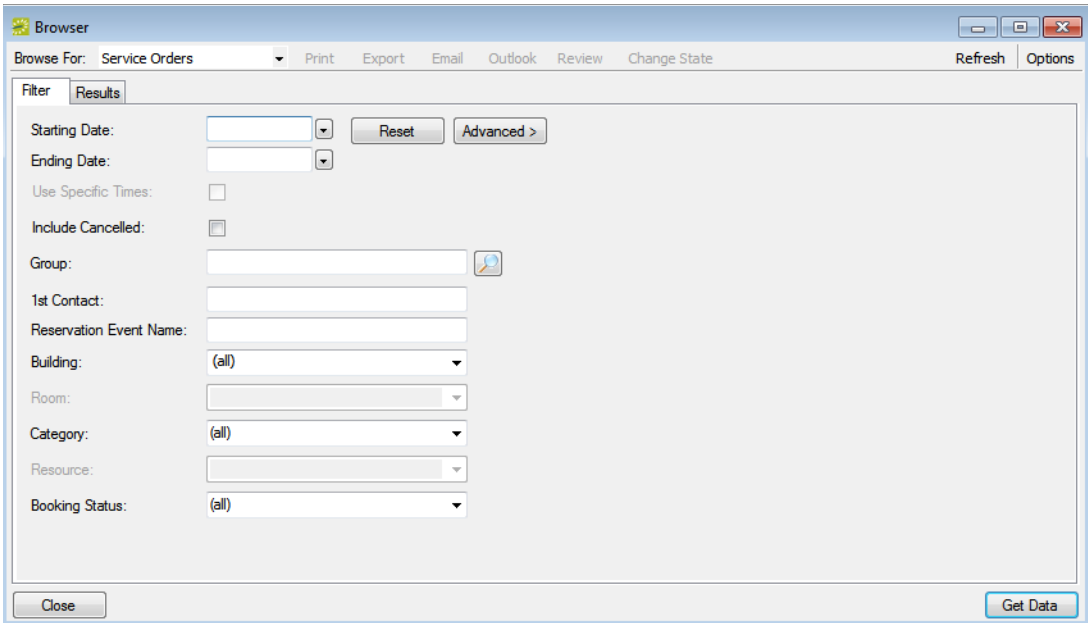
A web reservation is any reservation that a user has submitted through VEMS. The Web Reservation searching tool is identical to the Browser searching tool with one exception—when the Browser opens for the first time, the Browse for function is set to Reservations whereas the Web Reservation tool is set to Web Reservations. As a result, although this section is written from the perspective of using the Browser, all the information can be applied when using the Web Reservation searching tool. To open the Web Reservation searching took, click the Web Reservations icon on the EMS toolbar.

To carry out a search in the Browser

1. On the EMS toolbar, click the Browser icon .

   By default, the *first* time that the Browser window opens, the Filter tab is set to a basic search; otherwise, the Filter tab is set to the search type (Basic or Advanced) that you last carried out. See Figure 4-1 on page 198.

Figure 4-1: Browser window, Basic search options



2. Click the Basic/Advanced toggle to select the type of search that is to be carried out, and then continue to one of the following:
   - “To carry out a basic search in the Browser” below.
   - “To carry out an advanced search in the Browser” on page 201.

To carry out a basic search in the Browser

1. On the Browse For dropdown list, select the item for which to search.
2. Enter the search criteria.

Field	Description
• Starting Time • Ending Time	Both are optional.
Use Specific Times	Available only if the Starting Date is the same as the Ending Date.
Include Cancelled	By default, search results are not set to show canceled reservations. Select this option to search for canceled reservations as well.
Group	If the pre-defined list of groups is too extensive to scroll, then click the Search icon  to open the Groups window and search for a specific group. See “To search for a group and/or contact” on page 255.
• 1st Contact • Reservation Event Name	Enter a search string by which to filter your search. The string is not case-sensitive, but your search is limited to the exact order of characters in the string and it must begin with the information for which you are searching. For example, a search string of **ed** returns **Ed**, **Ed**ward, **Ed**die, and so on, but not Ted or Fred.

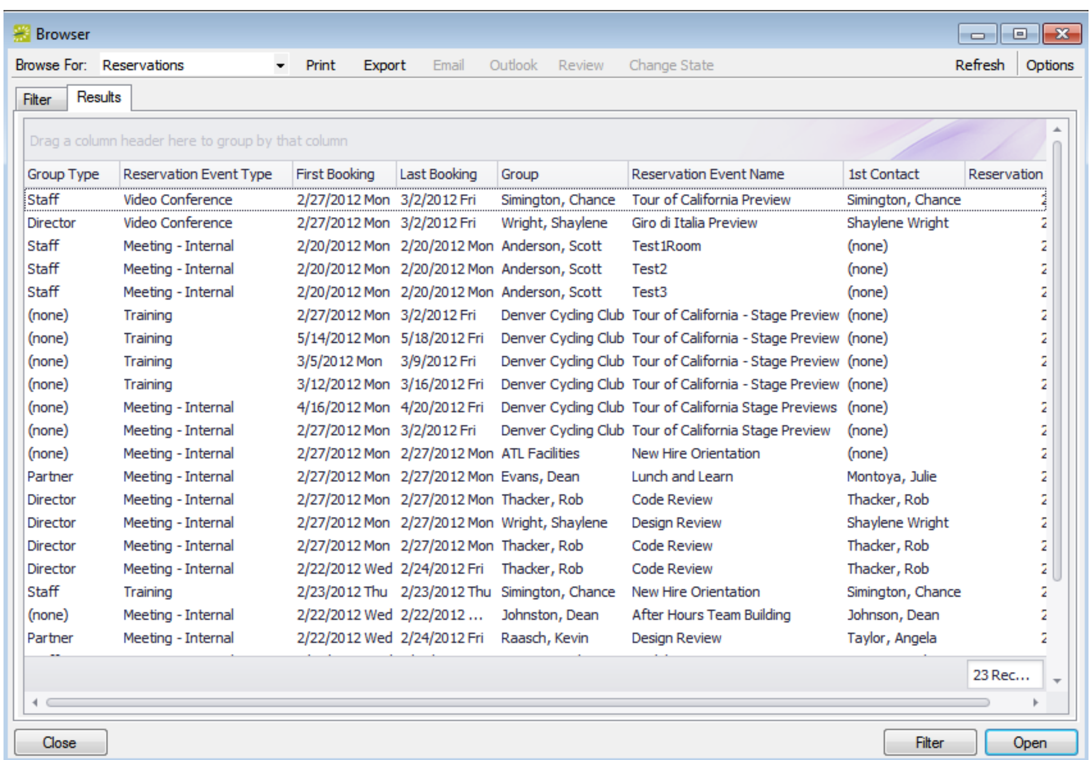
Field	Description
Building	The default value is set to (all). You can leave this value as is, or you can select a specific building, area, or view.
Building/Room	• If you select a specific building, then (all) rooms in the building are selected by default. You can select a specific room in the building. • If you select an area, then you can select a specific building that is contained in the area. • If you select a view, then Room is left blank; however, you can select a specific room to search.
Category	The default value is set to (all). You can leave this value as is, or you can select a specific category (booking detail).
Resource	Available only if you select a category that is a resource or service order. The default value is set to (all). You can leave this value as is, or you can select a specific resource item.
Booking Status	The default value is set to (all). You can leave this value as is, or you can select a specific booking status.

3. Optionally, click Options and edit the default values for one or more additional search options—Date/Time Filter, Number of Records to Return, When Filtering By Specific Room, and Show Service Order Items.

4. Click Get Data or Refresh.

   The search results are displayed on the Results tab.

Figure 4-2: Browser window, Results tab



5. Optionally, do one or more of the following:

   - The Results tab is an EMS Browser window. See "An EMS Browser Window" on page 35 for all the features that are available for this tab.
   - Double-click an event entry on the Results tab to open the event in the Navigator.
   - Click Print to print the search results.
   - In the Reservation view, select a search result entry, and then click Email to open a pre-addressed SMTP email to the group that is associated with the selected reservation. Complete and send the email as you would normally. See "Sending Email from EMS" on page 414.
   - Click Export to export the search results to a Microsoft Excel spreadsheet.
   - In the Bookings view, click Outlook to download the search results to your personal calendar.

Your EMS administrator must set a system parameter to enable this function. If this function is not available, contact your EMS administrator for assistance.

   - In the Service Orders view, to mark a service order as Reviewed, select the service order, or CTRL-click to select multiple service orders, and then click Review > Mark as Reviewed. Conversely, to mark a service order as Unreviewed, click Review > Mark as Unreviewed.
   - In the Service Orders view, to change the state of a service order in a booking, select the appropriate booking in the Results list, or CTRL-click to select multiple service orders *of the same category,* and then click Change State. A Change State dialog box opens. The dialog box lists all the available states for the service order. Select the new state for the service order on the State dropdown list.

For more information about reviewing service orders and selecting states, see "Searching with the Service Order Management Browser" on page 222.

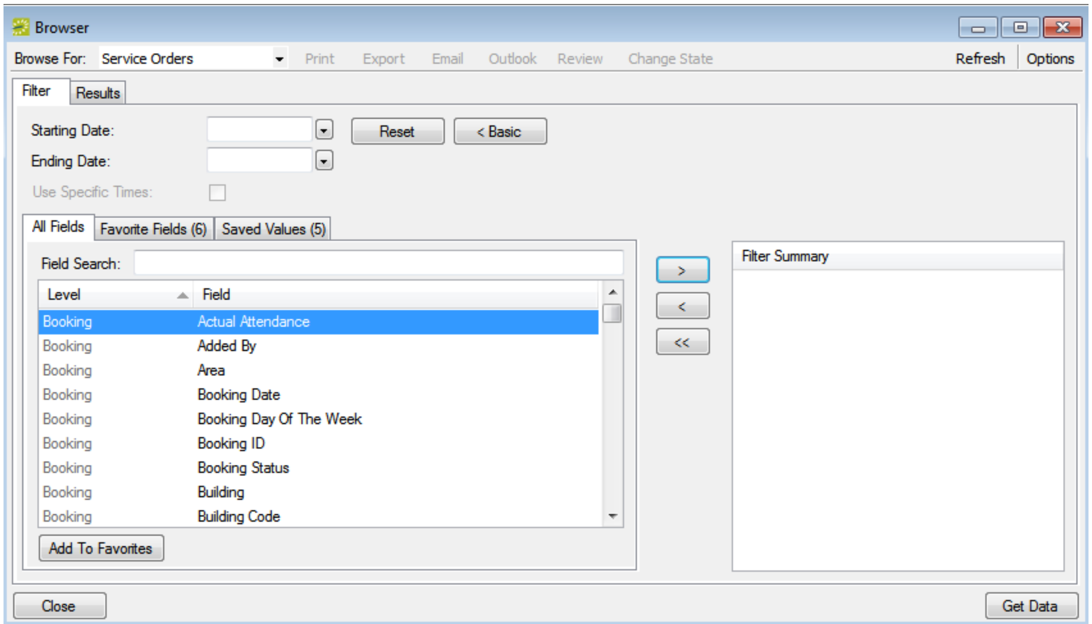
   - In the Browse For field, select a different item to search for. The Results tab is refreshed with the search results based on the item that you selected *and* the search criteria on the Filter tab.
   - Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
   - Click Refresh to requery the database based on the current search criteria.

6. Click Close.

   Any changes that you made to the search results columns (position, width, and so on) remain in effect for any other searches that you carry out. To reset the columns to their default values, see "Resetting Column Settings" on page 408.

To carry out an advanced search in the Browser

Figure 4-3: Browser window, Advanced search options



1. On the Browse For dropdown list, select the item for which to search.
2. Optionally, do one or more or all of the following:
   - Enter a Starting Date, an Ending Date, or both.
   - If the Starting Date and the Ending Date are the same, select Use Specific Times and enter specific time periods to search.

Use Specific Times is available only if the Starting Date is the same as the Ending Date.

   - Click Options and edit the default values for one or more additional search options—Date/Time Filter, Number of Records to Return, When Filtering By Specific Room, and Show Service Order Items.

3. For *each* field level option by which to carry out the search:
   - Select the field level option, and then click the Move button (>).

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*To filter the list of available fields, in the Field Search field, enter a search string. Your search is limited to the exact order of the characters in the string, but the search string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **add** returns **Add**ed by, Date **Add**ed, and Group **Add**ress Line 1. The list of fields that meet your search criteria is dynamically updated as you enter your search criteria.*

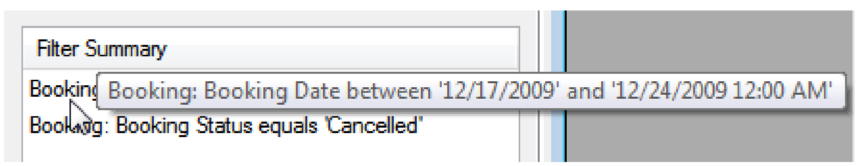
   - When prompted, enter a value or define the limits for the option, and then click OK.

   The option is moved to the Filter Summary list.

If you have specific fields and/or values by which you always want to carry out a search, then you can set up these fields to be your Favorite fields. See "To set up favorite fields for a Browser search" on page 205.

To view a selected field option in its entirety in the Filter Summary list, rest the mouse pointer on the entry. A tooltip showing the complete field option information opens.

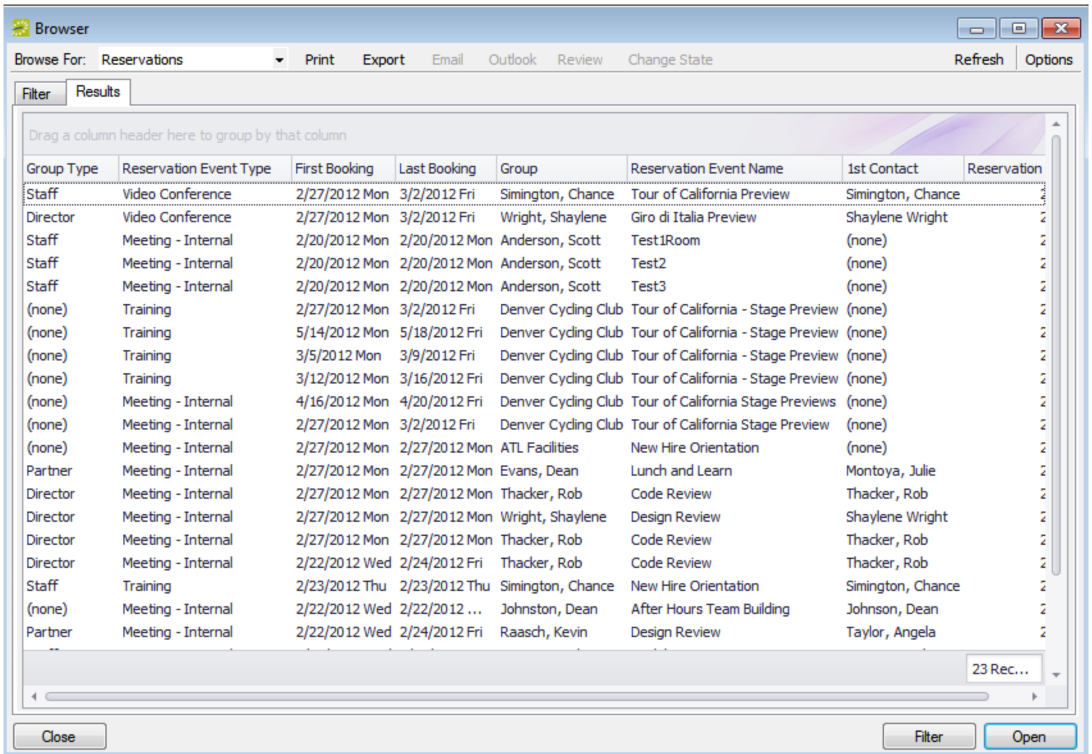
Figure 4-4: Viewing a selected field option in the Filter Summary list



4. Click Get Data or Refresh.

   The search results are displayed on the Results tab.

Figure 4-5: Browser window, Results tab



Group Type	Reservation Event Type	First Booking	Last Booking	Group	Reservation Event Name	1st Contact	Reservation
Staff	Video Conference	2/27/2012 Mon	3/2/2012 Fri	Simington, Chance	Tour of California Preview	Simington, Chance	
Director	Video Conference	2/27/2012 Mon	3/2/2012 Fri	Wright, Shaylene	Giro di Italia Preview	Shaylene Wright	
Staff	Meeting - Internal	2/20/2012 Mon	2/20/2012 Mon	Anderson, Scott	Test1Room	(none)	
Staff	Meeting - Internal	2/20/2012 Mon	2/20/2012 Mon	Anderson, Scott	Test2	(none)	
Staff	Meeting - Internal	2/20/2012 Mon	2/20/2012 Mon	Anderson, Scott	Test3	(none)	
(none)	Training	2/27/2012 Mon	3/2/2012 Fri	Denver Cycling Club	Tour of California - Stage Preview	(none)	
(none)	Training	5/14/2012 Mon	5/18/2012 Fri	Denver Cycling Club	Tour of California - Stage Preview	(none)	
(none)	Training	3/5/2012 Mon	3/9/2012 Fri	Denver Cycling Club	Tour of California - Stage Preview	(none)	
(none)	Training	3/12/2012 Mon	3/16/2012 Fri	Denver Cycling Club	Tour of California - Stage Preview	(none)	
(none)	Meeting - Internal	4/16/2012 Mon	4/20/2012 Fri	Denver Cycling Club	Tour of California Stage Previews	(none)	
(none)	Meeting - Internal	2/27/2012 Mon	3/2/2012 Fri	Denver Cycling Club	Tour of California Stage Preview	(none)	
(none)	Meeting - Internal	2/27/2012 Mon	2/27/2012 Mon	ATL Facilities	New Hire Orientation	(none)	
Partner	Meeting - Internal	2/27/2012 Mon	2/27/2012 Mon	Evans, Dean	Lunch and Learn	Montoya, Julie	
Director	Meeting - Internal	2/27/2012 Mon	2/27/2012 Mon	Thacker, Rob	Code Review	Thacker, Rob	
Director	Meeting - Internal	2/27/2012 Mon	2/27/2012 Mon	Wright, Shaylene	Design Review	Shaylene Wright	
Director	Meeting - Internal	2/27/2012 Mon	2/27/2012 Mon	Thacker, Rob	Code Review	Thacker, Rob	
Director	Meeting - Internal	2/22/2012 Wed	2/24/2012 Fri	Thacker, Rob	Code Review	Thacker, Rob	
Staff	Training	2/23/2012 Thu	2/23/2012 Thu	Simington, Chance	New Hire Orientation	Simington, Chance	
(none)	Meeting - Internal	2/22/2012 Wed	2/22/2012 ...	Johnston, Dean	After Hours Team Building	Johnson, Dean	
Partner	Meeting - Internal	2/22/2012 Wed	2/24/2012 Fri	Raasch, Kevin	Design Review	Taylor, Angela	

5. Optionally, do one or more of the following:

   - The Results tab is an EMS Browser window. See “An EMS Browser Window” on page 35 for all the features that are available for this tab.
   - Double-click an event entry on the Results tab to open the event in the Navigator.
   - Click Print to print the search results.
   - In the Reservation view, select a search result entry, and then click Email to open a pre-addressed SMTP email to the group that is associated with the selected reservation. Complete and send the email as you would normally. See “Sending Email from EMS” on page 414.
   - Click Export to export the search results to a Microsoft Excel spreadsheet.
   - In the Bookings view, click Outlook to download the search results to your personal calendar.

Your EMS administrator must set a system parameter to enable this function. If this function is not available, contact your EMS administrator for assistance.

- In the Service Orders view, to mark a service order as Reviewed, select the service order, or CTRL-click to select multiple service orders, and then click Review > Mark as Reviewed. Conversely, to mark a service order as Unreviewed, click Review > Mark as Unreviewed.
- In the Service Orders view, to change the state of a service order in a booking, select the appropriate booking in the Results list, or CTRL-click to select multiple service orders *of the same category*, and then click Change State. A Change State dialog box opens. The dialog box lists all the available states for the service order. Select the new state for the service order on the State dropdown list.

For more information about reviewing service orders and selecting states, see “Searching with the Service Order Management Browser” on page 222.

- In the Browse For field, select a different item to search for. The Results tab is refreshed with the search results based on the item that you selected *and* the search criteria on the Filter tab.
- Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
- Click Refresh to requery the database based on the current search criteria.

6. Click Close.

   Any changes that you made to the search results columns (position, width, and so on) remain in effect for any other searches that you carry out. To reset the columns to their default values, see “Resetting Column Settings” on page 408.

To set up favorite fields for a Browser search

If you have specific fields and/or values by which you always want to carry out a Browser search, you do not have to filter the list of fields on the All Fields tab for every search. Instead, you can set up each of these fields to be a favorite field with a specific value or limit if needed.

1. Open the Browser, and make sure that the Advanced search features are displayed.
2. For each field that you are setting up as favorite field, select the field on the All Fields tab, and then click Add to Favorites.

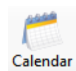
   The field is added to the Favorite Fields tab.
3. Optionally, after you define a value or define the limits for a field, click Save Value on the Filter dialog box.

   The next time that you carry out a search, you can simply open the Favorite Fields tab or the Saved Values tab to carry out a search based on your customized list of search fields.

Searching with the Calendar

You use the Calendar to search for reservations, bookings, and service orders in your EMS database. The results are displayed in a calendar view. When you carry out a search in the Calendar, you can carry out a *basic search* or an *advanced search*. A *basic search* is based on the basic information that you specify for a reservation when you first create it, such as the starting time, the end time, the group for which the event was scheduled, the group contact name, and so on. An *advanced search* is a field level search that is carried out at the reservation level, the booking level, the booking detail level, the booking detail item level, or any combination of these. For example, in an advanced search, you can specify criteria as granular as who added a specific booking detail item.

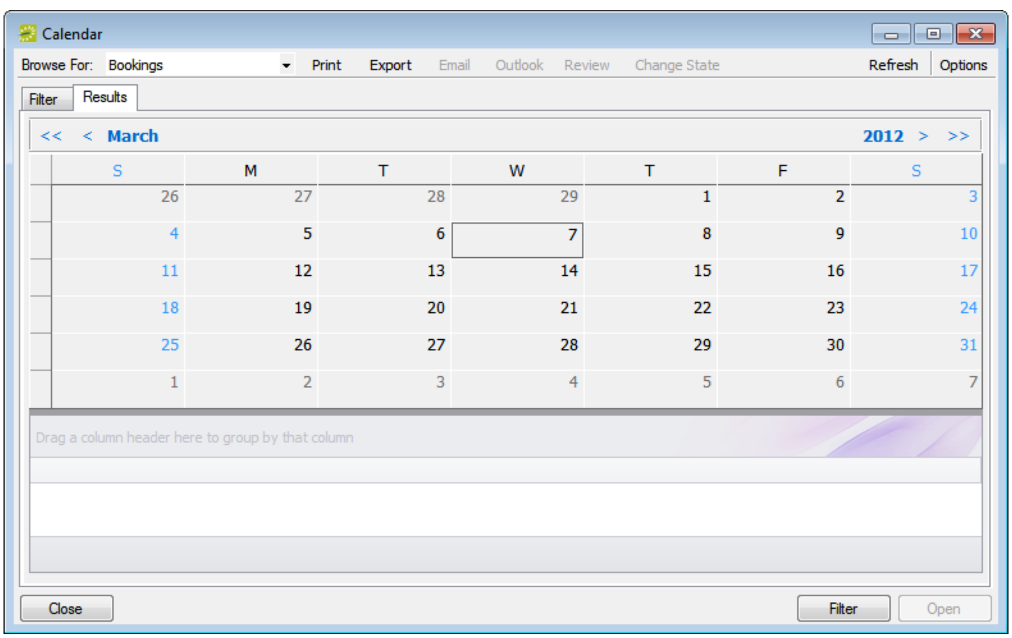
To carry out a search in the Calendar

1. On the EMS toolbar, click the Calendar icon 

.

   The Calendar window opens. By default, the *first* time that the Calendar window opens, the Results tab is the active tab and it is set to the current month and year. If you never edit the Get Data when Calendar Opens option (under Options), then the Results tab is always the active tab when the Calendar window opens; otherwise, the Filter tab is the active tab.

Figure 4-6: Calendar window, Results tab



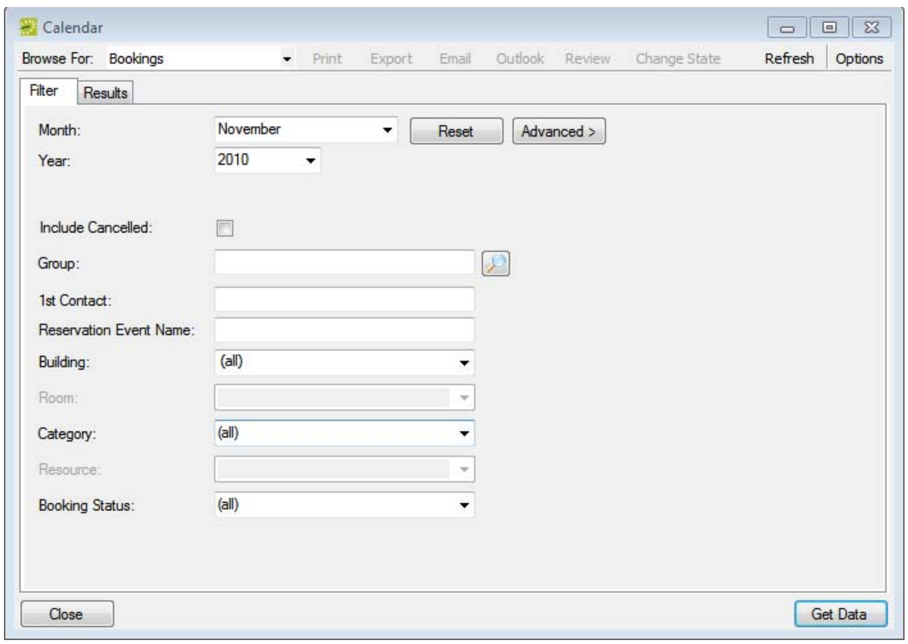
2. If needed, click Filter to open the Filter tab.

The first time that the Filter tab opens, it is set by default to a Basic search; otherwise, the Filter tab displays the search type (Basic or Advanced) that you last carried out.

3. Click the Basic/Advanced toggle to select the type of search that you want to carry out and then continue to one of the following:
   - "To carry out a basic search in the Calendar."
   - "To carry out an advanced search in the Calendar" on page 211.

To carry out a basic search in the Calendar

Figure 4-7: Calendar window, Filter tab with Basic search options



1. On the Browse For dropdown list, select the item for which to search.
2. Enter the search criteria.

Field	Description
Month Year	The default value is the current month and year, but you can change one or both of these values if needed.
Include Cancelled	By default, search results are not set to show canceled bookings. Select this option if you want to search for canceled bookings as well.

Field	Description
Group	If the pre-defined list of groups is too extensive to scroll, then click the Search icon to open the Groups window and search for a specific group. See “To search for a group and/or contact” on page 255.
• 1st Contact • Reservation Event Name	Enter a search string by which to filter your search. The search is not case-sensitive, but your search is limited to the exact order of characters in the string and it must begin with the information for which you are searching. For example, a search string of **ed** returns include **Ed**, **Ed**ward, **Ed**die, and so on, but not Ted or Fred.
Building	The default value is set to (all). You can leave this value as is, or you can select a specific building, area, or view.
Building/Room	• If you select a specific building, then (all) rooms in the building are selected by default. You can select a specific room in the building. • If you select an area, then you can select a specific building that is contained in the area. • If you select a view, then Room is left blank; however, you can select a specific room to search.
Category	The default value is set to (all). You can leave this value as is, or you can select a specific category (booking detail).
Resource	Available only if you select a category that is a resource or service order. The default value is set to (all). You can leave this value as is, or you can select a specific resource item.
Booking Status	The default value is set to (all). You can leave this value as is, or you can select a specific booking status.

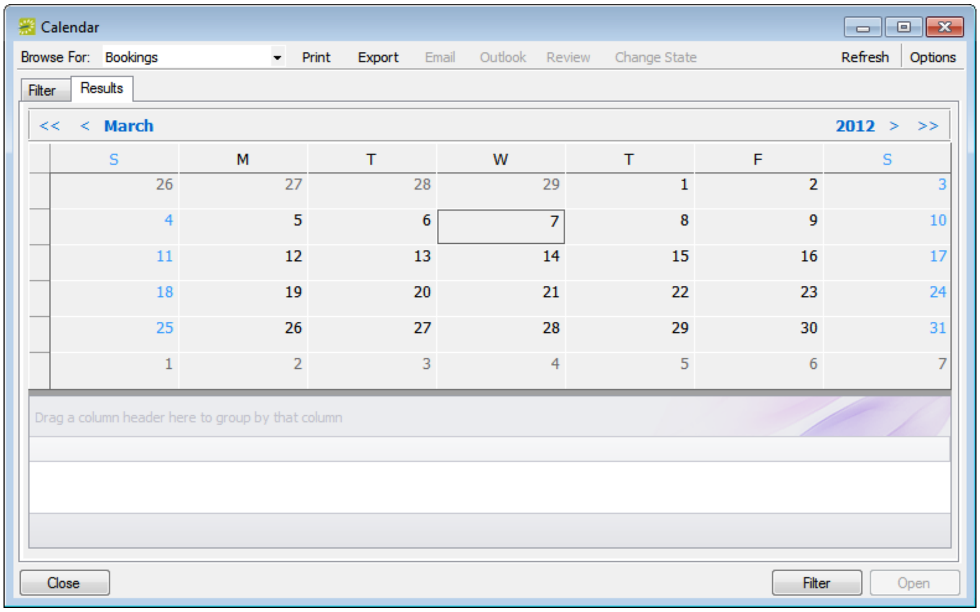
3. Optionally, click Options and edit the default values for one or more additional search options—Date/Time Filter, Number of Records to Return, Get Data when Calendar Opens, When Filtering By Specific Room, and Change Calendar Day Count Color.

4. Click Get Data or Refresh.

   The search results are displayed on the Results tab in a calendar view. The number of bookings that meet the search criteria is indicated on the dates on which the events occur. The current day’s date is outlined in black. See Figure 4-8 on page 209.

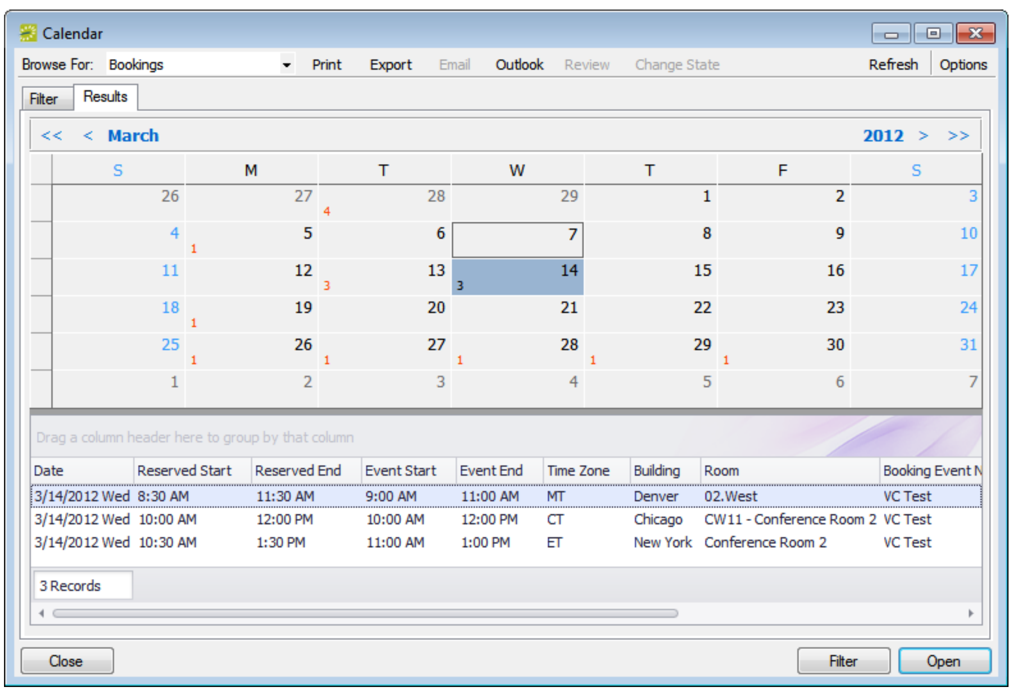
By default, the number of bookings is indicated in red unless you selected a different color for the Change Calendar Day Count Color. Any color that you pick here is carried over to the same option for the Resource Calendar.

Figure 4-8: Calendar window, Results tab



5. Optionally, do one or more of the following:
   - Click on a date in the upper pane of the Results tab to view a list of bookings for the date in the lower pane of the tab.

Figure 4-9: Calendar window, Results tab with list of events for selected dates



- The lower pane on the Results tab is an EMS Browser window. See “An EMS Browser Window” on page 35 for all the features that are available for this pane.
- Double-click the event entry on the Results tab to open an event in the Navigator.
- Click Print to print the search results.
- In the Reservation view, select a search result entry, and then click Email to open a pre-addressed SMTP email to the group that is associated with the selected reservation. Complete and send the email as you would normally. See “Sending Email from EMS” on page 414.
- Click Export to export the search results to a Microsoft Excel spreadsheet.
- In the Bookings view, click Outlook to download the search results to your personal calendar.

Your EMS administrator must set a system parameter to enable this function. If this function is not available, contact your EMS administrator for assistance.

- In the Service Orders view, to mark a service order as Reviewed, select the service order, or CTRL-click to select multiple service orders, and then click Review > Mark as Reviewed. Conversely, to mark a service order as Unreviewed, click Review > Mark as Unreviewed.
- In the Service Orders view, to change the state of a service order in a booking, select the appropriate booking in the Results list, or CTRL-click to select multiple service orders *of the same category*, and then click Change State. A Change State dialog box opens. The dialog box lists all the available states for the service order. Select the new state for the service order on the State dropdown list.

For more information about reviewing service orders and selecting states, see “Searching with the Service Order Management Browser” on page 222.

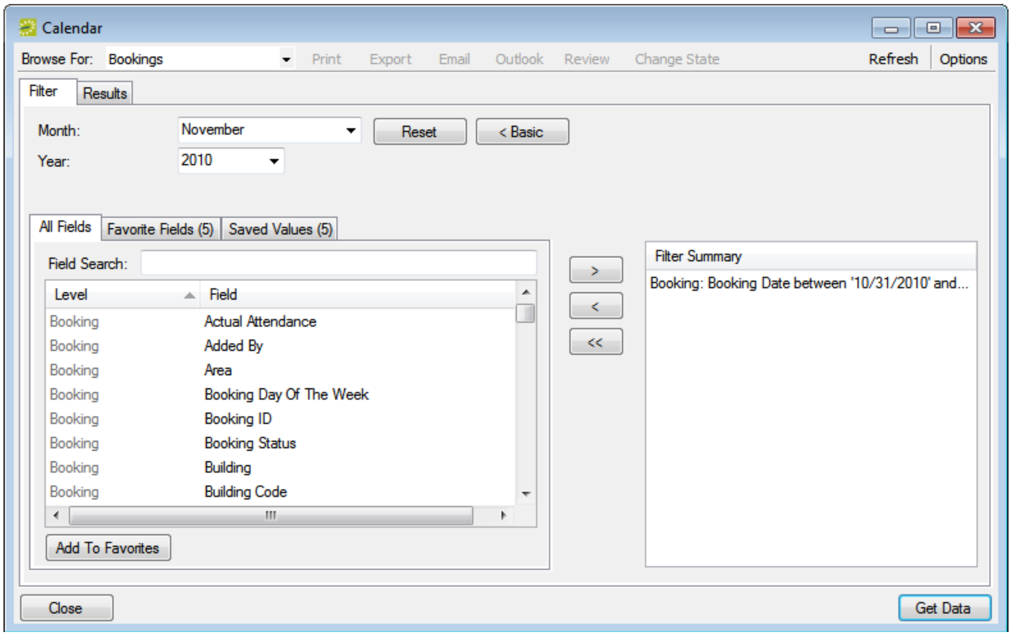
- In the Browse For field, select a different item to search for. The Results tab is refreshed with the search results based on the item that you selected *and* the search criteria on the Filter tab.
- Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
- Click Refresh to requery the database based on the current search criteria.

6. Click Close.

   Any changes that you made to the search results columns (position and width) remain in effect for any other searches that you carry out. If you want to reset the columns to their default values, see “Resetting Column Settings” on page 408.

To carry out an advanced search in the Calendar

Figure 4-10: Calendar window, Advanced search options



1. On the Browse For dropdown list, select the item for which to search.
2. Optionally, do one or both of the following:
   - The default values for the month and year are the current month and year. You can enter different values as needed.
   - Click Options and edit the default values for one or more additional search options—Date/Time Filter, Number of Records to Return, Get Data when Calendar Opens, When Filtering By Specific Room, and Change Calendar Day Count Color.
3. For *each* field level option by which to carry out the search:
   - Select the field level option, and then click the Move button (>).

*To filter the list of available fields, in the Field Search field, enter a search string. Your search is limited to the exact order of the characters in the string, but the search string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **add** returns **Add**ed by, Date **Add**ed, and Group **Add**ress Line 1. The list of fields that meet your search criteria is dynamically updated as you enter your search criteria.*

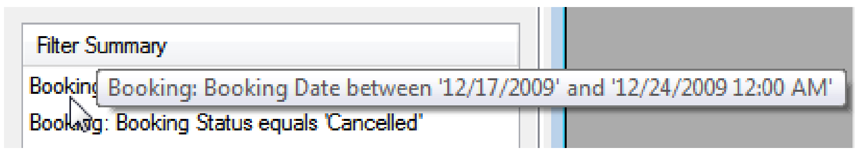
   - When prompted, enter a value or define the limits for the option, and then click OK.

The option is moved to the Filter Summary list.

If you have specific fields and/or values by which you always want to carry out a search, then you can set up these fields to be your Favorite fields. See *“To set up favorite fields for a Calendar search” on page 214.*

To view a selected field option in its entirety in the Filter Summary list, rest the mouse pointer on the entry. A tooltip showing the complete field option information opens.

Figure 4-11: Viewing a selected field option in the Filter Summary list

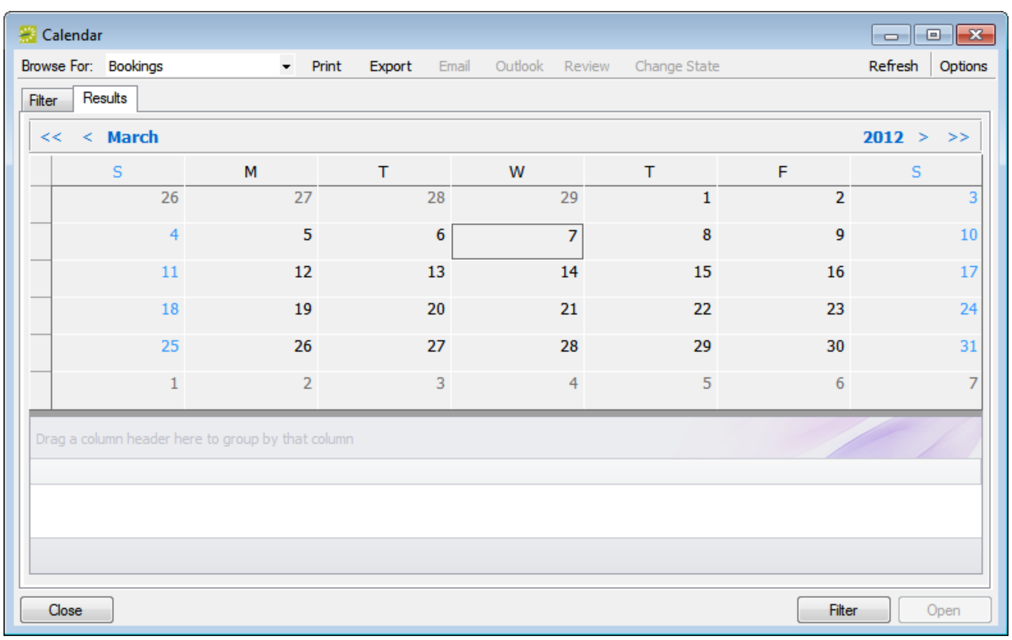


4. Click Get Data or Refresh.

   The search results are displayed on the Results tab in a calendar view. The number of bookings that meet the search criteria is indicated on the dates on which the events occur. The current day’s date is outlined in black.

By default, the number of bookings is indicated in red unless you selected a different color for the Change Calendar Day Count Color.

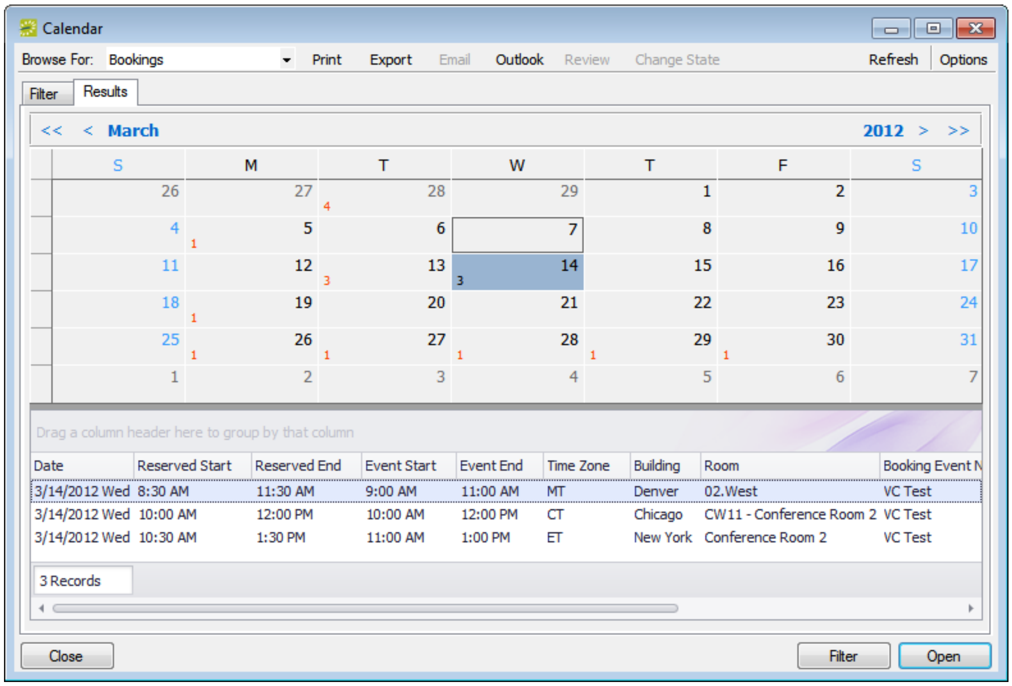
Figure 4-12: Calendar window, Results tab



5. Optionally, do one or more of the following:

 - Click on a date in the upper pane of the Results tab to view a list of bookings for the date in the lower pane of the tab.

Figure 4-13: Calendar window, Results tab with list of events for selected dates



 - The lower pane on the Results tab is an EMS Browser window. See “An EMS Browser Window” on page 35 for all the features that are available for this pane.
 - To open an event in the Navigator, double-click the event entry on the Results tab.
 - Click Print to print the search results.
 - In the Reservation view, select a search result entry, and then click Email to open a pre-addressed SMTP email to the group that is associated with the selected reservation. Complete and send the email as you would normally. See “Sending Email from EMS” on page 414.
 - Click Export to export the search results to a Microsoft Excel spreadsheet.
 - In the Bookings view, click Outlook to download the search results to your personal calendar.

Your EMS administrator must set a system parameter to enable this function. If this function is not available, contact your EMS administrator for assistance.

- In the Service Orders view, to mark a service order as Reviewed, select the service order, or CTRL-click to select multiple service orders, and then click Review > Mark as Reviewed. Conversely, to mark a service order as Unreviewed, click Review > Mark as Unreviewed.
- In the Service Orders view, to change the state of a service order in a booking, select the appropriate booking in the Results list, or CTRL-click to select multiple service orders *of the same category*, and then click Change State. A Change State dialog box opens. The dialog box lists all the available states for the service order. Select the new state for the service order on the State dropdown list.

For more information about reviewing service orders and selecting states, see *"Searching with the Service Order Management Browser" on page 222.*

- In the Browse For field, select a different item to search for. The Results tab is refreshed with the search results based on the item that you selected *and* the search criteria on the Filter tab.
- Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
- Click Refresh to requery the database based on the current search criteria.

6. Click Close.

   Any changes that you made to the search results columns (position and width) remain in effect for any other searches that you carry out. If you want to reset the columns to their default values, see "Resetting Column Settings" on page 408.

To set up favorite fields for a Calendar search

If you have specific fields and/or values by which you always want to carry out a Calendar search, you do not have to filter the list of fields on the All Fields tab for every search. Instead, you can set up each of these fields to be a favorite field with a specific value or limit if needed.

1. Open the Calendar, and make sure that the Advanced search features are displayed.
2. For each field that you are setting up as favorite field, select the field on the All Fields tab, and then click Add to Favorites.

   The field is added to the Favorite Fields tab.
3. Optionally, after you define a value or define the limits for a field, click Save Value on the Filter dialog box.

   The next time that you carry out a search, you can simply open the Favorite Fields tab or the Saved Values tab to carry out a search based on your customized list of search fields.

Searching with the Resource Calendar

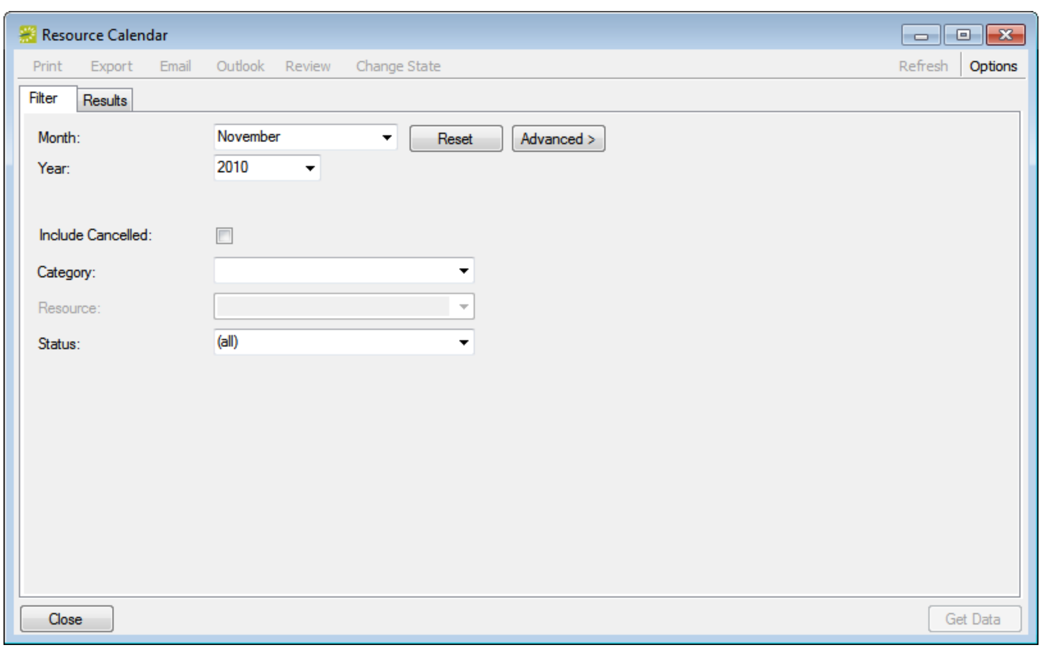
You use the Resource Calendar to search for a particular resource and determine how much of the resource (that is, how many individual items) is needed for a specific day or month in a specific year. For example, how many slices of key lime pie are needed in November, 2012? You can use the results of the search to assist you in managing the counts of the resources that your organization must ensure are available for scheduled events. When you carry out a search in the Resource Calendar, you can carry out a *basic search* or an *advanced search*. A *basic search* is based on the basic information that you specify for a resource item when you first create it, such as its category and status. An *advanced search* is a field level search that is carried out the booking level, the booking detail level, the booking detail item level, the reservation level, the service order level, or any combination of these. For example, in an advanced search, you can specify criteria as granular the date that the service order reminder was added. You can open a resource item that has been returned in the search results in the Navigator, and edit the item if needed.

To carry out a search in the Resource Calendar

1. On the EMS menu bar, click Reservations > Reservations > Resource Calendar.

   The *first* time that the Resource Calendar opens, the Filter tab is set by default to a Basic search; otherwise, the Filter tab is set to the search type (Basic or Advanced) that you last carried out.

Figure 4-14: Resource Calendar, Basic search



2. Click the Basic/Advanced toggle to select the type of search that is to be carried out, and then continue to one of the following:
   - “To carry out a basic search in the Resource Calendar.”
   - “To carry out an advanced search in the Resource Calendar” on page 218.

To carry out a basic search in the Resource Calendar

1. Leave the Month and Year set to the default values (current month and year), or optionally, enter different values as needed.
2. Enter the search criteria.

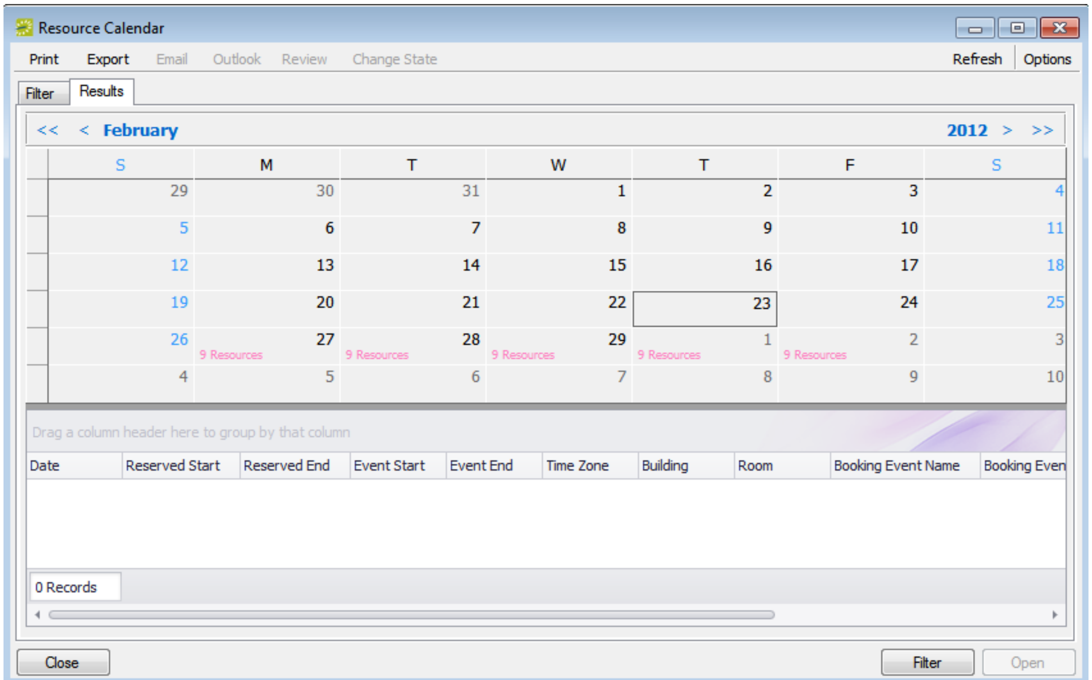
Field	Description
Include Cancelled	By default, search results are not set to show resource items for canceled reservations. Select this option to search for resource items in canceled reservations as well.
Category	Select a specific category (booking detail).
Resource	Available only if you select a category that is a resource or service order. Select a specific resource item.
Status	The default value is set to (all). You can leave this value as is, or you can select a specific booking status.

3. Optionally, click Options and edit the default values for one or more additional search options—Date/Time Filter, Number of Records to Return, Specific Room Filters, and Change Calendar Day Count Color.
4. Click Get Data or Refresh.

   The search results are displayed on the Results tab in a calendar view. The *total* number of resources in *all* bookings that meet the search criteria is indicated on the dates on which the events occur. The current day’s date is outlined in black. See Figure 4-15 on page 217.

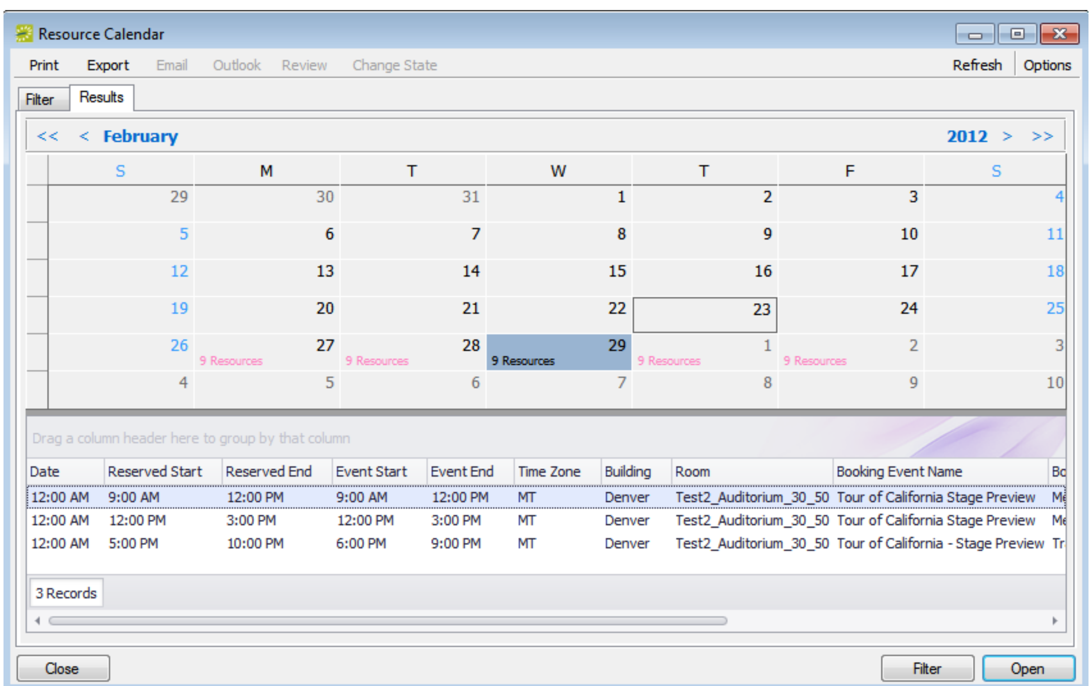
By default, the number of resources is indicated in red unless you selected a different color for the Change Calendar Day Count Color. Any color that you pick here is carried over to the same option for the Calendar.

Figure 4-15: Resource Calendar window, Results tab



5. Optionally, do one or more of the following:
   - Click on a date in the upper pane of the Results tab to view a list of bookings for the date in the lower pane of the tab.

Figure 4-16: Resource Calendar window, Results tab with list of events for selected dates



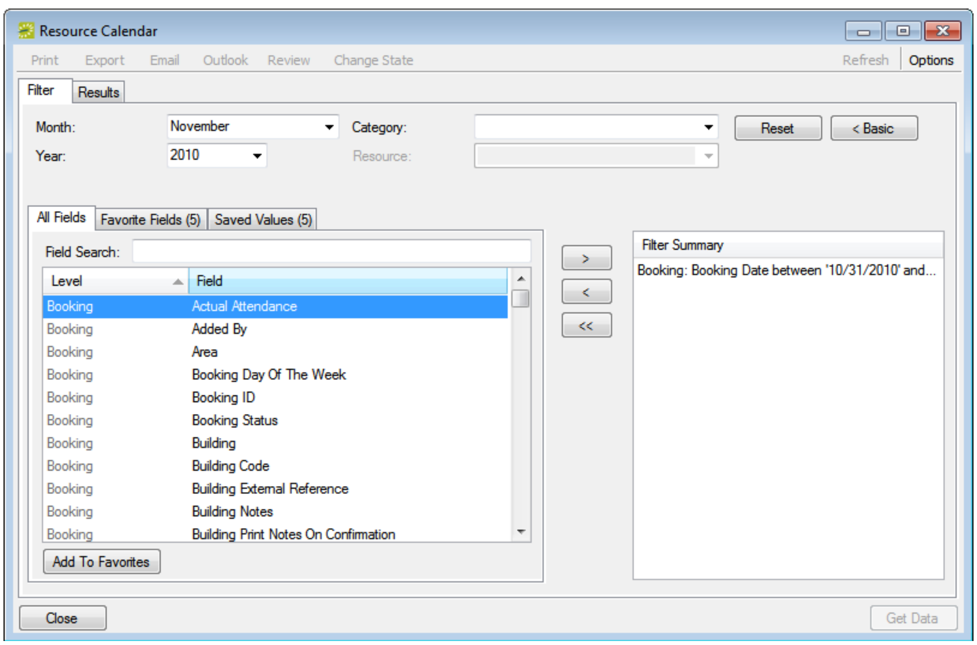
- The lower pane on the Results tab is an EMS Browser window. See "An EMS Browser Window" on page 35 for all the features that are available for this pane.
- Double-click an event entry on the Results tab to open the event in the Navigator.
- Click Print to print the search results.
- Click Export to export the search results to a Microsoft Excel spreadsheet.
- Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
- Click Refresh to requery the database based on the current search criteria.

6. Click Close.

   Any changes that you made to the search results columns (position and width) remain in effect for any other searches that you carry out. If you want to reset the columns to their default values, see "Resetting Column Settings" on page 408.

To carry out an advanced search in the Resource Calendar

Figure 4-17: Resource Calendar, Advanced search



1. Optionally, do one or both of the following:
   - The default values for the month and year are the current month and year. You can enter different values as needed.
   - Click Options and edit the default values for one or more additional search options—Date/Time Filter, Number of Records to Return, Specific Room Filters, and Change Calendar Day Count Color.

2. For *each* field level option by which to carry out the search:

   - Select the field level option, and then click the Move button (>).

To filter the list of available fields, in the Field Search field, enter a search string. Your search is limited to the exact order of the characters in the string, but the search string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of ***add*** *returns* ***Add****ed by, Date* ***Add****ed, and Group* ***Add****ress Line 1. The list of fields that meet your search criteria is dynamically updated as you enter your search criteria.*

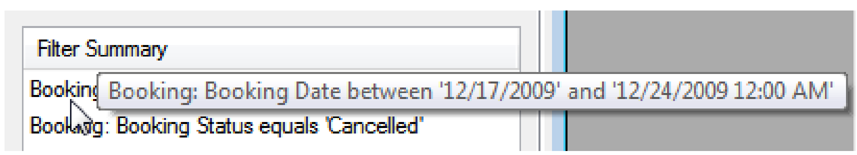
   - When prompted, enter a value or define the limits for the option, and then click OK.

   The option is moved to the Filter Summary list.

If you have specific fields and/or values by which you always want to carry out a search, then you can set up these fields to be your Favorite fields. See "To set up favorite fields for a Resource Calendar search" on page 221.

To view a selected field option in its entirety in the Filter Summary list, rest the mouse pointer on the entry. A tooltip showing the complete field option information opens.

Figure 4-18: Viewing a selected field option in the Filter Summary list

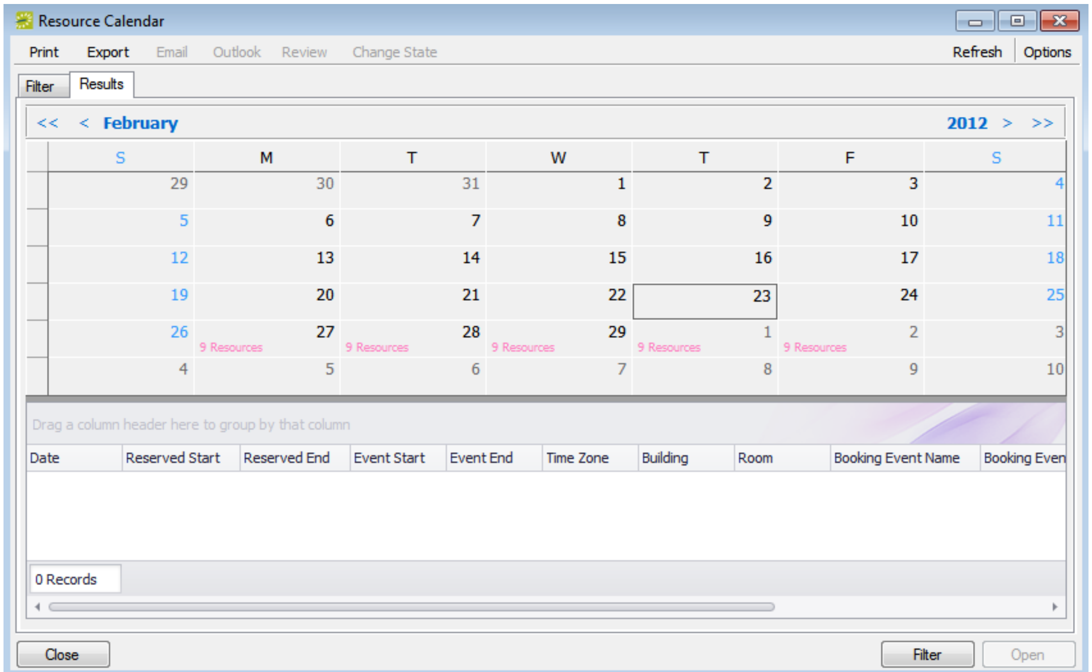


3. Click Get Data or Refresh.

   The search results are displayed on the Results tab in a calendar view. The *total* number of resources in *all* bookings that meet the search criteria is indicated on the dates on which the events occur. The current day's date is outlined in black. See Figure 4-19 on page 220.

By default, the number of resources is indicated in red unless you selected a different color for the Change Calendar Day Count Color.

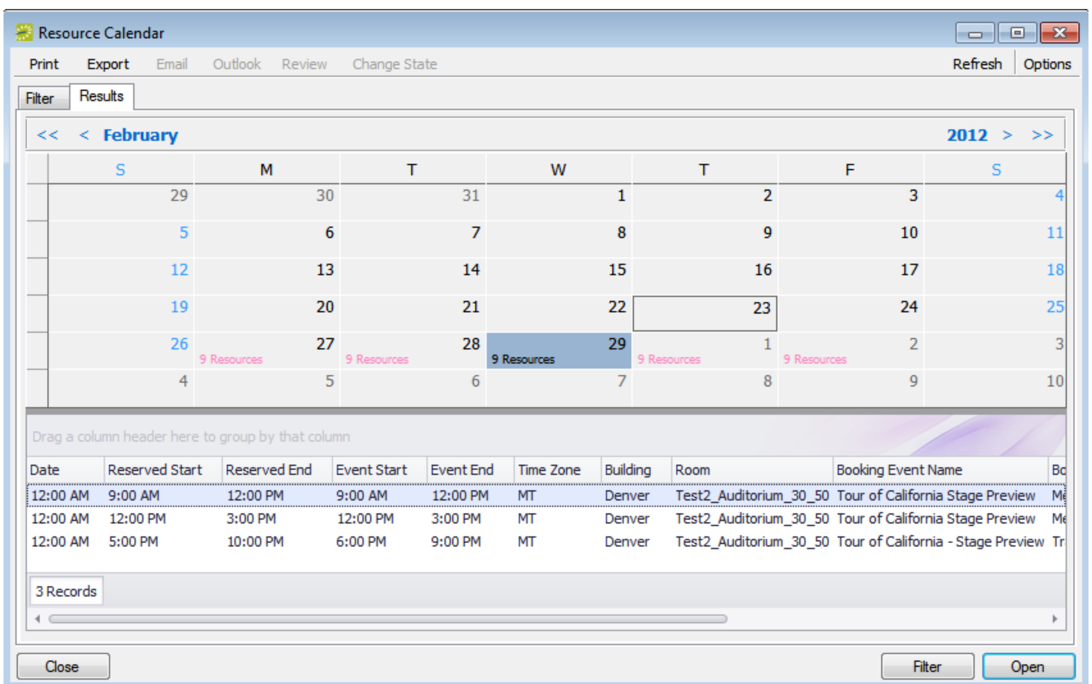
Figure 4-19: Resource Calendar, Results tab



4. Optionally, do one or more of the following:

   - Click on a date in the upper pane of the Results tab to view a list of bookings for the date in the lower pane of the tab.

Figure 4-20: Resource Calendar window, Results tab with list of events for selected dates



- The lower pane on the Results tab is an EMS Browser window. See "An EMS Browser Window" on page 35 for all the features that are available for this pane.
- Double-click an event entry on the Results tab to open the event in the Navigator.
- Click Print to print the search results.
- Click Export to export the search results to a Microsoft Excel spreadsheet.
- Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
- Click Refresh to requery the database based on the current search criteria.

5. Click Close.

   Any changes that you made to the search results columns (position and width) remain in effect for any other searches that you carry out. If you want to reset the columns to their default values, see "Resetting Column Settings" on page 408.

To set up favorite fields for a Resource Calendar search

If you have specific fields and/or values by which you always want to carry out a Resource Calendar search, you do not have to filter the list of fields on the All Fields tab for every search. Instead, you can set up each of these fields to be a favorite field with a specific value or limit if needed.

1. Open the Resource Calendar, and make sure that the Advanced search features are displayed.
2. For each field that you are setting up as favorite field, select the field on the All Fields tab, and then click Add to Favorites.

   The field is added to the Favorite Fields tab.
3. Optionally, after you define a value or define the limits for a field, click Save Value on the Filter dialog box.

   The next time that you carry out a search, you can simply open the Favorite Fields tab or the Saved Values tab to carry out a search based on your customized list of search fields.

Searching with the Service Order Management Browser

You use the Service Order Management browser to search for and view the resources with and without service orders for all bookings on a particular day as well as the current state of the resources and their Reviewed status. After viewing a resource, if applicable, you can change the state for a resource. You can review a resource, or you can mark a resource as unreviewed. You can also open a resource in the Navigator, and edit it if necessary.

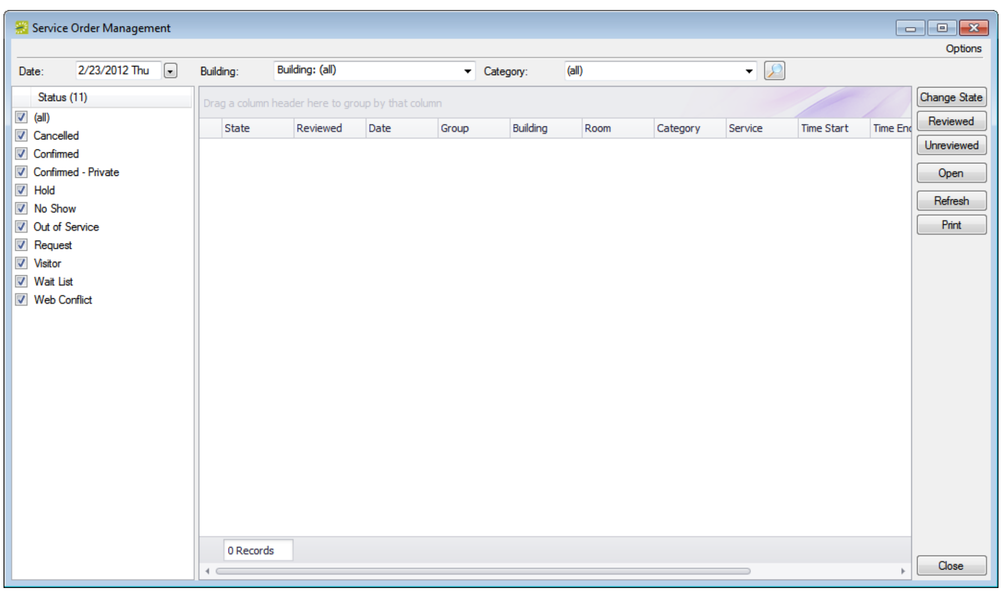
A category state is a process phase, or state, that describes the movement of a resource in the category through your organization's processes, for example, "Unassigned," "Assigned," "Out for Delivery," "In Prep," and so on. Your EMS administrator configures the states that are specific to your organization. Contact your EMS administrator for assistance with states.

To search with the Service Order Management browser

1. On the EMS toolbar, click the Manage Services icon.

   The Service Order Management window opens. When this window first opens, the display is static and you must manually refresh it. To set options for automatically refreshing the window's display, go to Step 2; otherwise, go to Step 4.

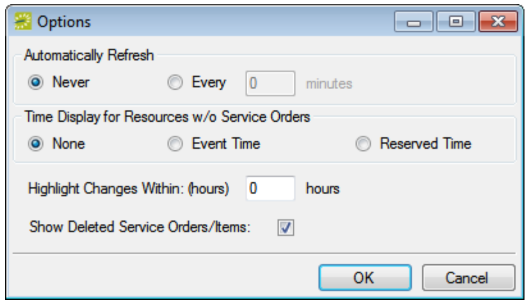
Figure 4-21: Service Order Management window



2. Click Options.

   The Options dialog box opens.

Figure 4-22: Options dialog box



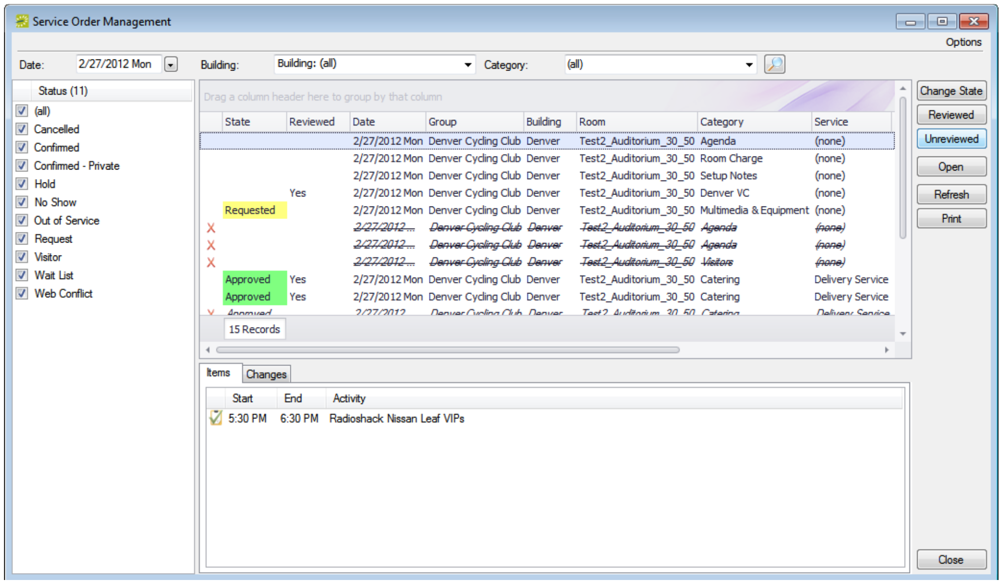
3. Edit the display options as needed for the Manage Services window, and then click OK to apply these changes.
4. To filter the search results, do one or more of the following:
   - Leave the Date set to the default value (the current day's date), or select a different date.
   - On the Building dropdown list, leave the value set to the default value (all buildings), or select a specific building, area, or view.
   - On the Category dropdown list, select the category by which to search.
   - In the Status pane, select one or more specific booking statuses, or select (all) statuses.
5. Click Refresh.

   A list of all bookings that meet your search criteria is displayed in the upper pane of the window.

   - If states are assigned to any of the resources in a booking, then the name of the state and if applicable, its color, is displayed in the State column for the booking. If a resource for a booking is of the type to which states can be assigned, but none has been assigned, then (none) is displayed in the State column for the booking.
   - If a resource has been reviewed for a booking, then "Yes" is displayed in the Reviewed column for the booking.
   - If your Options are set to show deleted service orders/items, then an "x" appears next to the booking for which the orders/items were deleted and a single line through the booking is displayed.

   See Figure 4-23 on page 224.

Figure 4-23: Service Order Management window with results



6. Optionally, do one or more of the following:

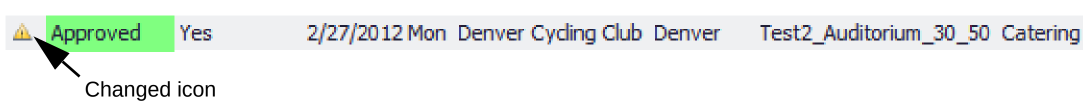
   - The upper pane on the Service Order Management window is an EMS Browser window. See "An EMS Browser Window" on page 35 for all the features that are available for this pane.

   - To view the resources (individual items) for a booking, select the booking. The resources are displayed on the Items tab in the lower pane of the window. See Figure 4-23 above.

   - To open an event in the Navigator and edit the resource item as needed, double-click the event entry on the Results tab. See "The Navigator," on page 77.

If you edit any information for a resource (quantity, notes, and so on) or the service order (service order time, estimated count, or so on) for a booking, then a Changed icon is displayed next to the booking.

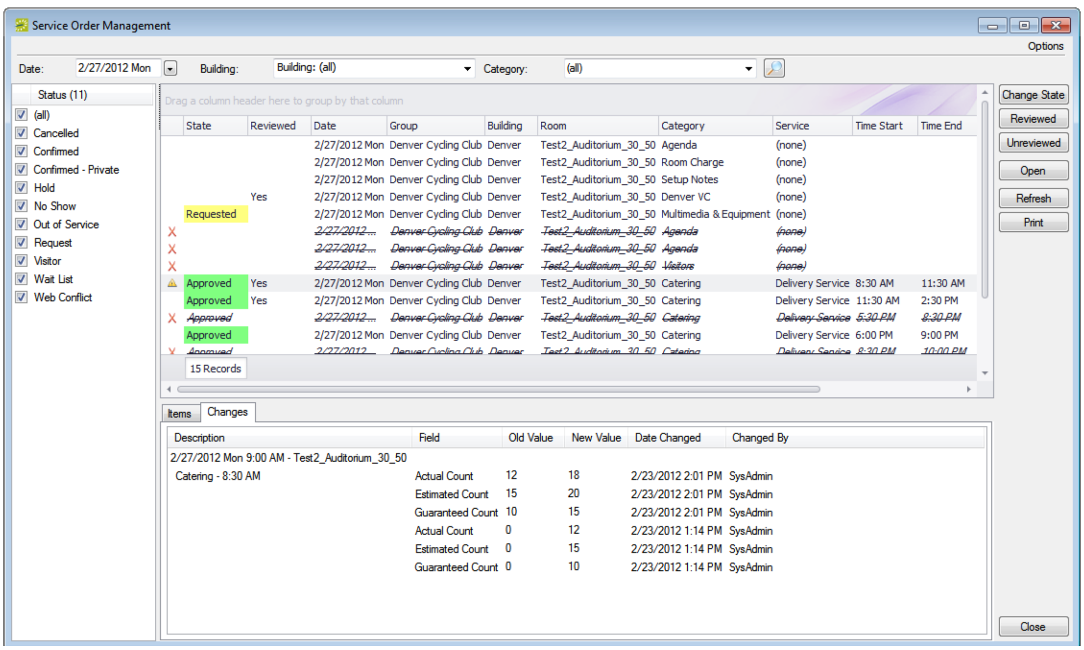
Figure 4-24: Booking with Changed icon



   - To mark a resource for a booking as reviewed, select the booking, or CTRL-click to select multiple bookings, and then click Reviewed. A message opens asking you if you are sure that you want to mark the resource as reviewed. Click Yes to close the message. "Yes" is displayed in the Reviewed column for the booking.

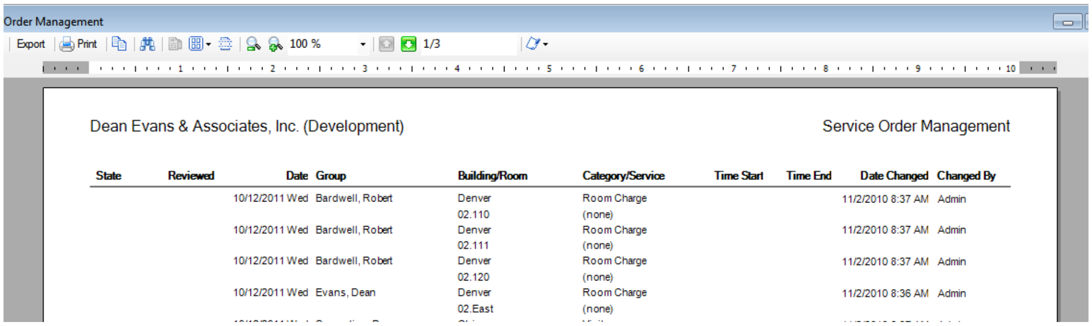
- To reverse the Reviewed status for a resource in a booking, select the appropriate booking, or CTRL-click to select multiple bookings, and then click Unreviewed. A message opens asking you if you are sure that you want to mark the selected resource as unreviewed. Click Yes to close the message. “Yes” is cleared from the Reviewed column for the booking.
- To change the state of the resources for a booking, select the booking, or CTRL-click to select multiple service orders *of the same category*, and then click Change State. A Change State dialog box opens. The dialog box lists all the available states for the resource. Select the new state for the resource on the State dropdown list.
- To view the changes made to the resources for a booking, select the booking, and then open the Changes tab in the lower pane of the window.

Figure 4-25: Viewing changes to a resource in the Service Order Management window



- To print the list of service orders that are displayed, click Print. An onscreen preview of the Service Orders list opens. The preview window contains options for printing a hard copy of the list, for emailing the list, and so on.

Figure 4-26: Onscreen preview for a printed reminder



- The Items tab and the Changes tab in the lower pane of the Service Order Management window have some of the same basic features as an EMS browser window. You can rearrange the column order by dragging a column to a new location using the column heading, you can change the width of the data columns, and you can sort the data columns on a tab in either ascending or descending sort order. See "An EMS Browser Window" on page 33.

- Make any necessary changes to the search criteria, and then click Refresh to repeat the search based on the new search criteria.

7. Click Close.

   Any changes that you made to the search results columns (position and width) remain in effect for any other searches that you carry out. If you want to reset the columns to their default values, see "Resetting Column Settings" on page 408.

EMS Dashboard

The Dashboard is a window that centralizes critical information about reservations in a single location. The information that is displayed on this window, including notifications, reminders, web reservations, and so on, provides you with the necessary input to manage your work in EMS.

This chapter covers the following topics:

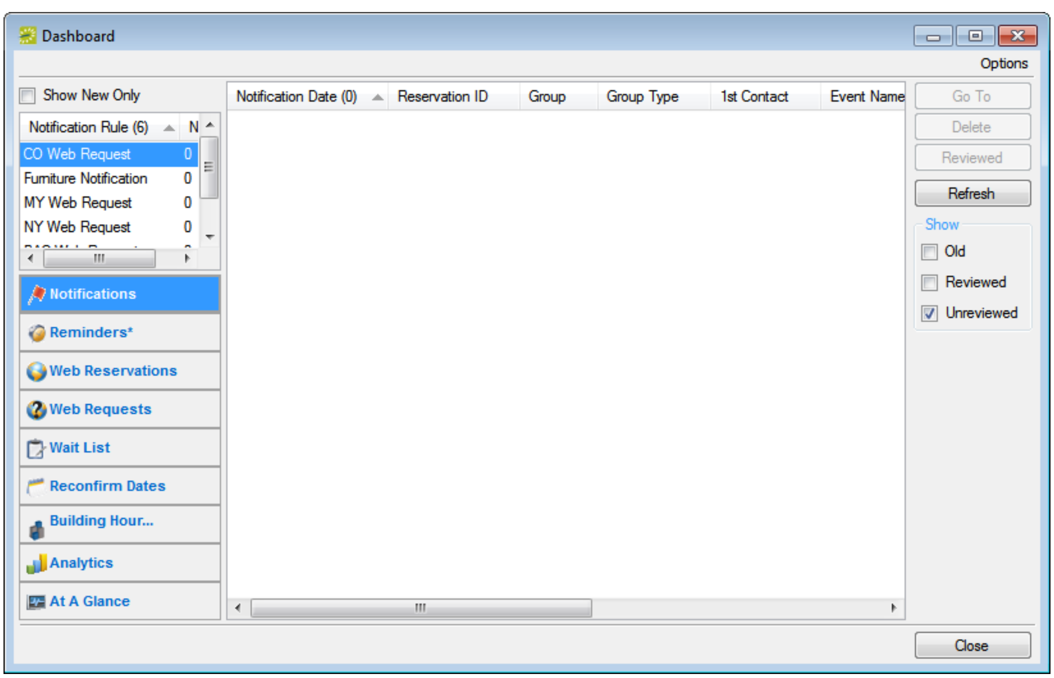
Overview of the EMS Dashboard and Dashboard Options

The Dashboard is a window that centralizes critical information about reservations in a single location. The information that is displayed on this window provides you with the necessary input to manage your work EMS. *By default*, when the window first opens, it has nine tabs—Notifications, Reminders, Web Reservations, Web Requests, Wait List, Reconfirm Dates, Building Hours Exceptions, Analytics, and At A Glance. If any tab on the Dashboard window has at least one record displayed on it, then, by default, when you log into EMS, the Dashboard window opens and the Dashboard icon on the main toolbar flashes briefly. Also, an asterisk (*) is displayed to the right of the tab name. All the tabs in the upper pane of the window have some of the basic features of an EMS browser window. You can sort the data columns on a tab in either ascending or descending sort order, you can rearrange the column order by dragging a column to a new location using the column heading, and you can change the width of the data columns.

For information about working with data columns on a Dashboard tab, see "To group data by columns in an EMS Browser window" on page 36 and "" on page 39.

You can change the default behavior of the Dashboard in the Dashboard Options dialog box. See "Dashboard options" on page 230. You can also click the Dashboard icon at any time to open the Dashboard window.

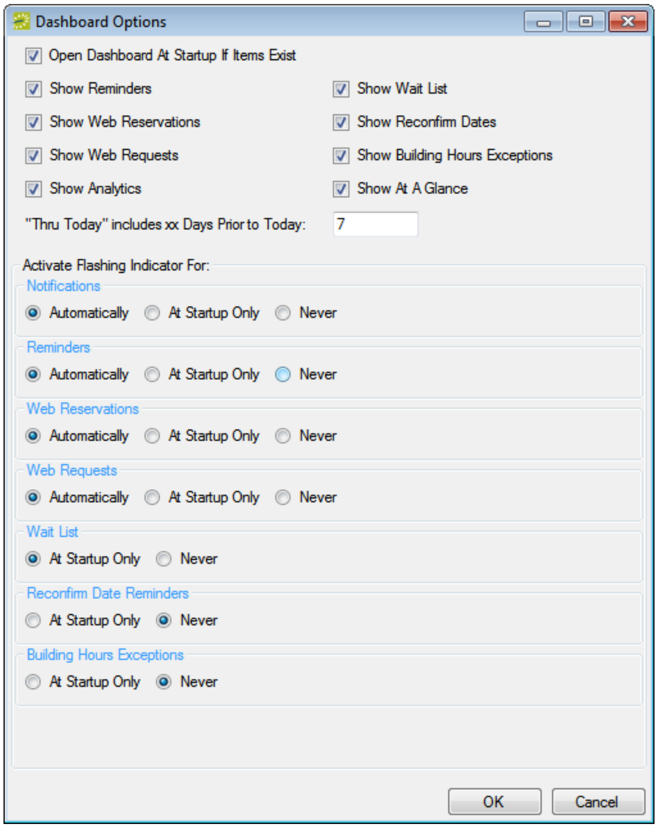
Figure 5-1: Dashboard window



Dashboard options

The appearance and functioning of your Dashboard window are determined by the values that you set for the Dashboard options. To view, and if needed, edit these values, in the upper right corner of the Dashboard window, click Options to open the Dashboard Options dialog box.

Figure 5-2: Dashboard options dialog box



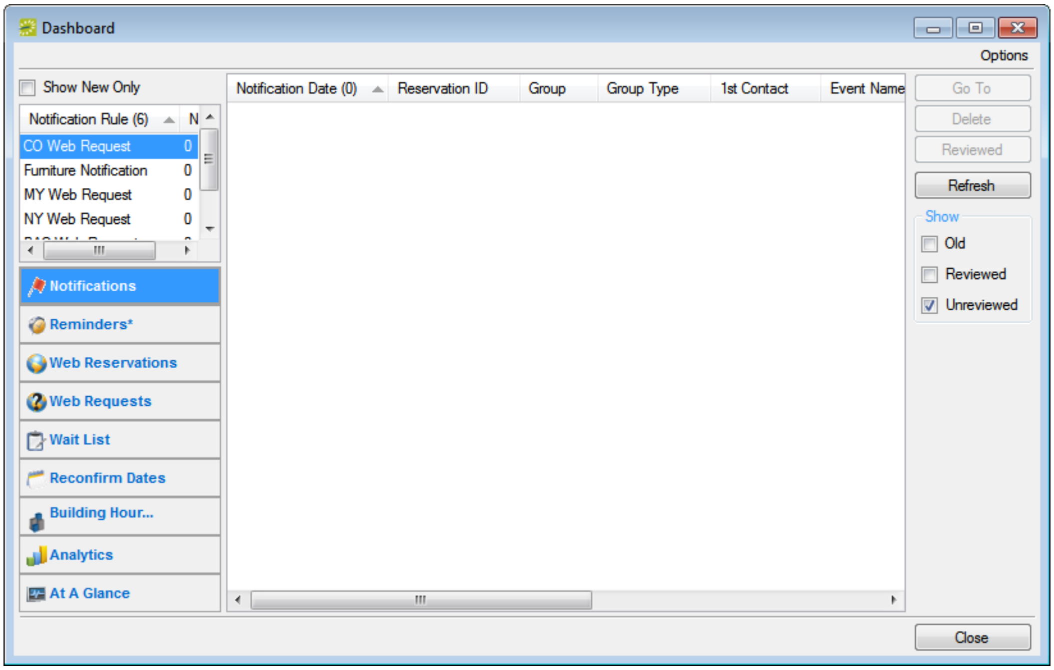
Option	Description
Open Dashboard At Startup If Items Exist	Selected by default. The Dashboard window opens automatically after you log into EMS if any tab displays at least one item.
• Show Reminders • Show Web Reservations • Show Web Requests • Show Analytics • Show Wait List • Show Reconfirm Dates • Show Building Hours Exceptions • Show At A Glance	Selected by default. Indicates the tabs that are to be displayed on the Dashboard window.

Option	Description
“Thru Today” includes xx Days Prior to Today	Indicates how far into the past that reminders are to be displayed in the “Thru Today” view. The default value is seven.
Activate Flashing Indicator For: • Notifications • Reminders • Web Reservations • Web Requests	Set on a per tab basis. Indicates when the Dashboard icon on the EMS toolbar is to flash if at least one item is displayed on any tab. Values are: • Automatically—Immediately when there is at least one record that is displayed on the indicated tab, even when you are working in EMS. • At Startup Only • Never
Activate Flashing Indicator For: • Wait List • Reconfirm Date Reminders • Building Hours Exceptions	Set on a per tab basis. Indicates when the Dashboard icon on the EMS toolbar is to flash if tasks on the tab require your attention. Values are: • At Startup Only • Never

Notifications Tab

Your EMS administrator can configure notification rules to alert you or groups of which you are a member when additions or modifications have been carried out in the EMS database such as the creation or modification of a booking, the creation or modification of a service order, the creation of a new web account, and so on.

Figure 5-3: Dashboard window, Notifications tab



When the Notifications tab *first* opens, all the notification rules that include you are listed in the Notification Rule pane (upper left pane) of the tab. Next to each rule, the number of *new* notifications (notifications with the current day's date) is displayed. The tab is interactive. You can:

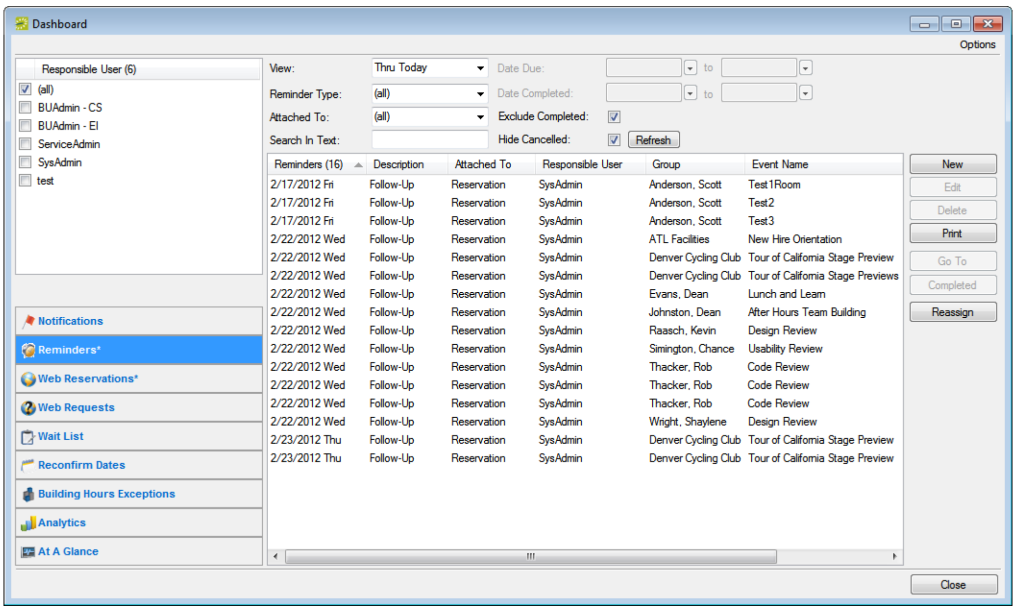
- Select a rule to view all unreviewed notifications for future bookings.
- Select a rule, and under Show, select Reviewed to view all reviewed notifications for future bookings.
- Select a rule, and under Show, select Old to view all notifications for past bookings.
- Select a notification to view detailed information about the notification (such as new bookings, the changes made to a booking, and the users who were notified of the changes) in a pane at the bottom of the window.
- Select Show New Only to show only new notifications (notifications with the current day's date) for the notification rules.
- Select a notification, and then click Reviewed to mark a notification as "Reviewed."

- Select a notification and then click Go To to open the item to which the notification refers.
  - If the notification is attached to a reservation, booking, or booking detail, then the reservation opens in the Navigator, and the appropriate folder (Reservation, Booking, or Booking Detail) is automatically selected.
  - If the notification is attached to a group, then the Group window opens with the group information displayed in the window.
- Click Refresh to check for notifications that have been issued since you opened the Dashboard.
- Select a notification, or CTRL-click to select multiple notifications, and then click Delete to delete the notifications from the Notifications tab.

Reminders Tab

A *comment* is a text entry that explains or clarifies a reservation, booking, group, or service order. A *reminder* is a comment that has a due date associated with it. The Reminders tab displays all the reminders for which you are the responsible user and that, by default, have a due date through the current day's date.

Figure 5-4: Dashboard window, Reminders tab



The tab is interactive. You can:

- View a list of reminders for other responsible users and/or set the criteria for which reminders that you want to view. See "To change the Reminders tab view" on page 235.
- Create an unattached reminder. "To create an unattached reminder" on page 236.
- Edit a reminder. "To edit a reminder" on page 237.
- Delete a reminder. "To delete a reminder" on page 237.
- Print a reminder. "To print a reminder" on page 238.
- Go to the item to which a reminder is attached. See "To go to the item to which a reminder is attached" on page 238.
- Complete a reminder. See "To complete a reminder" on page 238.
- Reassign multiple reminders from one EMS user to another. See "To reassign multiple reminders between EMS users" on page 239.

To change the Reminders tab view

By default, when the Dashboard window first opens, the Reminders tab displays all the reminders for which you are the responsible user and that have a due date through the current day's date. You can do one or more of the following to change this view:

- To view the reminders for which other users are responsible, simply select the user or users in the Responsible User pane.
- To view only a specific group of reminders for which you or others are the responsible users, change the viewing criteria.

Option	Description
View	View reminders that have the indicated due date. The default value is Thru Today. If a value from the pre-configured list does not meet your needs, then select (user specified) and in the Date Due fields, enter at least a Starting due date. The Ending due date is optional.
Reminder Type	The default value is (all).
Attached To	The default value is (all). To view reminders that are not attached to any item (reservation, booking, group, or service order), select (none). See "To create an unattached reminder" on page 236.
Search in Text	Enter the string by which to search for specific reminders. (The search is carried out on the Notes field for the reminder.) Your search is limited to the exact order of the characters in the string, but the search string is not-case sensitive and it can appear anywhere in the search results. For example, a search string of **cat** returns reminders that have "**cat**ering" or "Mary's **cat**ering" in the Notes field.
Date Completed	Available only if Exclude Complete is not checked.
Exclude Completed	Selected by default. Clear this option to display completed reminders in the Reminders list. To display completed reminders that meet the other viewing criteria, regardless of their completion dates, leave the Date Completed fields blank; otherwise, to view completed reminders that were completed by a specific date, you can enter a Starting date or a date range in the Date Completed fields.
Hide Cancelled	Not selected by default. Select this option to display canceled reminders in the Reminders list.

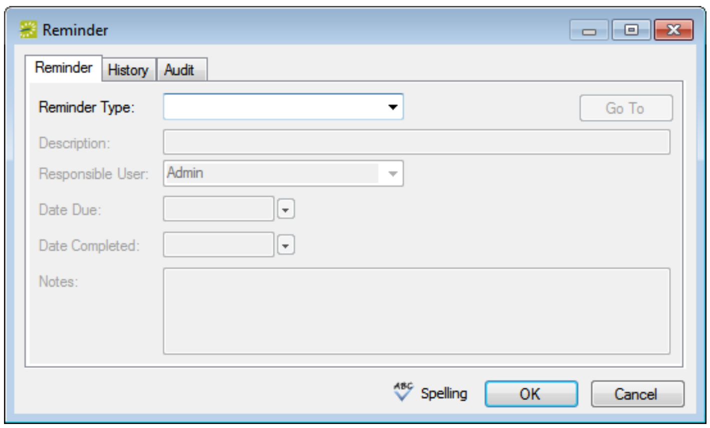
To create an unattached reminder

When you create reminder on the Navigator, the reminder is attached to a specific reservation, booking, or booking detail. Similarly, when you create a reminder on the Groups window, the reminder is attached to a specific group. If needed, however, you can create a reminder that addresses just your general business needs and is not attached to any specific item. For example, you can create a reminder about “preparing for your organization’s yearly safety inspection.” Any reminder that you create from the Reminders tab on the Dashboard window is an *unattached* reminder.

1. Click New.

   The Reminder dialog box opens.

Figure 5-5: Reminder dialog box



2. Do one of the following:
   - Select a Reminder Type.
   - If none of the pre-configured Reminder Types meets your working needs, then select (user-specified), and in the Description field, enter a description for the reminder type.

   The Responsible User field is populated with your User ID and the Date Due field is populated with the current day’s date.

3. Optionally, change the value for the Responsible User, the Date Due, or both.
4. If you are completing the reminder today, select a Date Completed; otherwise, leave this field blank. (This field is populated automatically when you or another user completes the reminder. See “To complete a reminder” on page 238.)
5. Optionally, do one or both of the following:
   - In the Notes field, enter any further explanation or information about the reminder.
   - Click Spelling to spell check the reminder before you save it.

6. Click OK.

   The Reminder dialog box closes. The newly created reminder is not attached to an item. It might or might not be displayed in the Reminders list depending on the values that you have set for filtering the display.

To edit a reminder

1. On the Reminders list, select the reminder that you are editing, and then click Edit.

   The Reminder dialog box opens. The dialog box is populated with the current information for the reminder.

2. Edit the reminder as needed.
3. Optionally, click Spelling to spell check the reminder before you save the edited reminder.
4. Click OK.

   The Reminder dialog box closes. If the reminder is attached to an item such as a reservation, then the reminder remains attached; otherwise, it is saved as an unattached reminder.

To delete a reminder

You can delete any reminder (attached or unattached) regardless of its due date and regardless if it is completed.

1. On the Reminders list, select the reminder that you are deleting, and then click Delete.

   A message opens asking you if it is OK to delete the reminder.

2. Click Yes.

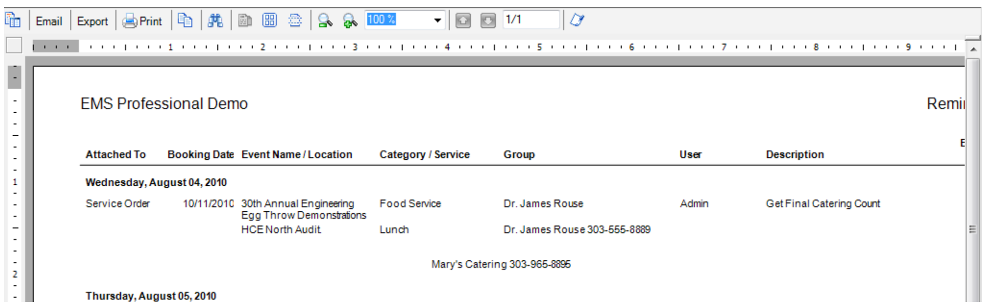
   The message closes and the reminder is deleted.

To print a reminder

1. On the Reminders list, select the reminder that you are printing, and then click Print.

   An onscreen preview of the reminder opens. The preview window contains options for printing a hard copy of the reminder, for emailing the reminder, and so on.

Figure 5-6: Onscreen preview for a printed reminder



2. Select the option or options that best fit your working needs.

To go to the item to which a reminder is attached

On the Reminders list, select a reminder, and then click Go To.

The Attached To column for the reminder must state anything other than "Unattached."

- If the reminder is attached to a reservation, booking, or booking detail, then the reservation opens in the Navigator, and the appropriate folder (Reservation, Booking, or Booking Detail) is automatically selected.
- If the reminder is attached to a group, then the Group window opens, with the group information displayed in the window.

To complete a reminder

1. On the Reminders list, select the reminder, or CTRL-click to select the multiple reminders that you are completing.
2. Click Completed.

   A message opens asking you if it is OK to set the selected reminders as completed.
3. Click Yes.

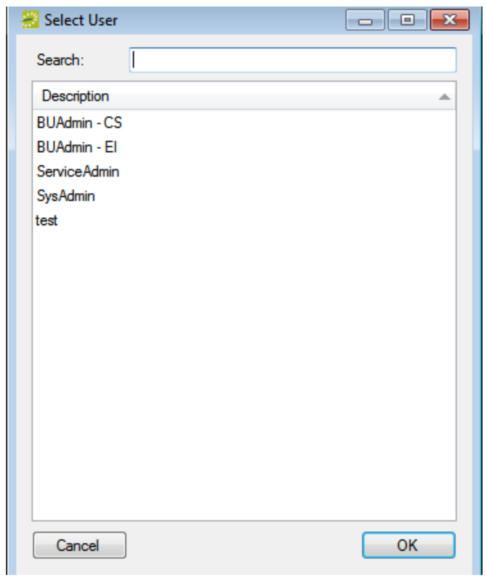
   The message closes. The reminders are completed with a date equal to the current day's date. The reminders might or might not be displayed in the Reminders list depending on the values that you have set for filtering the display.

To reassign multiple reminders between EMS users

1. On the Reminders list, select the reminder, or CTRL-click to select the multiple reminders that you are reassigning.
2. Click Reassign.

   The Select User dialog box opens. This dialog box lists all the users for your EMS implementation.

Figure 5-7: Select User dialog box



3. Select the user to whom you are reassigning the reminder.

---

*To search for a user, enter a search string in the Search field. The search string is limited to the exact order of the characters in the string, but the search string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **Admin** returns both **Admin** users and Sys**Admin**. The list of users that meet your search string is dynamically updated as you enter the string.*

4. Click OK.

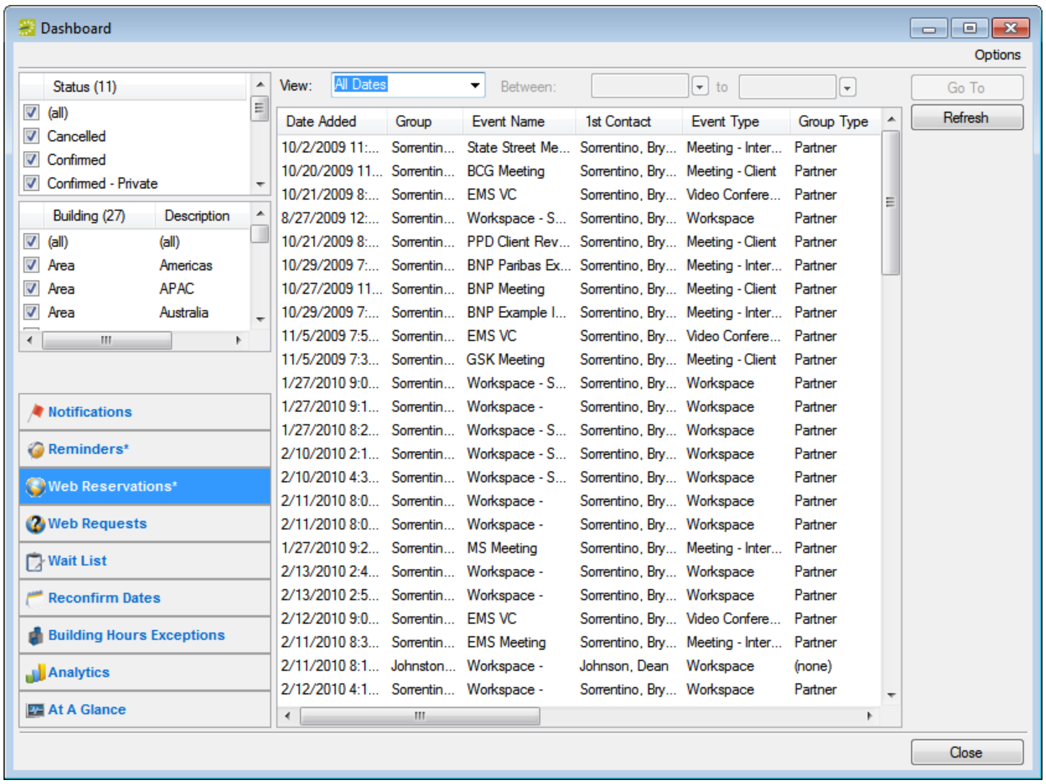
   A message opens, asking you if you are sure that you want to reassign the selected reminders to the user.
5. Click Yes.

   The Select User dialog box and message close and the reminder is reassigned.

Web Reservations Tab

The Web Reservation tab displays any reservation that was submitted through VEMS for web process templates that are set to Self Serve mode.

Figure 5-8: Web Reservations tab



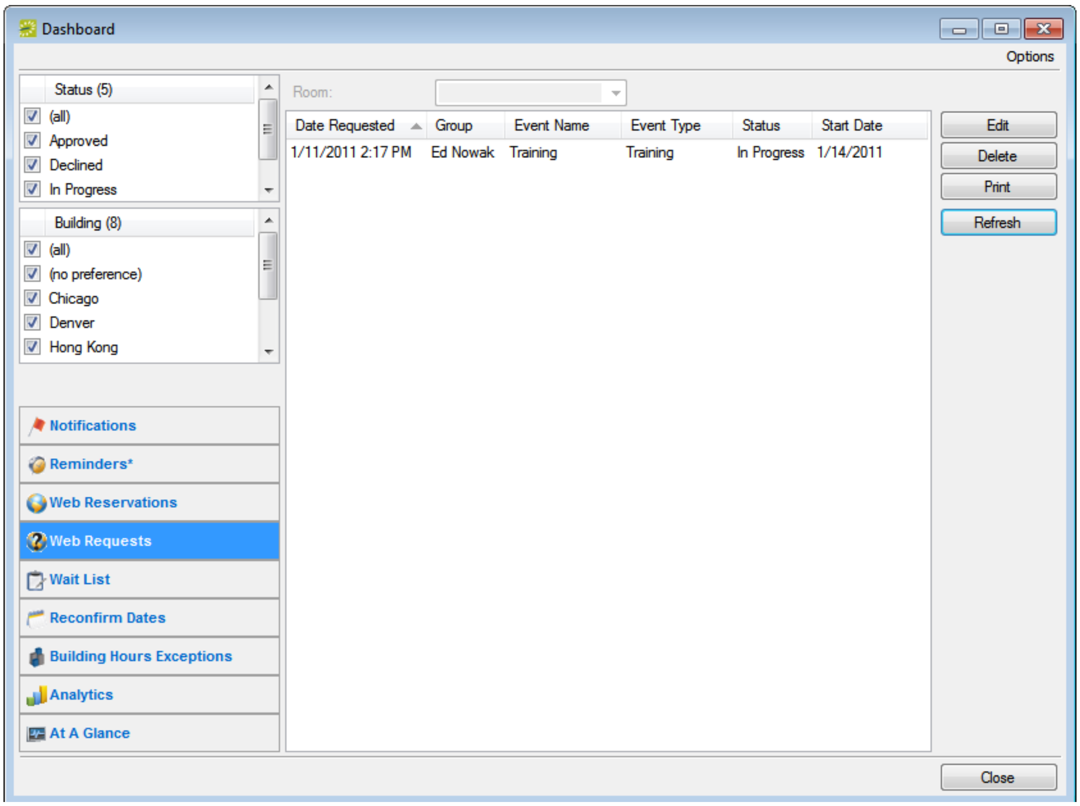
The tab is interactive. You can:

- Select options to filter the reservations that are displayed on the tab. After you select or edit the filtering options, click Refresh.
  - Status and Building/Area/View options are displayed on the left pane of the tab. You can select one or more statuses, or you can select all statuses in a single step. You can select a specific building, area, and/or view, or you can select all buildings, areas, and views in a single step.
  - Date options are displayed on the View list at the top of the right pane of the tab. You can view reservations for the indicated due date. The default value is Thru Today. If a value from the pre-configured list does not meet your needs, then select (user specified) and in the Date Due fields, enter at least a Starting due date. The Ending due date is optional.
- Select the reservation in the Reservations list, and then click Go To to open the reservation in the Navigator.

Web Requests Tab

The Web Requests tab displays any reservation that was submitted through VEMS for web process templates that are set to Request mode. A request that has not yet been processed has a status of Pending.

Figure 5-9: Dashboard window, Web Requests tab



The tab is interactive. You can:

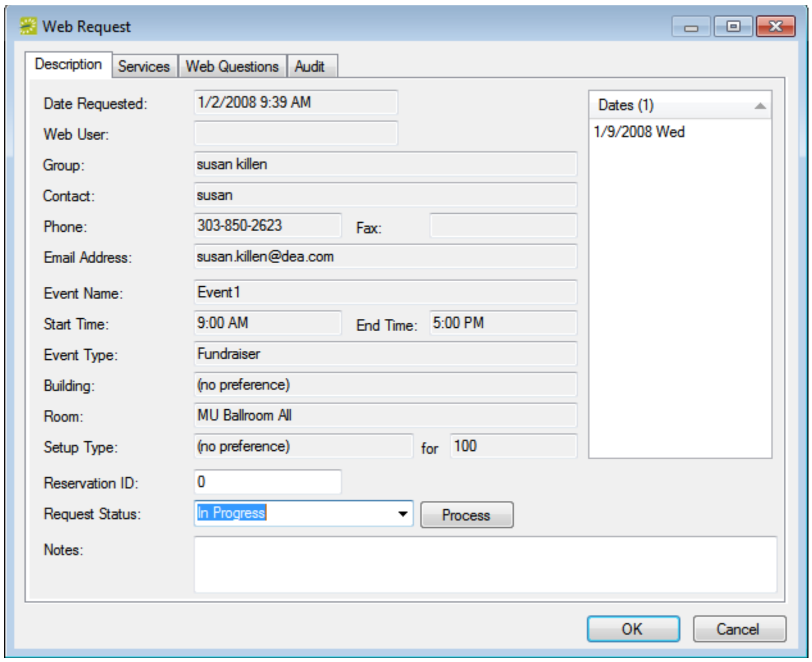
- Select options to filter the reservations that are displayed on the tab. After you select or edit the filtering options, click Refresh.
  - Status and Building/Area/View options are displayed on the left pane of the tab. You can select one or more statuses, or you can select all statuses in a single step. You can select a specific building, area, and/or view, or you can select all buildings, areas, and views in a single step.
  - Room options are displayed on the Room list at the top of the right pane of the tab. To enable the Room list, you must select a *specific* building.
- Edit a web request, including processing it. See "To edit a web request" on page 242.
- Delete a web request. See "To delete a web request" on page 244.
- Print a web request. See "To print a web request" on page 244.

To edit a web request

1. Select the web request that you are editing, and then click Edit.

   The Web Request dialog box opens. All of the information that was submitted for the request through VEMS is displayed in the dialog box. The dialog box always has a Description tab, a Web Questions tab, and an Audit tab. If the request included resources or setup notes, it also has a Services tab.

Figure 5-10: Web Request dialog box



2. Do one of the following:

   - Edit the request as necessary *without* processing it and then click OK. When editing the request without processing it, optionally, you can do one or more of the following:

     - If you have questions about the request or want to confirm some information (for example, “Will alcohol be served at the event?”) before you process the request, you can enter these questions or comments in the Notes field on the Description tab. A web user can see these notes when viewing the request in VEMS and you can wait for a response before deciding whether to process the request.

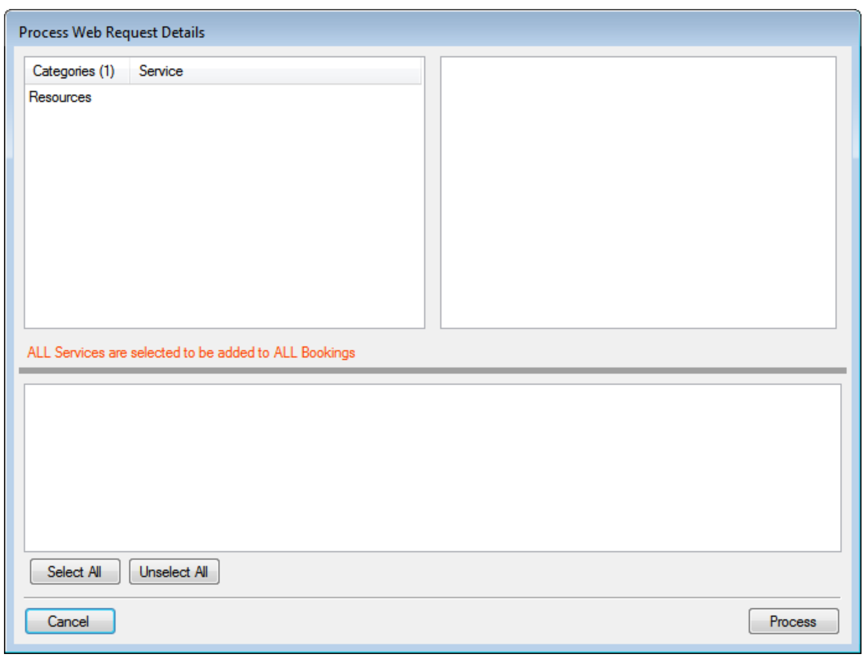
     - In addition, to indicate that you are reviewing the request before you process it, you can set the status of the request to In Progress on the Description tab. A web user can see this status when viewing the request in VEMS.

  - If the request required questions to be answered on the web, open the Web Questions tab to see the questions and the user's answers.
  - If the request includes resources, open the Services tab to see what the request includes. To view the details for each category, double-click a category to display its associated details in the right pane.
- To process the request and create a true reservation for the request in your EMS database, on the Description tab, click Process.

  The reservation opens in the Reservation Wizard. Continue to "Making a Reservation Using the Reservation Wizard" on page 45.

After you create a true reservation using the Wizard and the reservation includes a request for services, the Process Web Request Details window opens. (See Figure 5-11 below.) You can process the services immediately using the options on this window, or to process the services at a later date, click Cancel to close the window. You can then open the reservation on the Web Requests tab, and on the Services tab, click Process.

Figure 5-11: Process Web Request Details window



To delete a web request

1. Select the web request, or CTRL-click to select the multiple requests that you are deleting, and then click Delete.

   A message opens asking you if it is OK to delete the selected web requests.

2. Click Yes.

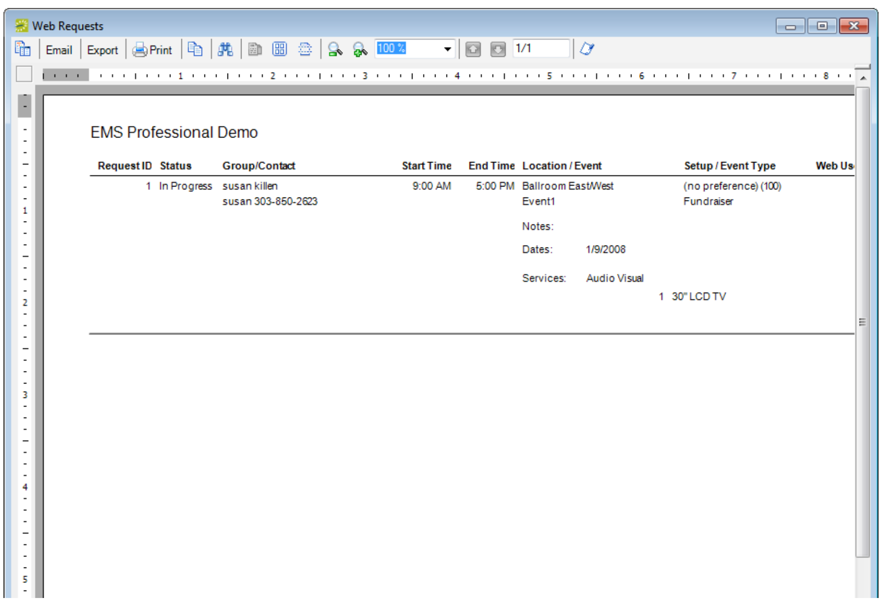
   The message closes. The selected web requests are deleted.

To print a web request

1. Select the web request, or CTRL-click to select the multiple requests that you are deleting, and then click Print.

   An onscreen preview of the selected requests opens. A variety of options are available from this preview, including the options to print a hard copy of the requests, to export the requests to a .pdf, and to email the requests.

Figure 5-12: Print preview for a web request

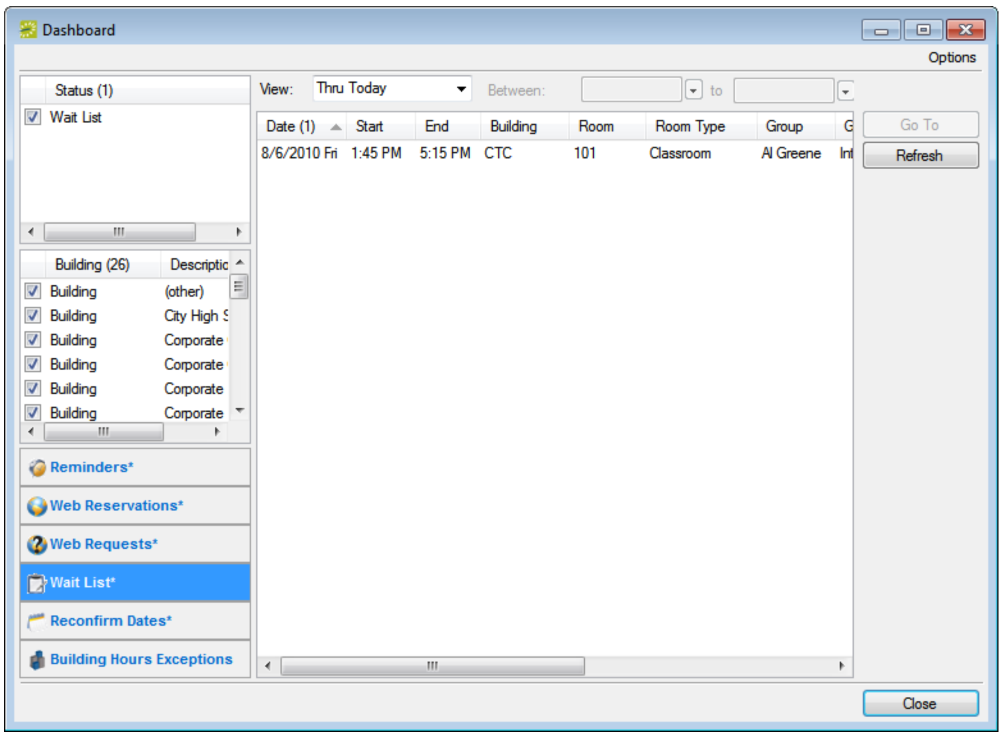


2. Select the option or options that best fit your working needs.

Wait List Tab

The Wait List tab provides you a way of monitoring wait-listed reservations. It also provides an indicator when the requested room becomes available.

Figure 5-13: Wait List tab



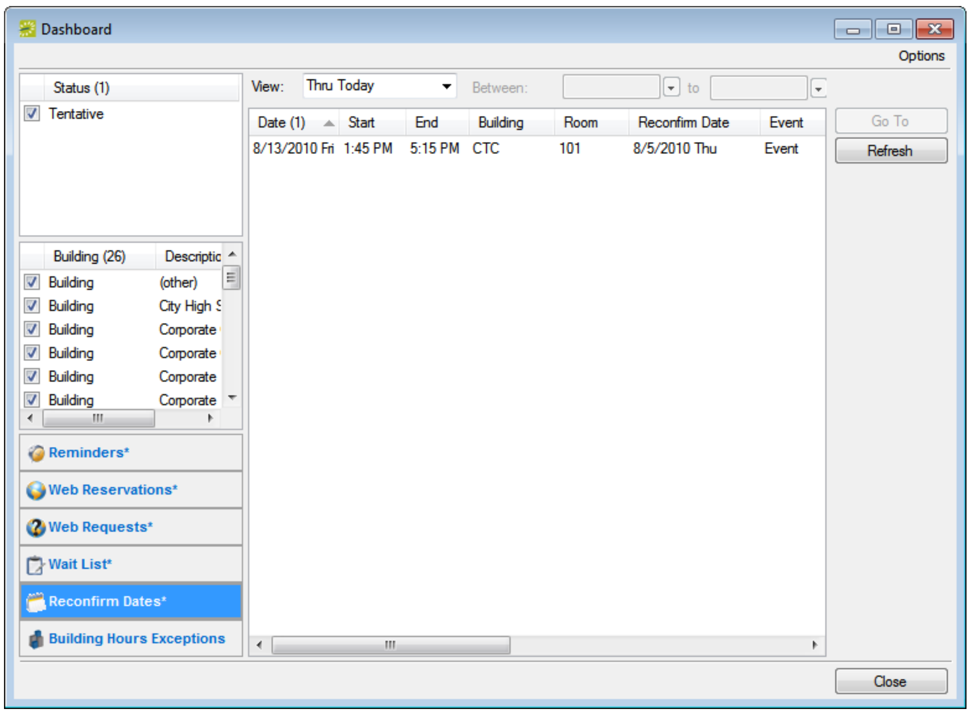
The tab is interactive. You can:

- Select options to filter the reservations that are displayed on the tab. After you select or edit the filtering options, click Refresh.
  - Status and Building/Area/View options are displayed on the left pane of the tab. You can select one or more statuses, or you can select all statuses in a single step. You can select a specific building, area, and/or view, or you can select all buildings, areas, and views in a single step.
  - Date options are displayed on the View list at the top of the right pane of the tab. You can view reservations for the indicated due date. The default value is Thru Today. If a value from the pre-configured list does not meet your needs, then select (user specified) and in the Date Due fields, enter at least a Starting due date. The Ending due date is optional.
- Select the reservation in the Reservations list, and then click Go To to open the reservation in the Navigator.

Reconfirm Dates Tab

The Reconfirm Dates tab displays reservations that have been booked in a status that requires the Reconfirm Date option (for example, a Tentative or Hold status). The list of reservations is automatically sorted in ascending order by Reconfirm Date. You use this tab as a reminder to reconfirm such reservations.

Figure 5-14: Reconfirm Dates tab



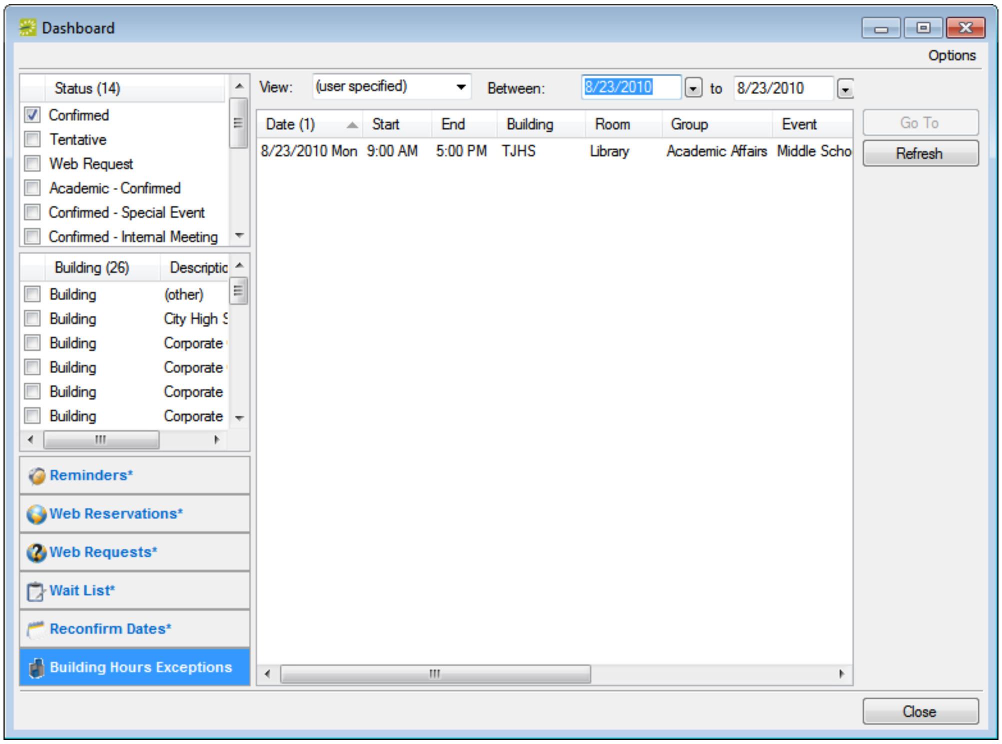
The tab is interactive. You can:

- Select options to filter the reservations that are displayed on the tab. After you select or edit the filtering options, click Refresh.
    - Status and Building/Area/View options are displayed on the left pane of the tab. You can select one or more statuses, or you can select all statuses in a single step. You can select a specific building, area, and/or view, or you can select all buildings, areas, and views in a single step.
    - Date options are displayed on the View list at the top of the right pane of the tab. You can view reservations for the indicated due date. The default value is Thru Today. If a value from the pre-configured list does not meet your needs, then select (user specified) and in the Date Due fields, enter at least a Starting due date. The Ending due date is optional.
- Select the reservation in the Reservations list, and then click Go To to open the reservation in the Navigator.

Building Hours Exceptions Tab

The Building Hours Exceptions tab displays reservations that occur outside of configured building hours.

Figure 5-15: Building Hours Exceptions tab



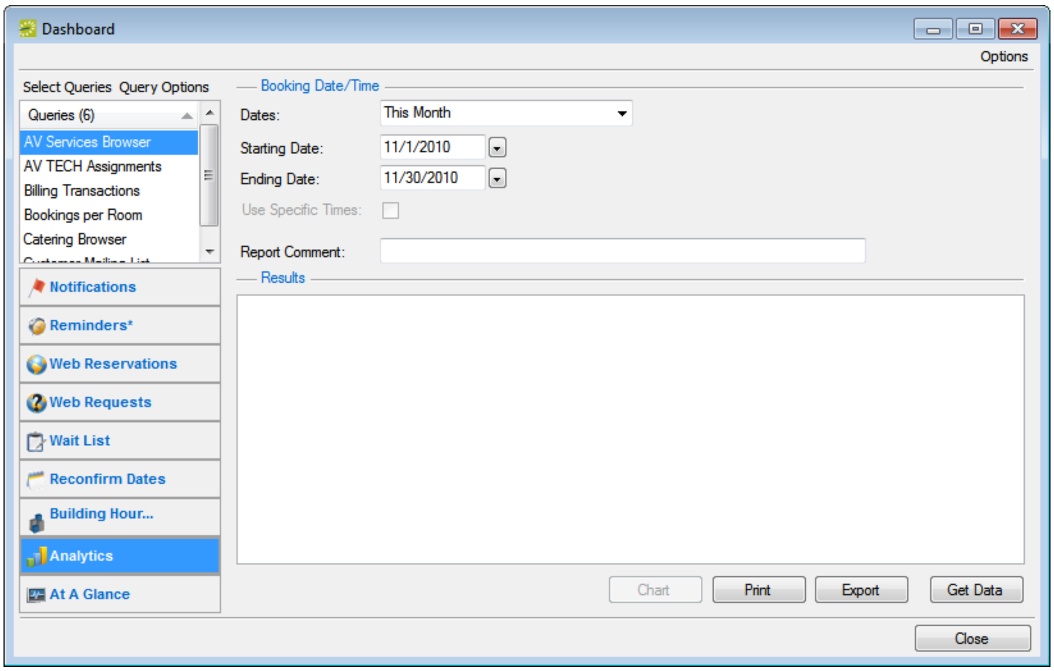
The tab is interactive. You can:

- Select options to filter the reservations that are displayed on the tab. After you select or edit the filtering options, click Refresh.
    - Status and Building/Area/View options are displayed on the left pane of the tab. You can select one or more statuses, or you can select all statuses in a single step. You can select a specific building, area, and/or view, or you can select all buildings, areas, and views in a single step.
    - Date options are displayed on the View list at the top of the right pane of the tab. You can view reservations for the indicated due date. The default value is Thru Today. If a value from the pre-configured list does not meet your needs, then select (user specified) and in the Date Due fields, enter at least a Starting due date. The Ending due date is optional.
- Select the reservation in the Reservations list, and then click Go To to open the reservation in the Navigator.

Analytics Tab

The Analytics tab provides quick access for queries that have been defined using the Query builder and to which you have access as a user. You can run these queries from the Analytics tab.

Figure 5-16: Dashboard window, Analytics tab



To run a query from the Analytics tab, do the following:

1. In the upper left corner of the Analytics tab, click Select Queries.

   The Queries dialog box opens. This dialog box lists the queries that have been defined using the Query builder and to which you have access.

2. Select the queries that you want to run, and then click OK.

   The Queries dialog box closes. The selected queries are displayed in the Queries pane (upper left) on the Analytics tab.

3. In the Queries pane, select the query that you want to run, and then select the date for which the data in your EMS database is to be queried.

Option	Description
Custom	The starting date is set to the first day of the month and the ending date is set to the last day of the month but you can edit one or both of these dates. **Note:** For some queries, if you select Custom, a Use Specific Times option becomes available. If you enter the same date for the starting date and ending date, you can select Use Specific Times, and then enter a starting time and ending time to query the data for in specific time range on the same day.
Last Month	The starting date is set to the first day of the previous month and the ending date is set to the last day of the previous month.
Last Quarter This Quarter This Quarter To Date	Quarters are based on a calendar year: • First quarter is 1/1 through 3/31. • Second quarter is 4/1 through 6/30. • Third quarter is 7/1 through 9/30. • Fourth quarter is 10/1 through 12/31. For example, if the current day's date is 11/22/2010, and you select Last Quarter, then the starting date is set to 7/1/2010 and the ending date is set to 9/30/2010.
Last Year	The starting date is set to 1/1 of the previous year, and the ending date is set to 12/31 of the previous year.
This month	The starting date is set to the first day of the current month and the ending date is set to the last day of the current month.
This Year	The starting date is set to 1/1 of the current year, and the ending date is set to 12/31 of the current year.
This Year to Date	The starting date is set to 1/1 of the current year, and the ending date is set to the current day's date.

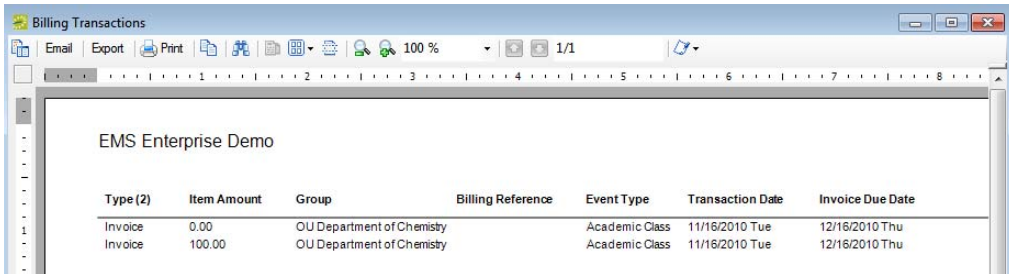
4. Optionally, in the Report Comment field, enter a description or explanation of the query.
5. Click Get Data.

   If the query returns data, then the results are displayed in the Results pane on the Analytics tab.
6. Optionally, do one or more of the following:
   - To export the query results to an Excel spreadsheet or to an XML file, click Export, and then select the appropriate file type. A dialog box opens in which you can specify the file name (the default file name is the name of the query, but you can always edit this), and the location to which to save the file.

The file type for an Excel spreadsheet is .xl or .xls and you cannot change this. The file type for an XML file is .xml and you cannot change this.

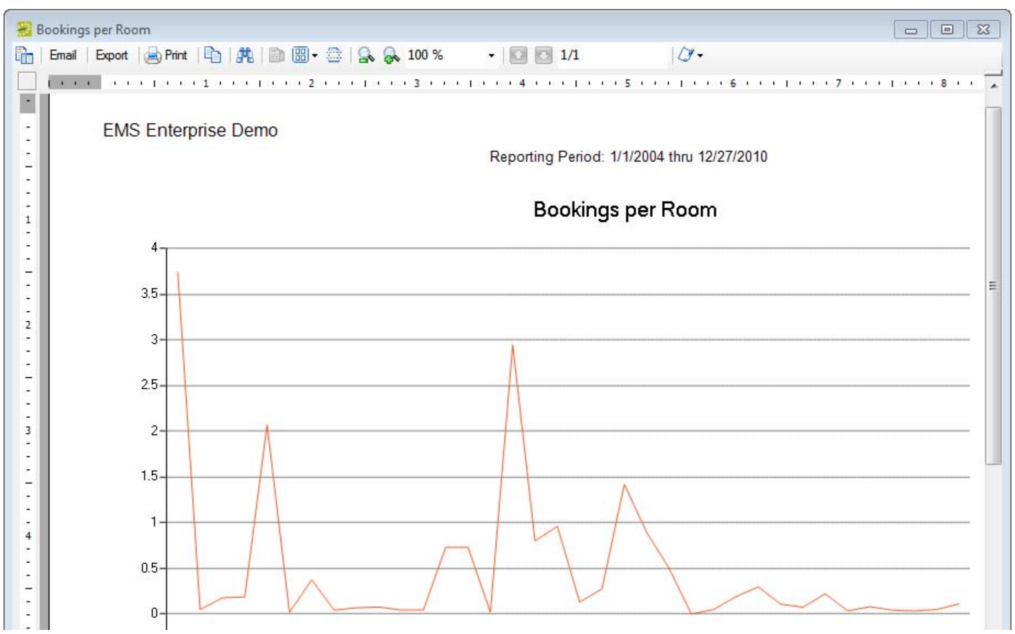
- To generate an onscreen preview of the printed query results, click Print. The preview window contains options for printing a hard copy of the query results, for emailing the results, and so on. Select the option or options that best fit your working needs.

Figure 5-17: Onscreen preview of a query results



- If the query has been defined with a Chart, the Chart option is enabled. Click Chart to generate an onscreen preview of the charted data. The preview window contains options for printing a hard copy of the chart, for emailing the chart, and so on. Select the option or options that best fit your working needs.

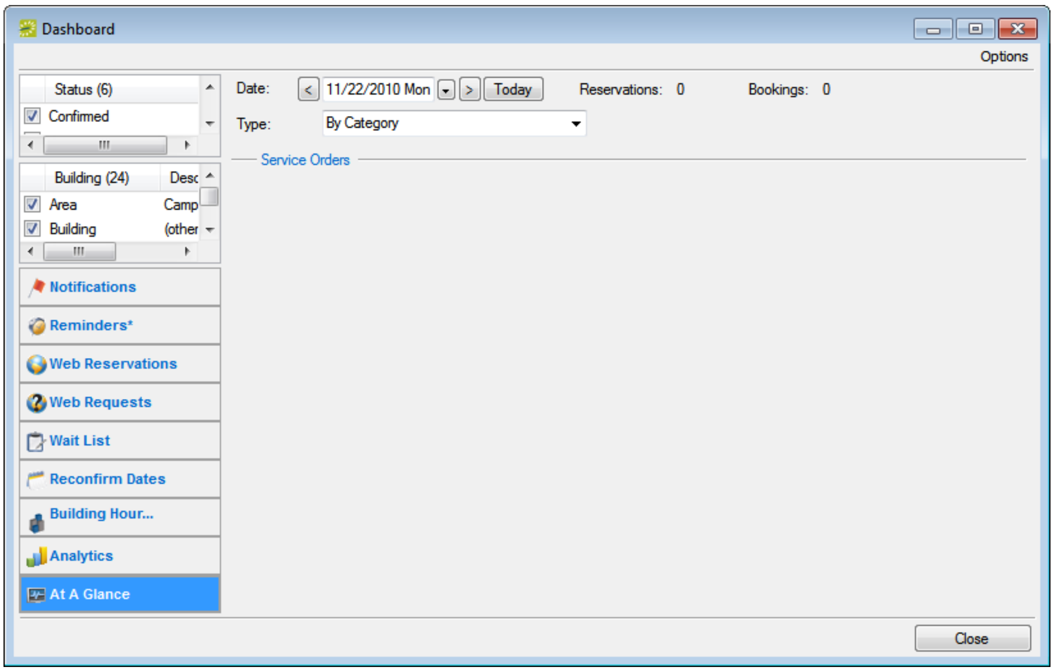
Figure 5-18: Onscreen preview of query results that are charted/graphed



At A Glance Tab

The At A Glance tab provides quick access to high-level booking statistics for events at your organization or facility. You can select to show booking statistics by category, by event type, by group type, by reservation source, by room type, or by status.

Figure 5-19: At A Glance tab



By default, when the tab first opens, the date is set to the current day's date, and category is the selected display type. To view booking statistics for your facility on a given date, do the following:

1. Select options (Status and Building) on the left pane of the tab to filter the results that are displayed on the tab.
2. Change the date and/or the display type as needed to view the bookings statistics for a selected date.

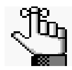
Groups and Contacts

A *group* is an entity for which reservations are made at your facilities. A group is one of the four core data items that your EMS administrator must configure so that you can make reservations. A group can be an internal or external entity and it can be an organization or an individual. A *contact* is a person who serves as the coordinator or focal point for a group.

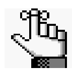
This chapter covers the following topics:

Searching for and Configuring Groups

A *group* is an entity for which reservations are made at your facilities. A group can be an internal or external entity and it can be an organization or an individual. A group must be configured before you can make reservations for it in EMS. Optionally, if you want to first confirm that a group has not already been configured, then you can search for the group.

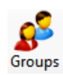


Typically, your EMS administrator carries out basic configuration of the groups for which you need to make reservations. You always have the option of modifying any group that your EMS administrator has configured and you always have the option of configuring new groups when needed.



Your organization might use a different term (such as client, customer, and so on) to identify the entities for which reservations are made at your facilities. Contact your EMS administrator if you need assistance in clarifying this term.

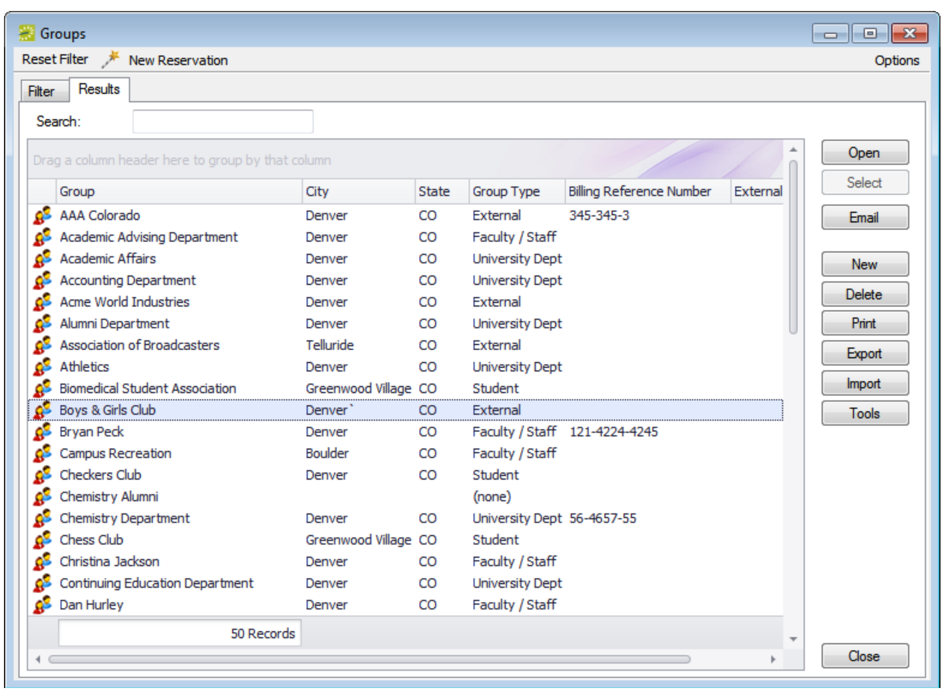
To search for a group and/or contact

1. On the toolbar, click the Groups icon 

.

   The Groups window opens. The Results tab is the active tab. By default, when the Results tab first opens, it lists the first 1000 groups that are currently configured in your EMS database and that have a status of Active.

Figure 6-1: Groups window, Results tab



Optionally, to change the number of records that are displayed in the Groups window, click Options, and then on the Group Options dialog box, select a different number of records to return.

2. Open the Filter tab and set your search criteria.

Option	Description
Display	• Groups—Display all groups that meet your search criteria on the Results tab. • Contacts—Display all contacts that meet your search criteria on the Results tab. **Note:** When a list of contacts is displayed, the contact's group is also displayed.
Search Fields	• Starts with—The string is not case-sensitive, but your search is limited to the exact order of the characters in the string, and the string must begin with the information for which you are searching. For example, **Assoc** returns **Assoc**iation of Broadcasters but not Biomedical Student Association. • Contains—Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive, and the string can be found anywhere in your search results. For example, **Assoc** returns both **Assoc**iation of Broadcasters and Biomedical Student **Assoc**iation.
Group	Fields are available if you select Groups for Display. Enter values as needed in any or all fields.
Contact	Fields are available only if you select Contacts for Display. Leave all fields set to their default search values to search for all active contacts that are currently configured in your EMS database, or enter values as needed in any or all fields. **Note:** If you select Contact, then both the Group fields and the Contact fields are available for searching. If you enter data in both sets of fields when you are searching for a contact, then your search criteria must be met for both the contact *and* the contact's group to be displayed on the Results tab.
Note: To reset the Filter at any time to its default settings, click Reset Filter.	

3. Click Get Data.

   The Results tab opens with a list of search results that meet all your search criteria.

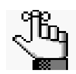
4. To further filter the display on the Results tab, in the Search field, enter a search string.

   The list of groups is dynamically updated as you enter your search string.

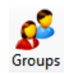
*Your search is limited to the exact order of the characters in the string, but the search string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **Assoc** returns both **Ass**ociation of Broadcasters and Biomedical Student **Assoc**iation.*

To configure groups

Typically, your EMS administrator carries out basic configuration of the groups for which you need to make reservations. You always have the option of modifying any group that your EMS administrator has configured and you always have the option of configuring new groups when needed.



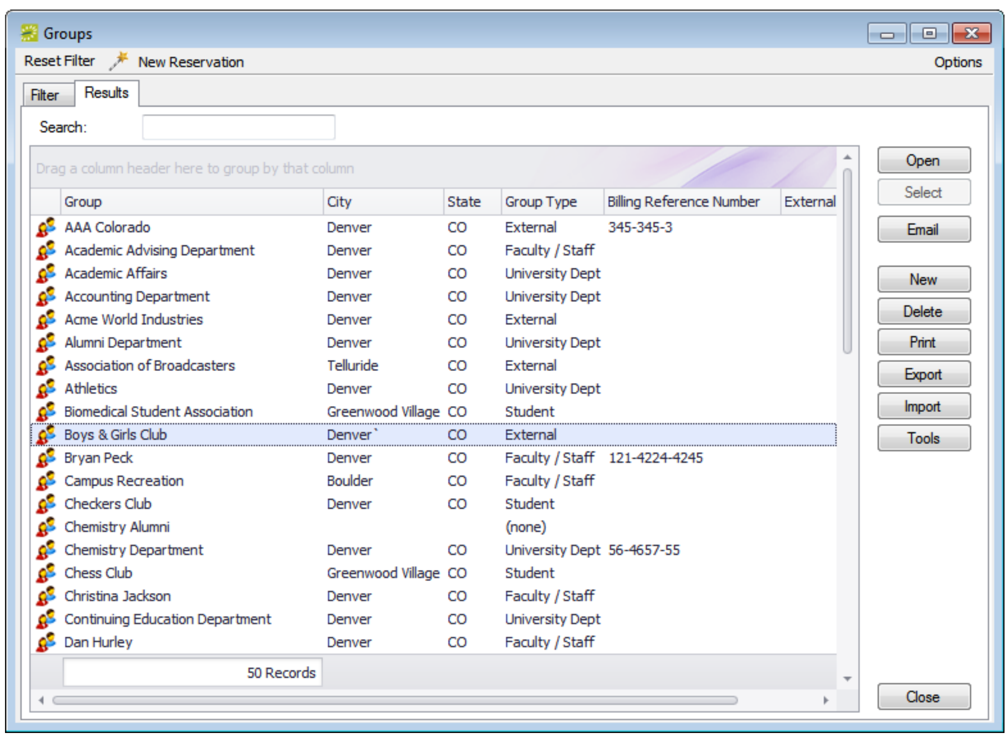
Remember that before you configure a group, you might want to search for the group to verify that it has not already been configured. See *"To search for a group and/or contact" on page 255.*

1. On the toolbar, click the Groups icon 

.

   The Groups window opens. The Results tab is the active tab. By default, when the Results tab *first* opens, it lists up the first 1000 groups that are currently configured in your EMS database and that have a status of Active.

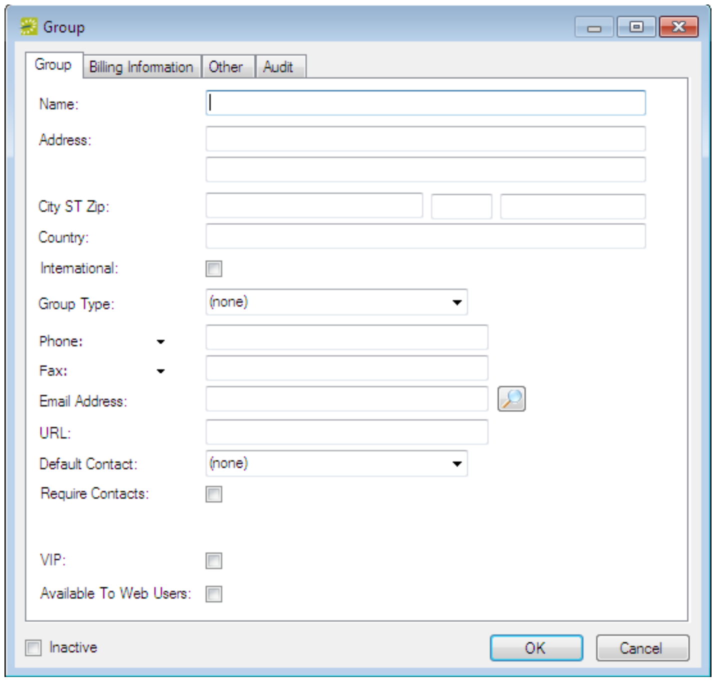
Figure 6-2: Groups window, Results tab



2. Click New.

   The Group dialog box opens. The Group tab is the active tab.

Figure 6-3: Group dialog box, Group tab



3. Enter the summary information for the new group.

The only required information is the group name. All other information on all tabs is optional and can be added at a later date when needed.

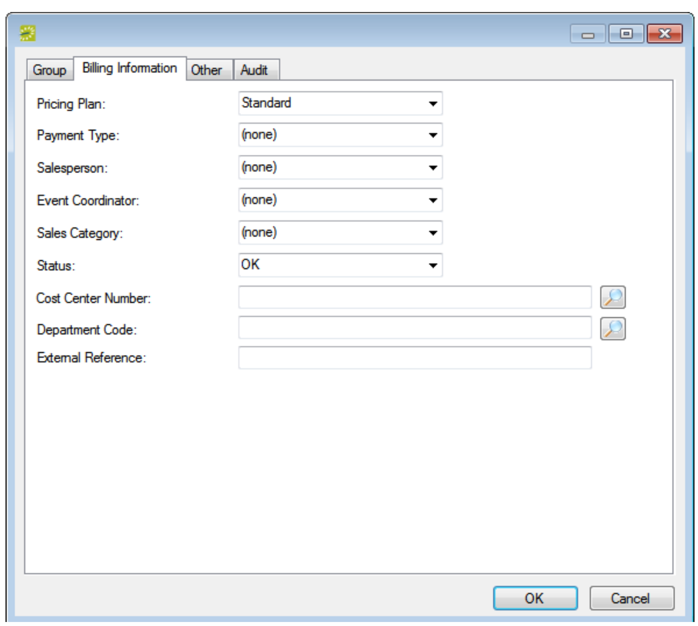
Field	Description
Name	Required field. The name of the group. **Note:** The name can be a maximum of 50 characters, including spaces.
Address City ST Country Zip	The street or mailing address for the group.
International	Select this option to drop the State and Zip fields for an international group.
Group Type	Pick a group type. **Note:** If calculations have been assigned to a group type, then these calculations are applied only to *new* groups of this type.

Field	Description
Phone Fax	The phone number and fax number for the group. **Note:** The Phone and Fax fields have a dropdown list available on which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.
Email Address	The email address for the group. **Note:** If your computer is connected to a network, click the Search icon  to open a Global Address Lookup dialog box and search for the email address.
URL	The URL for the group's website. **Note:** Web users can link to this group's web site on VEMS.
Default Contact	Populated with the name of the default contact for the group *after* you have defined default contacts for the group.
Require Contacts	Select this option if the group is to *always require* a contact when a reservation is being made for the group.
VIP	Select this option if the group is to be designated as a VIP group.
Available to Web Users	Select this option if users are to be able to select the group on the Group Lookup page in VEMS.
Inactive	Leave this option blank to add the group as an active group. Select this option to inactivate the group.

4. Optionally, do one or both of the following; otherwise, go to Step 5.

   - Open the Billing Information tab and add the default billing information for the group.

Figure 6-4: Group dialog box, Billing Information tab

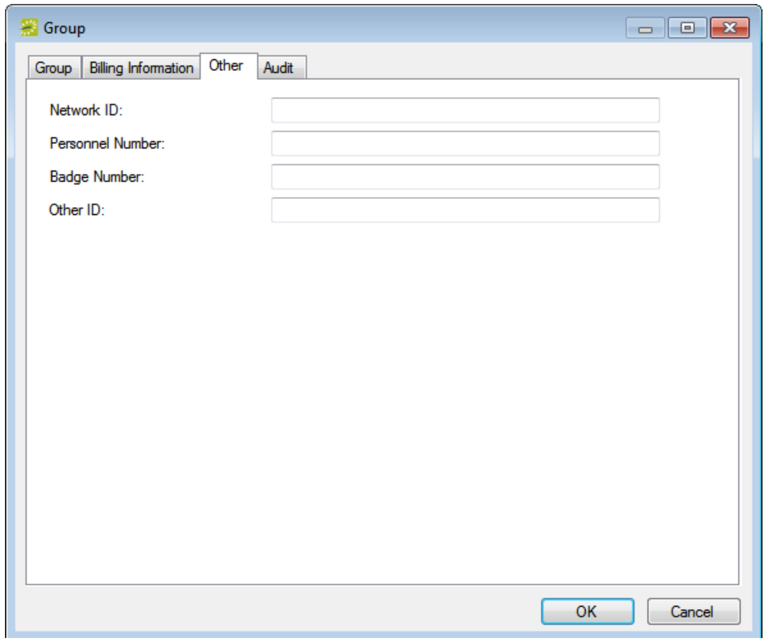


The values that you specify here are the default values that are applied when a new reservation is made for the group. Any EMS user can change these values if needed.

Option	Description
Pricing Plan	Pick a pricing plan.
Payment Type	Pick a payment type.
Salesperson	Pick a salesperson.
Event Coordinator	Pick an event coordinator.
Sales Category	Pick a sales category.
Status	The status is a way to indicate the standing or ranking of the group. The default values are the following: • OK—A reservation can be made for the group. (In your organization, this status could indicate that the group is current in payments due.) • Warning—If a group status is set to Warning, then a Warning message opens when you make a reservation for the group. It does not, however, prevent a reservation from being made for the group. • Bad—If a group status is set to Bad, then reservations cannot be made for the group.
Billing Reference Number	You can manually enter data into the field, or you can click the Search icon to open a master list of billing reference numbers and select a reference. **Note:** To define a list of eligible billing references that are specific to the group, see “Configuring Additional Information for a Group” on page 263.
PO Number	You can manually enter data into the field, or you can click the Search icon to open a master list of PO Numbers and select a PO number. **Note:** To define a list of eligible PO numbers that are specific to the group, see “Configuring Additional Information for a Group” on page 263.
External Reference	Links the group to a web user record and/or HR Toolkit.
Account	Pick an account.

- Open the Other tab and add any other identifying information for the group as needed.

Figure 6-5: Group dialog box, Other tab

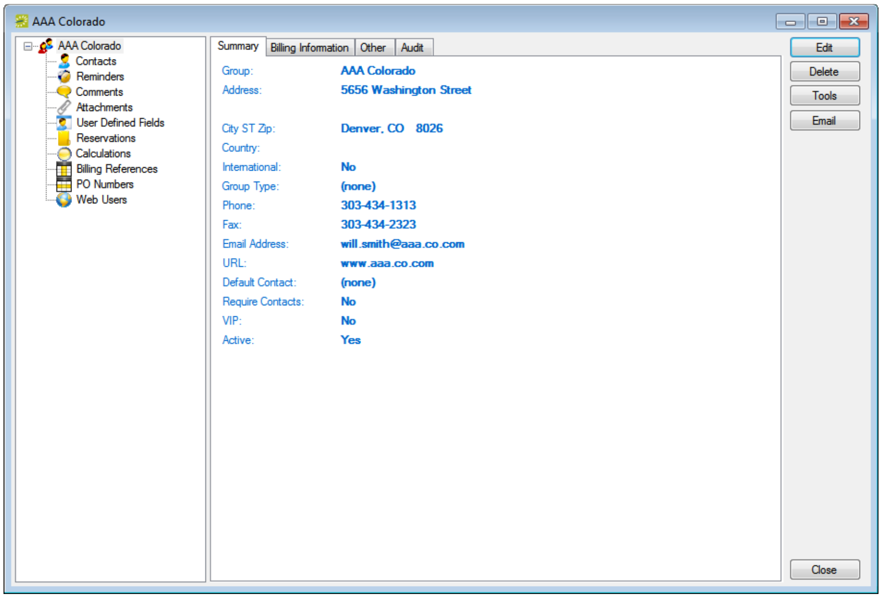


Option	Description
Network ID	The Windows login for the group.
Personnel Number	Organization number for the group.
Badge Number	Badge number for the group.
Other ID	Any secondary ID for the group.

5. Click OK.

   The Group dialog box closes and a group-specific window opens with the newly configured group automatically selected. (See Figure 6-6 on page 262.) You can use the options on this window to carry out additional configuration for the group. See "Configuring Additional Information for a Group" on page 263.

Figure 6-6: Example of a group-specific window



Configuring Additional Information for a Group

After you have configured a new group in your EMS database with the basic group information (group identifying information, billing information and/or other information), you have the option of configuring additional information for the group. You can:

- Create a web user from the group. See "To create a web user from a group" on page 263.
- Assign the group to a web user. See "To assign the group to a web user" on page 266.
- Add reminders to the group. See "To add a reminder to a group" on page 268.
- Add comments to the group. See "To add a comment to a group" on page 269.
- Add attachments to the group. See "To add attachments to a group" on page 271.
- Add user defined fields to the group. See "To add user defined fields to a group" on page 272.
- Assign calculations to the group. See "To assign calculations to a group" on page 273.
- Configure a master list of group-specific billing reference numbers. See "To configure a list of billing reference numbers" on page 275.
- Configure a master list of group-specific PO numbers. See "To configure a list of PO numbers" on page 276.

When you select a configuration item (contacts, reminders, and so on) in the left pane in the group-specific window, the right pane for the window is an EMS browser window. See "An EMS Browser Window" on page 35

For information about adding a contact to a group, including creating a web user for a contact, see "Configuring Contacts for a Group" on page 278. For information about editing a contact for a group, see "Editing Group Information" on page 286.

To create a web user from a group

A *web user* is a registered user who can submit requests for reservations or schedule reservations in VEMS. When you add a new group in your EMS database, you decide the "level" of the group that you are adding. For a group that is added at the individual (personnel/employee) level, you might also need to create a web user from the group. This user can then create and view reservations on behalf of a group or groups in VEMS. You can create only one web user *from* a group. When you create a web user, you can also specify one or more delegates for the web user. A *delegate* is a web user who can create and view reservations on behalf of another web user.

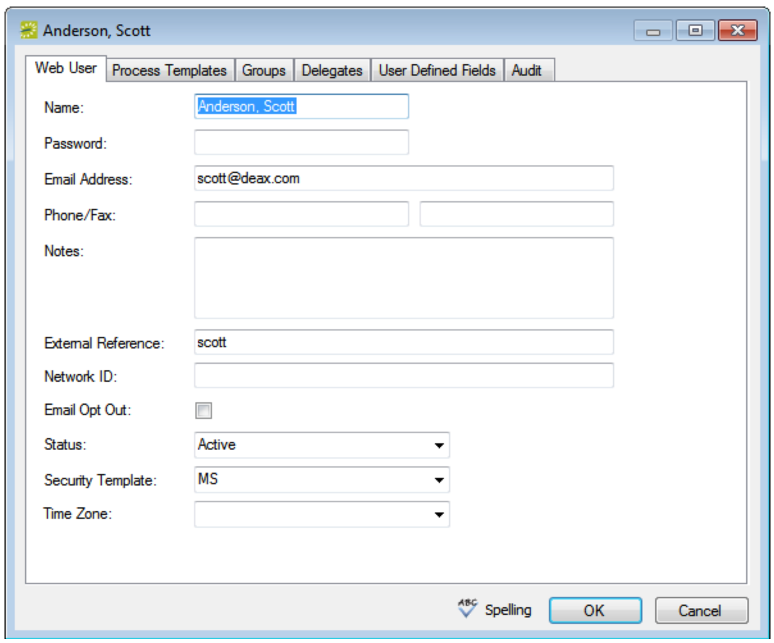
1. Open the Groups window and search for the group for which you are creating the web user. See "To search for a group and/or contact" on page 255.

2. On the Groups window, select the group, and then click Tools > Create Web User.

   A group-specific dialog box opens. The Web User tab is the active tab.

The User Defined Fields tab displays the questions that a web user was required to answer when the user requested to create an account through VEMS and it is not relevant to the procedure that is described below.

Figure 6-7: Group-specific dialog box, Web User tab



3. Enter the information for the web user.

Ideally, you should enter all the necessary information for your web user before you save the web user; however, at any time if you need to access your web user, on the EMS menu bar, click Configuration > Web > Web Users.

Field	Description
Name	Automatically populated after you select the group from the Groups window.
Password	The password that a web user must enter to log in to VEMS.
Email address	If this information has been entered in the Groups window for the group, then this field is automatically populated after you select the group from the Groups window. If the field is blank, you must enter the full email address for the user. (The user must enter this address to log in to VEMS.)

Field	Description
Phone/Fax	Optional fields. If this information has been entered for the group, then these fields are automatically populated after you select the group from the Groups window. If the fields are blank, you can enter values if needed.
Notes	Optional field.
External Reference	Optional field. Links the web user to a group and/or HR Toolkit.
Network ID	Optional field. The web user's network ID.
Email Opt Out	Select this option if the web user is not to receive automatic emails (such as reservation summary emails) from VEMS. The user will still receive manually sent emails.
Status	Required field. Select the status for the web user: • Active—The web user can log in to VEMS. • Inactive—The user cannot log in to VEMS and is instructed to contact the EMS administrator. • Pending—The web user cannot log in to VEMS and is informed that he/she must check back at a later time.
Security Template	Required field. This determines the web user's access to the system—the menu items that the user can see and the information that the user can view in a tooltip when 'rolling-over' an event in VEMS.
Time Zone	Required field. Select the time zone for the user.

4. Open the Process Templates tab and on the Available list, select the web process template, or CTRL-click to select the multiple templates to which you are assigning the user, and then click the Move button (>) to move the selected templates to the Selected list.

A web process template defines the functions that are available to each type of web user in VEMS when the user is submitting a request for a reservation.

5. Open the Groups tab and do one of the following to specify the groups on whose behalf the web user can view and make reservations in VEMS.
   - The group (web user) is selected by default. You can leave this group in the Selected list, or you can select the group and click the Remove button (<).
   - Specify any combination of search criteria for the Find field and Group Type, and then click Display to produce a list of all groups that meet the criteria. In the Available list, select a group, or CTRL-click to select multiple groups, and then click the Move button (>) to move the selected groups to the Selected list.

If you leave the Find field blank, then a list of all currently active groups for the selected group type is displayed. If you enter a search string in the Find field, the string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, ***And*** *returns* ***And****erson, Scott, but not Cooper, Anderson.*

6. Open the Delegates tab, and on the Search by dropdown list, do one of the following to specify the delegates for the web user:
   - Leave the Find field blank, and then click Display to open a list of *all* currently available web users. Select a user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.
   - On the Search By dropdown list, select the option by which to search (Email Address or User Name), and in the Find field, enter the string by which to filter your search, and then click Display. Select a web user, or CTRL-click to select web multiple users, and then click the Move button (>) to move the selected users to the Selected list.

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*The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of **bob** returns **bob**.worth@emssoftwarew.com but not dbobbett@emssoftware.com.*

7. Optionally, click Spelling to spell check any information that you manually entered for the web user.
8. Click OK.

   The dialog box for creating a web user closes and a message opens indicating that the web user was created successfully.
9. Click OK to close the message and return to the Groups window.

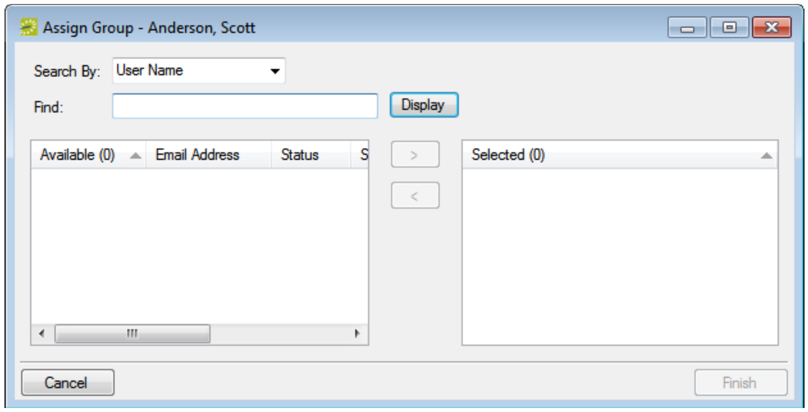
To assign the group to a web user

When you add a new group in your EMS database, you should also assign the group to a web user. This web user can then create and view reservations on behalf of the group in VEMS. You can assign a group to one or more web users.

1. Open the Groups window and search for the group to which you are assigning the web user. See "To search for a group and/or contact" on page 255.
2. On the Groups window, select the group, and then click Tools > Assign to Web Users.

   The Assign Group dialog box opens. See Figure 6-8 on page 267.

Figure 6-8: Assign Group dialog box



3. Do one of the following to select the web users that are being assigned to the group:

   - Leave the Find field blank, and then click Display to open a list of *all* currently active web users. Select the web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.

   - In the Search By dropdown list, select the option by which to search (Email Address or User Name) and then in the Find field, enter the string by which to filter your search, and then click Display. Select the web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected users to the Selected list.

The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of ***bob*** *returns* ***bob****.worth@emssoftware.com but not dbobbett@emssoftware.com.*

4. Click Finish.

   A message opens indicating that the group was assigned successfully.

5. Click OK to close the message and return to the Groups window.

To add a reminder to a group

A *comment* is a text entry that explains or clarifies a reservation, a booking, a group, or a booking detail that is a service order. A *reminder* is a comment that has a due date associated with it.

1. Open the Groups window and search for the group to which you are adding the reminder. See "To search for a group and/or contact" on page 255.
2. On the Groups window, select the group, and then click Open.

   A group-specific window opens. The group is automatically selected in the window.

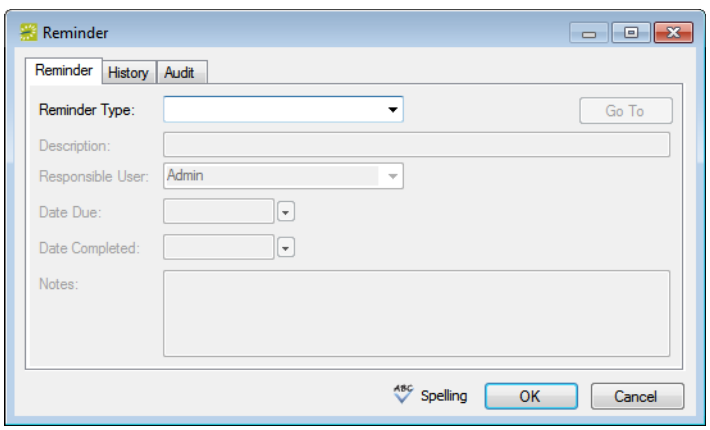
For an example of a group-specific window, see *Figure 6-6 on page 262.*

3. In the left pane of the group-specific window, select Reminders.

   A list of all reminders that are currently configured for the group is displayed in the right pane of the window.
4. Click New.

   The Reminder dialog box opens. The Responsible User field is populated with the your User ID.

Figure 6-9: Reminder dialog box



5. On the Reminder Type dropdown list, select the type of reminder that you are adding; otherwise, if none of the pre-configured reminder types meets your working needs, select (user specified comment), and then in the Description field, enter a description for the reminder type.

   The Date Due field is populated with the current day's date.

The description can be a maximum of 30 characters, including spaces.

6. Optionally, change the value for the Responsible User, the Date Due, or both.
7. If you are completing the reminder today, select a Date Completed; otherwise, leave this field blank.

If you leave this field blank, then it is automatically populated when you or another user completes the reminder on the Reminders tab of the Dashboard window. See "To complete a reminder" on page 238.

8. Optionally, do one or both of the following:
   - In the Notes field, enter any further explanation or information about the reminder.
   - Click Spelling to spell check the reminder before you save it.
9. Click OK.

   The Reminder dialog box closes. The newly added reminder is automatically selected in the group-specific window.

To add a comment to a group

A *comment* is a text entry that explains or clarifies a reservation, a booking, a group, or a booking detail that is a service order.

1. Open the Groups window and search for the group to which you are adding the comment. See "To search for a group and/or contact" on page 255.
2. On the Groups window, select the group, and then click Open.

   A group-specific window opens. The group is automatically selected in the window.

For an example of a group-specific window, see Figure 6-6 on page 262.

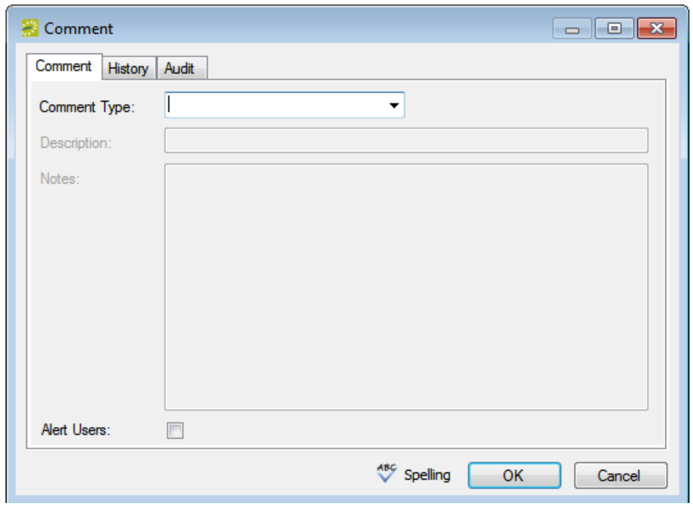
3. In the left pane of the group-specific window, select Comments.

   A list of all comments that are currently configured for the group is displayed in the right pane of the window.

4. Click New.

   The Comment dialog box opens.

Figure 6-10: Comment dialog box



5. On the Comment Type dropdown list, select the type of comment that you are adding; otherwise, if none of the pre-configured comment types meets your working needs, select (user specified comment), and then in the Description field, enter a description for the comment type.

The description can be a maximum of 30 characters, including spaces.

6. In the Notes field, enter the comment.
7. Optionally, do one or both of the following:
   - To alert any EMS user who opens this group or a reservation that is assigned to this group that this comment has been added to the group, select Alert Users.
   - Click Spelling to spell check the comment before you add it to the group.
8. Click OK.

   The Comment dialog box closes. The newly added comment is automatically selected in the group-specific window.

To add attachments to a group

An *attachment* is used to describe any file that you can add to or store on a reservation, a booking, or a group.

1. Open the Groups window and search for the group to which you are adding the attachment. See "To search for a group and/or contact" on page 255.

2. On the Groups window, select the group, and then click Open.

   A group-specific window opens. The group is automatically selected in the window.

For an example of a group-specific window, see Figure 6-6 on page 262.

3. In the left pane of the group-specific window, select Attachments.

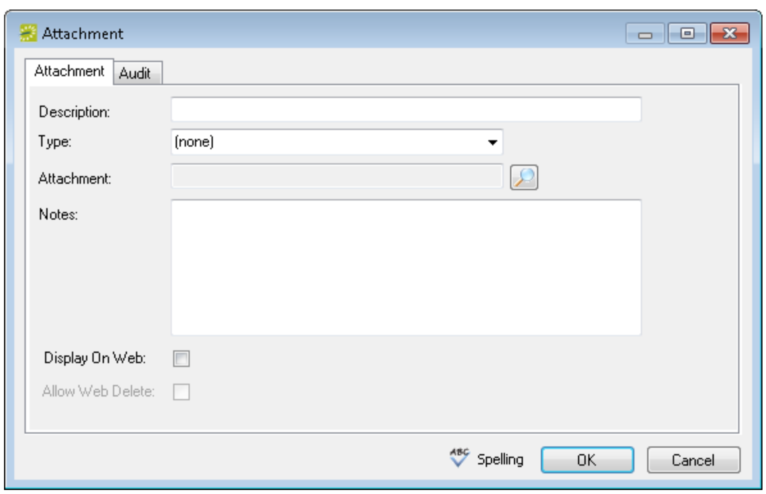
   A list of all attachments that have already been added to the group is displayed in the right pane of the window.

To view any attachment in this list, select it, and then click View.

4. Click New.

   The Attachment dialog box opens.

Figure 6-11: Attachment dialog box



5. In the Description field, enter a name or description for the attachment.

The description can be a maximum of 50 characters, including spaces. If you leave this field blank, then the Description field is populated with the name of the file after you attach it to a group.

6. On the Type dropdown list, select the attachment type.

7. Click the Search icon to open the Find Attachment dialog box, and then browse to and select the attachment.

   The Find Attachment dialog box closes. The file name for the attachment is displayed in the Attachment field.

8. Optionally, do one or both of the following as needed:

   - If you left the Description field blank, then the name of the attached file is used by default for the file description, and you can edit this if needed.

   - Click Spelling to spell check the description before you attach the drawing to the group.

9. Click OK.

   The Attachment dialog box closes. The newly added attachment is automatically selected in the group-specific window.

To add user defined fields to a group

A *user defined field* (UDF) is a custom field that stores additional data for a group. Typically, your EMS administrator configures the types of fields that are available as well as the allowed values (text, numeric, and so on) for the fields. When you add a user defined field to a group, you must specify a value for the field.

1. Open the Groups window and search for the group to which you are adding the UDF. See “To search for a group and/or contact” on page 255.

2. On the Groups window, select the group, and then click Open.

   A group-specific window opens. The group is automatically selected in the window.

For an example of a group-specific window, see Figure 6-6 on page 262.

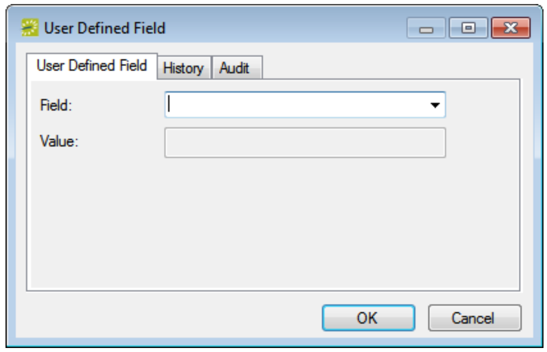
3. In the left pane of the group-specific window, select User Defined Fields.

   A list of all UDFs that have already been added to the group is displayed in the right pane of the window.

4. Click New.

   The User Defined Field dialog box opens. See Figure 6-12 on page 273.

Figure 6-12: User Defined Field dialog box



5. On the Field dropdown list, select the UDF that you are adding to the group.
6. In the Value field, enter a value for the UDF.
7. Click OK.

   The User Defined Field dialog box closes. The newly added UDF is automatically selected in the group-specific window.

To assign calculations to a group

Calculations are additional charges that can be applied to billable items (a category, a group, a group type, a resource, or a room) such as gratuity or sales tax. When you configure a group, you can assign the calculations that are to always apply to the group.

1. Open the Groups window and search for the group to which you are assigning the calculations. See "To search for a group and/or contact" on page 255.
2. On the Groups window, select the group, and then click Open.

   A group-specific window opens. The group is automatically selected in the window.

For an example of a group-specific window, see *Figure 6-6 on page 262.*

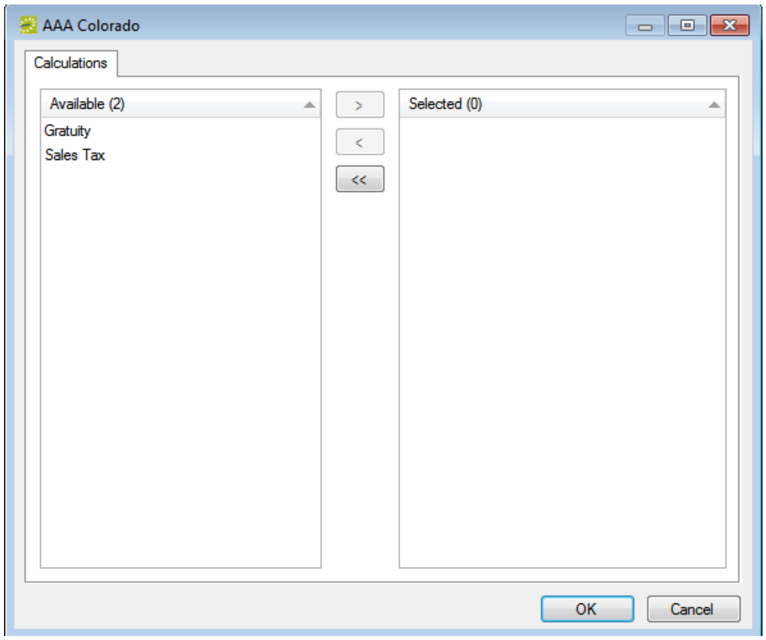
3. In the left pane of the group-specific window, select Calculations.

   The right pane of the group-specific window displays any calculations that have already been assigned to the group.

4. Click Edit.

   The Calculations dialog box opens. The group name is displayed at the top of the dialog box.

Figure 6-13: Calculations dialog box



5. On the Available list, select the calculation, or CTRL-click to select the multiple calculations that are to always apply to this group, and then click the Move button (>) to move the selected calculations to the Selected list.

Your EMS administrator can also assign calculations to a group type. If your EMS administrator has already assigned calculations for this group's type, then these calculations are automatically applied to the group. The calculations are displayed in the Selected list after you click OK and save the group; however, you can always edit these calculations.

6. Continue with any other optional configuration for the group as needed; otherwise, click OK to close the Calculations dialog box and return to the group-specific window.

To configure a list of billing reference numbers

You can configure a list of billing reference numbers that are specific to the group.

1. Open the Groups window and search for the group for which you are configuring the master billing reference numbers list. See “To search for a group and/or contact” on page 255.

2. On the Groups window, select the group, and then click Open.

   A group-specific window open. The group is automatically selected in the window.

For an example of a group-specific window, see *Figure 6-6 on page 262.*

3. In the left pane of the group-specific window, select Billing Reference.

   A list of all currently active billing reference numbers for the group is displayed in the right pane of the group-specific window.

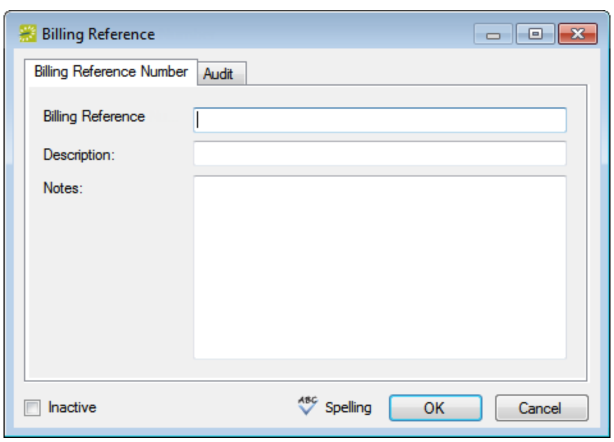
4. Optionally, to display all billing reference numbers regardless of status, click Show Inactive.

   Any inactive billing reference numbers are displayed in red italics in the right pane.

5. Click New.

   The Billing Reference dialog box opens.

Figure 6-14: Billing Reference dialog box



6. Enter the information for the new billing reference number.

Option	Description
Billing Reference Number	The billing reference number that is associated with the group. **Note:** The reference can be alphanumeric and it has a maximum of 100 characters, including spaces.
Description	A description of the billing reference number.
Notes	Any other comments or statements that are applicable for the billing reference number.
Inactive	Leave this option blank to add the reference as an active reference (the billing reference number is to be available when a reservation is made for the group). Select this option to inactivate the billing reference number.

7. Optionally, click Spelling to spell check the information for the billing reference number before you save it.
8. Continue with any other optional configuration for the group as needed; otherwise, click OK to close the Billing Reference Number dialog box and return to the group-specific window.

To configure a list of PO numbers

You can configure a list of PO numbers that are specific to the group.

1. Open the Groups window and search for the group for which you are configuring the master PO numbers list. See “To search for a group and/or contact” on page 255.
2. On the Groups window, select the group, and then click Open.

   A group-specific window open. The group is automatically selected in the window.

For an example of a group-specific window, see Figure 6-6 on page 262.

3. In the left pane of the group-specific window, select PO Numbers.

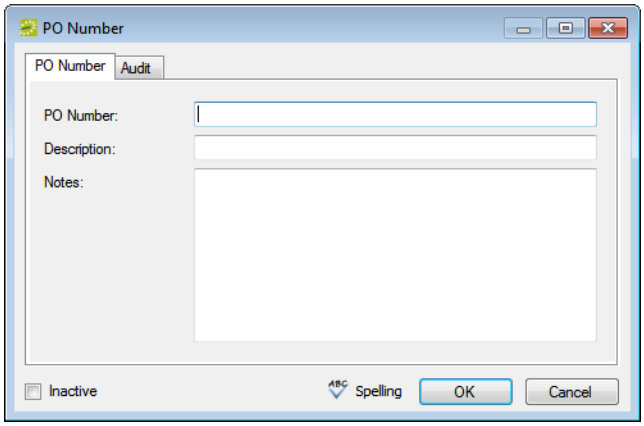
   A list of all currently active PO numbers for the group is displayed in the right pane of the group-specific window.
4. Optionally, to display all PO numbers regardless of status, click Show Inactive.

   Any inactive PO numbers are displayed in red italics in the right pane.

5. Click New.

   The PO Number dialog box opens.

Figure 6-15: PO Number dialog box



6. Enter the information for the new PO number.

Option	Description
PO Number	The PO number that is associated with the group. **Note:** The reference can be alphanumeric and it has a maximum of 100 characters, including spaces.
Description	A description of the PO number.
Notes	Any other comments or statements that are applicable for the PO number.
Inactive	Leave this option blank to add the PO number as an active number (the PO number is to be available when a reservation is made for the group). Select this option to inactivate the PO number.

7. Optionally, click Spelling to spell check the information for the PO number before you save it.

8. Continue with any other optional configuration for the group as needed; otherwise, click OK to close the PO Number dialog box and return to the group-specific window.

Configuring Contacts for a Group

A *contact* is a person who serves as the coordinator or focal point for a group. You have two options for configuring a contact for a group. You can configure a” free form” contact, which requires you to manually enter the contact information, or you can configure a contact from another group, which means that you do not have to manually enter the contact information. Instead, the group information is automatically used for the contact.

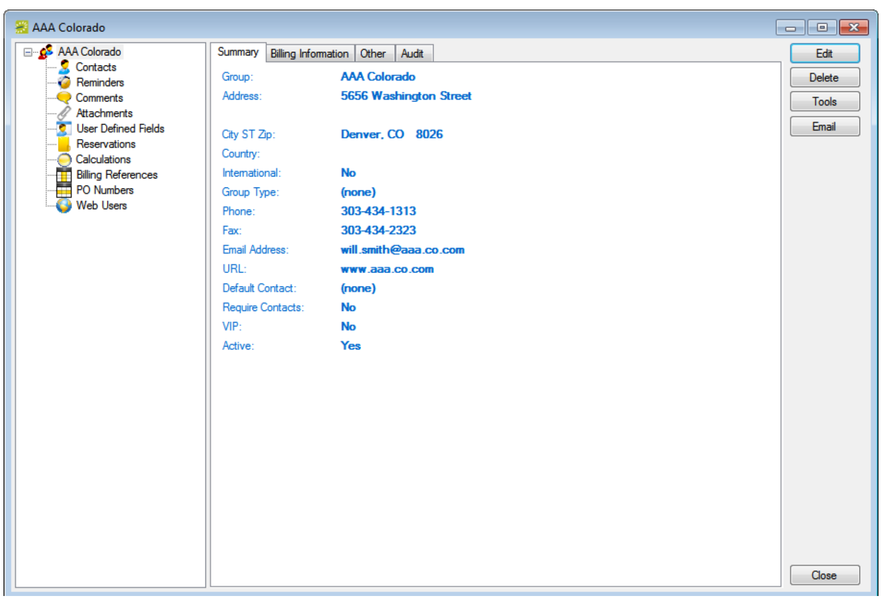
You can also configure and edit a contact “on the fly” during the reservation process. See “Making a Reservation Using the Reservation Wizard” on page 45 for details.

To configure contacts

1. Open the Groups window and search for the group for which you are configuring the contact. See “To search for a group and/or contact” on page 255.
2. Select the group, and then click Open.

   A group-specific window opens. The group is automatically selected in the window.

Figure 6-16: Group-specific window



3. In the left pane of the group-specific window, select Contacts.

   A list of all currently active contacts for the group is displayed in the right pane of the group-specific window.

Optionally, to display all group contacts regardless of status, click Show Inactive. Any inactive contacts are displayed in red italics in the right pane.

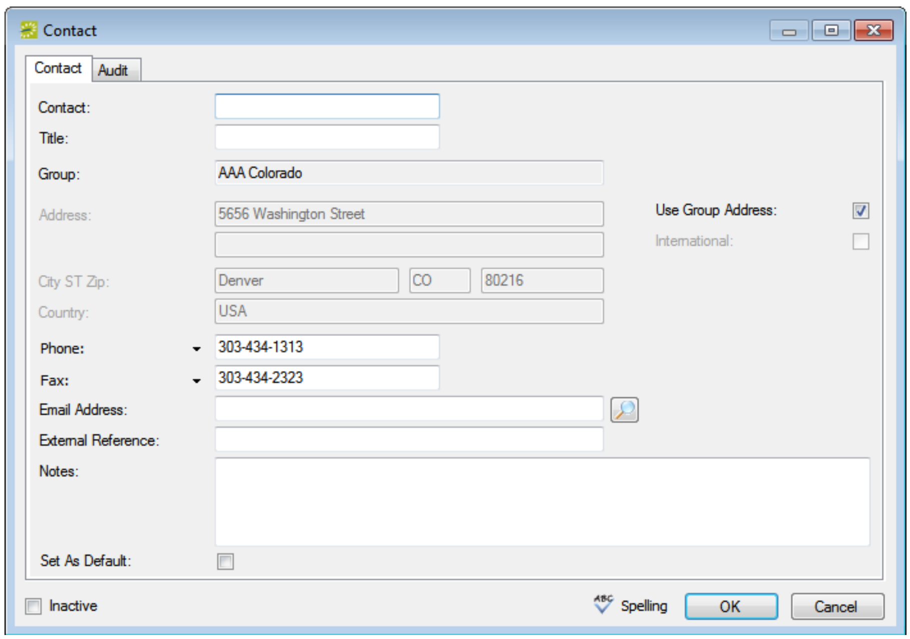
4. Continue to one of the following:
   - "To configure a contact manually" below.
   - "To configure a contact from a group" on page 281.

To configure a contact manually

1. Click New.

   The Contact dialog box opens.

Figure 6-17: Contact dialog box



2. Enter the information for the new contact.

Field	Description
Contact	The name of the contact. **Note:** The name can be a maximum of 50 characters, including spaces.
Title	The title (Mr., Ms., Dr., and so on) of the contact.
Group	Populated with the name of the group that you selected. You cannot change this value.
Address	Populated with the address of the group that you selected. If the contact address is not the same as the group address, then clear Use Group Address and enter the appropriate values in the Address fields.

Field	Description
International	Select this option to drop the State and Zip fields for an international group.
Phone Fax	The phone number and fax number for the contact. By default, they are set to the phone number and fax number for the group, but you can always edit these values. **Note:** The Phone and Fax fields have a dropdown list available on which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.
Email Address	The email address for the contact. **Note:** If your computer is connected to a network, click the Search icon to open a Global Address Lookup dialog box and search for the email address.
External Reference	Links the contact to an outside program, for example, HR Toolkit, if needed.
Notes	Any other information that is pertinent for the contact.
Set as Default	Select this option if the contact is to be the default contact for the selected group. **Note:** If a default contact has been defined for a group, then when you specify the group information for a reservation, the Contact field is automatically populated with the name of the default contact. **Note:** You can always specify a contact as the default contact for a selected group at a later date. To do so, select the contact in the right pane of the group-specific window, click Set Default, and then click Yes at the prompt to set the selected user as the default contact.
Inactive	Leave this option blank to add the contact as an active contact. Select this option to inactivate the contact.

3. Optionally, do one or both of the following:
   - Click Spelling to spell check the information for the contact before you save it.
   - Make sure that the newly created contact is selected so that you can create a web user from the contact. See “To create a web user from a contact” on page 283.
4. Click OK.

   The Contact dialog box closes. The contact is added to the group. The group-specific window remains open.

To configure a contact from a group

1. Click Tools > Click Create Contact from Another Group.

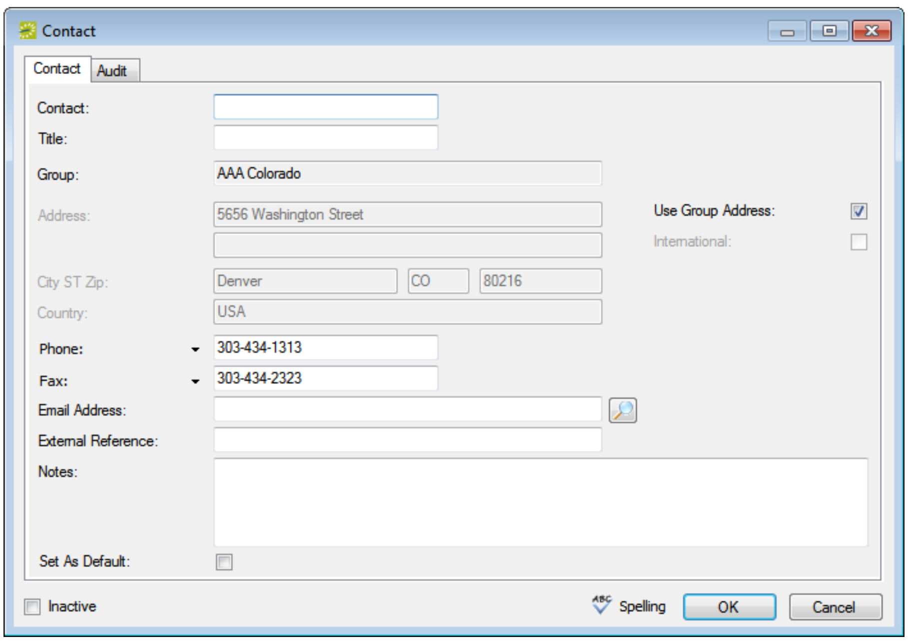
   A second Groups window opens.

2. Search for the group that is to be the source of the contact, and then click Select.

See "To search for a group and/or contact" on page 255.

The Contact dialog box opens. The name of the group (contact source) is displayed in the Group field and you cannot edit this value. The remainder of the fields (Contact Name, Address, Phone, and so on) display the information for the group that you selected in Step 2 of "To configure contacts" on page 278.

Figure 6-18: Contact dialog box



3. If needed, edit the information for the contact.

Field	Description
Contact	The name of the contact. **Note:** The name can be a maximum of 50 characters, including spaces.
Title	The title (Mr., Ms., Dr., and so on) of the contact.
Group	Populated with the name of the group that you selected first (the group for which you are configuring the contact). You cannot change this value.

Field	Description
Address	Populated with the address of the contact. If the contact address is the same as the group address, then select Use Group Address to populated the address fields with the group address; otherwise, you can edit these values.
International	Not applicable if Use Group Address is selected. Select this option to drop the State and Zip fields from the address for an international contact.
Phone Fax	The phone number and fax number for the group. **Note:** The Phone and Fax fields have a dropdown list available on which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.
Email Address	The email address for the contact. **Note:** If your computer is connected to a network, click the Search icon  to open a Global Address Lookup dialog box and search for the email address.
External Reference	Links the contact to an outside program, for example, HR Toolkit, if needed.
Notes	Any other information that is pertinent for the contact.
Set as Default	Select this option if the contact is to be the default contact for the selected group. **Note:** If a default contact has been defined for a group, then when you specify the group information for a reservation, the Contact field is automatically populated with the name of the default contact. **Note:** You can always specify a contact as the default contact for a selected group at a later date. See "To edit the contacts for a group" on page 287.
Inactive	Leave this option blank to add the contact as an active contact. Select this option to inactivate the contact.

4. Optionally, do one or both of the following:
   - Click Spelling to spell check the information for the contact before you save it.
   - Make sure that the newly created contact is selected so that you can create a web user from the contact. See "To create a web user from a contact" on page 283.
5. Click OK.

   The Contact dialog box closes. The contact is added to the group. The group-specific window remains open.

To create a web user from a contact

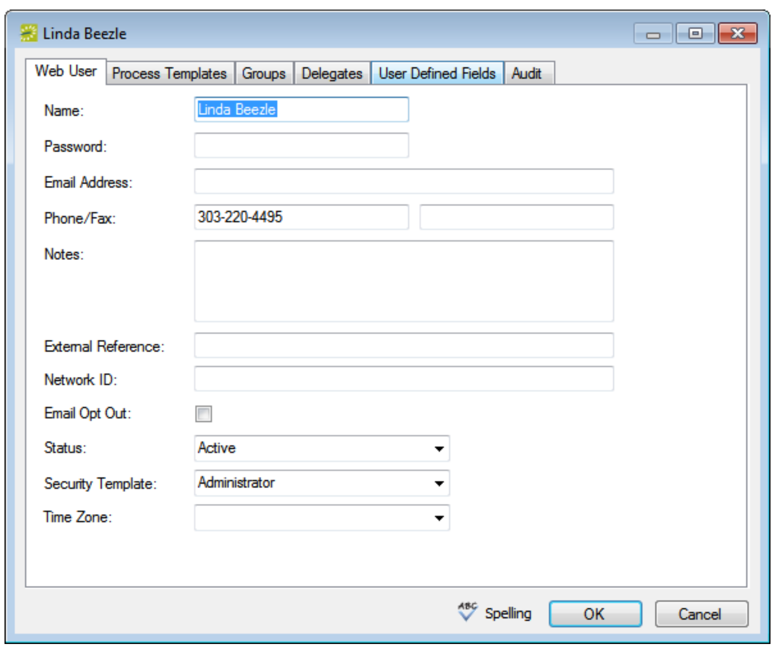
A *web user* is a registered user who can submit requests for reservations or schedule reservations in VEMS. When you add a contact to a group in your EMS database, you might also need to create a web user from the contact. This web user can then create and view reservations on behalf of the contact's group in VEMS. You can create only one web user *from* a contact. When you create a web user, you can also specify one or more delegates for the web user. A *delegate* is a web user who can create and view reservations on behalf of another web user.

1. If needed, open the group that contains the contact from which you are creating the web user in the group-specific window. See "To configure contacts" on page 278.
2. In the left pane of the group-specific window, make sure that Contacts is selected.
3. In the right pane of the window, select the contact from which you are creating the web user.
4. Click Tools > Create Web User from Contact.

   A contact-specific dialog box opens. The Web User tab is the active tab.

The User Defined Fields tab displays the questions that a web user was required to answer when the user requested to create an account through VEMS and it is not relevant to the procedure that is described below.

Figure 6-19: Contact-specific dialog box, Web User tab



5. Enter the information for the web user.

Field	Description
Name	Automatically populated after you select the contact. You can edit this information.
Password	The password that a web user must enter to log in to VEMS.
Email address	If this information has been entered for the contact, then this field is automatically populated after you select the contact. If the field is blank, you must enter the full email address for the user. (The user must enter this address to log in to VEMS.)
Phone/Fax	Optional fields. If this information has been entered for the contact, then these fields are automatically populated after you select the contact. If the fields are blank, you can enter values if needed.
Notes	Optional field.
External Reference	Optional field. Links the web user to an outside program if needed.
Network ID	Optional field. The web user’s network ID.
Email Opt Out	Select this option if the web user is not to receive automatic emails (such as reservation summary emails) from VEMS. The user will still receive manually sent emails.
Status	Required field. Select the status for the web user: • Active—The web user can log in to VEMS. • Inactive—The user cannot log in to VEMS and is instructed to contact the EMS administrator. • Pending—The web user cannot log in to VEMS and is informed that he/she must check back at a later time.
Security Template	Required field. This determines the web user's access to the system—the menu items that the user can see and the information that the user can view in a tooltip when 'rolling-over' an event in VEMS.
Time Zone	Required field. Select the time zone for the user.

6. Open the Process Templates tab and on the Available list, select the web process template or CTRL-click to select the multiple templates to which this user is to be assigned, and then click the Move button (>) to move the selected templates to the Selected list.

A web process template defines the functions that are available to each type of web user in VEMS when the user is submitting a request for a reservation.

7. Open the Groups tab and do one of the following to specify the groups on whose behalf the web user can view and make reservations in VEMS.
   - The contact's group is selected by default. You can leave this group in the Selected list, or you can select the group and click the Remove button (<).
   - Specify any combination of search criteria for the Find field and Group Type, and then click Display to produce a list of all groups that meets the criteria. In the Available list, select a group, or CTRL-click to select multiple groups, and then click the Move button (>) to move the selected groups to the Selected list.

If you leave the Find field blank, then a list of all currently active groups for the selected group type is displayed. If you enter a search string in the Find field, the string is not case-sensitive, but your search is limited to the exact order of the characters in the string and the string must begin with the information for which you are searching. For example, ***AAA*** *returns* ***AAA*** *Colorado, but not Colorado AAA.*

8. Open the Delegates tab, and on the Search by dropdown list, do one of the following to specify the delegates for the web user:
   - Leave the Find field blank, and then click Display to open a list of *all* currently available web users. Select a web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.
   - On the Search By dropdown list, select the option by which to search (Email Address or User Name), and in the Find field, enter the string by which to filter your search, and then click Display. Select a web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.

The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and the string must begin with the information for which you are searching. For example, if searching by Email Address, a search string of ***bob*** *returns* ***bob****.worth@emssoftware.com but not dbobbett@emssoftware.com.*

9. Optionally, click Spelling to spell check any information that you manually entered for the user.
10. Click OK.

    The dialog box for creating a web user closes and a message opens indicating that the web user was created successfully.
11. Click OK to close the message and return to the group-specific window.

Editing Group Information

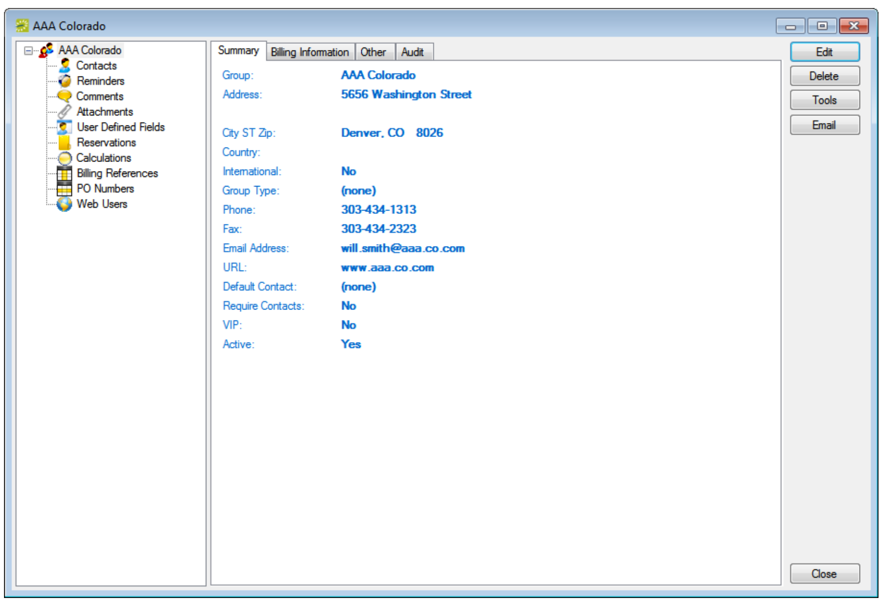
You can edit any and all information for a group. The way that you edit the information depends on the information itself. You can edit the Summary information, the Billing information, and the Other information through the Edit function on the group-specific dialog box. You must edit the group's contacts, reminders, comments, attachments, UDFs, calculations, billing reference numbers, PO numbers, and web users on the group-specific window.

To edit group information

1. Open the Groups window and search for the group for which you are editing the information. See "To search for a group and/or contact" on page 255.
2. Select the group, and then click Open to open the group in the group-specific window.

   The group is selected by default. The Summary tab is the active tab.

Figure 6-20: Group-specific window



3. Continue to one of the following:

- "To edit summary, billing, and/or other group information" on page 287.
- "To edit the contacts for a group" on page 287.
- "To edit the reminders for a group" on page 288.
- "To edit the comments for a group" on page 288.
- "To edit the attachments for a group" on page 289.

- "To the edit user defined fields (UDFs) for a group" on page 290.
- "To edit the calculations for a group" on page 290.
- "To edit the billing reference numbers for a group" on page 291.
- "To edit the PO numbers for a group" on page 291.
- "To edit the web users for a group" on page 292.

To edit summary, billing, and/or other group information

1. To edit the summary information, billing information, and/or other information for the group, click Edit.

   The group-specific dialog box opens.

2. Open the appropriate tab, and then edit the information as needed.

   See Step 3 and Step 4 of "To configure groups" on page 257.

3. After you edit the information, click OK.

   The group-specific dialog box closes. You return to the group-specific window with the group still selected.

To edit the contacts for a group

1. In the left pane of the group-specific window, select Contacts.

   A list of all contacts that are currently configured for the group is displayed in the right pane of the window.

2. In the right pane of the window, select the contact that you are editing, and then do one of the following:

   - To set the selected contact as the default contact for the group, click Set Default, and then click Yes at the prompt.
   - To edit the information for the contact, click Edit.

     The Contact dialog box opens. The dialog box displays the information for the selected contact.

3. Edit the information for the contact as needed. See "To configure a contact manually" on page 279.

4. Click OK.

   The Contact dialog box closes. You return to the group-specific window with Contacts still selected.

To edit the reminders for a group

1. In the left pane of the group-specific window, select Reminders.

   A list of all reminders that are currently configured for the group is displayed in the right pane of the window.

2. In the right pane of the groups-specific window, select the reminder that you are editing, and then click Edit.

   The Reminder dialog box opens. The Reminder tab is the active tab.

3. Do any or all of the following to edit the reminder as needed:

   - On the Reminder Type dropdown list, select a different reminder type.
   - Optionally, change the value for the Responsible User, the Date Due, or both.
   - If you are completing the reminder today, select a Date Completed; otherwise, leave this field blank.

If you leave this field blank, then it is automatically populated when you or another user completes the reminder on the Reminders tab of the Dashboard window. *See “To complete a reminder” on page 238.*

   - In the Notes field, enter any further explanation or information about the reminder.

4. Optionally, click Spelling to spell check the edited reminder before you save it.

5. Click OK.

   The Reminder dialog box closes. The newly edited reminder is automatically selected in the group-specific window.

To edit the comments for a group

1. In the left pane of the group-specific window, select Comments.

   A list of all comments that are currently configured for the group is displayed in the right pane of the window.

2. In the right pane of the group-specific window, select the comment that you are editing, and then click Edit.

   The Comment dialog box opens. The Comment tab is the active tab.

3. Do any or all of the following to edit the comment as needed:
    - On the Comment Type dropdown list, select a different comment type.

If none of the pre-configured comment types meets your working needs, select (user specified comment), and then in the Description field, enter a description for the comment type.The description can be a maximum of 30 characters, including spaces.

- In the Notes field, enter or modify the comment.
- To alert any EMS user that opens this group that this comment has been added to the group, select Alert Users.

4. Optionally, click Spelling to spell check the edited comment before you save it.
5. Click OK.

   The Comment dialog box closes. The newly edited comment is automatically selected in the group-specific window.

To edit the attachments for a group

1. In the left pane of the group-specific window, select Attachments.

   A list of all attachments that have been added for the group is displayed in the right pane of the window.
2. In the right pane of the group-specific window, select the attachment that you are editing, and then click Edit.

   The Attachment dialog box opens.
3. Do any or all of the following to edit the attachment as needed:
    - Edit the description for the attachment.

The description can be a maximum of 50 characters, including spaces. If you leave this field blank, then the Description field is populated with the name of the file after you attach it to a group.

- On the Type dropdown list, select a different attachment type.
- Click the Search icon to open the Find Attachment dialog box, and then browse to and select a different attachment.
- If you left the Description field blank, then the name of the attached file is used by default for the file description, and you can edit this if needed.

4. Optionally, click Spelling to spell check the edited attachment before you save it.

5. Click OK.

   The Attachment dialog box closes. The newly edited attachment is automatically selected in the group-specific window.

To the edit user defined fields (UDFs) for a group

1. In the left pane of the group-specific window, select User Defined Fields.

   All user defined fields that are currently configured for the group are displayed in the right pane of the group-specific window.

2. In the right pane of the group-specific window, select the UDF that you are editing, and then click Edit.

   The User Defined Field dialog box opens. The User Defined Field tab is the active tab.

3. Do one or both of the following to edit the UDF:
   - On the Field dropdown list, select a different UDF.
   - In the value field, edit the value for the UDF.

4. Click OK.

   The User Defined Field dialog box closes. The newly edited UDF is automatically selected in the group-specific window.

To edit the calculations for a group

1. In the left pane of the group-specific window, select Calculations, and then click Edit.

   The Calculations dialog box opens.

2. Do one or both of the following:
   - On the Available list, select the calculation, or CTRL-click to select the multiple calculations that are to always apply to this group, and then click the Move button (>) to move the selected calculations to the Selected list.
   - On the Selected list, select the calculation, or CTRL-click to select the multiple calculations that are *not* to apply to this group, and then click the Remove button (<) to move the selected calculations to the Available list.

3. Click OK.

   The Calculations dialog box closes. You return to the group-specific window with Calculations still selected.

To edit the billing reference numbers for a group

1. In the left pane of the group-specific window, select Billing References.
2. In the right pane of the window, select the billing reference number that you are editing, and then click Edit.

   The Billing Reference dialog box opens. The dialog box displays the information for the selected billing reference number.
3. Edit the information for the billing reference number as needed.

Option	Description
Billing Reference	The billing reference number that is associated with the group. **Note:** The reference can be alphanumeric and it has a maximum of 100 characters, including spaces.
Description	A description of the billing reference number.
Notes	Any other comments or statements that are applicable for the billing reference number.
Inactive	Leave this option blank to add the reference as an active reference (the billing reference number is to be available when a reservation is made for the group). Select this option to inactivate the billing reference number.

4. Optionally, click Spelling to spell check the information for the billing reference number before you save it.
5. Click OK.

   The Billing Reference dialog box closes. You return to the group-specific window with Billing References still selected.

To edit the PO numbers for a group

1. In the left pane of the group-specific window, select PO Numbers.
2. In the right pane of the window, select the PO number that you are editing, and then click Edit.

   The PO Number dialog box opens. The dialog box displays the information for the selected PO number.
3. Edit the information for the PO number as needed.

Option	Description
PO Number	The PO number that is associated with the group. **Note:** The reference can be alphanumeric and it has a maximum of 100 characters, including spaces.
Description	A description of the PO number.

Option	Description
Notes	Any other comments or statements that are applicable for the PO number.
Inactive	Leave this option blank to add the PO number as an active number (the PO number is to be available when a reservation is made for the group). Select this option to inactivate the PO number.

4. Optionally, click Spelling to spell check the information for the billing reference number before you save it.
5. Click OK.

   The PO Number dialog box closes. You return to the group-specific window with PO Numbers still selected.

To edit the web users for a group

When you edit the web users for a group, you can select additional web users for the group, or you can remove web users for the group. You cannot edit the web user itself, nor can you edit the delegates for a web user.

1. In the left pane of the group-specific window, select Web Users.
2. In the right pane of the group-specific window, select the web user whom you are editing, and then click Edit.

   The Web Users dialog box opens.
3. Do one or both of the following:
   - To add a new web user for the group:
     - Leave the Find field blank, and then click Display to open a list of *all* currently active web users. Select the web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.
     - In the Search By dropdown list, select the option by which to search (Email Address or User Name) and then in the Find field, enter the string by which to filter your search, and then click Display. Select the web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected users to the Selected list.

*The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and the string must begin with the information for which you are searching. For example, if searching by Email Address, a search string of **bob** returns **bob**.worth@emssoftware.com but not dbobbett@emssoftware.com.*

- To remove a web user from a group, in the Selected field, select the user, or CTRL-click to select the multiple web users that you are removing from the group, and then click the Remove button (<) to move the selected web users to the Available list.

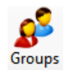
4. After you edit the information, click OK.

   The Web User dialog box closes. You return to the group-specific window with Web Users still selected.

Importing Groups

You can import groups into your EMS database from a tab-delimited text file. (See *Import File Specification* in the *EMS Setup Guide* for the file specifications.)

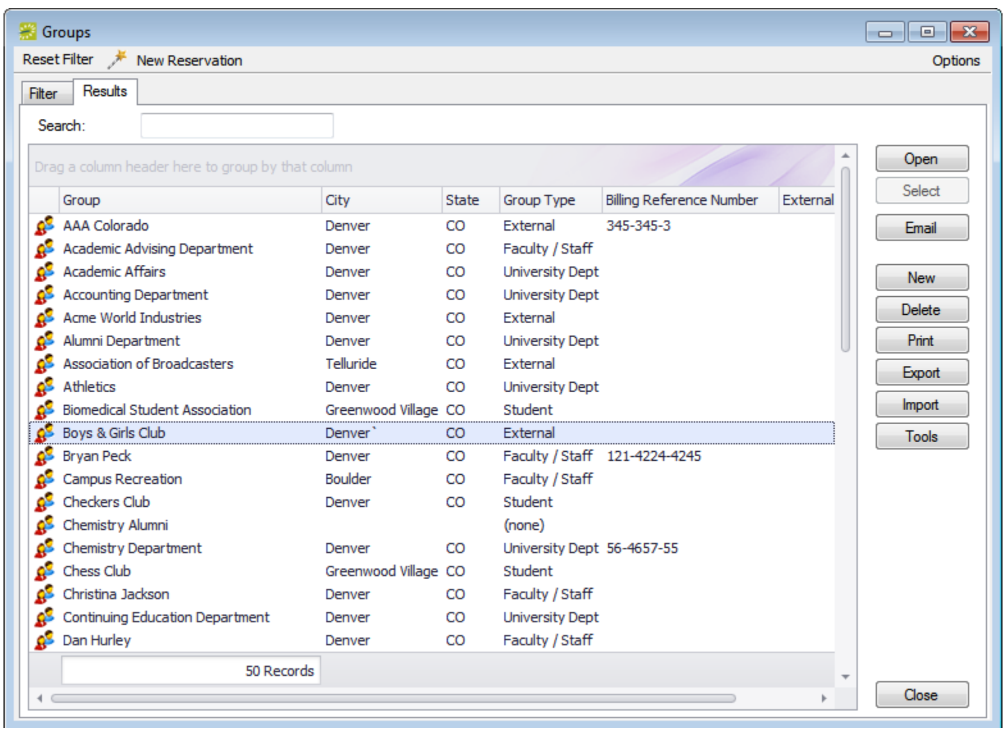
To import groups

1. On the EMS toolbar, click the Groups icon 

.

   The Groups window opens.

Figure 6-21: Groups window



2. Click Import.

   The Open File dialog box opens.

3. Browse to and select the text file that lists the groups that you are importing.

   A dialog box opens, indicating the number of groups that you are about to import, and asking you if you want to continue.

4. Click Yes.

   A message opens indicating that the import was successful.

5. Click OK to close the message and return to the Groups window.

Working with Reservations for a Group

You have a variety of options for working with the reservations for a group. You can:

- Search for and make a reservation for a group from the Groups window.
- Search for and make a reservation for a group from the group-specific window.
- Search for reservations by group, and then open and view any existing reservations in the Navigator for a group from the group-specific window.
- Reassign the reservations for a group or contact from the group-specific window.

In EMS Workplace, you can also make a group reservation from the Group Reservation window.

To work with reservations for a group

1. Open the Groups window and search for the appropriate group. See “To search for a group and/or contact” on page 255.
2. On the Groups window, select the group, and then do one of the following:
    - Click New Reservation at the top of the window to open the Reservation Wizard, and then continue to “Making a Reservation Using the Reservation Wizard” on page 45.
    - Click Open to open the group-specific window (the group is automatically selected in the window), and then continue to one of the following:
        - “To search for and view reservations by group from the group-specific window” below.
        - “To search for and make a reservation for a group from the group-specific window” on page 296.
        - “To reassign a reservation for a group from the group-specific window” on page 296.

To search for and view reservations by group from the group-specific window

1. In the left pane of the group-specific window, select Reservations.

    All reservations that have been made for the group in your EMS database and that have a date greater than or equal to the current day’s date are displayed in the right pane of the group-specific window.

Optionally, to show all reservations that have been made for the group, click Show Old.

2. In the right pane of the group-specific window, select the appropriate reservation, and then click Open.

   The reservation opens in the Navigator.

3. Continue to “The Navigator,” on page 77.

To search for and make a reservation for a group from the group-specific window

1. In the left pane of the group-specific window, select Reservations.

   All reservations that have been made for the group in your EMS database and that have a date greater than or equal to the current day’s date are displayed in the right pane of the group-specific window.

Optionally, to show all reservations that have been made for the group, click Show Old.

2. Click New.

   The Reservation Wizard opens.

3. Continue to “Making a Reservation Using the Reservation Wizard” on page 45.

To reassign a reservation for a group from the group-specific window

1. In the left pane of the group-specific window, select Reservations.

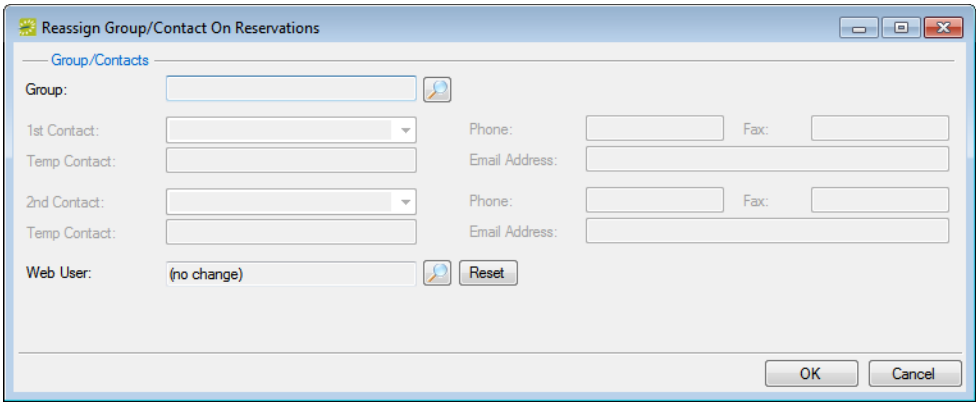
   All reservations that have been made for the group in your EMS database and that have a date greater than or equal to the current day’s date are displayed in the right pane of the group-specific window.

Optionally, to show all reservations that have been made for the group, click Show Old.

2. In the right-pane of the group-specific window, select the appropriate reservation, or CTRL-click to select multiple reservations, and then click Reassign.

   The Reassign Group/Contact on Reservations dialog box opens. See Figure 6-22 on page 297.

Figure 6-22: Reassign Group/Contact on Reservations dialog box



3. On the Group dropdown list, select the group to which you are reassigning the reservation, or click the Search icon to open the Groups window and search for the group. See "To search for a group and/or contact" on page 255.
4. Optionally, edit any and/or all of the group information as needed.

Option	Description
1st Contact 2nd Contact	The contact for the group to which you are reassigning the reservation. **Note:** If none of the pre-configured contacts is appropriate, then select (temporary contact) and in the Temp Contact field, enter the name of the temporary contact.
Phone Fax Email Address	The phone, fax, and email address for the contacts for the group to which the reservation is being reassigned. If you selected from the list of the pre-configured contacts, then some or all of this information might be automatically populated, but you can still edit the values. If you selected a (temporary contact), then you must enter this information for the contact.
Web User	The web user for the group. Initially, this field is set to (no change) which means that the web user for the group to which you are reassigning the reservation is to remain as is; however, if needed, you can click the Search icon to open the Web Users dialog box and select a different web user. • You can search by User Name or Email Address. • To search a list of all available web users, leave the Search field in the Web Users dialog box blank, and then click Display. • To search for a specific web user, enter a search string in the Search field, and then click Display. **Note:** The string is not case-sensitive, but your search is limited to the exact order of characters in the string and the string must begin with the information for which you are searching. For example, if searching by Email Address, a search string of bob returns bobworth@emssoftware.com but not dbobbett@emssoftware.com. **Note:** To return this field to the (no change) value at any time, click Reset.

5. Click OK.

   A Reassign Reservations message opens, asking you if it is OK to reassign the selected reservations to the group.

6. Click Yes.

   The Reassign Reservations message closes and a second Reassign Reservations message opens, indicating the reservations were successfully reassigned.

7. Click OK.

   The message closes, and the reassigned reservations are no longer displayed in the group-specific window.

You might have to click Reservations in the left-pane of the group-specific window to refresh the display.

To make a group reservation from the Group Reservation window (EMS Workplace only)

1. On the EMS Workplace toolbar, click the Group Reservation icon 

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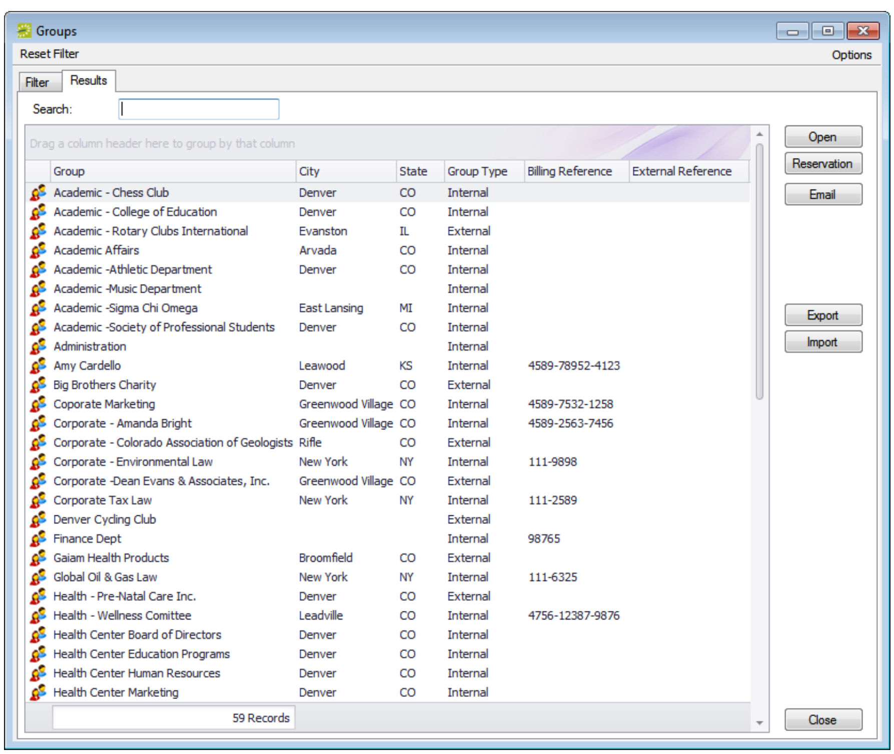
   The Group Reservation window opens. The Results tab is the active tab.

Figure 6-23: Group Reservation window



2. Open the Filter tab, and search for the group for which you are making a reservation. See “To search for a group and/or contact” on page 255.

3. Select the group for which you are making the reservation, and then click Reservation.

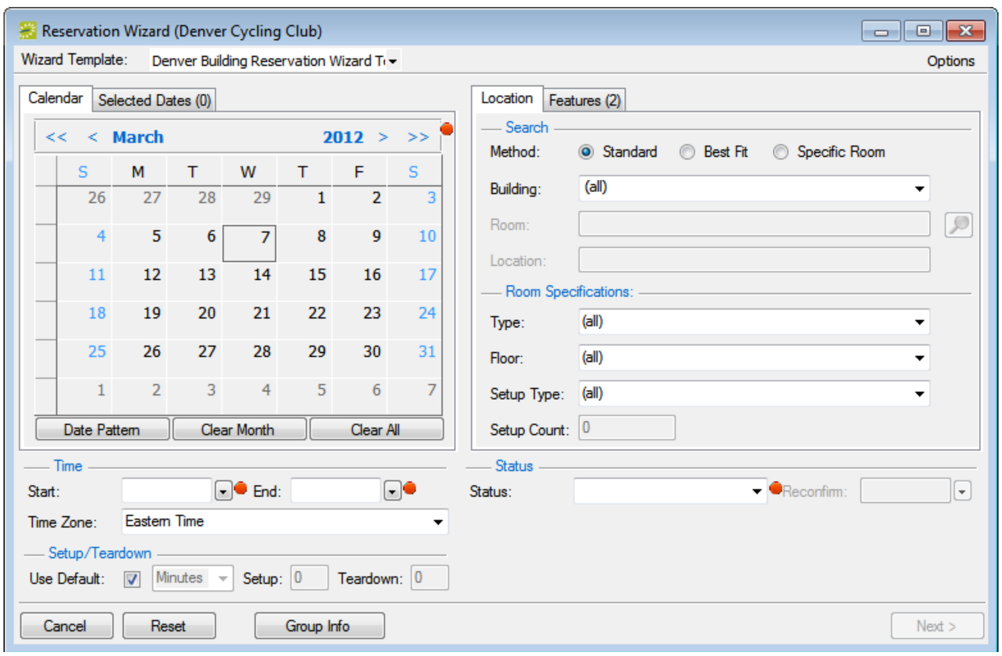
   A dropdown list of the available Reservation Wizard templates opens.

4. Select the appropriate template.

   The Reservation Wizard opens. The name of the group for which you are making the reservation is displayed in the title bar of the Reservation Wizard. The Reservation Wizard template that you selected is displayed on the Wizard Template dropdown list at the top of the Reservation Wizard. (You can always select a different template if needed.)

Depending on how your EMS administrator has configured the template that you selected, you might be prompted to select a reservation start date before the Reservation Wizard opens.

Figure 6-24: Reservation Wizard with Wizard Template option



5. Continue making the reservation as you normally would. See “Making a Reservation Using the Reservation Wizard” on page 45.

Emailing a Group

Whether your organization uses Microsoft Outlook or SMTP, you can always email an EMS group.

If your organization uses Microsoft Outlook, you can continue to use this email system to send emails to EMS groups; otherwise, to email an EMS group using the SMTP option, your user account must have an email address

To email a group

1. Search for the group that you are emailing. See “To search for a group and/or contact” on page 255.
2. Do one of the following:
    - On the Groups window, select the group and then click Email.

      Depending on how your system is configured, either a pre-addressed Outlook email form or a pre-addressed SMTP email form opens. The To field is populated with the email address that is defined for the group, but you can edit this value if needed. Go to Step 4.
    - On the Groups window, select the group, and then click Open.

      The group-specific window opens. Go to Step 3.
3. On the group-specific window, make sure that the group is selected in the left pane, and then click Email.

   Depending on how your system is configured, either a pre-addressed Outlook email form or a pre-addressed SMTP email form opens. The To field is populated with the email address that is defined for the group, but you can edit this value if needed.
4. Complete and send the email as you normally would.

Printing and Exporting Group Information

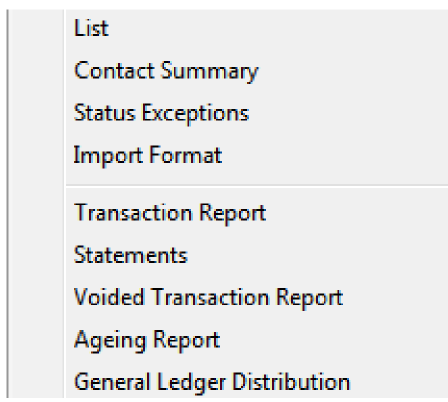
You can print a variety of information for selected groups such as contact summary information, status exceptions, group import format information, and billing information, and you can also export a list of selected groups and the summary information for each group (type, name, address, and so on) to an Excel spreadsheet.

To print group information

1. Search for the groups for which you are printing the information. See “To search for a group and/or contact” on page 255.
2. On the Groups window, click Print.

   A list with a variety of options for printing information for the groups *that are currently displayed* in the Groups window opens.

Figure 6-25: Group print options

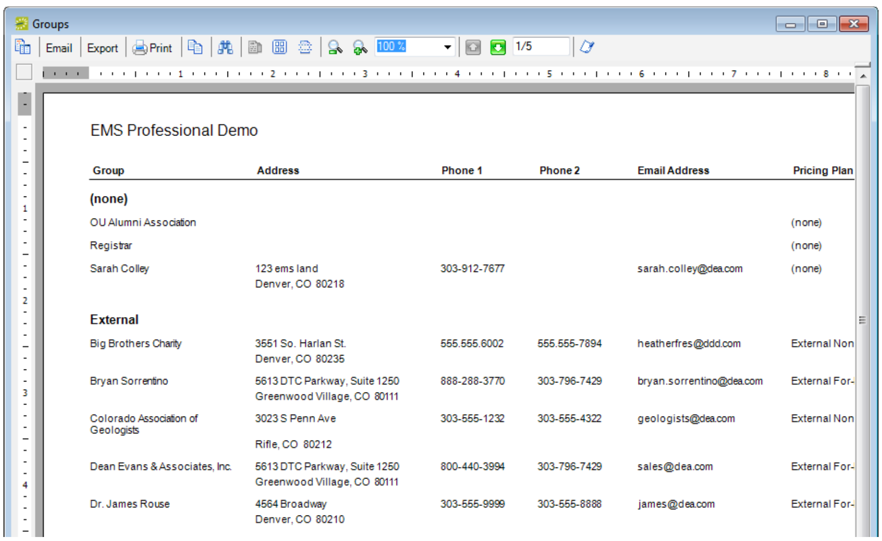


3. Select the information that you want to print for the displayed groups.

Option	Description
List	Opens an onscreen preview of all groups (group name, address, phone number, email address, pricing plan, and status) that are currently displayed in the Groups window. The groups are sorted by group type.
Contact Summary	Opens an onscreen preview of all the contacts (group name, group phone number, contact name, and contact phone number) that have been configured for all the groups that are currently displayed in the Groups window.
Status Exceptions	Opens an onscreen preview of a list of groups that is derived from all the groups that are currently displayed in the Groups window that have any status other than OK. The groups are sorted by group type.
Import Format	Opens an onscreen preview of the required format for the tab-delimited file that is to be used when importing groups.

Option	Description
Note: A variety of options are available from an onscreen preview, including the options to print a hard copy of the information, to export the information to a .pdf, and to email the printed information. See Figure 6-26 below.	
Transaction Report	See "Generating an EMS Billing Report" on page 394.
Statements	See "Generating an EMS Billing Report" on page 394.
Voided Transaction Report	See "Generating an EMS Billing Report" on page 394.
Ageing Report	See "Generating an EMS Billing Report" on page 394.
General Ledger Distribution	See "Generating an EMS Billing Report" on page 394.

Figure 6-26: Example of an onscreen preview of printed group information



To export a list of groups to an Excel spreadsheet

1. Search for the groups that are you exporting to an Excel spreadsheet. See "To search for a group and/or contact" on page 255.
2. On the Groups window, click Export.

   A Save As dialog box opens for naming the file and selecting the location in which to save the file. (The file details the summary information—type, name, address, and so on—for each group.) By default, the file is named Groups.xls, and the file location is your Document Library, but you can change the name if needed, and you can also select a different location in which to save the file. After you name and save the file, you have the option of previewing the exported file.

To preview the file, Microsoft Excel must be installed on your EMS client.

Printing and Exporting Web User Information

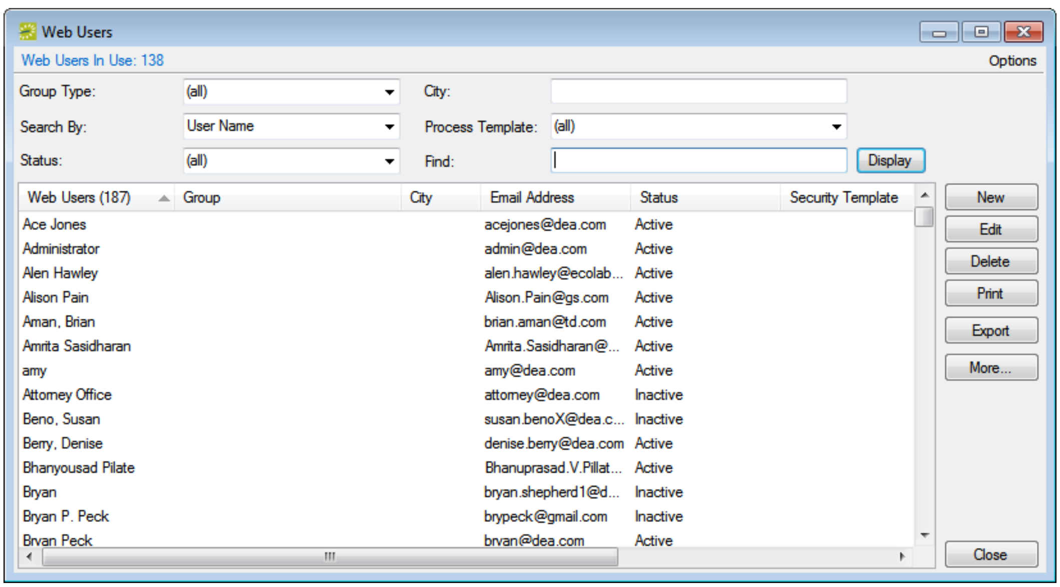
You can print a variety of information for selected web users and you can also export a list of selected web users (name and email address) to an Excel spreadsheet.

To print or export web user information

1. On the EMS menu bar, click Configuration > Web > Web Users.

   The Web Users window opens. In the upper left hand corner, the number of web users currently in use for VEMS is displayed.

Figure 6-27: Web Users window



2. Enter any combination of the following search criteria:

   - On the Group Type dropdown list, leave the group type set to the default value of (all), or select a specific group type.
   - On the Search by dropdown list, select User Name or Email Address.
   - On the Status dropdown list, select the user status by which to search.
   - On the Process Template dropdown list, leave the default value of (all), or select a specific web process template.

3. To further filter the displayed search results do one or both of the following:
   - To filter the search results based on either the User Name or Email Address, in the Filter field, enter a search string.
   - To filter the search results based on city, in the City field, enter a search string.

For either field, the string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of ***bob*** *returns* ***bob****worth@emssoftware.com but not dbobbett@emssoftware.com.*

4. Click Display.

   The web users who meet your search criteria are displayed in the lower pane of the Web Users window.

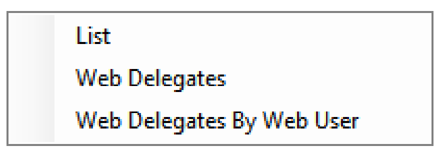
5. Continue to one of the following:
   - “To print web user information” below.
   - “To export a list of web users to an Excel spreadsheet” on page 305.

To print web user information

1. On the Web Users window, click Print.

   A list with a variety of options for printing information for the web users *that are currently displayed* in the Web Users window opens.

Figure 6-28: Web User print options

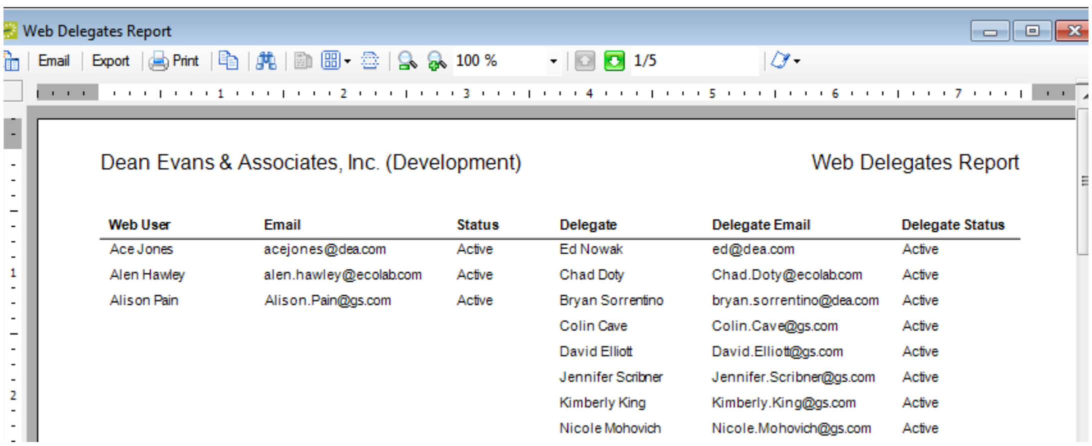


2. Select the information that you want to print for the displayed web users.

Option	Description
List	Opens an onscreen preview of a list of all the web users (web user name, email address, status, security template, process template, and last login) who are currently displayed in the Web Users window. The list is sorted alphabetically by web user name.
Web Delegates	Opens an onscreen preview of a list of all the web delegates (delegate name, delegate email address, delegate status, web user, web user email address, and web user status) for all the active web users who are currently configured in your EMS database. The list is sorted alphabetically by web delegate name and then by web user name for web users that have multiple delegates.

Option	Description
Web Delegates by Web User	Opens an onscreen preview of a list of all the web delegates (web user name, web user email address, web user status, delegate name, delegate email address, and delegate status) for all the active web users who are currently configured in your EMS database. The list is sorted alphabetically by web user name and if a web user has multiple delegates, the delegate is then sorted alphabetically by delegate name.
Note: A variety of options is available from an onscreen preview, including the options to print a hard copy of the information, to export the information to a .pdf, and to email the printed information. See Figure 6-29 below.	

Figure 6-29: Example of an onscreen preview of the Web Delegates by Web User report



Dean Evans & Associates, Inc. (Development) — Web Delegates Report

Web User	Email	Status	Delegate	Delegate Email	Delegate Status
Ace Jones	acejones@dea.com	Active	Ed Nowak	ed@dea.com	Active
Alen Hawley	alen.hawley@ecolab.com	Active	Chad Doty	Chad.Doty@ecolab.com	Active
Alison Pain	Alison.Pain@gs.com	Active	Bryan Sorrentino	bryan.sorrentino@dea.com	Active
			Colin Cave	Colin.Cave@gs.com	Active
			David Elliott	David.Elliott@gs.com	Active
			Jennifer Scribner	Jennifer.Scribner@gs.com	Active
			Kimberly King	Kimberly.King@gs.com	Active
			Nicole Mohovich	Nicole.Mohovich@gs.com	Active

To export a list of web users to an Excel spreadsheet

On the Web Users window, click Export.

A Save As dialog box opens for naming the file and selecting the location in which to save the file. (The file contains the name and address for each web user that is currently displayed in the Web Users window.) By default, the file is named Web User List.xls, and the file location is your Document Library, but you can change the name if needed, and you can also select a different location in which to save the file. After you name and save the file, you have the option of previewing the exported file.

To preview the file, Microsoft Excel must be installed on your EMS client.

Confirmations

In EMS, a *confirmation* is a document that details the critical information for a reservation—the date, the time, the location, the scheduled resources, and so on. You send a confirmation to the group who is sponsoring or hosting the event as verification that the reservation has been correctly set up—the time and location are correct, all the necessary resources have been scheduled, and so on. You can also use the confirmation to inform the group of any outstanding issues related to the reservation (such as a balance due) and to provide other information that is not necessarily reservation-specific such as your organization's cancellation policies, your organization's alcohol policies, and so on. You can generate a confirmation for all the bookings in a reservation, or just for a selected booking in a reservation.

This chapter covers the following topics:

- "Specifying your Confirmation Settings" on page 308.
- "Generating a Single Confirmation at a Time" on page 311.
- "Generating Word Merge Documents for Custom Documentation" on page 316.

Remember, a fast way to view reservations is through the Reservation Book. See "Viewing and Editing Reservations in the Reservation Book" on page 62.

This chapter details the generation of a single confirmation at a time. To generate confirmations for multiple reservations in a single step, see "Generating Multiple Confirmations" on page 420.

Specifying your Confirmation Settings

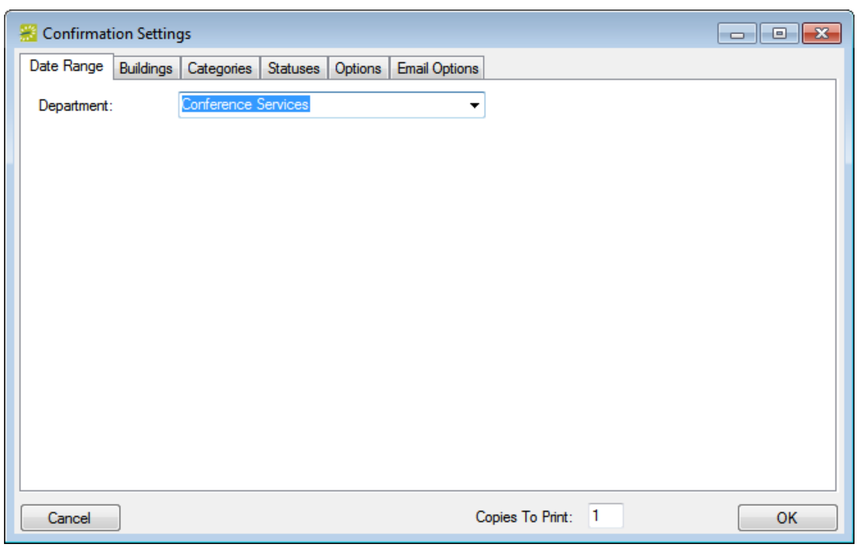
The Confirmation Settings dialog box provides a variety of options that you can specify for manual and automatic generation of a confirmation for a reservation or a booking. You can specify your confirmation settings one time and use these settings for all confirmations that you generate, or you can change the settings on as-needed basis and tailor them for each confirmation that you generate.

To specify your confirmation settings

1. Open a reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 79.
   - "Opening a reservation through the Reservation Book" on page 80.
   - "Opening a reservation through a group" on page 80.
   - "Search Tools," on page 195.
2. In the upper right hand corner of the Navigator, click Settings > Confirmation Settings.

   The Confirmation Settings dialog box opens.

Figure 7-1: Confirmation Settings dialog box



3. Specify the settings for your system's confirmations.

Field	Description
Date Range tab—The department name that appears at the top of a printed confirmation.	
Buildings tab—Select the specific buildings that are to be included in the confirmation.	
Categories tab—Select the specific booking details that are to be included in the confirmation.	

Field	Description
Statuses tab—Select the specific statuses that are to be included in the confirmation.	
Options tab—Format settings for a printed confirmation.	
Confirmation Title	Appears bold and centered at the top of the printed confirmation.
Header Message Footer Message	Pre-configured blocks of text that appear in the header and footer of the printed confirmation.
Paper Size	The size of the paper on which the confirmation is printed. Values are Letter, Legal, and A4.
Print Comments	Include the comments for the reservation in the printed confirmation.
Print Reminders	Include the reminders for the reservation in the printed confirmation.
Print Cancel Reasons	Include the reasons for cancellation in the printed confirmation.
Print User Defined Fields	Include user-defined fields and their values in the printed confirmation.
Print Room Phone	Include the phone number for the room in which the event is being held in the printed confirmation.
Print Room Notes	Include any notes for the room in which the event is being held in the printed confirmation.
Print Building Notes	Include any notes about the building in the printed confirmation.
Print Billing Reference Allocation	Include the billing reference numbers for the event as well as the percentage of charges that is allocated to each number in the printed confirmation.
Print PO Allocation	Include the PO numbers for the event as well as the percentage of charges that is allocated to each number in the printed confirmation.
Print Category Subtotals	Include the subtotal charges by category in the printed confirmation.
Print Room Type	Include the room type for the event in the printed confirmation.
Print Item Selection Notes	Include the notes for each resource selection item for the event in the printed confirmation.
Suppress Reserved Time	Do not show the reserved time for the event in the printed confirmation.
Suppress Location	Do not show the location for the reservation in the printed confirmation.
Suppress Pricing	Do not show the reservation’s room charges or resource charges in the printed confirmation.
Suppress Logo	Do no show your organization’s logo in the printed confirmation.
Suppress Item Notes	Do not show notes for any booking items in the printed confirmation.
Suppress Item Special Instructions	Do not show special instructions for any booking items in the printed confirmation.
Suppress Item Selections	Do not show any resource item selections in the printed confirmation.
Always Display Time Zone	Always show the time zone for the event in the printed confirmation.

Field	Description
Display Messages as HTML	If you have defined any HTML messages, then select this option to display the HTML version of these messages in the printed confirmation; otherwise, the message is displayed in plain text.
Limit Bookings to Those With Details in Selected Categories	Show only those bookings in the printed confirmation that contain details for the categories that are selected on the Categories tab.
Email Options tab—Format settings for the body of an emailed confirmation.	
Header Message Footer Message	Pre-configured blocks of text that appear in the body of the emailed confirmation. **Note:** Your EMS administrator configures these values. Contact your administrator if you need assistance with adding or editing a value.
Email Format	• None—Opens a blank email form. • Detail—The confirmation appears in its entirety in the email body. • Mobile Friendly—The confirmation appears in a condensed version that is viewable on a mobile device. • Summary—Only the booking information appears in the email body.
Attached Detailed Confirmation	The entire confirmation is provided as an attachment to the email.
Attach .ics file	An .ics file is a file that a recipient can save to create an entry in his/her personal calendar. Select this option to attach an .ics file to the email.
Prompt for Res. Attachments	Select from a list of reservation-level attachments that you are including in the email.
Email To Email CC	Select the users associated with the reservation who should receive the email confirmation.
Copies to Print	The number of copies of the confirmation that are automatically printed if you print the confirmation. (Not applicable if you email a confirmation.)

4. You can now generate a confirmation (manually or automatically) based on the settings that you have specified. See "Generating a Single Confirmation at a Time" on page 311.

Generating a Single Confirmation at a Time

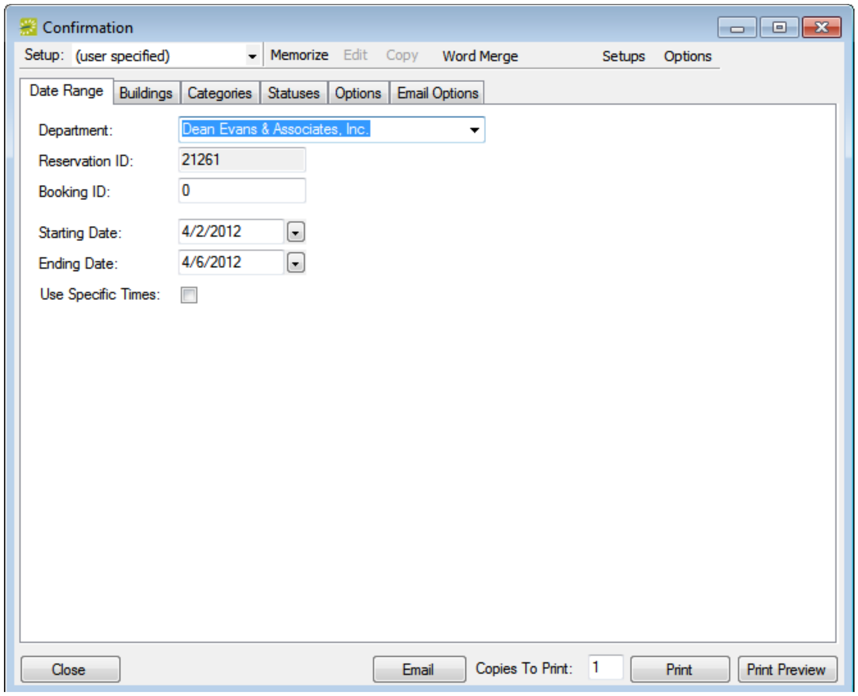
You can generate a confirmation for all the bookings in a reservation, or just for a selected booking in a reservation. In the *default* implementation of EMS, when you request to generate a confirmation for a reservation or a booking, the Confirmation dialog box opens. The Confirmation dialog box has the same tabs as the Confirmation Settings dialog box. (Remember, the values that you specified on the Confirmation Settings dialog box determine the information that is included in a confirmation. See "Specifying your Confirmation Settings" on page 308.) It also contains options for generating a print preview of the confirmation and for *manually* printing or emailing an EMS-generated confirmation. If you want to *automatically* generate a printed or emailed confirmation according to your confirmation settings, then you must edit the Confirmation setting on the General tab of the Navigator Options dialog box.

To manually generate a single confirmation at a time

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 79.
   - "Opening a reservation through the Reservation Book" on page 80.
   - "Opening a reservation through a group" on page 80.
   - "Search Tools," on page 195.
2. In the left pane of the Navigator, do one of the following:
   - Select the reservation for which you are generating the confirmation.
   - Select the reservation for which you are generating the confirmation, and then in the Bookings (lower right) pane, select the booking for which you are generating the confirmation.
3. Do one of the following:
   - If you are generating a confirmation for a reservation, then open the Reservation Summary tab or Properties tab in the upper right pane of the Navigator, and then click Confirmation.
   - If you are generating a confirmation for a selected booking, then open the Booking Summary tab in the upper right pane of the Navigator, and then click Confirmation.

   The Confirmation dialog box opens. The dialog box has the same tabs as the Confirmation Settings dialog box with one exception, the Date Range tab. (Additional options are available on the Date Range tab that you can use to limit the confirmation to specific bookings and/or specific booking times.) It also has options for saving, or *memorizing*, the displayed confirmation settings so that you do not have to adjust the settings every time you generate the confirmation. When the dialog box first opens, the Setup is set to (user-specified). See Figure 7-2 on page 312.

Figure 7-2: Confirmation dialog box, Date Range tab



4. Do one of the following:

   - Review the selections on this dialog box, and optionally, make any needed modifications.

If you use specific times, then you must also click Options and indicate how the confirmation is to be limited—to bookings that start within the range or to bookings that occur within the time range.

If needed, you can always save, or memorize, these settings. See *"Working with Memorized Reports" on page 323.*

   - On the Setup dropdown list, select a saved, or *memorized*, confirmation.

If you select a memorized confirmation, then the only changes that you can make are to the dates and/or times on the Date Range tab.

5. Do one of the following:

   - To manually generate a printed confirmation, edit the number of copies to print as needed in the Copies to Print field (the default value is 1), and then click Print.

     A Print dialog box opens in which you can specify information such as the printer to use, the page range, and so on. Click Print in this dialog box to manually generate the printed confirmation.

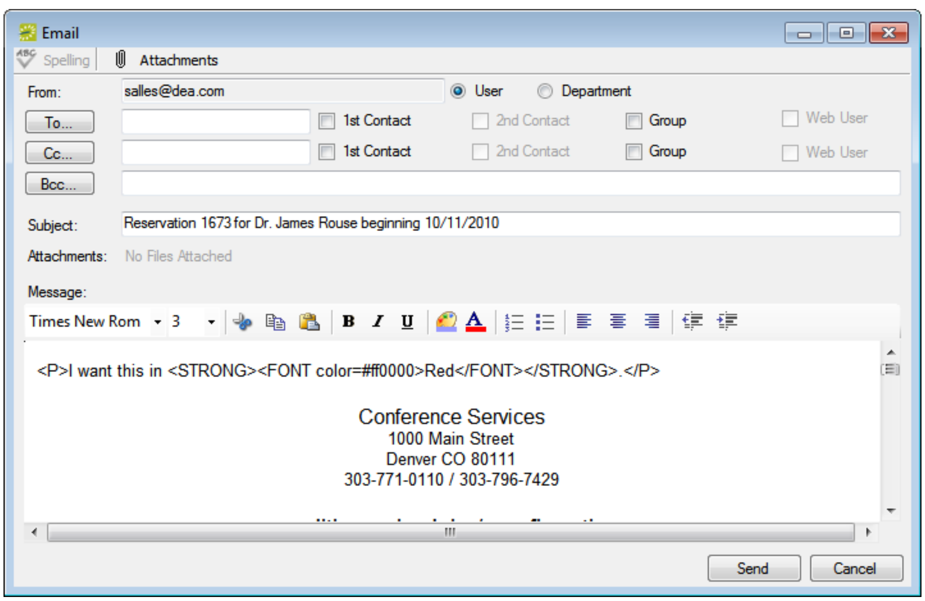
Before you print the confirmation, you can click Print Preview to open an onscreen preview of the printed confirmation. A variety of options are available from this preview, including the options to email the confirmation, to export the confirmation to a .pdf, and to print the confirmation.

   - To manually generate an emailed confirmation, click Email.

     See “Sending Email from EMS” on page 414.

If you are using SMTP email, then Figure 7-3 below is an example of the SMTP email window that opens.

Figure 7-3: SMTP email window for a confirmation



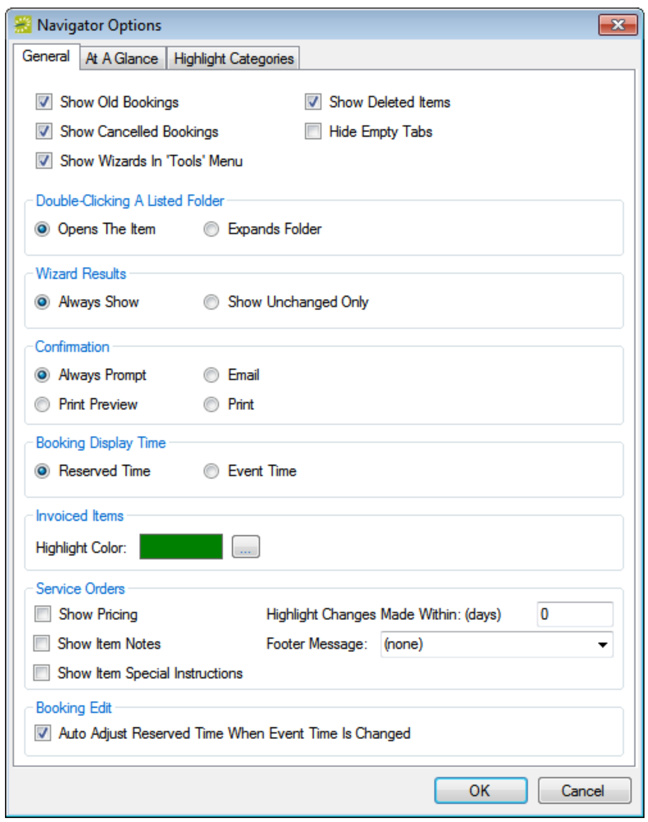
To automatically generate a confirmation

If you want to always automatically generate a printed or emailed confirmation based on your confirmation settings, then you must edit the Confirmation setting on the General tab of the Navigator Options dialog box.

1. Open the reservation in the Navigator. See:
   - “Opening a reservation directly in the Navigator” on page 79.
   - “Opening a reservation through the Reservation Book” on page 80.
   - “Opening a reservation through a group” on page 80.
   - “Search Tools,” on page 195.
2. In the upper corner of the Navigator window, click Settings > Options.

   The Navigator Options dialog box opens. The General tab is the active tab.

Figure 7-4: Navigator Options dialog box, General tab

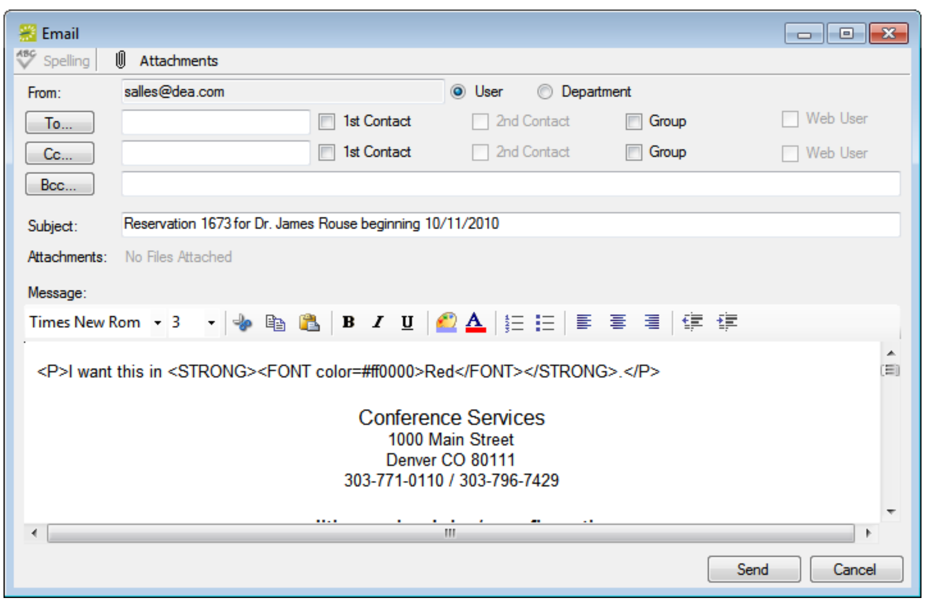


3. Under Confirmation, select one of the following:
   - Email—To always automatically generate an emailed confirmation based on your confirmation settings.
   - Print—To always automatically generate a printed confirmation based on your confirmation settings.
4. Click OK to close the dialog box and return to the Navigator.

   The next time you select any reservation or booking in the Navigator and click Confirmation, the following happens:
   - If your Navigator Options are set to Print, then a Print dialog box opens in which you can specify information such as the printer to use, the page range, and so on. Click Print in this dialog box to generate a printed confirmation that is based on your confirmation settings.
   - If your Navigator Options are set to Email, then see "Sending Email from EMS" on page 414.

If you are using SMTP email, then Figure 7-5 below is an example of the SMTP email window that opens.

Figure 7-5: SMTP email window for a confirmation



Generating Word Merge Documents for Custom Documentation

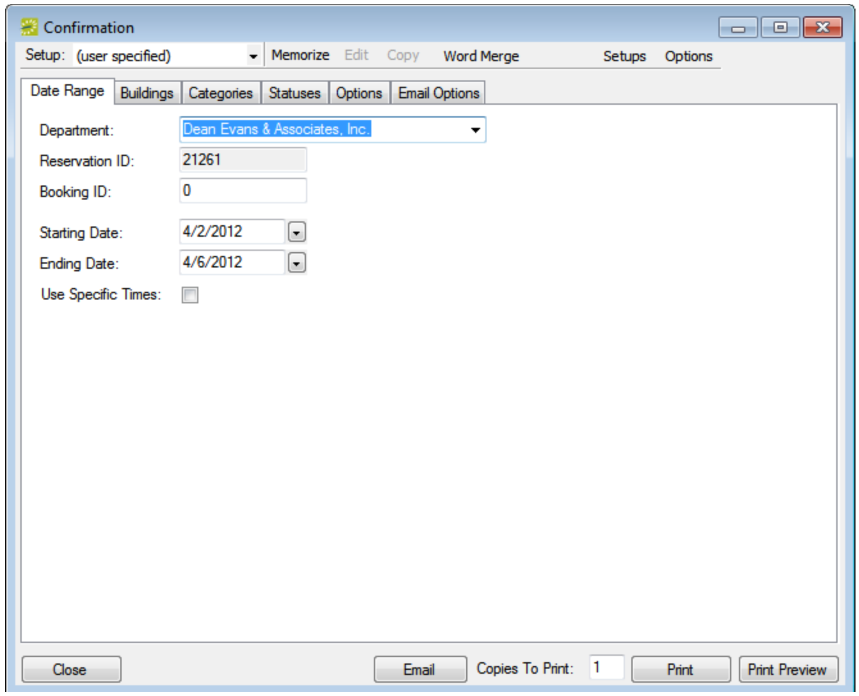
EMS provides options for producing pre-formatted documents that contain reservation information such as confirmations. Your organization, however, might have organization-specific information that must be included in these documents. If your organization has purchased and implemented the optional Word Merge module, you can generate *Word Merge documents* to produce custom confirmations, contracts, and so on that contain not only selected reservation information from EMS, but also, any information that is required by your organization. Because these documents are generated in a Word format (.docx), you cannot print them or email them from EMS; however, you can manually print them and send them as an attachment in a email just as you would any other Word document.

To generate Word Merge Documents

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 79.
   - "Opening a reservation through the Reservation Book" on page 80.
   - "Opening a reservation through a group" on page 80.
   - "Search Tools," on page 195.
2. In the left pane of the Navigator, do one of the following:
   - Select the reservation for which you are generating the confirmation.
   - Select the reservation for which you are generating the confirmation, and then in the Bookings (lower right) pane, select the booking for which you are generating the confirmation.
3. Do one of the following:
   - If you are generating a confirmation for a reservation, then open the Reservation Summary tab or Properties tab in the upper right pane of the Navigator, and then click Confirmation.
   - If you are generating a confirmation for a selected booking, then open the Booking Summary tab in the upper right pane of the Navigator, and then click Confirmation.

   The Confirmation dialog box opens. The Date Range tab is the active tab. See Figure 7-6 on page 317.

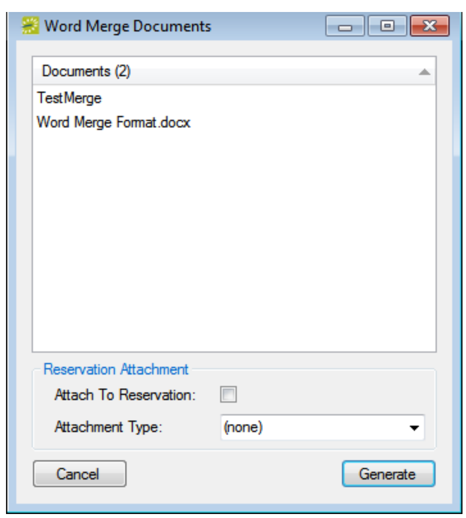
Figure 7-6: Confirmation dialog box, Date Range tab



4. At the top of the Confirmation dialog box, click Word Merge.

   The Word Merge Documents dialog box opens. This dialog box displays all the Word Merge documents that your EMS administrator has configured for your organization-specific documents such as confirmations, contracts, and so on.

Figure 7-7: Word Merge Documents window



5. Select the appropriate Word Merge document, and then optionally, do one or both of the following:

   - To attach the document at the reservation-level for the selected reservation, click Attach to Reservation.
   - Select the attachment type.

6. Click Generate.

   A message opens, indicating that the Word Merge was successful, and asking you if you want to view the document.

7. Optionally, click Yes.

   The document opens in Microsoft Word. You can now use any of the standard Word functions to save the document, to print the document, attach the document to email, and so on.

To save a copy of the document in your EMS database, you must either attach the document to the reservation, or you must open and view the document and save it as a Word document.

Reports and Queries

EMS contains six different categories of general reports to assist you in monitoring and maintaining your organization’s reservation records and associated transactions. The application also contains a Query Builder function which you can use to define custom criteria for searching for information in your organization’s EMS database.

This chapter covers the following topics:

Reports that are specific for the Billing function in EMS are detailed in “Billing,” on page 361.

Generating an EMS Report

All EMS reports are available under the Reports option on the menu bar. For any EMS report, you can specify the parameters, options, and format for the report, or you can generate the report according to *memorized* settings. Not all reports require the same parameters, nor do they all have the same options available. In addition, you can generate different reports in different formats.

To generate a report

1. On the EMS menu bar, click Reports to open the Reports menu, and then click the option for the report that you are generating. For example, to generate the Event Schedule report, click Reports > Daily > Event Schedule.
2. On the Setup dropdown list, do one of the following:
   - To generate the report according to the filter settings that you specify (parameters, options, and so on), leave (user specified) selected on the Setup list, and then go to Step 3.
   - To run the report with filter settings that have been saved, or *memorized*, select the memorized report on the Setup list, and then go to Step 5.

For detailed information about memorized reports, see "Working with Memorized Reports" on page 323.

3. On the Options list, select the Date/Time filter by which to generate the report.
4. Specify the report parameters, options, and format. See:
   - "Daily reports" on page 329.
   - "Sales reports" on page 334.
   - "Statistics reports" on page 337.
   - "Other reports" on page 340.
   - "Exceptions reports" on page 342.
   - "Hoteling reports (EMS Workplace only)" on page 345.

For brevity and ease, the parameters and options that are available for each report are not discussed here. Instead, the options are discussed in "Report Descriptions and Options" on page 328. Billing reports are discussed in "Billing," on page 361. Academic reports are discussed in ,
"Academic Planning (EMS Campus)," on page 443. Contact your EMS administrator if you need assistance in generating any of these reports.

5. Optionally, do one or more or all of the following:
   - In the Report Comment field, enter a comment that is to be printed on the report.

The comment can be a maximum of 255 characters, including spaces.

   - Click Print Preview.

     A preview of the report opens onscreen.
   - To print a hard copy of the report, specify the number of copies that you are printing, and then click Print.
6. Click Close.

   Unless you change the filter settings, all subsequent reports are generated and printed according to the parameters and options that you have specified and in the format that you specified. If you want to save certain settings so that you do not have to adjust the filter settings every time you run the report, you can memorize the report. See “Working with Memorized Reports” on page 323.

Working with Memorized Reports

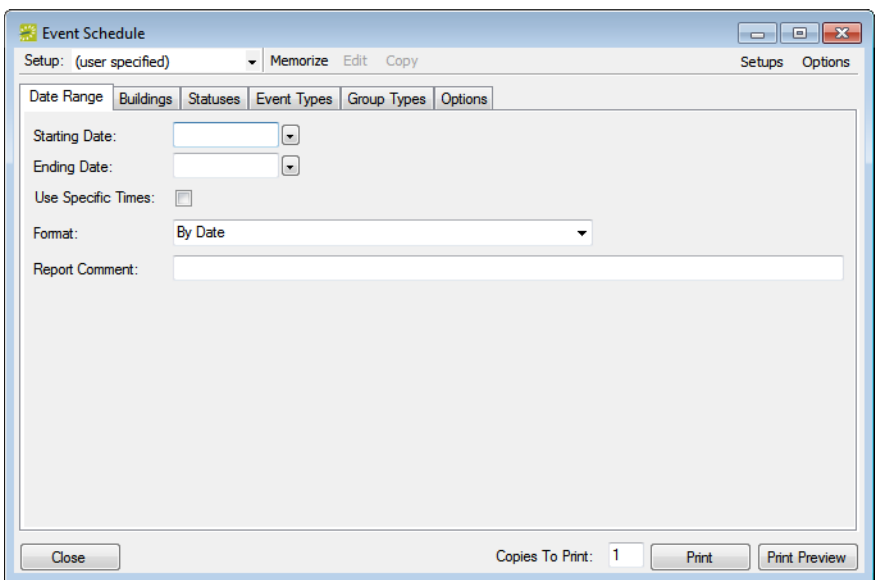
A *memorized* report is a report for which the filter settings have been saved, or memorized, so that you do not have to adjust the filter settings every time you run the report. You can create a memorized report "from scratch," or you can copy an existing memorized report, and edit the filter settings as needed to create a new memorized report. If you are the owner of a memorized report, you can also edit the name of an existing memorized report and you can delete a memorized report.

Although this topic is written from the perspective of reports, it is also applicable for working with memorized confirmations and invoices.

To create a memorized report "from scratch"

1. On the EMS menu bar, click Reports to open the Reports menu, and then click the option for the report that you are memorizing. For example, to memorize the Event Schedule report, click Reports > Daily > Event Schedule to open the Event Schedule dialog box.

Figure 8-1: Event Schedule report dialog box



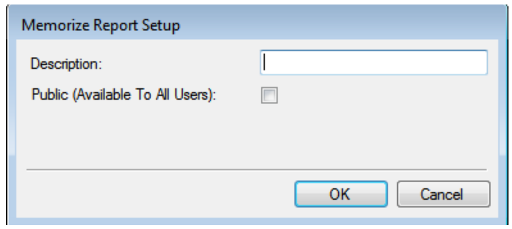
2. On the <Report> dialog box, click Options, and then select the Date/Time filter by which to generate the report.

3. Specify the report parameters, options, and format.

4. On the <Report> dialog box, click Memorize.

   The Memorize Report Setup dialog box opens.

Figure 8-2: Memorize Report Setup dialog box



5. In the Description field, enter a name or description for the report.

The description can be a maximum of 50 characters, including spaces.

6. If you are an administrative user, and the report is to be available to all users, then select Public (Available to All Users); otherwise, if the report is to be available only to you (the owner), then leave this option blank.

If you are not an administrative user, then only your EMS administrator can make your memorized reports available to all users. Contact your EMS administrator for assistance.

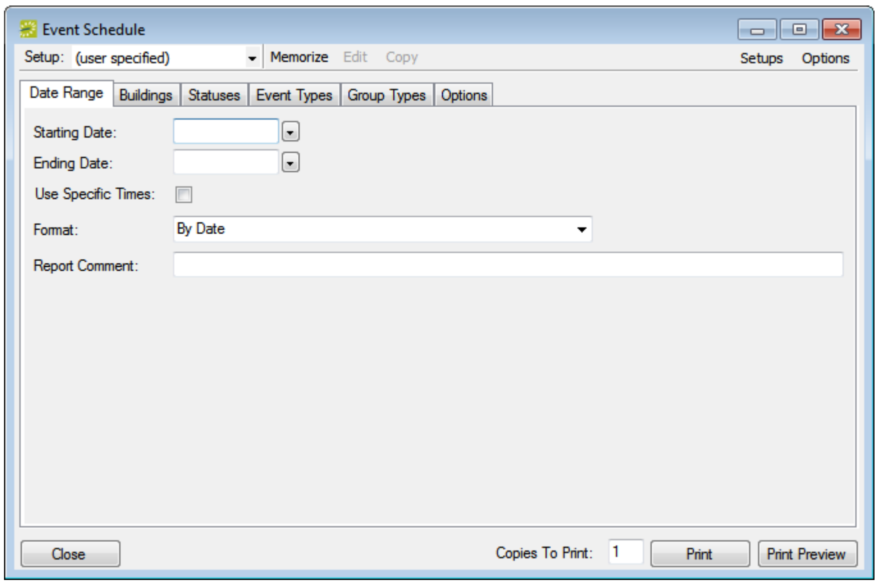
7. Click OK.

   The Memorize Report Setup dialog box closes. You return to the <Report> dialog box. The memorized report is now an option on the Setup dropdown list.

To create a memorized report by copying

1. On the EMS menu bar, click Reports to open the Reports menu, and then click the option for the report that you are memorizing. For example, to memorize the Event Schedule report, click Reports > Daily > Event Schedule to open the Event Schedule dialog box.

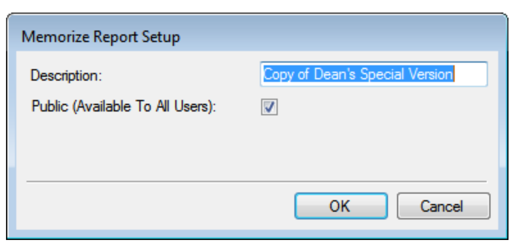
Figure 8-3: Event Schedule report dialog box



2. On the Setup dropdown list, select the memorized report from which you are copying the filter settings, and then click Copy.

   The Memorize Report Setup dialog box opens. By default, the Description field indicates that you are naming a copy of a memorized report.

Figure 8-4: Memorize Report Setup dialog box



3. In the Description field, enter a name or description for the new memorized report.

The description can be a maximum of 50 characters, including spaces.

4. If you are an administrative user, and the report is to be available to all users, then select Public (Available to All Users); otherwise, if the report is to be available only to you (the owner), then leave this option blank.

If you are not an administrative user, then only your EMS administrator can make your memorized reports available to all users. Contact your EMS administrator for assistance.

5. Click OK.

   The Memorize Report Setup dialog box closes. You return to the <Report> dialog box. The filter settings are populated with the settings for the memorized report.

6. Click Edit, and then edit the filter settings for the report as needed.

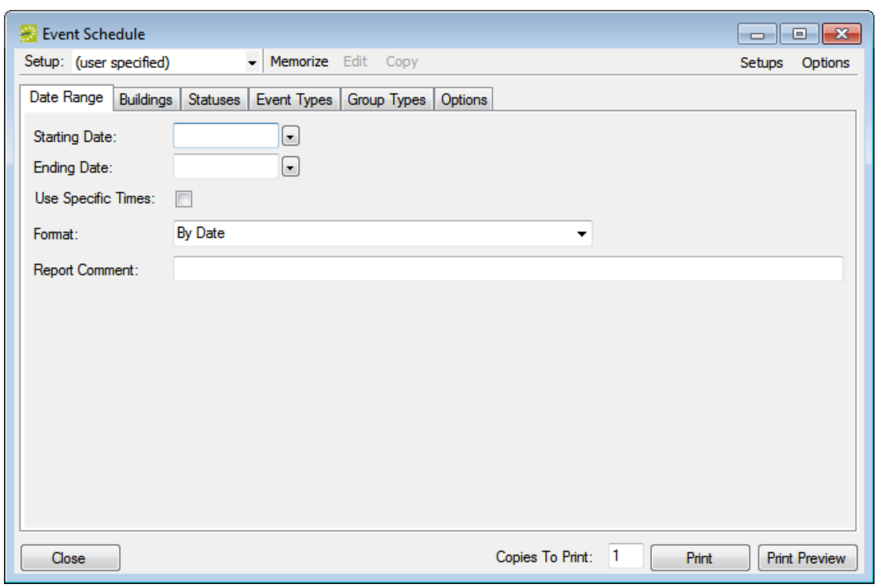
7. Click Memorize.

   The memorized report is now an option on the Setup dropdown list.

To edit or delete a memorized report

1. On the EMS menu bar, click Reports to open the Reports menu, and then click the option for the memorized report that you are editing. For example, to edit a memorized Event Schedule report, click Reports > Daily > Event Schedule to open the Event Schedule dialog box.

Figure 8-5: Event Schedule report dialog box

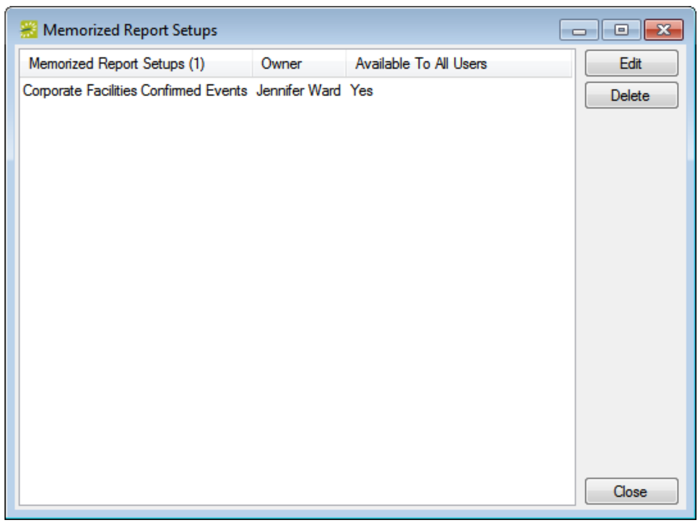


2. On the <Report> Setup dialog box, click Setups.

   The Memorized Report Setups dialog box opens. This dialog box lists all the memorized report setups for which you are the owner, and therefore can edit the name and/or delete the report.

Administrative users can edit and delete all memorized reports in the system. See Managing Memorized Reports in the EMS Setup Guide.

Figure 8-6: Memorized Report Setups dialog box



3. Select a memorized report setup, and then do one of the following:

   - To edit the name of the report, click Edit to open the Memorize Report Name dialog box, and edit the name of the report in the Description field.

The description can be a maximum of 50 characters, including spaces.

   - To delete the report, click Delete, and then click Yes in the message that asks you if you are sure that you want to delete the selected report.

Report Descriptions and Options

This section provides a description of every EMS report in the categories listed below and it also defines the options that are available for each report.

See:

- "Daily reports" on page 329.
- "Sales reports" on page 334.
- "Statistics reports" on page 337.
- "Other reports" on page 340.
- "Exceptions reports" on page 342.
- "Hoteling reports (EMS Workplace only)" on page 345.

Daily reports

Report	Description	Options
Event Schedule	A summary of the events that are scheduled at your facility, sorted by date and event start time. The report shows event start and end time, group name, event name, and location. You typically print and post the Event Schedule in a lobby or entry way to help visitors find their events.	• Use Page Breaks - If the report is run across multiple days, then each day starts on a new page. • Show Bookings on Start Date Only—If a booking is scheduled overnight, then only the start date of the booking is displayed in the report. For example, a booking exists for 3P Thursday through 10A Friday. If this option is selected, then the booking is displayed only for Thursday in the report. • Show Holidays—Displays any holidays that are configured in the EMS database on the report. • Show Building Hours—Displays building hours on the report. • VIP Events Only—Only the events that are marked as a “VIP” are displayed in the report. • Use Calendar Styles: Events are displayed in the font/color of the Calendar Style that is associated with each event.
Event Calendar	A chronological list of scheduled events in a wall calendar format.	• Use Calendar Styles—Events are displayed in the font/color of the Calendar Style that is associated with each event. • Weekly Calendar—One week per page is displayed in the report. • Show Adjacent Calendar Days—Works in conjunction with the Weekly Calendar option to display events that occur on Saturday and Sunday in the report. • Grey Out Adjacent Calendar Days—Works in conjunction with The “Show Adjacent Calendar Days” option to display events that occur on adjacent days in gray instead of in black. • Hide Holidays—By default, holidays are displayed on the Daily Calendar Report. Select this option to hide holidays in the report. • By Room—Displays events one room at a time in a calendar view.

Report	Description	Options
Room Cards	A list of events that is designed to be posted outside a room or event space. The report notes the date, event time, and location for events, as well as the group sponsoring each event. The report can be a single list of all events that are scheduled for the room on a particular date, or it can be a single page per event.	• Show Bookings on Start Date Only—If a booking is scheduled overnight, then only the start date of the booking is displayed in the report. For example, a booking exists for 3P Thursday through 10A Friday. If this option is selected, then the booking is displayed only for Thursday in the report. • Print Blank Room Cards—Prints a room card for a space that does not have any events scheduled. • Print Logo—Prints the facility logo on each room card. You can specify the logo location on the right or left side of the room card. • Sort Room Cards By Book Sequence—If Book Sequencing is being used on Room Configuration, then a facility can print room cards in the Book Sequence order. • Print Combo Room Components—Prints an individual room card for each component of a combo room. • Suppress End Time—Do not show the end times for bookings in the report.
Activity Schedule	A list of bookings in all rooms in a building, or just in a specific room in the building. The report, which shows event start and end times, event name, group name and room, can be generated for a range of dates. The report can generated in one of two formats—by Date or by Building.	• Use Page Breaks—A new page is generated for each date or for each building. • Show Bookings on Start Date Only—If a booking is scheduled overnight, then only the start date of the booking is displayed in the report. For example, a booking exists for 3P Thursday through 10A Friday. If this option is selected, then the booking is displayed only for Thursday in the report.

Report	Description	Options
Setup Worksheet	An internal report that sets up crews, custodial, or operations personnel use to ensure that each room is arranged properly for each event. The report displays detailed information about each booking, including setup type, setup notes, required resources, user defined fields, special instructions and resource item notes.	• Use Page Breaks—If this report is run across multiple days, then each day starts on a new page. • Highlight Changes Made Within:(days)—Changes that have been made within the specified number of days are highlighted in the report. • Limit Bookings To Those With Details In Selected Categories—Only bookings with a booking detail from the specified categories are displayed in the report. • Show Bookings on Start Date Only—If a booking is scheduled overnight, then only the start date of the booking is displayed in the report. For example, a booking exists for 3P Thursday through 10A Friday. If this option is selected, then the booking is displayed only for Thursday in the report. • Keep Detail Together—If an event has booking details, then the details are kept together on one page instead of being split across two pages. • Show Holidays—Holidays are displayed in the report. • Show Building Hours—Building hours that are associated with each building are displayed in the report. • Show Item Notes—Any notes that have been entered for a booking detail item are displayed in the report. • Show Item Special Instructions—Any special instructions that have been entered in VEMS for a booking detail item are displayed in the report. • Show User Defined Fields—Any user defined fields and their answers for a reservation are displayed in the report. • Show Booking Changes Only—Bookings that have been edited within the specified number of days are displayed in the report.

Report	Description	Options
Service Order Schedule	Lists the service orders that are scheduled for a date or date range. Produced by category.	• Use Page Breaks—If this report is run across multiple days, then each day starts on a new page. • Show Details—Booking item details that associated with each event are displayed in the report. • Highlight Changes Made Within:(days)—Changes that have been made within the specified number of days are highlighted in the report • Show Pricing—Any pricing that is associated with an item is displayed in the report. • Show Item Notes—Any notes that have been entered for a booking detail item are displayed in the report. • Show Item Special Instructions—Any special instructions that have been entered in VEMS for a booking detail item are displayed in the report.
Service Orders	Separate pages for each service order in a date range. The report provides information on the event and the items or services needed. Produced by category.	• Highlight Changes Made Within:(days)—Changes that have been made within the specified number of days are highlighted in the report. • Footer Message—Used to specify the Footer message that is displayed on each page of the report. • Show Item Notes—Any notes that have been entered for a booking detail item are displayed in the report. • Show Item Special Instructions—Any special instructions that have been entered in VEMS for a booking detail item are displayed in the report.

Report	Description	Options
Banquet Event Order	Separate pages for each booking that occurs on a date or within a date range that has the “Primary Category” specified. Service orders, resource information, notes, and information for resource with order type categories are included in the report.	• Highlight Changes Made Within:(days)—Changes that have been made within the specified number of days are highlighted in the report. • Show Pricing—Any pricing that is associated with an item is displayed in the report. • Limit Bookings To Those With Details In Selected Categories—Only bookings with a booking detail from the specified categories are displayed in the report. • Show Item Notes—Any notes that have been entered for a booking detail item are displayed in the report. • Show Item Special Instructions—Any special instructions that have been entered in VEMS for a booking detail item are displayed in the report. • Show Item Selection Notes—Any notes that have been entered for a booking detail item selection are displayed in the report. • Show Service User Defined Fields—Any user defined questions and their answers for any listed category are displayed in the report. • Set Page Numbers By Booking—Resets page number for every unique booking. • Use Page Breaks—If this report is run across multiple days, then each day starts on a new page.
Resource Schedule	Lists by category and date, how many of each resource item is needed, as well as the event time, event name, location, and group.	• Use Page Breaks—If this report is run across multiple days, then each day starts on a new page. • Highlight Changes Made Within:(days)—Changes that have been made within the specified number of days are highlighted in the report. • Show Overbooked Resources Only—Only those bookings where the selected resource exceeds the number available in inventory at that time are displayed in the report.

Report	Description	Options
Service Order Change Report	List the service orders to which a change has been made by Booking/Service Order ID. Includes the service order category, a description of the change, the old value for the service order, the new value for the service order, the date of the change, and the ID for the user who made the change.	N/A
Attendee Visitor Report	Lists the attendees for an event by date or date range, and indicates whether they are visitors and shows their group name, phone number, event name, the room they will be in, and the start and end times for their event.	• Use Page Breaks—If this report is run across multiple days, then each day starts on a new page.
Production Report	Lists production items and their quantities grouped by production area.	• Show Item Notes—Any notes that have been entered for a booking detail item are displayed in the report. • Show Item Special Instructions—Any special instructions that have been entered in VEMS for a booking detail item are displayed in the report. • Show Item Selections—Any selections that have been entered for a booking detail item are displayed in the report.

Sales reports

Report	Description	Options
Sales by Group Type	Lists the sales for each group type for a date or date range.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.

Report	Description	Options
Sales by Group	Lists the sales for each group, divided by group type, for a date or date range.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.
Sales by Category	Lists the revenue generated by each resource category for a date or date range.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.
Sales by Resources	Lists the sales for each resource item for a date or date range.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.
Sales by Reservation	Lists the reservations that have bookings for a specified date or date range and shows the charges, by category, for the reservation. Also gives a grand total for all reservations. If a reservation also has bookings that fall outside the specified date or date range, these figures are not included in the report.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.
Sales by Billing Reference	Lists the total sales for a date or date range, based on the billing reference number on the reservations that have bookings in the specified range. Sales that are associated with reservations that have no billing reference number are not included in the report.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.

Report	Description	Options
Sales by Booking	Lists the sales for a particular date or for each date in a date range, broken down by booking. This report displays the following information—Start/End Times, Group, Event Name, Location, Billing Reference#, PO Number, Payment Type, Status, Reservation ID, Booking ID, and Sales amount.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.
Status Changes by Reservation	Lists the sales that are associated with a reservation where the reservation or booking status was changed.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.
Status Changes by Booking	Lists the sales that are associated with bookings where the bookings status was changed.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.

Statistics reports

All Statistics reports, except Hourly Room Utilization and Hourly Resource Inventory Utilization, provide an “Analyze” feature to view data. Click Analyze to open a Browser window that displays the queried data. You can group the information by column, you can export the raw data to an Excel file, and you can click Details to provide more detailed information about the queried data.

The Room Utilization report, the Hourly Room Utilization report, and the Hourly Room Utilization report are available only in EMS Enterprise. They are not available in EMS Professional.

Report	Description	Options
Room Statistics	Lists all rooms by building and for each room, indicates the following information—the number of bookings for the date range selected, the reserved hours, the event hours, the estimated attendance (i.e., setup count), and the actual attendance.	• Include Report Criteria—The filter settings for the report are displayed in the report.
Room Utilization	Lists the number of bookings, hours used, hours available, percent utilization, and hours vacant for rooms, by building, for the date range specified.	• Day Selection—Specify which day(s) of the week to include in the report. • Group By Utilization Category—Groups rooms by utilization (low, high, unused). • Include Cost—The cost for vacancies is displayed in the report. • Include Unused—Include rooms that contain no bookings in the report. • Cap Utilization at 100%?—Percent utilization cannot exceed 100%. • Low Utilization—Specify what percentage equals “Low” utilization. • High Utilization—Specify what percentage equals “High” utilization. • Availability Based On—Select to base availability on one of the following - Building Hours, Hours per Day, or Specific Hours. • Include Report Criteria—The filter settings for the report are displayed in the report.

Report	Description	Options
Hourly Room Utilization	Displays room utilization broken down by hours in the day, by percentage utilized.	• Day Selection—Specify which day(s) of the week to include in the report. • Display Chart—Includes a chart on the final page of the report that summarizes the reported data.
Hourly Resource Inventory Utilization	Displays resources, and the number of items used on an hourly basis for a specified date range.	• Day Selection—Specify which day(s) of the week to include in the report. • Display Chart—Includes a chart on the final page of the report that summarizes the reported data.
Group Statistics	Displays Number of Bookings, Reserved Hours, Event Hours, Estimated Attendance, and Actual Attendance by Group Type for a given date or date range. The format can be set to “Detail” to provide statistics for each specific group.	• Include Report Criteria—The filter settings for the report are displayed in the report.
Event Type Analysis	Provides information by event type on the following—the number of reservations, the number of bookings, the percentage of total reserved hours, the percentage of total event hours, the percentage of total estimated attendance, the percentage of total attendance, the actual attendance, and the percentage of total.	• Include Report Criteria—The filter settings for the report are displayed in the report. • Display Chart—Includes a chart on the final page of the report that summarizes the reported data.
Reservation Source Analysis	Displays the number of reservations, the number of bookings with percentage, reserved hours with percentage, event hours with percentage, estimated attendance with percentage, and actual attendance with percentage by reservation source.	• Include Report Criteria—The filter settings for the report are displayed in the report. • Display Chart—Includes a chart on the final page of the report that summarizes the reported data.
Resource Statistics	Lists the quantity and the hours used by category and by resource item.	• Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Quantities—Includes all resources even if the resource is not used during the date range specified. • Show Inactive Resources—Includes all inactive resources used during the date range specified.

Report	Description	Options
Room Availability	Provides a count of room availability by room type for a given date range.	N/A
Setup Count Analysis	Lists the total number of bookings by setup count.	N/A
Seat Occupancy	Displays the capacity for each room, the number of bookings for the date range, the seats available for the bookings, the total estimated attendance based on setup count on each booking, the average estimated attendance, and the estimated percentage of seats filled for the specified date range.Figures are also provided for total actual attendance, average actual attendance, and actual percentage of seats filled.	• Include Report Criteria—The filter settings for the report are displayed in the report.
Benchmark Metrics Report	Compiles metrics for a number of different areas within EMS, for example, Rooms By Number of Bookings, Reservations By Source, and so on.	• Days Open Per Week—Indicates the number of days per week your facility is open per week. The default value is 7. • Hours Open Per Day—Indicates the number of hours per day that your facility is open. The default value is 10.

Other reports

Report	Description	Options
Cancellation Report	Lists the bookings that have a status that was changed to “Cancelled” on the date or dates specified, or lists the bookings on the date or dates specified that have a status type of “Cancelled.” The report also lists the date that the booking status was changed, the date the bookings were to have taken place, and the location of the event, the name of the person who canceled the booking, the reason for the cancellation, and the booking ID. You can run the report in one of two formats—by Booking Date (the date that the bookings were to occur) or by Cancel Date (the date that the bookings were canceled).	N/A
Cancellation Summary	Summarizes, by reservation, all charges for bookings on a date or in a date range. The report shows the first and last bookings canceled within the reservation, the Group, the reservation number, the group contact, the event name, the event type, the total charges, and the reason for cancellation of the most recently canceled booking. Reservations that do not have charges associated with the bookings are not displayed on this report. You can select Use Specific times and then enter a range of times to limit the report to bookings that occurred within this specified time range.	N/A

Report	Description	Options
Reservation Summary	A summary of reservations that occurred within a specific date range. The report also lists complete reservation information (reservation number, event name, group, contact person, and so on) and booking dates. User defined fields can also be printed in this report. You can select Use Specific times and then enter a range of times to limit the report to reservations that occurred within this specified time range.	N/A

Exceptions reports

Report	Description	Options
Undefined Setups	Lists the bookings on the selected date or date range for which no setup count has been entered. The report lists the following information for the bookings—the event name, time and location, contact name and phone number, booking status, and ID number. You can select Use Specific times and then enter a range of times to limit the report to bookings that occurred within this specified time range. You can enter information about the report, or a name or description for the report in the Report Comment field.	• Show Bookings on Start Date Only—If a booking is scheduled overnight, then only the start date of the booking is displayed in the report. For example, a booking exists for 3P Thursday through 10A Friday. If this option is selected, then the booking is displayed only for Thursday in the report.
Status Reminder Report	Lists the bookings that have a status with a reconfirm date that falls within the selected date range. You typically use the information in this report to review tentative bookings. The report can be run in one of two formats—by Status Date (the date that the event was put in a “Tentative” status) or by Booking Date (the actual date of the event). You can select Use Specific times and then enter a range of times to limit the report to bookings that occurred within this specified time range. You can enter a report name or description or any pertinent information about the report in the Comment field.	N/A

Report	Description	Options
Wait List Report	Lists all the bookings with a Wait status for the time period that you have requested. Detects situations where a booking has been canceled and there are one or more bookings with a Wait status that can now be changed to Confirmed, and indicates if the room is available. You can select Use Specific times and then enter a range of times to limit the report to bookings that occurred within this specified time range.	N/A
Booking Conflict Analysis	Reviews information on all bookings for a date or date range and lists any conflicts **Note:** EMS does not allow double-bookings, but they might exist because conversion of data from systems that do allow them, or the result of users failing to restart EMS after encountering error messages.	N/A
Building Hours Exceptions	Lists events for a date or date range that fall outside of the configured building hours. Either event time or reserved time is checked based on the “Validate Building Hours on Event Time” parameter. The report also shows the start and end times, group, event name, location, reservation number, and booking number. You can select Use Specific times and then enter a range of times to limit the report to bookings that occurred within this specified time range. You can enter information about the report, or a name or description for the report in the Report Comment field.	N/A

Report	Description	Options
Inactive Room With Bookings	Lists the bookings for a specified date or date range that are scheduled in inactive rooms. You can select Use Specific times and then enter a range of times to limit the report to bookings that occurred within this specified time range. You can enter information about the report, or a name or description for the report in the Report Comment field. You can click View to open the booking for viewing and editing, changing the status of the booking and/or emailing the group.	N/A
Inactive Groups With Reservations	Lists the reservations for a specified date or date range that are scheduled for inactive groups. You can click View to go to the reservation for viewing and editing, including changing the status of the reservation and/or its bookings.	N/A
Invalid Service Orders	Lists the service orders that have a start time and/or end time that fall outside the reserved time for the room. Lists the category, date, reserved and event start and end times, location, group, reservation number, booking number, service order number and a description of the invalid order. You can select Use Specific times and then enter a range of times to limit the report to bookings that occurred within this specified time range. You can enter information about the report, or a name or description for the report in the Report Comment field. **Note:** Service orders that fall outside the reserved time are considered invalid even if the Validate Service Order Times Against Booking parameter is set to “No.”)	N/A

Report	Description	Options
Invalid Billing References	Lists the bookings for a particular date or date range that are in reservations that have invalid billing reference numbers. You can select Use Specific times and then enter a range of times to limit the report to bookings that occurred within this specified time range. You can enter information about the report, or a name or description for the report in the Report Comment field. **Note:** A billing reference number is considered invalid if it has not been defined in the Billing Reference Configuration area but the Validate Billing Reference parameter is set to “Valid Only.”	N/A
Inactive Web Process Templates	Displays the inactive web process templates that are attached to reservations.	N/A

Hoteling reports (EMS Workplace only)

Report	Description	Options
Room Occupancy Summary	Displays, by building and room type, the number and percentage of rooms occupied.	N/A
No Show	Lists the bookings for which the reservation holder did not check in. **Note:** A customer can be checked in via the EMS Kiosk, the EMS desktop client, or VEMS.	N/A

Report	Description	Options
Early Checkout	Lists the bookings for which the reservation holder checked out before the end of the reserved time. **Note:** A customer can be checked out via the EMS Kiosk, the EMS desktop client, or VEMS.	N/A
Visitor	Lists events for groups that have cities on their group record, other than what is specified in the Exclude Locations field. If multiple locations are to be listed, they should be entered with a comma between them (for example, Denver, Houston, Tampa, and so on).	N/A
Booking Notice Statistics	Lists the total bookings for a date or date range, divided into three “Amount of Notice” categories, where the Amount of Notice is the time between when the booking was scheduled and the date/ time for which it was scheduled. The report can be generated in one of two formats— “standard” or by room type.	N/A
Transition	Tracks the occupants of hoteling spaces during a specified date range. Lists by floor and room where the occupant was last, what room the occupant is moving to, and who was in the space the previous day. Typically this report is run for a two day range and the days of the week must be checked. This report can be used by personnel who are responsible for preparing hoteling spaces for each occupant.	• Show Details—Prints the categories that are associated with the bookings. • Highlight Changes Made Within:(days)—Changes that have been made within the specified number of days are highlighted in the report.
Arrivals and Departures	Lists the departures and arrivals for a particular room by building and floor. The report shows the time of the departure if the customer is a departure and the time of the arrival if the customer is an arrival. Typically, this report is run for a two day timespan listing the departure date first and the arrival date second.	N/A

Report	Description	Options
Groups With Multiple Bookings	Lists groups that have multiple bookings for the date or date range specified. The information is organized by date, and lists the start and end times, the room, the room type, and the booking status for each booking.	N/A
Check In Statistics	Lists the percentage of customers who have checked in by building, building-room type, or room type. **Note:** A customer can be checked in via the EMS Kiosk, the EMS desktop client, or VEMS.	N/A

Working with a Query

A *query* is the primary mechanism for retrieving information from a database. A query consists of questions that are presented to the database in a predefined format. A Query Builder function is available from the Reports menu. You can use this function to create queries for retrieving information from your EMS database. When you create a query, you can name and save the query so that you can run the query at any time that you choose. You can create a query from “scratch,” or you can create a query by copying an existing query and editing the copied query as needed. You can also edit a query, delete a query, and view and print a query.

To create a query

1. On the EMS menu bar, click Reports.

   The Reports menu opens.

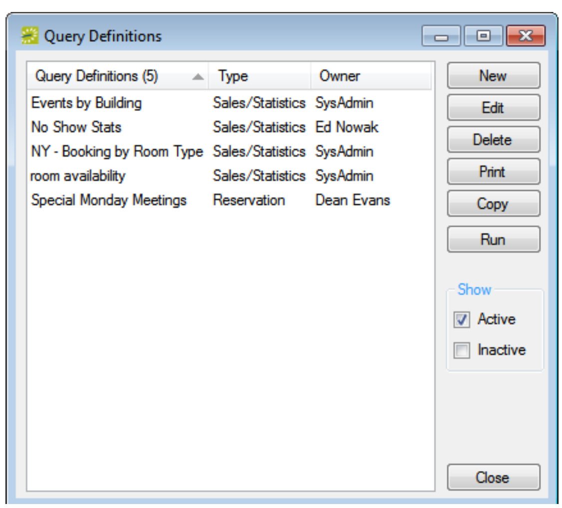
2. On the Reports menu, click Queries.

   The Queries menu opens. This menu always contains the Query Builder option. It also contains options for any queries that have been previously defined in your EMS database.

3. Click Query Builder.

   The Query Definitions dialog box opens. The dialog box displays all the queries that have been previously defined in your EMS database and that have a status of Active.

Figure 8-7: Query Definitions dialog box

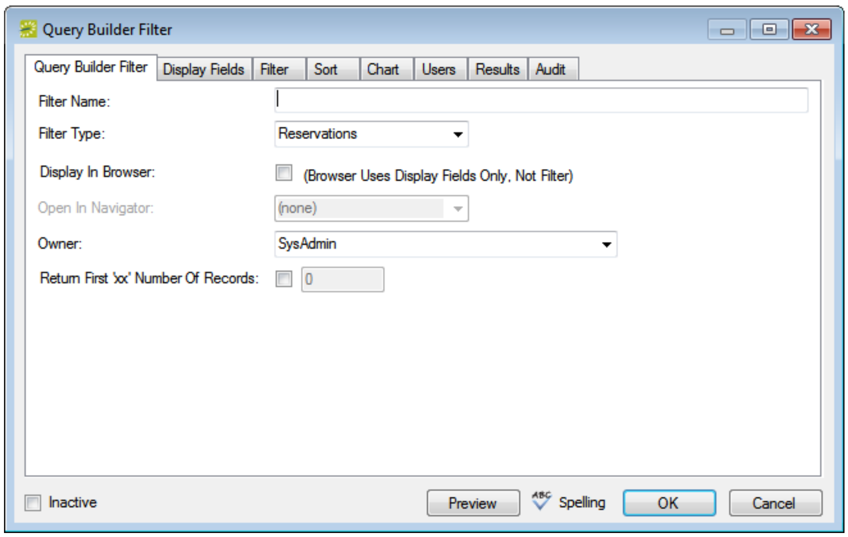


Optionally, to view all queries in your EMS database, regardless of status, under Show, click Inactive.

4. Do one of the following:
    - To create a query from scratch, click New.
    - To create a query by editing an existing query, select the query that is to be edited, and then click Copy.

    The Query Builder Filter dialog box opens. The Query Builder Filter tab is the active tab. You use the options on this dialog box to name and define the query.

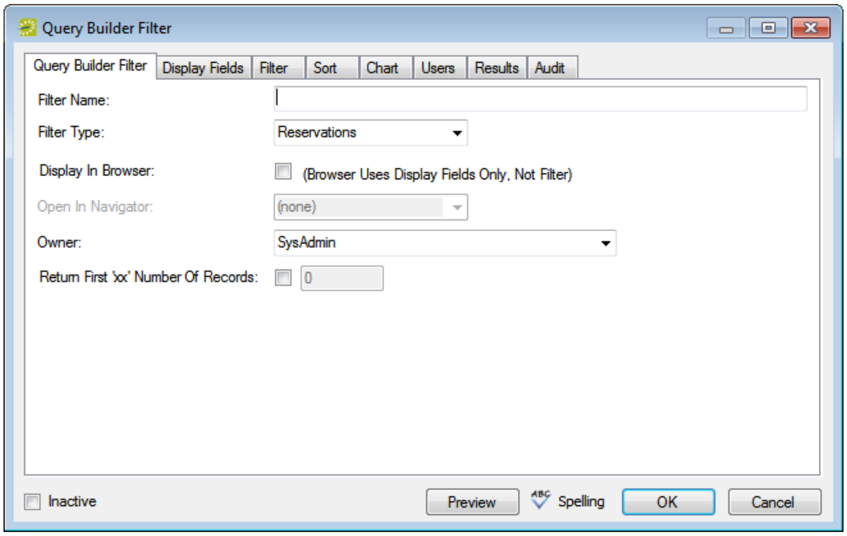
Figure 8-8: Query Builder Filter dialog box, Query Builder Filter tab



5. Enter or edit the needed information for the query. See:
    - "Query Builder Filter tab" on page 350.
    - "Display Fields tab" on page 351.
    - "Filter tab" on page 353.
    - "Sort tab" on page 354.
    - "Chart tab" on page 355.
    - "Users tab" on page 356.
6. Do one of the following:
    - Click OK to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.
    - Open the Results tab, and then click Preview to run the query immediately and view the results on the tab. You can then click OK to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.

Query Builder Filter tab

Figure 8-9: Query Builder Filter dialog box, Query Builder Filter tab



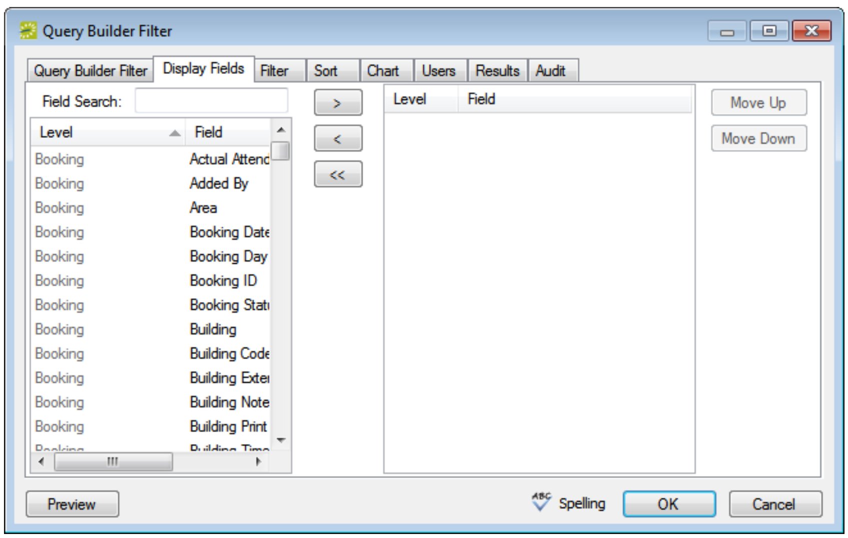
1. On the Query Builder Filter tab, name and define the query.

Option	Description
Filter Name	Name of the query filter. **Note:** The name can be a maximum of 50 characters, including spaces.
Filter Type	The type of information that the filter is to capture. The Filter Type affects the items that are available on the Display Fields tab and the Filter tab. A Filter Type of Group allows you to capture address information that can be exported and subsequently used by other programs to create mailing labels. **Note:** Only a single Filter Type, Reservation, is available in EMS Professional.
Display in Browser	Available only for a Filter Type of Billing or Reservations. Select this option if the query that you are creating is to be available in the Browser.
Open in Navigator	Available only if the Filter Type is Reservations and Display in Browser is selected. Indicate what the system should open in the Navigator when a user double-clicks on an item that is retrieved by the query.
Owner	Available only to administrative users.
Return First “xx” Number of Records	To limit the number of records that the query returns, select this option, and then enter the number of records in the field.
Inactive	By default, a query is added as an active query. Select this option to inactivate the query.

2. Continue with any other configuration for the query as needed, or do one of the following:
   - Click OK to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.
   - Open the Results tab, and then click Preview to run the query immediately and view the results on the tab. You can then click OK to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.

Display Fields tab

Figure 8-10: Query Builder Filter dialog box, Display Fields tab



1. Open the Display Fields tab, and then do one of the following:
   - Select the field, or CTRL-click to select the multiple fields that are to be displayed in the query results, and then click the Move button (>) to move the selected fields to the Selected list.
   - In the Field Search field, enter the string by which to filter your search for available fields. Select the field, or CTRL-click to select multiple fields, and then click the Move button (>) to move the selected fields to the Selected list.

---

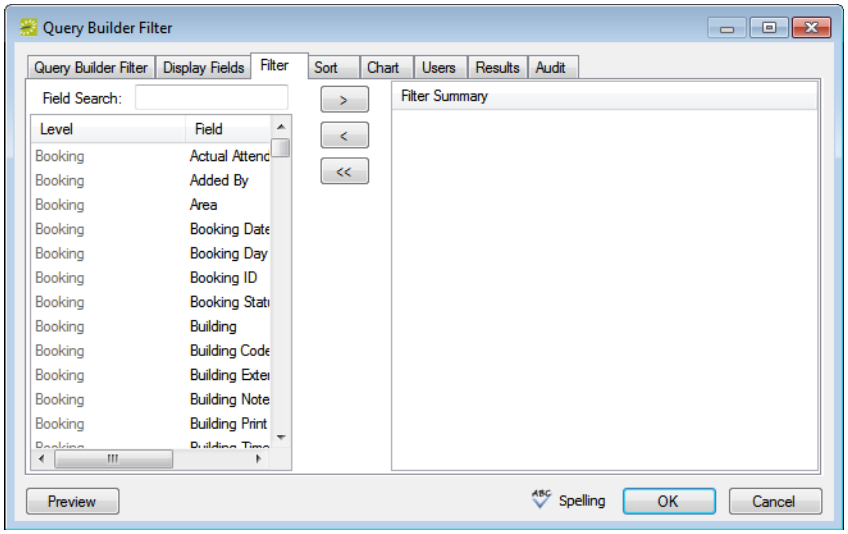
*The search is limited to the exact order of characters in the string, but the string is not case-sensitive and it can be found anywhere in the search results. For example, a search string of **Add** returns both **Add**ed By and Date **Add**ed. As you enter the search string, the Available Fields list is dynamically updated with a list of fields that meet the search criteria.*

If you are copying an existing query, then when the Display Fields tab opens, the Selected list is already populated with a list of fields. You can select one or more of these fields, and then click the Remove button (<) to move these fields back to the Available list.

2. The fields are displayed in the query results in the order in which they are listed in the Selected list. Optionally, to change the order of the fields, select a field and then click Move Up/Move Down as needed.
3. Continue with any other configuration for the query as needed, or do one of the following:
   - Click OK to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.
   - Open the Results tab, and then click Preview to run the query immediately and view the results on the tab. You can then click OK to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.

Filter tab

Figure 8-11: Query Builder Filter dialog box, Filter tab



1. Open the Filter Fields tab, and then do one of the following:
   - For each field that is to define the query, select the field, and then click the Move button (>) to move the fields to the Filter Summary list.
   - In the Field Search field, enter the string by which to filter your search for available fields. For each field that is to define the query, select the field, and then click the Move button (>) to move the fields to the Filter Summary list.

*The search is limited to the exact order of characters in the strings but the string is not case-sensitive and it can be found anywhere in the search results. For example, a search string of **Contact** returns both **Contact** Name and 1st **Contact**. As you enter the search string, the Available Fields list is dynamically updated with a list of fields that meet the search criteria.*

For each field that you select, a dialog box opens in which you must specify the allowed values for the field. After you specify the values and click OK, the dialog box closes, and the selected field is moved to the Filter Summary list.

If you are copying an existing query, then when the Filter Summary tab opens, the Filter Summary list is already populated. You can select one or more of these fields and then click the Remove button (<) to move these fields back to the Available list. If you want to use the same Filter Summary fields in the “new” query, but with different values, you cannot change the values directly. You must move the appropriate fields back to the Available list, then select the fields again to change their values.

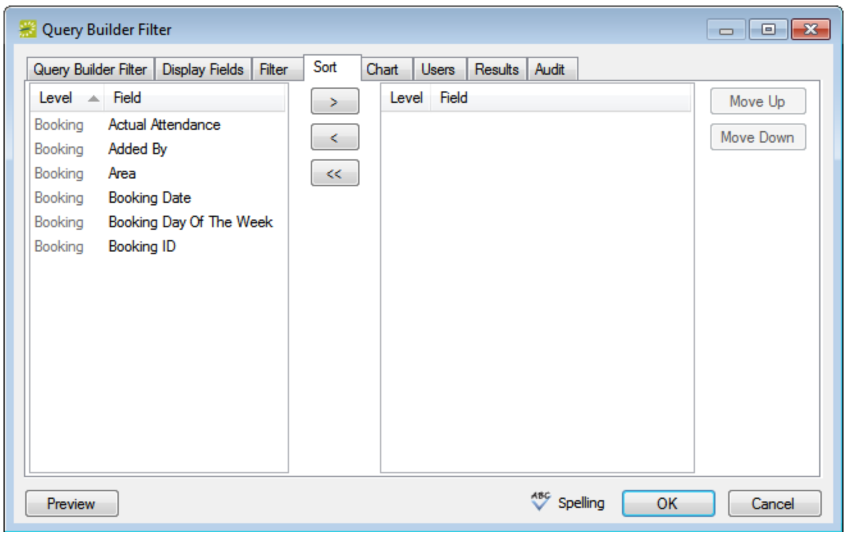
2. Continue with any other configuration for the query as needed, or do one of the following:

   - Click OK to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.

   - Open the Results tab, and then click Preview to run the query immediately and view the results on the tab. You can then click OK to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.

Sort tab

Figure 8-12: Query Builder Filter dialog box, Sort tab



1. Open the Sort tab, select the field or CTRL-click to select the multiple fields by which the query results are to be sorted, and then click the Move button (>) to move the fields to the Selected list.

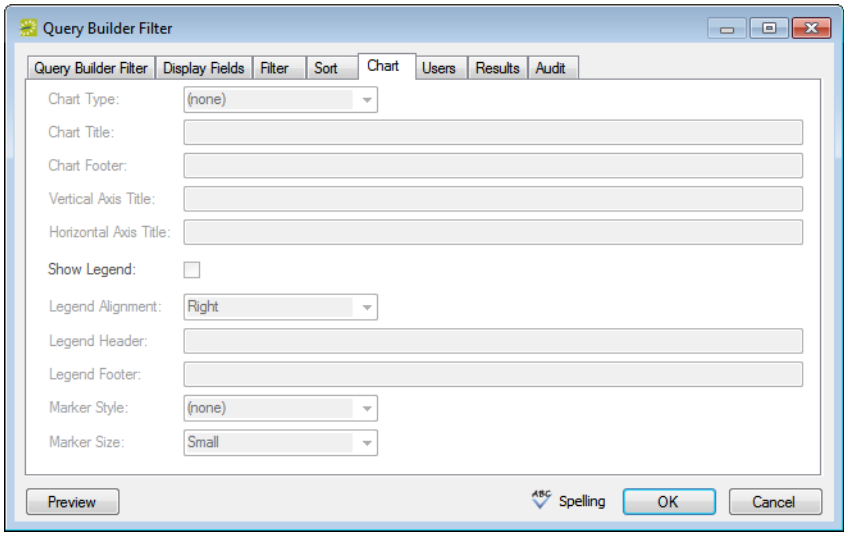
2. Continue with any other configuration for the query as needed, or do one of the following:

   - Click OK to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.

   - Open the Results tab, and then click Preview to run the query immediately and view the results on the tab. You can then click OK to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.

Chart tab

Figure 8-13: Query Builder Filter dialog box, Chart tab

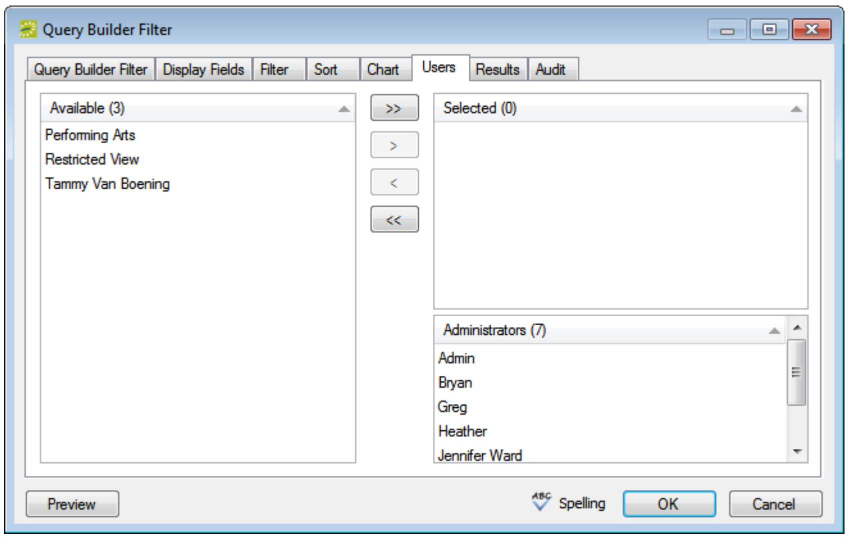


1. Open the Chart tab, and specify the type of chart that is to be used to graph the query results.
2. Manually enter any information for the chart (for example, Chart Title) as needed.
3. Optionally, do one or both of the following:
   - To show a legend with the chart, select Show Legend, and then specify the legend information (alignment, header, footer, and marker style and size).
   - To spell check any charting information that you manually entered, click Spelling.
4. Continue with any other configuration for the query as needed, or do one of the following:
   - Click OK to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.
   - Open the Results tab, and then click Preview to run the query immediately and view the results on the tab. You can then click OK to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.

Users tab

The ability to assign specific queries to specific users is available only in EMS Enterprise. It is not available in EMS Professional.

Figure 8-14: Query Builder Filter dialog box, Users tab



1. Open the Users tab, and in the Available list, select the user, or CTRL-click to select the multiple users who can run this query, and then click the Move (>) button to move the selected users to the Selected list.

By default, all administrative users can run any query that any user creates. These users are listed in the Administrative list. You cannot remove any administrative users from this list.

2. Continue with any other configuration for the query as needed, or do one of the following:

   - Click OK to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.

   - Open the Results tab, and then click Preview to run the query immediately and view the results on the tab. You can then click OK to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.

To edit a query

1. On the EMS menu bar, click Reports.

   The Reports menu opens.

2. On the Reports menu, click Queries > Query Builder.

   The Query Definitions dialog box opens. The dialog box displays, by name, any queries that have been previously defined in your EMS application. See Figure 8-7 on page 348.

3. Select the query that you are editing, and then click Edit.

   The Query Definitions dialog box opens. All of the tabs are populated with the information for the selected query.

4. Edit the query as necessary including one or more of the following:

   - Renaming the query.
   - Changing the fields that are to be displayed in the query results.
   - Changing the fields that define the query.
   - Changing the order of the fields by which the query results are to be sorted.
   - Changing the charting options for the query results.
   - Changing the users who can run the query.

5. Do one of the following:

   - Click OK to close the Query Builder Filter dialog box and save the edited query. The edited query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.
   - Open the Results tab, and then click Preview to run the query immediately and view the results on the tab. You can then click OK to close the Query Builder Filter dialog box and save the edited query. The edited query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.

To delete a query

1. On the EMS menu bar, click Reports.

   The Reports menu opens.

2. On the Reports menu, click Queries > Query Builder.

   The Query Definitions dialog box opens. The dialog box displays any queries that have been previously defined in your EMS application. See Figure 8-7 on page 348.

3. Select the query that is to be deleted, and then click Delete.

   A message opens, asking you if it is OK to delete the selected query.

4. Click Yes.

   The message closes. The query is deleted.

To view and print a query

1. On the EMS menu bar, click Reports.

   The Reports menu opens.

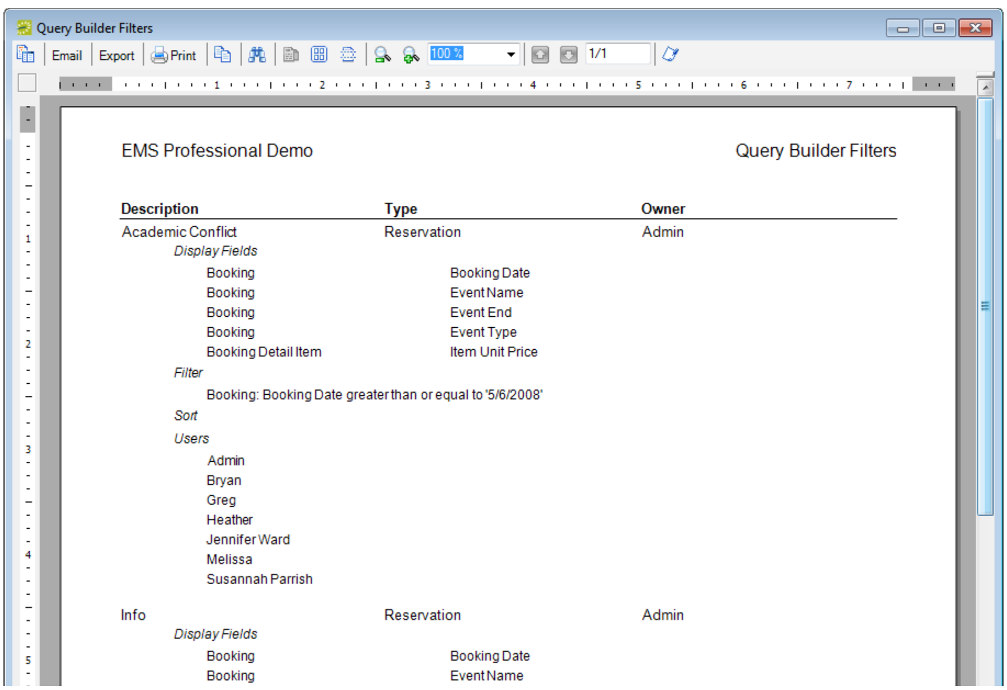
2. On the Reports menu, click Queries > Query Builder.

   The Query Definitions dialog box opens. The dialog box displays any queries that have been previously defined in your EMS application. See Figure 8-7 on page 348.

3. Select the query that is to be printed, and then click Print.

   An onscreen preview of the selected query opens. A variety of options are available from this preview, including the options to print a hard copy of the query, to email the query, and so on.

Figure 8-15: Print preview for a query



4. Select the option or options that best fit your working needs.

To run a query

When you run a saved query, you can run the query from the Reports menu, or you can run the query from the Query Definitions dialog box.

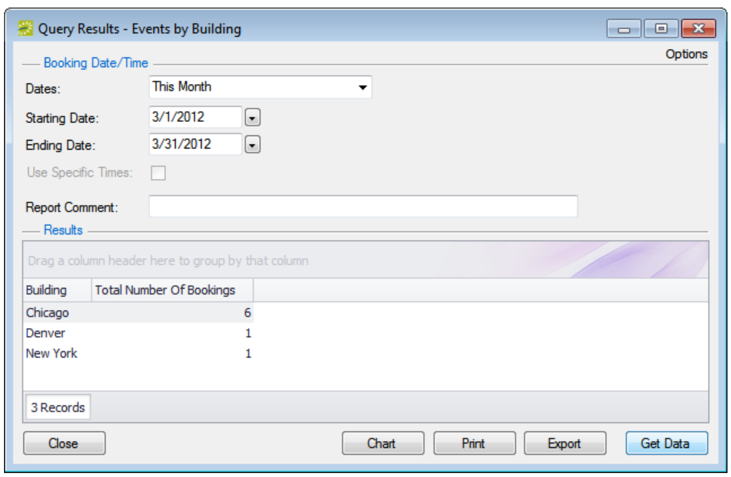
1. On the EMS menu bar, click Reports and on the Reports menu, click Queries, and then do one of the following:

   - Click the name of the query that you are running.
   - Click Queries > Query Builder and on the Query Definitions dialog box, select the query that you are running, and then click Run.

   The query is run and the results are displayed onscreen in the Query Results dialog box.

The Results (lower) pane on the Query Results dialog box is an EMS browser window. See *"An EMS Browser Window" on page 35* *for all the features that are available for this pane.*

Figure 8-16: Query Results dialog box example



2. Optionally, on the Query Results dialog box, do one or more of the following, and then click Get Data to rerun the query according to the edited definition.

   - Select the date for which the data in your EMS database is to be queried.

Option	Description
Custom	The starting date is set to the first day of the month and the ending date is set to the last day of the month but you can edit one or both of these dates. **Note:** For some queries, if you select Custom, a Use Specific Times option becomes available. If you enter the same date for the starting date and ending date, you can select Use Specific Times, and then enter a starting time and ending time to query the data in specific time range on the same day.

Option	Description
Last Month	The starting date is set to the first day of the previous month and the ending date is set to the last day of the previous month.
Last Quarter This Quarter This Quarter To Date	Quarters are based on a calendar year: • First quarter is 1/1 through 3/31. • Second quarter is 4/1 through 6/30. • Third quarter is 7/1 through 9/30. • Fourth quarter is 10/1 through 12/31. For example, if the current day's date is 5/22/2012, and you select Last Quarter, then the starting date is set to 1/1/2012 and the ending date is set to 3/31/2012.
Last Year	The starting date is set to 1/1 of the previous year, and the ending date is set to 12/31 of the previous year.
This month	The starting date is set to the first day of the current month and the ending date is set to the last day of the current month.
This Year	The starting date is set to 1/1 of the current year, and the ending date is set to 12/31 of the current year.
This Year to Date	The starting date is set to 1/1 of the current year, and the ending date is set to the current day's date.

- Change the Starting Date, Ending Date, or both.
- In the Report Comment field, enter a comment that is to be printed on the query.

The comment can be a maximum of 255 characters, including spaces.

- Click Options and change the settings for specific room filter and/or the number of records to return.

3. After you have run the query to your satisfaction, you can then do one or both of the following:
    - To print the query results, click Print. An onscreen preview of the query results opens. A variety of options are available from this preview, including the options to print a hard copy of the query results, to export the query results to a .pdf, and to email the query results. Select the option or options that best fit your working needs.
    - To export the query results to an Excel spreadsheet, or to an XML file, click Export, and then click Excel or XML as appropriate.

Billing

Accurate and timely billing is critical to ensuring a successful experience for organizations that schedule events at your facilities. EMS provides a variety of functions for working with invoices and transactions for reservations and bookings as well as reporting on this information.

This chapter covers the following topics:

Overview of Billing in EMS

In EMS, at a high-level, billing is a two-step process:

- The first step is to generate invoices. (See “Working with Invoices” on page 364.) You can generate invoices based on reservation number, date range, or both. For example, you could generate invoices for all bookings in Reservation 1829 that occurred last month. After you have generated the invoices, EMS tracks the amount due and the age of the invoices.

As part of this process, you can generate the Billing Worksheet report. (See “Generating an EMS Billing Report” on page 394.) You use this report to review the dollar amounts for the bookings for which you intend to create invoices. You can correct any discrepancies that you note in the report by editing the bookings or booking items in question.

- The second step to is process received payments using the Payment Entry function. (See “Searching for Transactions” on page 378.) You can also use this function to enter deposits made against a reservation before invoicing or booking and to enter adjustments.

Financial transactions in EMS are batched by department. For example, if a user who is a member of the Scheduling department applies a deposit to a reservation, then the deposit is shown on a confirmation only if the user who applied the deposit or other users in the Scheduling department print the confirmation. If a user in another department, for example, the Catering department, prints the confirmation, then the deposit is not shown on the confirmation. Similarly, invoices that are generated by a department are printed on the Ageing report only if the report is generated for the same department. If you invoice a reservation or one of its bookings, any deposit that was previously made on the reservation is then applied and is no longer shown on the confirmation. If you invoice an event, the event is locked and cannot be edited. You can edit the event only after you void the invoice. You cannot void an invoice if payments have been made against it. You must first void the payments. You can use an adjustment with a negative dollar amount to clean up your financial records. For example, you generate an invoice for $102 for a group and the group returns a check for $100. If you do not want to ask the group for a $2.00 check, an adjustment of “$2.00-” balances your books.

Working with Invoices

You can generate an invoice in EMS based on a specific booking date or date range, a reservation number, or both. For example, you can generate invoices for all bookings from May 1 through May 14, for all bookings in reservation number 22, or for all bookings in reservation number 22 that occurred between May 1 and May 14. You can generate multiple invoices for the same booking, with each invoice showing the charges for a different category (such as room charges on one invoice, catering charges on another invoice, and so on). This might be necessary in situations in which you must produce multiple invoices for the same booking if the departments within your organization bill separately for the services they provide. You can also reprint an invoice and void an invoice.

You can work with invoices for a single reservation, or you can batch process multiple invoices. If you want to work with invoices for a single reservation, you do so through the Transactions tab in the Navigator. If you want to work with a batch of invoices, you do so through the EMS Billing menu: Billing > Invoices > Invoicing.

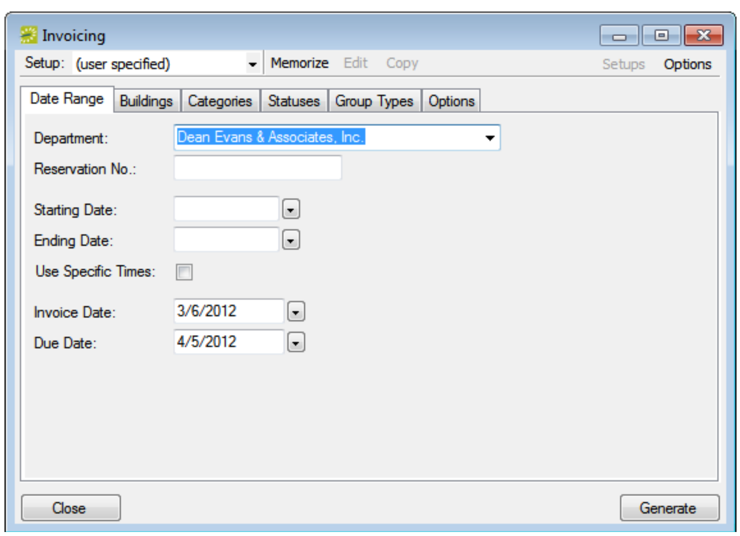
To generate an invoice

Before you generate an invoice, you should generate the Billing Worksheet report. See "Generating an EMS Billing Report" on page 394.

1. Do one of the following:
   - Open the reservation in the Navigator (see "Opening a reservation in the Navigator" on page 79), and on the Transactions tab, click New > Invoice.
   - On the EMS menu bar, click Billing > Invoices > Invoicing.

   The Invoicing window opens.

Figure 9-1: Invoicing window



2. Do one of the following:
   - Review the selections on this dialog box, and optionally, make any needed modifications.

Field	Description
Date Range tab	
Department	Select the department that is creating the invoices. The department name and address is printed at the top of the invoice. **Note:** This field is automatically populated if you have a default department assigned to your user account but you can select a different value if needed.
Reservation Number	Automatically populated if you are generating an invoice from the Transaction tab; otherwise, enter a reservation number.
Starting Date Ending Date	Automatically populated with the first (starting) booking date and the last (ending) booking date for the selected reservation when you are generating an invoice from the Transaction tab; otherwise, enter the date range of the bookings for which you are generating the invoice.
Use Specific Times	If only a specific time for the bookings is to be invoiced (for example, the bookings are from 8 am to 5 pm and you want to invoice the booking from only 8 am to noon), then click Use Specific Times, and then enter a specific time period.
Invoice Date	The default value is the current day's date. You can leave this value as is, or enter a different date.
Due Date	The system default value is 30 days from the current day's date. (Your EMS administrator might have configured a different default value for this field.) You can leave in the field as is, or you can enter a different date.
Buildings tab/Categories tab/Statuses tab/Group Types tab	
Open the appropriate tab on the window and select the buildings, resource categories, booking statuses, and group types that are to be invoiced. This information is displayed on the invoice. **Note:** A Show Inactive option is available for both categories and statuses. Select this option to show inactive categories and statuses. You can select these inactive items as part of your filtering criteria. **Note:** To select a building, category, and so on, select the item in the Available list (CTRL-click to select multiple items), and then click the Move button (>) to move the items to the Selected list.	
Options tab—Format settings for a printed confirmation	
Header Message Footer Message	Select the header message and footer message that is to be printed on the invoice. By default, the header and footer messages are printed on every page of the invoice. To print the header only on the first page of the invoice, clear the Print Header on Each Page option.
Currency	Select the currency that indicates how a room or resources in a category should be charged.
Print Comments	Include the comments for the reservation in the printed invoice.
Print Reminders	Include the reminders for the reservation in the printed invoice.
Print User Defined Fields	Include user-defined fields and their values in the printed invoice.

Field	Description
Suppress Reserved Time	Do not show the reserved time on the printed invoice. (Instead, only the event time is included on the printed invoice.)
Print Item Notes	Include the notes for any booking items in the printed invoice.
Print Zero Priced Items	Include resources for which there was no charge in the printed invoice.
Print Item Selections	Include any resource item selections in the printed invoice.
Print Header On Each Page	Include the selected Header message on each page of the printed invoice.
Suppress Logo	Do not show your department's/organization's logo on the printed invoice.
Print Billing Reference Allocation	Include the billing reference numbers for the event as well as the percentage of charges that is allocated to each number in the printed invoice.
Print Category Subtotals	Include the subtotal charges by category in the printed invoice.
Display Messages as HTML	If you have defined any HTML messages, then select this option to display the HTML version of these messages in the printed invoice; otherwise, the message is displayed in plain text.

If needed, you can always save, or memorize, these settings. See *"Working with Memorized Reports" on page 323.*

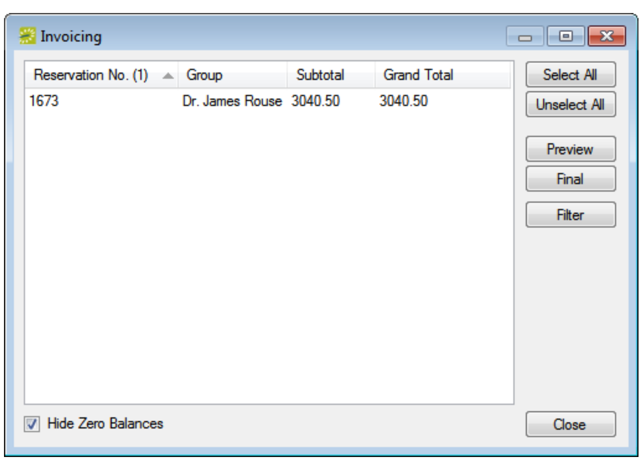
- On the Setup dropdown list, select a saved, or *memorized*, invoice.

If you select a memorized confirmation, then the only changes that you can make are to the dates and/or times on the Date Range tab.

3. Click Generate.

   The generated invoices are displayed in the Invoicing dialog box. By default, invoices with a zero balance are not shown.

Figure 9-2: Invoicing dialog box with generated invoices



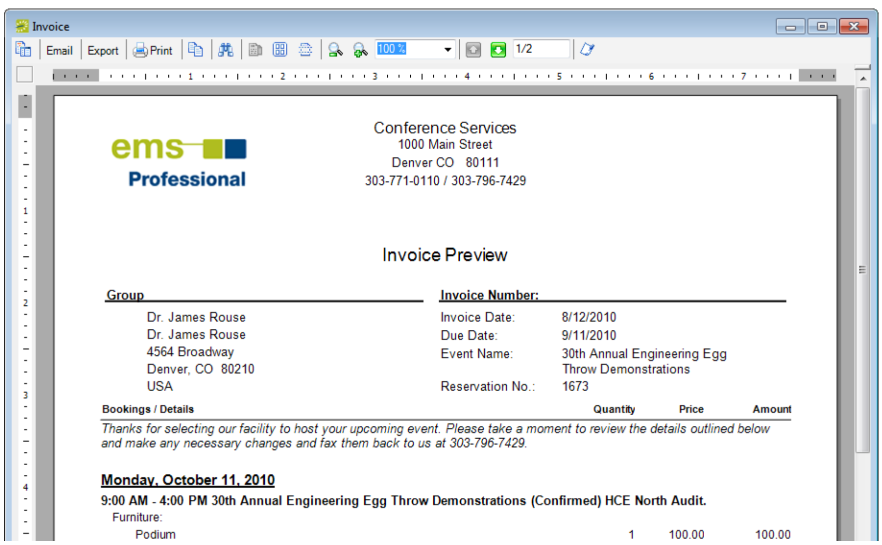
4. Optionally, you can do one or more of the following to work with the invoices that are displayed; otherwise, if you are satisfied with the invoices, you can go to Step 5 to post the invoice.

   - To show zero balance invoices in the window, clear the Hide Zero Balances option.
   - To preview an invoice, select the invoice, or CTRL-click to select multiple invoices, and then click Preview.

     An onscreen preview of the selected invoices opens. The preview is titled “Invoice Preview” to distinguish the invoices from invoices that have been posted. The invoices also do not have invoice numbers, which are not issued until you post the invoices. The preview window contains options for printing a hard copy of the invoices, for emailing the invoices (see “Sending Email from EMS” on page 414), and so on. Select the option or options that best fit your working needs.

   - To change the criteria for the invoices, click Filter to return to the Invoicing window After changing the criteria, you can generate the invoices again.

Figure 9-3: Onscreen preview of an in-progress invoice



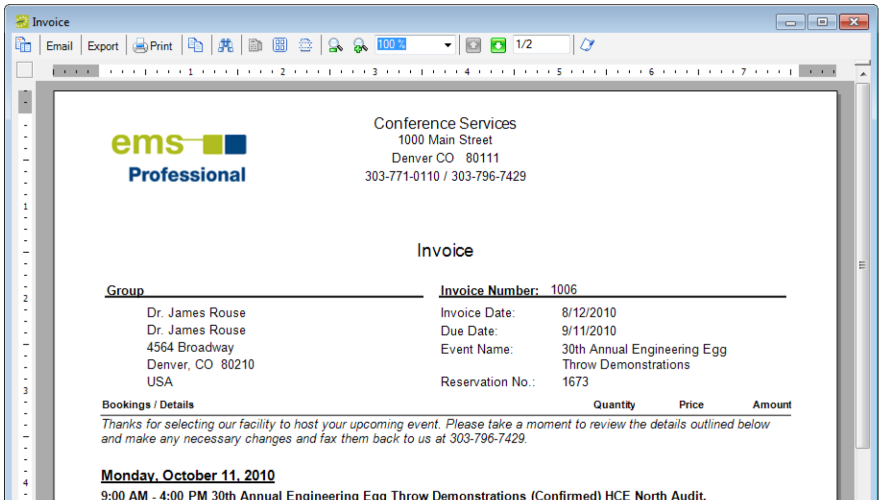
5. To post an invoice, select the invoice (CTRL-click to select multiple invoices), and then click Final.

   A message opens warning you that you are about to post and print (#) invoices, and asking you if want to continue.

6. Click Yes.

   The message closes and an onscreen preview of the *final* invoices opens. The preview is titled “Invoices” and each invoice has been issued an invoice number. The preview window contains options for printing a hard copy of the invoices, for emailing the invoices (see “Sending Email from EMS” on page 414), and so on. Select the option or options that best fit your working needs. See Figure 9-4 on page 368.

Figure 9-4: Onscreen preview of a posted invoice



After you generate and post an invoice, the message “Items have been invoiced” is displayed in red text on the Reservation Summary tab, the Booking Summary tab, and the <Booking Detail> Summary tab in the Navigator. The booking detail folder in which the invoiced items reside now has a green background in the Booking Details pane and the icon for each invoiced item also has a green background in the Items pane. Also, the invoice is permanently saved, and you cannot edit it. You can make changes to the balance due for a reservation only by creating an adjustment or by voiding the invoice and regenerating it after you edit the booking information. (Because invoiced bookings are locked and cannot be edited, you must void the invoice before you can edit the bookings.)

To reprint an invoice

You can reprint both non-voided and voided invoices. You can reprint invoices *for only one department at a time* from the Billing area of EMS. Reprinting an invoice does not recalculate the invoice. The invoice is simply printed as it appeared when it was first generated. You can specify the invoices that you are reprinting, or you can search for invoices that meet specific criteria, and then select specific invoices to reprint from the list of search results.

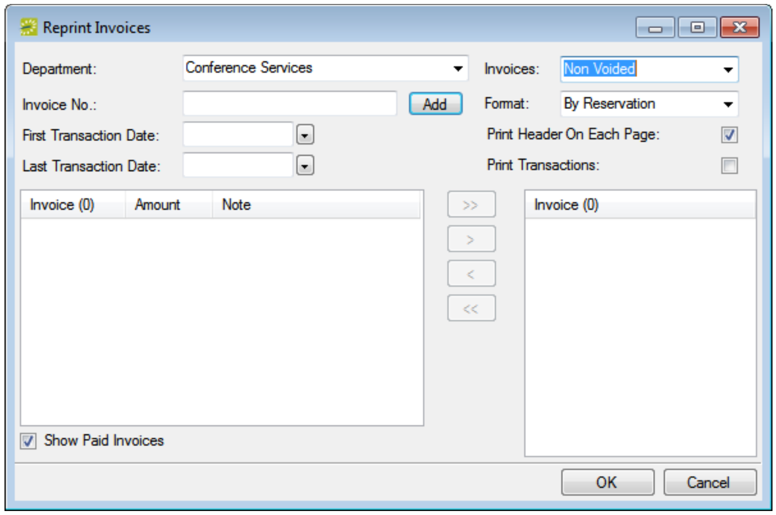
To reprint invoices for one or more departments, you must select the reservation in the Navigator, open the Transactions tab and CTRL-click to select the multiple invoices that you are reprinting, and then use the Reprint option on the Transactions tab.

To specify invoices for reprinting

1. On the EMS menu bar, click Billing > Other > Reprint Invoices.

   The Reprint Invoices dialog box opens. See Figure 9-5 on page 369.

Figure 9-5: Reprint Invoices dialog box



2. In the Department field, select the department that generated the invoices.

This field is automatically populated if you have a default department assigned to your user account but you can select a different value if needed.

3. In the Invoice No. field, enter the number of the invoice that you are reprinting, and then click Add.

   The invoice is displayed (by number) in the lower right Invoice pane.

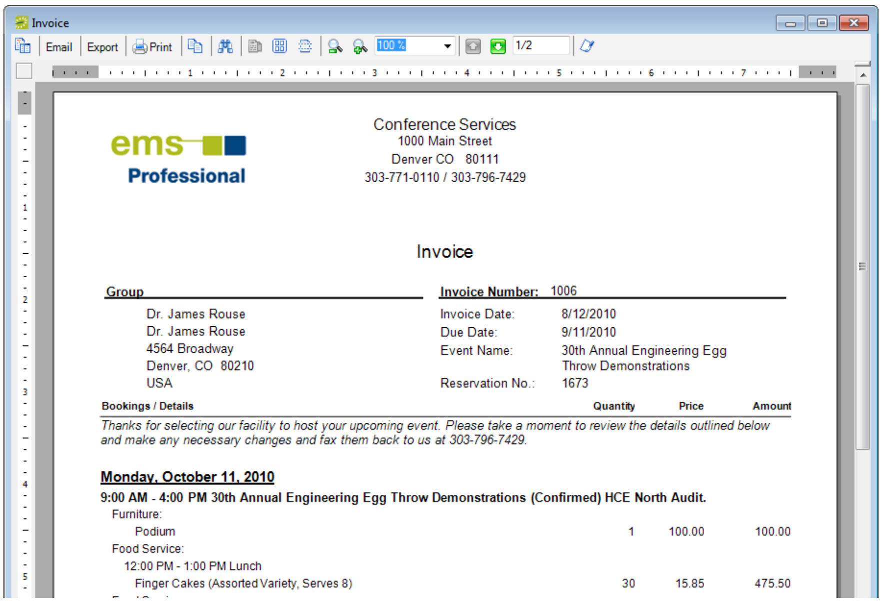
4. Repeat Step 3 until you have added all the invoices that you are reprinting.
5. Leave the reprinting criteria set to their default values, or optionally, edit them as needed.

Option	Description
Invoices	The invoice type that you are reprinting—Non Voided (the default value) or Voided.
Format	Select the sort order for the reprinted invoices. The default value is By Reservation.
First Transaction Date Last Transaction Date	Leave these values blank to reprint the invoice for all bookings; otherwise, enter the date range of the bookings for which you are reprinting the invoice.
Print Header on Each Page	Leave this option selected to print the invoice header on every page of the invoice.
Print Transactions	Select this option to include any associated transactions (deposits, payments, and so on) in the reprinted invoice.

6. Click OK.

   An onscreen preview of the invoices opens. The preview is titled “Invoices.” The preview window contains options for printing a hard copy of the invoices, for exporting the invoices to a .pdf, emailing the invoice (see “Sending Email from EMS” on page 414) and so on. Select the option or options that best fits your working needs.

Figure 9-6: Onscreen preview of an invoice selected for reprinting

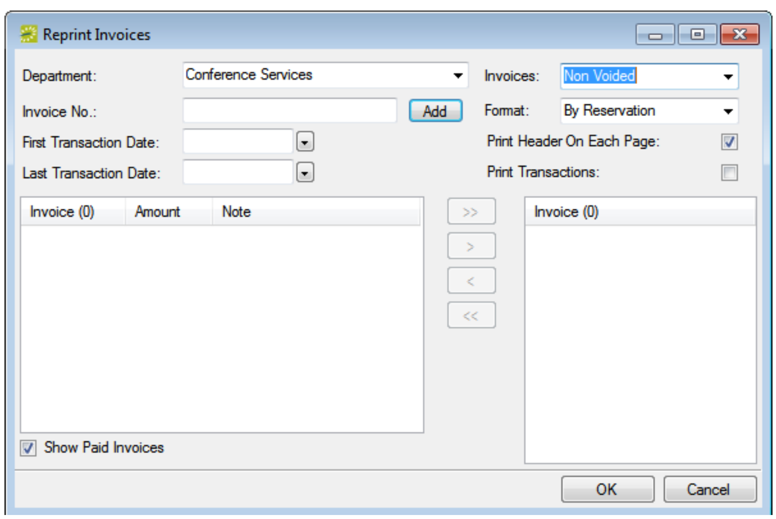


To search for invoices to reprint

1. On the EMS menu bar, click Billing > Other > Reprint Invoices.

   The Reprint Invoices dialog box opens.

Figure 9-7: Reprint Invoices dialog box



2. Enter the criteria to search for the invoices that you are reprinting.

   As you enter the search criteria, the lower left Invoice pane is dynamically updated with the invoices that meet the criteria. The Note column in this pane indicates if payments have been made against the invoice.

Field	Description
Department	The department that generated the invoice. You can search for invoices for reprinting as long as the invoices were generated by the same department. **Note:** This field is automatically populated if you have a default department assigned to your user account but you can select a different value if needed.
Invoices	Select the type of invoice for which to search—Non Voided or Voided.
First Transaction Date Last Transaction Date	You must enter at least a First Transaction date. By default, the Last Transaction date is set to the same date. You can change the Last Transaction date if needed.
Show Paid Invoices	Leave this option selected to include paid invoices in the search.

3. Leave the reprinting criteria set to their default values, or optionally, edit them as needed.

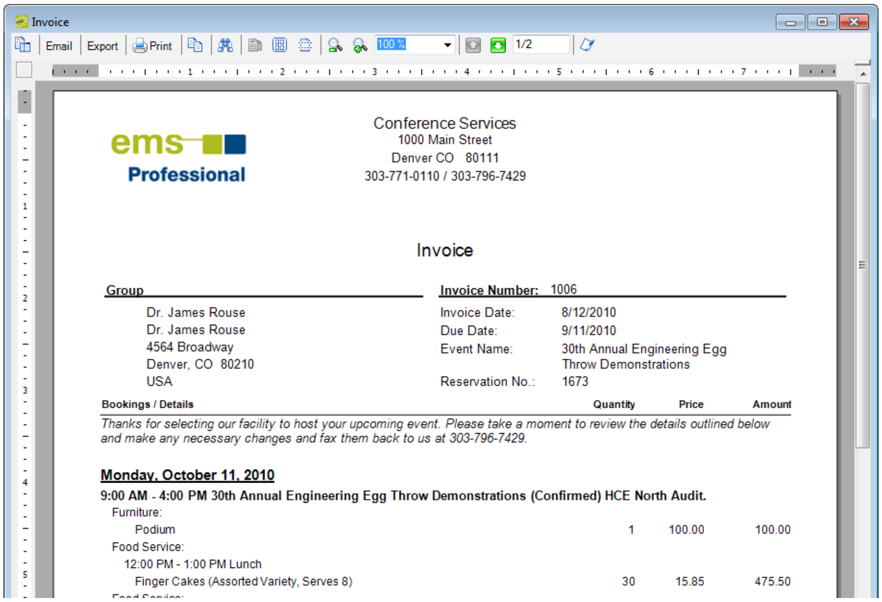
Option	Description
Format	Select the sort order for the reprinted invoices. The default value is By Reservation.
Print Header on Each Page	Select this option to print the invoice header on every page of the reprinted invoice.
Print Transactions	Select this option to include any associated transactions (deposits, payments, and so on) in the reprinted invoice.

4. In the lower left Invoice pane, select the invoice, or CTRL-click to select the multiple invoices that you are reprinting, and then click the Move button (>) to move the selected invoices to the lower right Invoice pane.

5. Click OK.

   An onscreen preview of the invoices opens. The preview is titled “Invoices.” The preview window contains options for printing a hard copy of the invoices, for exporting the invoices to a .pdf, emailing the invoice (see “Sending Email from EMS” on page 414), and so on. Select the option or options that best fits your working needs. See Figure 9-8 on page 372.

Figure 9-8: Onscreen preview of an invoice selected for reprinting



To void an invoice

You can void an invoice only if the invoice has *not* been paid. If payments have been made against an invoice, you must first void the payments.You can void invoices *for only one department at a time*. When you void an invoice, the invoice is removed from the Ageing report and its associated bookings are unlocked. You can specify the invoices that you are voiding, or you can search for invoices that meet specific criteria, and then select specific invoices to void from the list of search results.

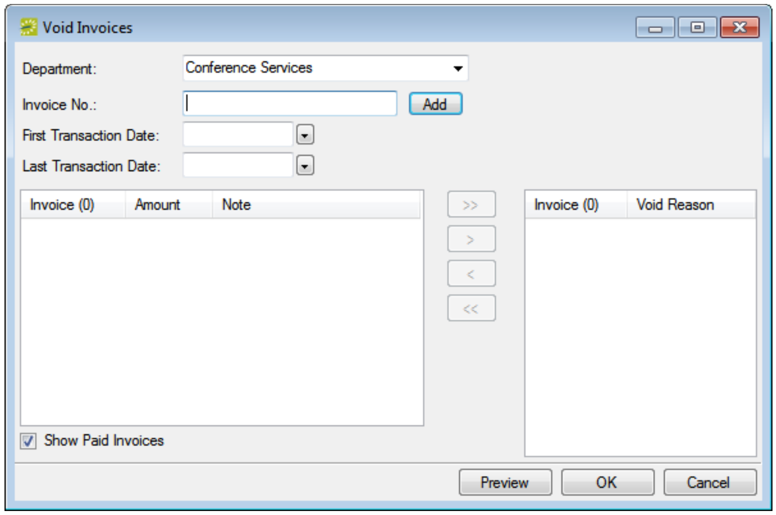
You can also void an invoice from the Transactions tab when a reservation is selected in the Navigator.

To specify invoices to void

1. On the EMS menu bar, click Billing > Other > Void Invoices.

   The Void Invoices dialog box opens. See Figure 9-9 on page 373.

Figure 9-9: Void Invoices dialog box

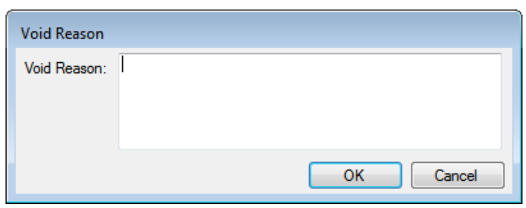


2. In the Department field, select the department that generated the invoices.
3. In the Invoice No. field, enter the number of the invoice that you are voiding, and then click Add.

   Two results are possible:

   - If payments have *not* been applied to the invoice, then a Void Reason dialog box opens. Continue to Step 4.

Figure 9-10: Void Reason



   - If payments have been applied to the invoice, then an error message opens indicating that payments have been applied to the invoice and it cannot be voided. You must void the payments first before you can continue with voiding the invoice. See “To void a transaction” on page 391.

4. Enter a reason for voiding the invoice, and then click OK.

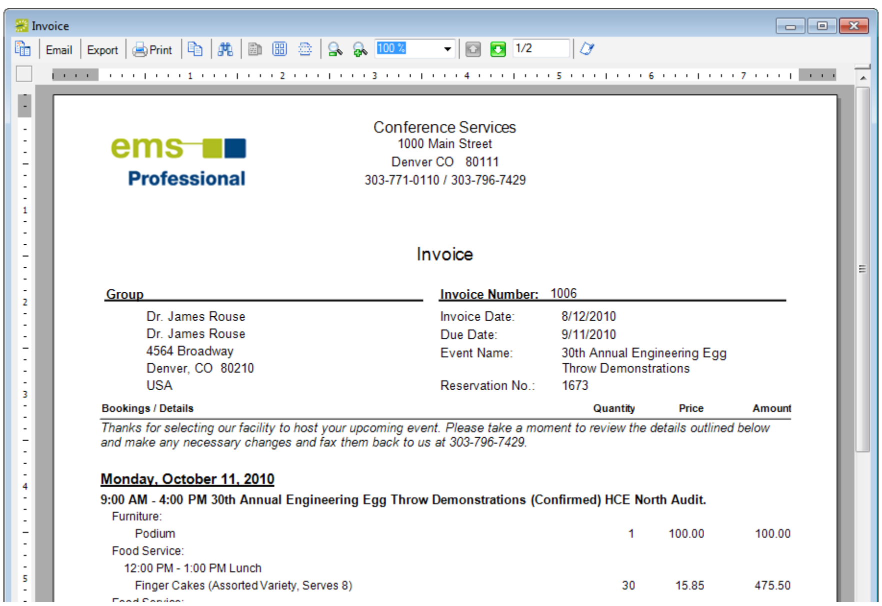
   The invoice is displayed (by number) in the lower right Invoice pane.

5. Repeat Step 3 and Step 4 until you have selected all the invoices from the same department that you are voiding.

6. Do one of the following:
   - To review an invoice before you void it, go Step 7.
   - To void an invoice without reviewing it, go to Step 8.
7. Optionally, before you void a selected invoice, you can review it to ensure that it is indeed an invoice that you want to void. In the lower right Invoice pane, select the invoice, or CTRL-click to select multiple invoices, and then click Preview.

   An onscreen preview of the selected invoices opens. The preview is titled “Invoices.” The preview window contains options for printing a hard copy of the invoices, for exporting the invoices to a .pdf, and so on. (See Figure 9-11 on page 374.) Select the option or options that best fit your working needs. For example, before you void an invoice, you might want to email a copy of the invoice to a colleague to confirm that the invoice should be voided.

Figure 9-11: Onscreen preview of an invoice selected for voiding



8. In the lower right Invoice pane, select the invoice, or CTRL-click to select the multiple invoices that you are voiding, and then click OK.

   A message opens asking you if you are sure that you want to void the selected invoices.
9. Click Yes.

   A message opens indicating that the invoices have been voided.
10. Click OK.

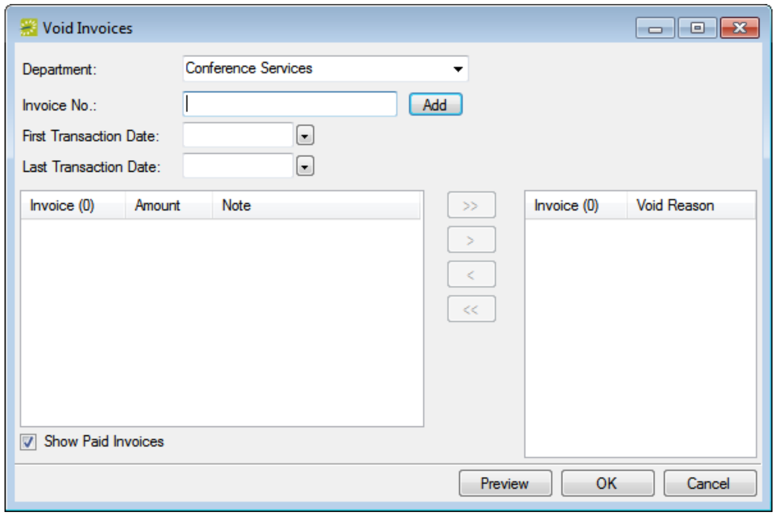
    The message and the Void Invoices dialog box close. The Void column is set to Yes on the Transactions tab for each of the voided invoices in the Navigator.

To search for invoices to void

1. On the EMS menu bar, click Billing > Other > Void Invoices.

   The Void Invoices dialog box opens.

Figure 9-12: Void Invoices dialog box



2. Enter the criteria to search for the invoices that you are voiding.

   As you enter the search criteria, the lower left Invoice pane is dynamically updated with the invoices that meet the criteria. The Note column in this pane indicates if payments have been made against the invoice.

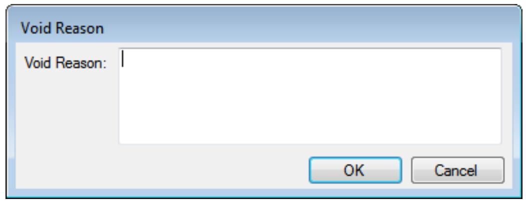
Field	Description
Department	The department that generated the invoice. You can search for invoices for voiding as long as the invoices were generated for the same department. You cannot void invoices from different departments.
First Transaction Date Last Transaction Date	You must enter at least a First transaction date. The Last transaction date is optional.
Show Paid Invoices	Leave this option selected to include paid invoices in the search. If you want to void an invoice against which payments have been made, then this reminder serves to prompt to you to first void the payments before you void the invoice. See “To void a transaction” on page 391.

3. Select the invoice, or CTRL-click to select the multiple invoices that you are voiding, and then click the Move button (>).

Remember, you can select an invoice for voiding only if payments have not been applied to the invoice.

A Void Reason dialog box opens. See Figure 9-13 on page 376.

Figure 9-13: Void Reason



4. Enter a reason for voiding the invoice, and then click OK.

   The Void Reason dialog box closes. The invoices are displayed (by number) in the lower right Invoice pane.

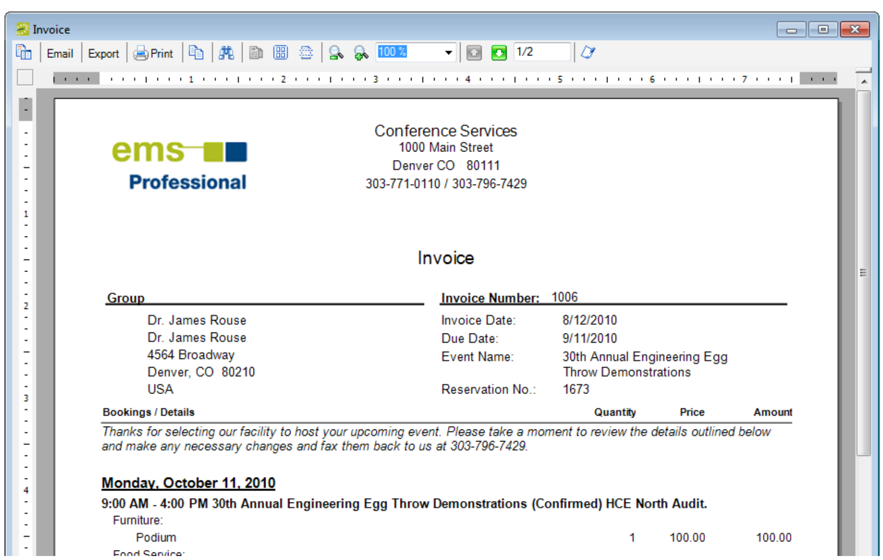
5. Do one of the following:

   - To review an invoice before you void it, go Step 6.
   - To void an invoice without reviewing it, go to Step 7.

6. Optionally, before you void a selected invoice, you can review it to ensure that it is indeed an invoice that you want to void. In the lower right Invoice pane, select the invoice, or CTRL-click to select multiple invoices, and then click Preview.

   An onscreen preview of the selected invoices opens. The preview is titled “Invoices.” The preview window contains options for printing a hard copy of the invoices, for exporting the invoices to a .pdf, and so on. Select the option or options that best fit your working needs. For example, before you void an invoice, you might want to email a copy of the invoice to a colleague to confirm that the invoice should be voided.

Figure 9-14: Onscreen preview of an invoice selected for voiding



7. In the lower right Invoice pane, select the invoice, or CTRL-click to select the multiple invoices that you are voiding, and then click OK.

   A message opens asking you if you are sure that you want to void the selected invoices.

8. Click Yes.

   A message opens indicating that the invoices have been voided.

9. Click OK

   The message and the Void Invoices dialog box close. The Void column is set to Yes on the Transactions tab for each of the voided invoices in the Navigator.

Searching for Transactions

A *transaction* in EMS can be one of four types—a deposit (deposit and damage deposit), a payment, an adjustment, or a refund.

Transaction Type	Description
Deposit	A *deposit* is the dollar amount paid in advance of a meeting or event before invoicing occurs. • A *deposit* is added to a reservation. After you invoice the reservation, all outstanding deposits are applied to the invoice to reduce the balance due. • A *damage deposit* is used to a collect a deposit that is not applied to an invoice and therefore, does not reduce the balance due. Instead, if the customer does not damage the room, any reserved equipment, and so on, then you must return the damage deposit to the customer by voiding the damage deposit transaction.
Payment	A *payment* is the dollar amount that is applied to an invoice to reduce the balance due. A *pre-payment* is similar to a deposit and is applied to a reservation.
Adjustment	An *adjustment* is a modification that is made to the amount due on an existing invoice. For example, if you send out an invoice to a group for $202.00 and the group sends you a check for $200.00, you can make an adjustment of "$2.00-" to close out the invoice.
Refund	A *refund* is the return of funds that have been applied to an invoiced reservation.

You can use the Browse Transaction function to search for any of these transaction types. The results are displayed in a list view. When you carry out a search in the for a transaction, you can carry out a basic search or an advanced search. A basic search is based on the basic information that you specify for a transaction when you first create it, such as the group to which the transaction applies, the department that generated the transaction, and so on. An advanced search is a field level search that is carried out the reservation level, the transaction level, or a combination of these. For example, in an advanced search, you can specify criteria as granular as the Bill To Contact at the reservation level.

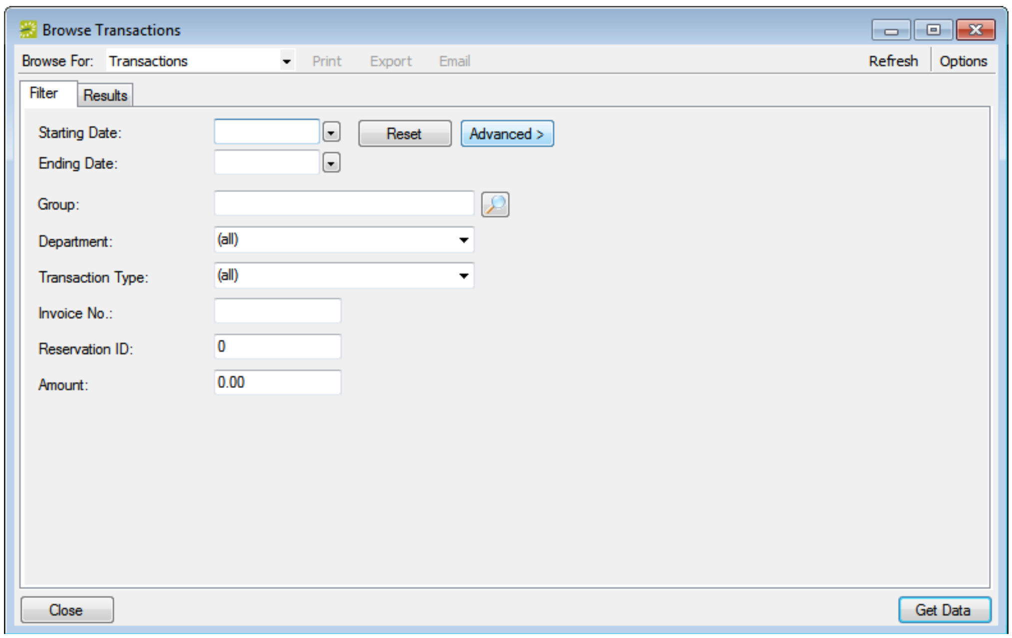
You can find all transactions for a reservation on the Transactions tab in the Navigator. *See "Layout and folder structure" in "The Navigator," on page 77.*

To search for a transaction

1. On the EMS menu bar, click Billing > Other > Browse Transactions.

   The Browse Transactions window opens. The *first* time that the Browse Transaction window opens, the Filter tab is set by default to a basic search; otherwise, the Filter tab is set to the search type (Basic or Advanced) that you last carried out.

Figure 9-15: Browse Transactions window, Basic search options



2. Click the Basic/Advanced toggle to select the type of search that is to be carried out, and then continue to one of the following:
   - "To carry out a basic transaction search."
   - "To carry out an advanced transaction search" on page 381.

To carry out a basic transaction search

1. Enter the search criteria.

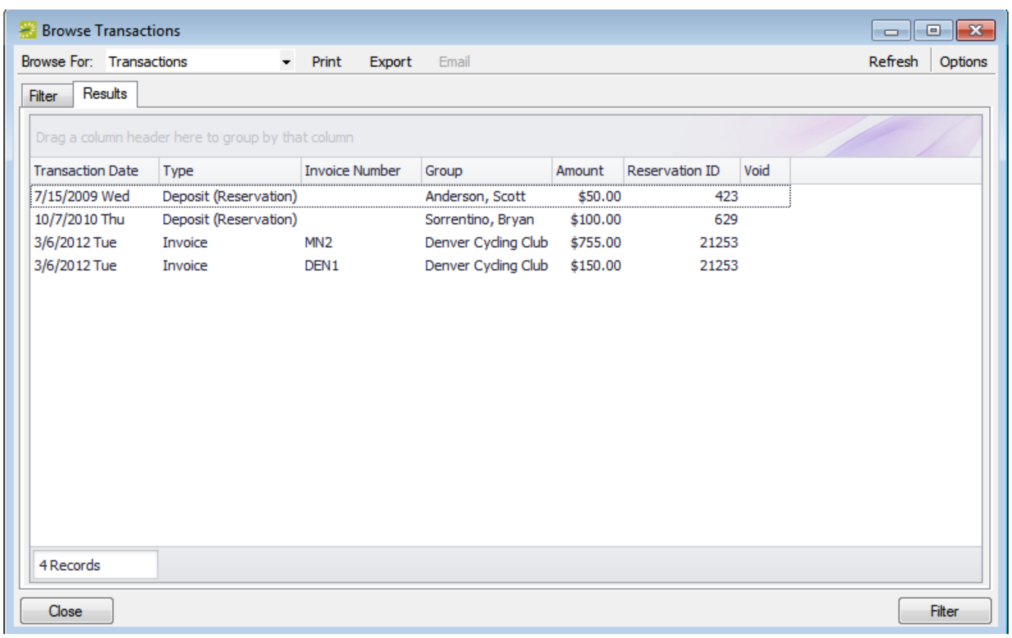
Field	Description
• Starting Time • Ending Time	The date range during which the transactions were carried out. Both are optional.
Group	Click the Search icon  to open the Groups window and search for a for the group for which the transactions apply. See "To search for a group and/or contact" on page 255.
Department	Leave the default value set to (all) or select a specific department that generated/issued the transaction.

Field	Description
Transaction Type	Leave the default value set to (all), or select a specific transaction type for which to search.
Invoice Number	If you are searching for a specific invoice or invoices, enter a search string. **Note:** The search is not case-sensitive, but your search is limited to the exact order of characters in the string and it must begin with the information for which you are searching. For example, a search string of **10** returns **10**00, **10**17, but not 910.
Reservation ID	Leave the default value set to 0 to search for a transaction regardless of reservation ID; otherwise, enter the exact value of the reservation ID.
Amount	Leave the default value set to 0.00 to search for transactions regardless of the transaction amount; otherwise, enter the exact amount of the transaction.

2. Optionally, click Options and edit the default value the Number of Records to Return search option.
3. Click Get Data or Refresh.

   The search results are displayed on the Results tab.

Figure 9-16: Browse Transactions window, Results tab

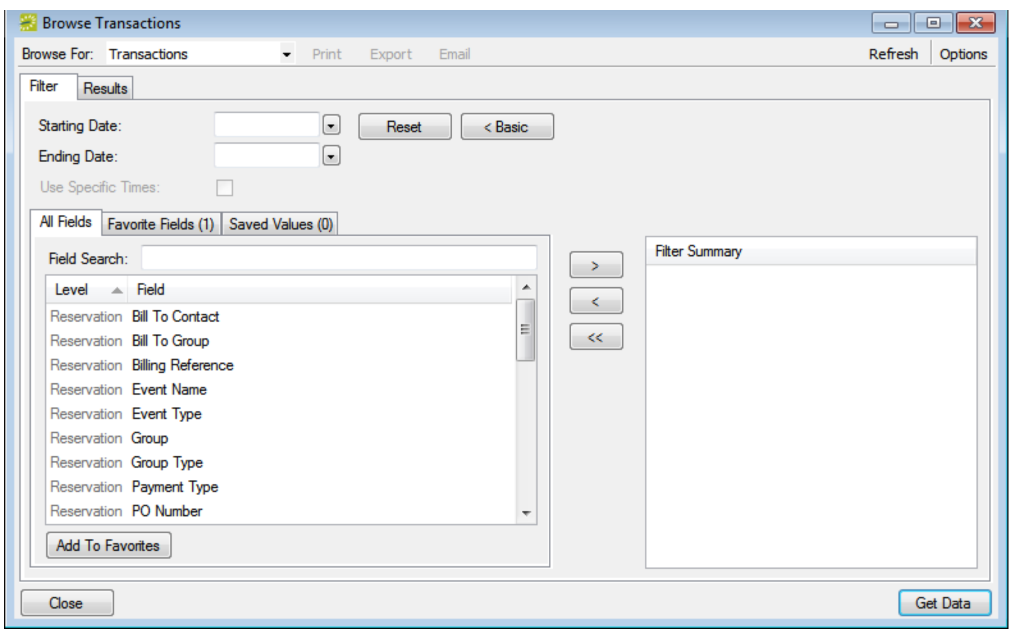


4. Optionally, do one or more of the following:
   - The lower pane on the Results tab is an EMS Browser window. See “An EMS Browser Window” on page 35 for all the features that are available for this pane.
   - Click Print to print the search results.
   - Click Export to export the search results to a Microsoft Excel spreadsheet.
   - Select a search result entry for an *invoice*, and then click Email to open a pre-addressed SMTP email to the group that is associated with the invoiced reservation. Complete and send the email as you would normally. (The invoice is sent as an attachment.) See “Sending Email from EMS” on page 414.
   - Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
   - Click Refresh to requery the database based on the current search criteria.
5. Click Close.

   Any changes that you made to the search results columns (position and width) remain in effect for any other searches that you carry out. If you want to reset the columns to their default values, see “Resetting Column Settings” on page 408.

To carry out an advanced transaction search

Figure 9-17: Browse Transaction window, Advanced search options



1. Optionally, enter a Starting Date, an Ending Date, or both.

2. Optionally, if the Starting Date and the Ending Date are the same, select Use Specific Times and enter specific time periods to search.

Use Specific Times is available only if the Starting Date is the same as the Ending Date.

3. For each field level option by which to carry out the search:

    - Select the field level option, and then click the Move button (>).

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*To filter the list of available fields, in the Field Search field, enter a search string. Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **type** returns **Type**, Payment **Type**, and so on.*

    - When prompted, enter a value or define the limits for the option, and then click OK.

    The option is moved to the Filter Summary list.

If you have specific fields and/or values by which you always want to carry out a search, then you can set up these fields to be your Favorite fields. See

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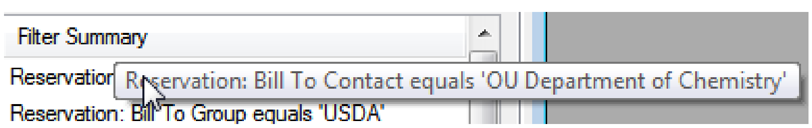
To view a selected field option in its entirety in the Filter Summary list, rest the mouse pointer on the entry. A tooltip showing the complete field option information opens.

Figure 9-18: Viewing a selected field option in the Filter Summary list



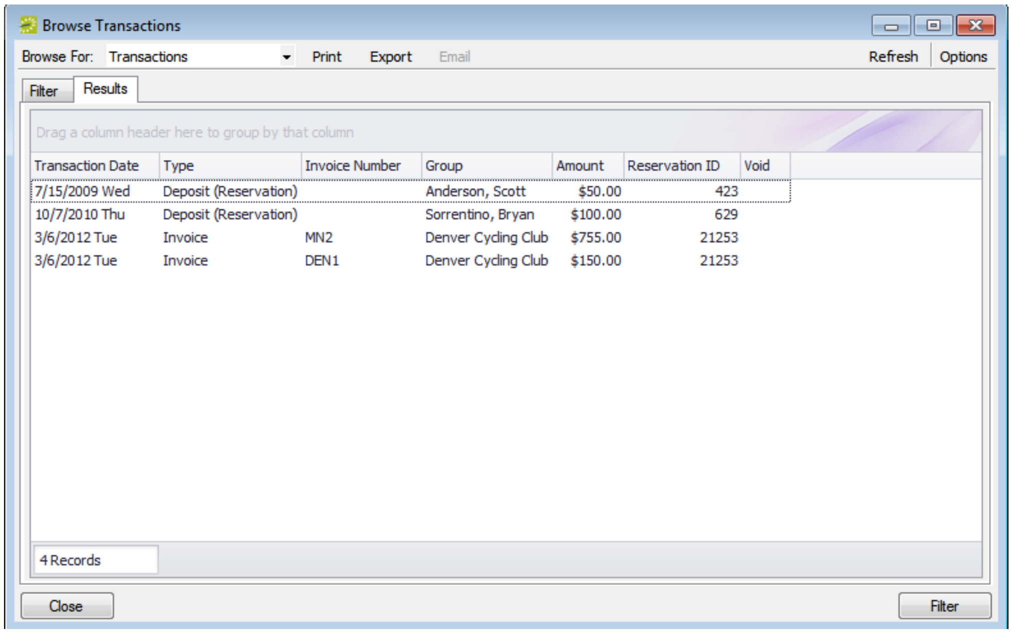
4. Optionally, click Options and edit the default values for one or more additional search options—Date/Time Filter, Number of Records to Return, and Specific Room Filters.

5. Optionally, click Options and edit the default value the Number of Records to Return search option.

6. Click Get Data or Refresh.

   The search results are displayed on the Results tab.

Figure 9-19: Browse Transactions window, Results tab



7. Optionally, do one or more of the following:
   - The lower pane on the Results tab is an EMS browser window. See "An EMS Browser Window" on page 35 for all the features that are available for this pane.
   - Click Print to print the search results.
   - Click Export to export the search results to a Microsoft Excel spreadsheet.
   - Select a search result entry for an *invoice*, and then click Email to open a pre-addressed SMTP email to the group that is associated with the invoiced reservation. Complete and send the email as you would normally. (The invoice is sent as an attachment.) See "Sending Email from EMS" on page 414.
   - Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
   - Click Refresh to requery the database based on the current search criteria.
8. Click Close.

   Any changes that you made to the search results columns (position and width) remain in effect for any other searches that you carry out. If you want to reset the columns to their default values, see "Resetting Column Settings" on page 408.

To set up favorite fields for a Transaction search

If you have specific fields and/or values by which you always want to carry out a Transaction search, you do not have to filter the list of fields on the All Fields tab for every search. Instead, you can set up each of these fields to be a favorite field with a specific value or limit if needed.

1. Open the Browse Transactions window, and make sure that the Advanced search features are displayed.
2. For each field that you are setting up as favorite field, select the field on the All Fields tab, and then click Add to Favorites.

   The field is added to the Favorite Fields tab.
3. Optionally, after you define a value or define the limits for a field, click Save Value on the Filter dialog box.

   The next time that you carry out a search, you can simply open the Favorite Fields tab or the Saved Values tab to carry out a search based on your customized list of search fields.

Working with Transactions

Working with transactions in EMS consists of entering the transaction correctly, and if needed voiding a transaction. You can:

- Enter a deposit and void a deposit.
- Enter a payment and void a payment.
- Enter an adjustment and void an adjustment.
- Enter a refund and void a refund.

The steps for entering the different types of transactions are specific to the transaction. The steps for voiding a transaction are identical, regardless of the transaction type.

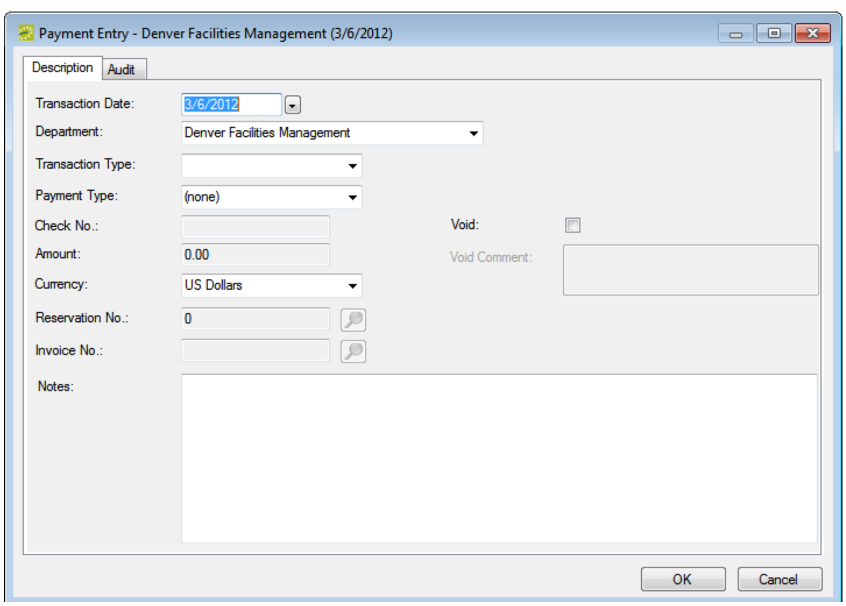
If needed, you can first search for a transaction to ensure that it has not already entered or voided. *See "To search for a transaction" on page 379.*

To enter a deposit or damage deposit for a reservation

1. Do one of the following:
   - Open the reservation in the Navigator (see "Opening a reservation in the Navigator" on page 79), and on the Transactions tab, click New > Payment.
   - On the EMS menu bar, click Billing > Payments > Payment Entry, and then on the Payment Entries window, click New.

   The Payment Entry dialog box opens.

Figure 9-20: Payment Entry dialog box



2. Enter the deposit information.

Field	Description
Transaction Date	The default value is the current day’s date. You can edit this value if needed.
Department	Select the department.
Transaction Type	Select the transaction type—Damage Deposit, Deposit (Reservation), or Deposit (Bookings). • A Deposit (Reservation) is best suited for reservations with one or more bookings that are to be invoiced in their entirety upon completion of the event. • A Deposit (Bookings) is best suited for reservations with multiple bookings, for example, an event with multiple occurrences spanning several months, that is to be billed monthly. A Deposit (Bookings) allows you to spread the deposit across multiple months so that only a portion of the deposit is consumed and applied to the invoice that is generated monthly. In this scenario, a large deposit that is entered as Deposit (Reservation) would be consumed in its entirety by the first invoice that is generated.
Payment Type	Select the payment type.
Check No.	Enter a check number if you selected “Check” as the payment Type.
Amount	Enter the amount of the deposit.
Currency	Select the currency for the deposit.
Reservation No.	Automatically populated if you opened the Payment Entry dialog box from the Transaction tab in the Navigator; otherwise, enter a reservation number or click the Search icon to open the Reservations window and search for a reservation.
Invoice No.	N/A as deposits are applied before an invoice is generated. The invoicing process totals the charges for the specified date range, consumes any applied *reservation* deposits, and results in a net balance due for the invoice. The invoicing process does not consume any Damage deposits.
Notes	Optional. Enter any other comments or statements that explain or clarify the deposit.

3. Click OK.

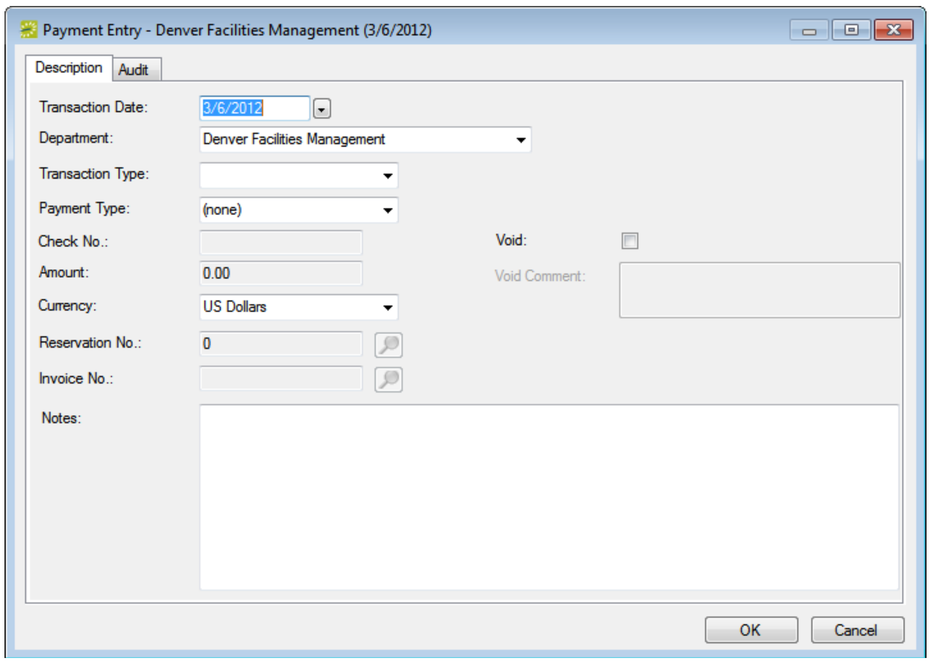
   The Payment Entry dialog box closes. The transaction information is displayed on the Transactions tab for the reservation.

To enter a payment or pre-payment

1. Do one of the following:
   - Open the reservation in the Navigator (see “Opening a reservation in the Navigator” on page 79), and on the Transactions tab, click New > Payment.
   - On the EMS menu bar, click Billing > Payments > Payment Entry, and then on the Payment Entries window, click New.

   The Payment Entry dialog box opens.

Figure 9-21: Payment Entry dialog box



2. Enter the payment information.

Field	Description
Transaction Date	The default value is the current day’s date. You can edit this value if needed.
Department	Select the department.
Transaction Type	Select the transaction type—Payment or Pre-payment. **Note:** Remember that pre-payments act just like deposits in that they are applied to a reservation and are applied to an invoice reducing the balance due. Payments are applied to an invoice.
Payment Type	Select the payment type.
Check No.	Enter a check number if you selected “Check” as the payment Type.
Amount	Enter the amount of the payment.
Currency	Select the currency for the payment.

Field	Description
Reservation No.	• If you selected Payment as the Transaction Type, then this field is not available as payments are applied against invoices, not reservations. • If you selected Pre-payment as the transaction type, then the field is automatically populated if you opened the Payment Entry dialog box from the Transaction tab in the Navigator; otherwise, you must enter a reservation number or click the Search icon to open the Reservations window and search for a reservation.
Invoice No.	• If you selected Pre-payment as the Transaction Type, then this field is not available as pre-payments are applied before an invoice is generated. • If you selected Payment as the Transaction Type, then you must enter an invoice number in this field, or click the Search icon to open the Invoices window and search for an invoice.
Notes	Optional. Enter any other comments or statements that explain or clarify the payment.

3. Click OK.

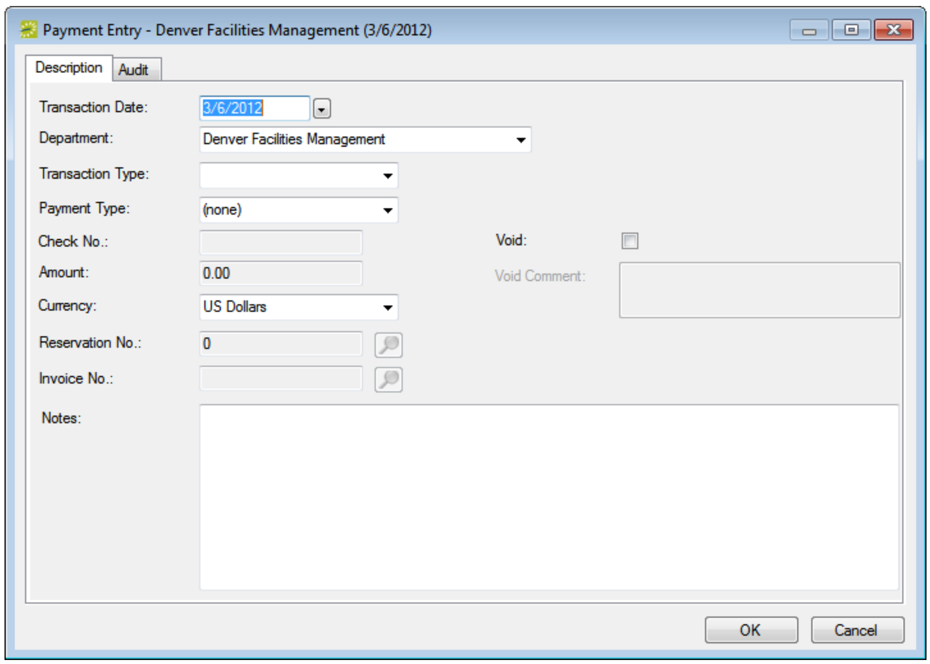
   The Payment Entry dialog box closes. The transaction information is displayed on the Transactions tab for the reservation.

To enter an adjustment for an invoice

1. Do one of the following:
   - Open the reservation in the Navigator (see "Opening a reservation in the Navigator" on page 79), and on the Transactions tab, click New > Payment.
   - On the EMS menu bar, click Billing > Payments > Payment Entry, and then on the Payment Entries window, click New.

   The Payment Entry dialog box opens.

Figure 9-22: Payment Entry dialog box



2. Enter the adjustment information.

Field	Description
Transaction Date	The default value is the current day's date. You can edit this value if needed.
Department	Select the department.
Transaction Type	Select the transaction type—Adjustment.
Payment Type	Select the payment type.
Check No.	Enter a check number if you selected "Check" for the payment type.
Amount	Enter the amount of the adjustment. To decrease the invoice by the indicated amount, enter a minus sign (-) before or after the amount.
Currency	Select the currency for the adjustment.
Reservation No.	N/A as adjustments are applied to invoices.

Field	Description
Invoice No.	You must enter an invoice number or click the Search icon to open the Invoices window and search for an invoice
Notes	Optional. Enter any other comments or statements that explain or clarify the adjustment.

3. Click OK.

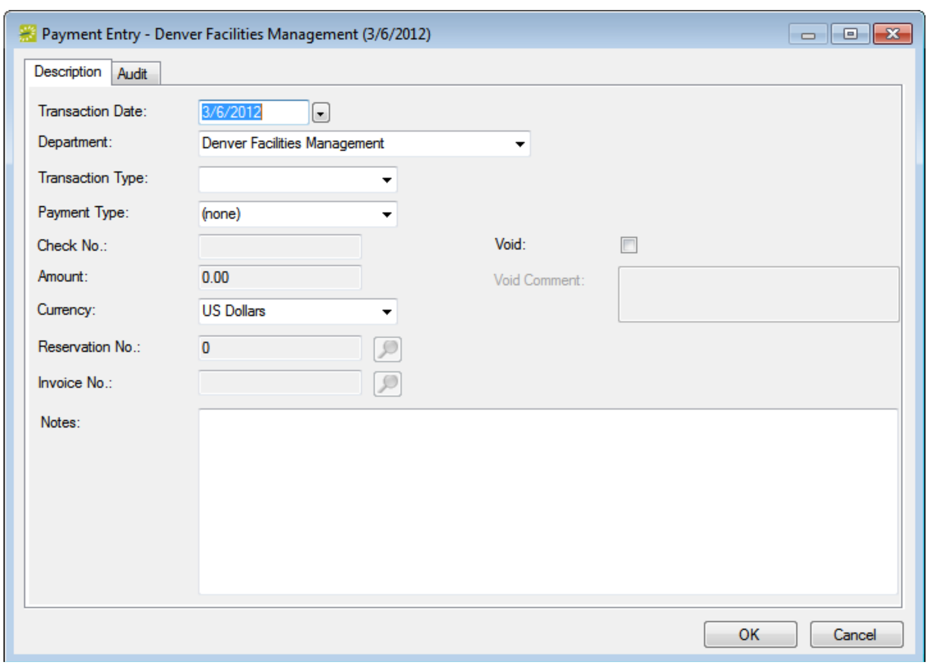
   The Payment Entry dialog box closes. The transaction information is displayed on the Transactions tab for the reservation.

To enter a refund

1. Do one of the following:
   - Open the reservation in the Navigator (see “Opening a reservation in the Navigator” on page 79), and on the Transactions tab, click New > Payment.
   - On the EMS menu bar, click Billing > Payments > Payment Entry, and then on the Payment Entries window, click New.

   The Payment Entry dialog box opens.

Figure 9-23: Payment Entry dialog box



2. Enter the refund information.

Field	Description
Transaction Date	The default value is the current day’s date. You can edit this value if needed.
Department	Select the department.
Transaction Type	Select the transaction type—Refund.
Payment Type	Select the payment type.
Check No.	Enter a check number if you selected “Check” as the payment type.
Amount	Enter the amount of the refund.
Currency	Select the currency for the refund.
Reservation No.	N/A as refunds are applied to invoices.
Invoice No.	You must enter an invoice number or click the Search icon to open the Invoices window and search for an invoice
Notes	Optional. Enter any other comments or statements that explain or clarify the refund.

3. Click OK.

   The Payment Entry dialog box closes. The transaction information is displayed on the Transactions tab for the reservation.

To void a transaction

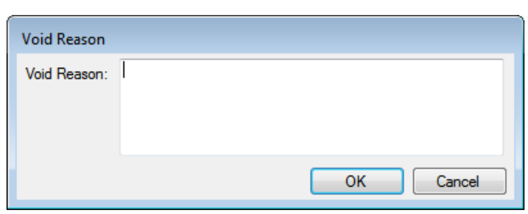
You can void a transaction for a reservation from the Transactions tab, or you can void a transaction from the Payment Entries window.

To void a transaction from the Transactions tab

1. Open the reservation in the Navigator. (See “Opening a reservation in the Navigator” on page 79.)
2. Open the Transactions tab, and on the Transactions tab, select the transaction that is to be voided (CTRL-click to select multiple transactions), and then click Void.

   A Void Reason dialog box opens.

Figure 9-24: Void Reason dialog box



3. Enter the reason for voiding the transactions, and then click OK.

   The Void Reason dialog box closes and a message opens indicating that the transaction has been voided.

4. Click OK.

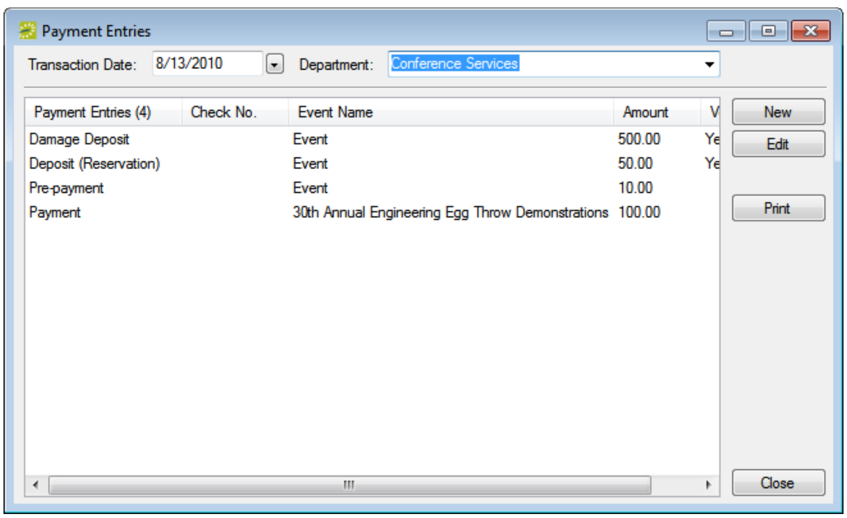
   The Void Transaction message closes. The Void column is set to Yes for each of the voided transactions in the Navigator.

To void a transaction from the Payment Entries window

1. On the EMS menu bar, click Billing > Payments > Payment Entry.

   The Payment Entries window opens. This window lists all transactions (voided and non-voided) that were ever made in your EMS system for a selected department on a selected date.

Figure 9-25: Payment Entries window



2. Select the date (the default value is the current day's date) and the department for which you are voiding the transaction.

   The Payment Entries window is updated with the list of payments that meet the date and department criteria.

3. Select the transaction that is to be voided, and then click Edit.

   The Payment Entry dialog box opens. This window details specific information for the selected transaction. (See Figure 9-20 on page 385.)

4. Click Void, and, then in the Void Comment field, enter a reason for voiding the transaction.

5. Click OK.

   The Payment Entry dialog box closes. You return to the Payment Entries window. The Void column is set to Yes for the voided transaction.

Generating an EMS Billing Report

All EMS Billing reports are available under the Billing option on the menu bar. For any EMS report, you can specify the parameters, options, and format for the report, or you can generate the report according to *memorized* settings. (For detailed information about a memorized report, see “Working with Memorized Reports” on page 323.) Not all reports require the same parameters, nor do they all have the same options available. In addition, you can generate different reports in different formats.

For brevity and ease, the parameters and options that are available for each report are not discussed here. Instead, the options are discussed in “Report Descriptions and Options” on page 396. Contact your EMS administrator if you need assistance in generating any of these report.

To generate a report

1. On the EMS menu bar, click Billing to open the Billing menu, and then do one of the following:
    - To generate the Billing Worksheet report, click Billing > Invoices > Billing Worksheet.
    - To generate any other Billing report, click Billing > Reports, and then click the option for the report that you are generating. For example, to generate the Ageing report, click Billing > Reports > Ageing.

All Billing reports other than the Billing Worksheet report are also available from Reports > Billing.

2. On the Setup dropdown list, do one of the following:
    - To generate the report according to the filter settings that you want (parameters, options, and so on), leave user-specified selected, then go to Step 3.
    - To run the report with filter settings that have been saved, or *memorized*, select the memorized report, and then go to Step 4.

For detailed information about memorized reports, see “Working with Memorized Reports” on page 323.

3. Specify the report parameters, options, and format. See:
    - “Invoice reports” on page 397.
    - “Reports” on page 397.

4. Optionally, do one or both of the following:
   - Click Print Preview.

     A preview of the report opens onscreen.
   - To print a hard copy of the confirmation, specify the number of copies that you are printing, and then click Print.
5. Click Close.

   Unless you change the setup, all subsequent reports will be generated and printed according to the parameters and options that you have specified and in the format that you specified. If you want to save certain settings so that you do not have to adjust the filter settings every time you run the report, you can memorize the report. See "Working with Memorized Reports" on page 323.

Report Descriptions and Options

This section provides a description of every EMS report in the categories listed below and it also defines the options that are available for each report.

See:

- “Invoice reports” on page 397.
- “Reports” on page 397.

Invoice reports

Report	Description	Options
Billing Worksheet	Provides information on how bookings are to be invoiced. The report can include bookings within a date range, bookings within a reservation, or bookings within a date range inside a reservation. The report breaks down the charges in the same way as an invoice. The report also provides options for printing heading/footer messages and the detail for zero-dollar items.	See “Options tab—Format settings for a printed confirmation” in “To generate an invoice” on page 364.

Reports

Report	Description	Options
Ageing Report	A list of outstanding invoices. Current invoices are listed first, followed by past due invoices organized by age. Ageing Reports are based on department.	• Currency—Select the currency for the invoices. • Show Unapplied Deposits—Deposits that are applied to reservations that have not been invoiced are displayed on the report.

Report	Description	Options
Statements	A list of outstanding invoices for a selected group. Current invoices are listed first, followed by past due invoices organized by age.	• Currency—Select the currency for the invoices. • Report Title—Can create a title that is displayed at the top of the statement. • Header Message—Select a message from the pre-configured messages that is displayed at the top of every page of the statement. • Include Transactions On Zero Balance Invoices Within [ ]days—Statements that have a zero balance within the specified number of days are displayed. • Show Billing Reference Number—The billing reference number is displayed under the invoice information. • Show Purchase Order Number—The purchase order number is displayed under the invoice information. • Show Transaction Notes—Any notes entered for the transaction are displayed under the invoice information. • Use Current group Address - The *current* address of the group is displayed on the statement. (This address might or might not be the address for the group when the reservation was made.)

Report	Description	Options
Transaction Report	Shows all the billing transactions during a specified period if you generate the report in the By Transaction Type by Date format. Simply enter the date or date range and click Print. The report lists the group, event name, reservation ID, transaction date, transaction type, invoice number, check number, and amount. **Note:** If the report is generated in Standard format, deposits are not shown as transactions if they have been absorbed by the generation of an invoice. **Note:** You can also generate the Transaction Report from within a reservation to see only transactions for the selected event and you can generate the Transaction Report from the Print option on the Payment Entries window. Click Billing > Payments > Payment Entry, and then on the Payment Entries window, click Print.	Currency—Select the currency for the billing transactions.
Voided Transaction Report	Lists the payments, deposits, or adjustments that were voided on a specific date or within a date range. Lists the group, event name, reservation ID, transaction date and type, invoice number (if applicable), check number, and amount.	Currency—Select the currency for the voided transactions.
Invoice Detail Report	Provides detail for all invoices that were generated within a given date range. **Note:** See “To reprint an invoice” on page 368 for detailed instructions about the options that are available for the Print Invoice Detail dialog box.	N/A

Report	Description	Options
General Ledger Distribution	Shows the totals for invoices that were generated within a given date range. Entries are broken down by account, invoice, rate plan, or invoice. You can also generate this report in a Summary format.	• Currency—Select the currency for the invoices. • Invoices With Payments Only—Only invoices where payment has been received are posted on the report. • Show Applied Deposits/Prepayments—Applied deposits and prepayments are posted on the report. (An applied deposit is a deposit on a reservation that has been invoiced.)

User Settings

As an EMS user, you can manage many aspects of your account to better suit your working needs.

This chapter covers the following topics:

Setting User Preferences and Default Values

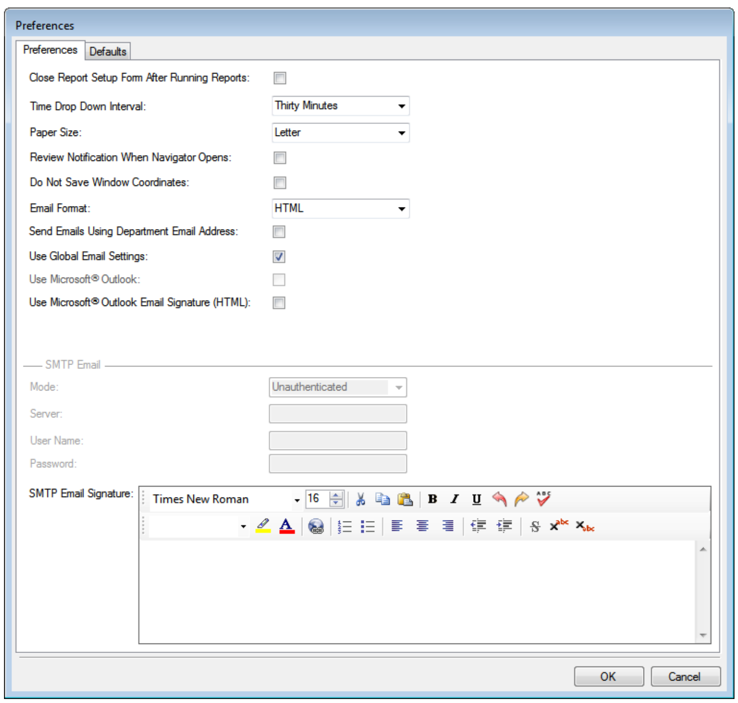
Preferences, like system parameters, are settings that affect the basic functioning of your EMS system. The difference is that system parameters are global settings that affect all users on the system, whereas preferences are applicable only to your user account. You can set the values for many preferences for your EMS instance to better suit your working needs. These preferences include whether a report window stays opens or closes automatically after you run a report, the time interval for Time dropdown fields, the format in which to send emails from your computer, the default values for specific fields in the Reservation Wizard and other EMS client windows, and the application that is to open all drawings (.png, .jpg, .gif, and so on) that are attached to bookings in the Navigator.

To set user preferences and default values

1. On the EMS menu bar, click Settings > Preferences.

   The Preferences dialog box opens. The Preferences tab is the active tab.

Figure 10-1: Preferences dialog box, Preferences tab

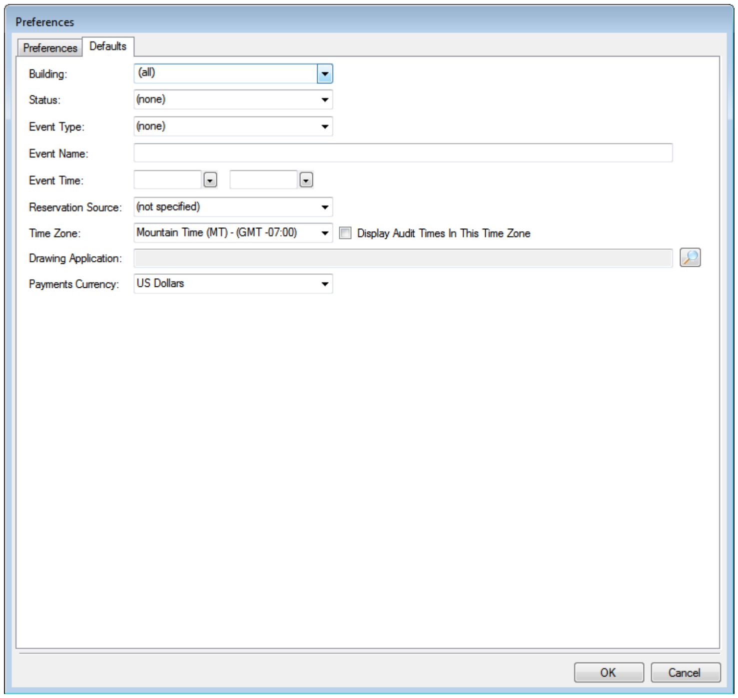


2. Edit your user preferences as needed.

Field	Description
Close Report Setup Form After Running Reports	Select this option if the window from which you generate a report is to automatically close after you run the report. Do not select this option if you want the window to remain open.
Time Drop Down Interval	The time interval displayed on a Time dropdown list—i.e., if you select 30 minutes, then options on the dropdown list are displayed as 1:00 1:30, 2:00 and so on. All Time dropdown lists are 24 hour lists.
Paper Size	The size of the paper on which reports, confirmations, and invoices are printed. Values are Letter, Legal, and A4.
Review Notifications When Navigator Opens	If this option is selected, then a notification in the Dashboard is automatically marked as “Reviewed” if you select the notification, and then click Go To. If this option is not selected, then you must select a notification, and then click Reviewed to manually mark the notification as “Reviewed.”
Do Not Save Window Coordinates	All windows in EMS have default coordinates (a position) in EMS. If you move a window from its default position when working in EMS, but you want the window to open in its default position the next time the window opens, then select this option.
Email Format	The format in which your emails are sent—HTML or Plain Text.
Send Emails Using Department Email Address	Select this option if you want the From email address for all the emails that you send from EMS to be the email address of the department that is associated with your user account.
Use Global Email Settings	If you want to use the global email settings that your EMS administrator has defined, then select this option.
Use Microsoft Outlook	If this option is selected, then EMS uses Microsoft Outlook for your default email client. If this option and the Use Global Email Settings option are *not* selected, then EMS uses the SMTP Email settings specific to your account. (These settings are specified in the lower pane of the Preferences dialog box.)
Use Microsoft Outlook Email Signature (HTML)	If the Use Microsoft Outlook option is selected, and your Email Format option is set to HTML, then you can select this option to include your Microsoft Outlook signature when you send emails from EMS.
SMTP Email	Contact your EMS administrator with assistance in specifying these values. **Note:** If you are using SMTP Email settings that are specific to your account, then you also have the option of creating a signature that is to be included in all the emails that you send from EMS.

3. Open the Defaults tab, and set the default values for the indicated items.

Figure 10-2: Preferences dialog box, Defaults tab



Field	Description
Building	You can select all buildings, a specific building, or a specific view or area. The value that you select here automatically populates the Building dropdown list in the Reservation Wizard and other EMS client windows, for example, the Visitors window.
Status Event Type Event Name Event Time Reservation Source Time Zone/ Display Audit Times in This Time Zone Payments Currency	The values that you select here automatically populate the appropriate fields in the Reservation Wizard, and other EMS client windows. **Note:** The event name can be a maximum of 30 characters, including spaces.
Default Drawing Application	Click the Search icon to open the Find Drawing Application dialog box and select the program that is to open all drawings (.png, .jpg, .gif, and so on) that are attached to bookings in the Navigator.

4. Click OK to close the Preferences dialog box and apply your edited preferences and default values.

Changing your Password

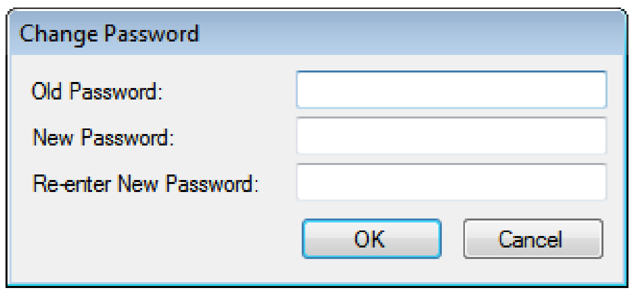
When your EMS administrator first sets up your user account, your password is predefined for you. You can change this password if you want.

To change your password

1. On the EMS menu bar, click Settings > Change Password.

   The Change Password dialog box opens.

Figure 10-3: Change Password dialog box



2. Do the following:
   - In the Old Password field, enter your current EMS password.
   - In the New Password field, enter the new password.
   - In the Re-enter New Password field, enter your new password again, exactly as you entered it in the New Password field.
3. Click OK to close the Change Password dialog box.

   The next time that you log in to EMS, you must use your new password.

Resetting Window Coordinates

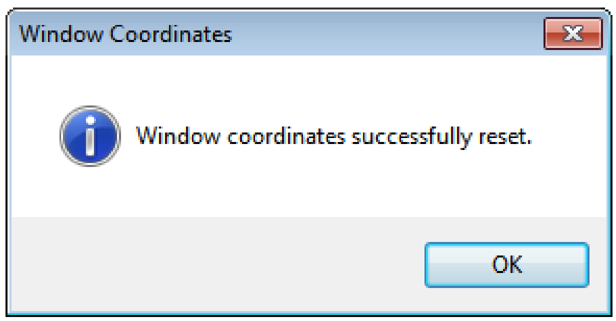
All windows in EMS have default coordinates (a size and position) in EMS. If you have moved one or more windows or resized one or more windows during an EMS session, and you want the windows to open in their default positions and sizes, you can reset the window coordinates to their default values.

To reset window coordinates

1. On the EMS menu bar, click Settings > Reset Window Coordinates.

   The Window Coordinates dialog box opens.

Figure 10-4: Window Coordinates dialog box



2. Click OK.
3. If necessary, restart your EMS application.

Resetting Column Settings

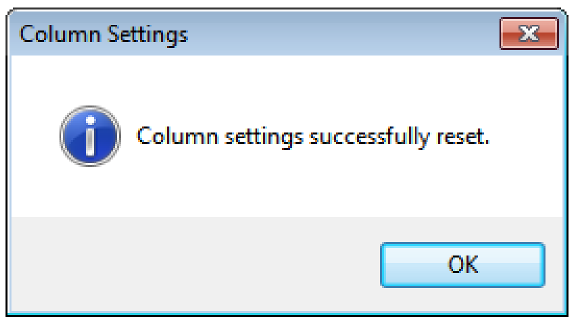
All columns in EMS have default values for their positions and widths in EMS. If you have changed the position, width, or both of one more columns during an EMS session, and you want the columns to open with their default values, you can reset the columns to their default values.

To reset column settings

1. On the EMS menu bar, click Settings > Reset Column Settings.

   The Column Settings dialog box opens.

Figure 10-5: Column Settings dialog box



2. Click OK.
3. If necessary, restart your EMS application.

Defining Your Views

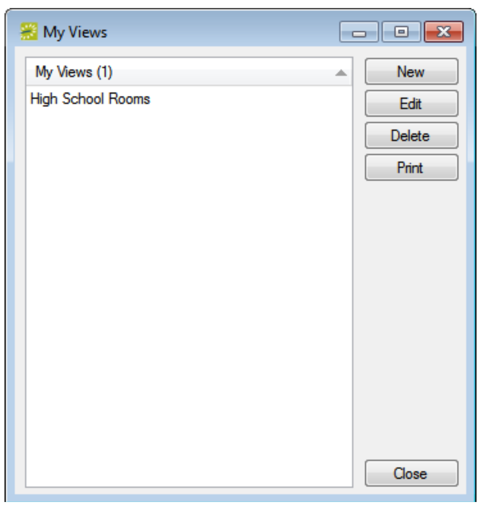
A *view* is simply a user-defined grouping of specific rooms. When searching for rooms in which to schedule events, you can select (all) buildings to search, a specific building, an area, or a view. If your job entails making multiple reservations for groups that always book events in specific rooms or locations, then to make your room search easier and more efficient, you can define the views that best meet your working needs. For example, if you are making multiple reservations for your school district's athletic teams, then you could define a view called School District 1 - Athletic, and this view would contain the following event locations—Baseball Field 1, Baseball Field 2, Gym 1, Gym 2, Pool, and so on.

To define your views

1. On the EMS menu bar, click Settings > My Views.

   The My Views window opens. This window lists all the views that *you* have defined.

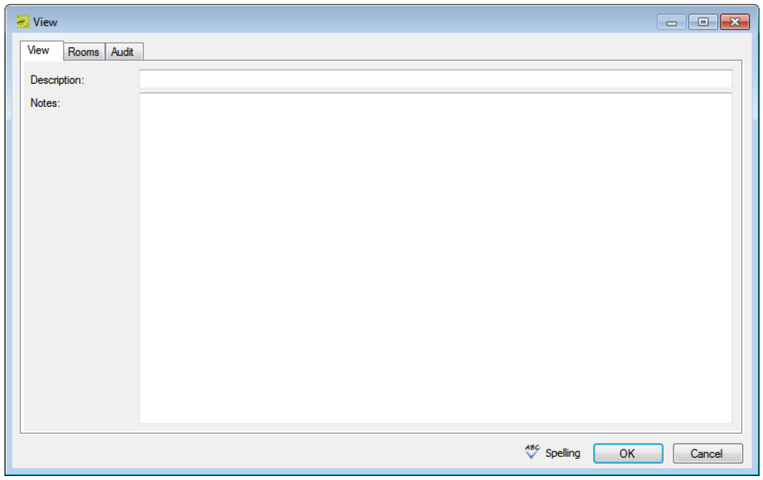
Figure 10-6: My Views window



2. Click New.

   The View dialog box opens. The View tab is the active tab. See Figure 10-7 on page 410.

Figure 10-7: View dialog box, View tab



3. In the Description field, enter a name or description for the view.

The description can be a maximum of 50 characters, including spaces.

4. Optionally, in the Notes field, enter any additional information that is pertinent for the view.
5. Open the Rooms tab, and do one or both of the following:
   - Select (all) buildings, a specific building, a view, or an area for which to search for rooms to include in the view.

The views that are available are not only all the views that you have defined for this EMS database, but also, all the views that other users have defined for this EMS database.

   - Leave the Room Type set to the default value of (all), or select a specific room type.

   As you select your search criteria, the list of rooms that meet the search criteria is dynamically updated.
6. In the Available list, select the room, or CTRL-click to select multiples rooms that you are including in the view, and then click the Move (>) button to move the available rooms to the Selected list.
7. Optionally, click Spelling to spell check the view before you save it.
8. Click OK.

   The View dialog box closes. You return to the My Views window with the newly defined view automatically selected.

Other Reservation Functions

EMS contains several miscellaneous standalone functions to assist you in managing and maintaining reservations and bookings in your system as well as managing your general work requirements.

This chapter covers the following topics:

Recording Actual Attendance Numbers for Bookings

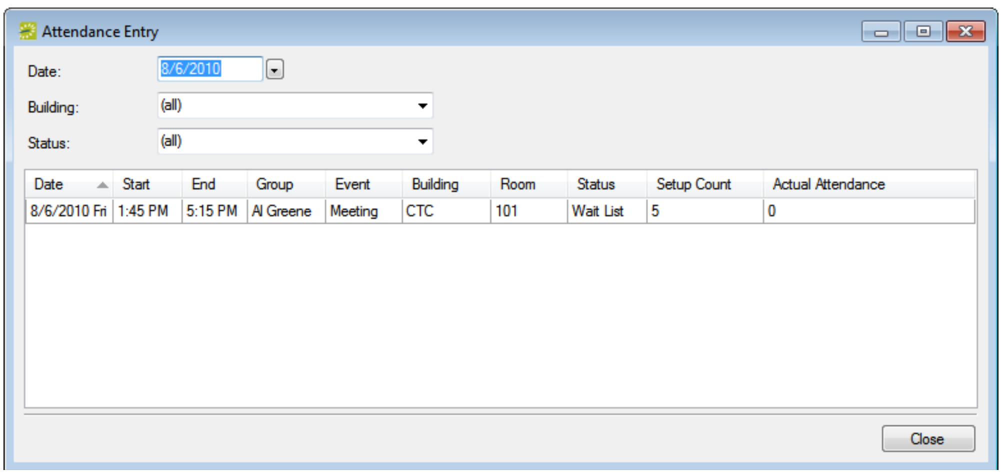
You use the Attendance Entry tool to view and record the actual attendance for *bookings*. (The tool does not address reservation-level attendance.) The actual attendance numbers that you enter do not replace the setup count (i.e., the estimated attendance) that you entered prior to an event. Reports that provide attendance information typically provide both the estimated attendance and the actual attendance.

To record actual attendance numbers for bookings

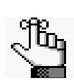
1. On the EMS main menu, click Reservations > Other > Attendance Entry.

   The Attendance Entry window opens.

Figure 11-1: Attendance Entry window



2. In the Date field, select a date for which you are recording the booking attendance.



The date must occur on or before the current day's date.

3. Optionally, specify a building and/or a booking status to filter the list of booking results.
4. For each booking as needed, scroll to the Actual Attendance column, double-click in the column to select the currently displayed value, and then enter the actual attendance number in the column.
5. Click Close.

Sending Email from EMS

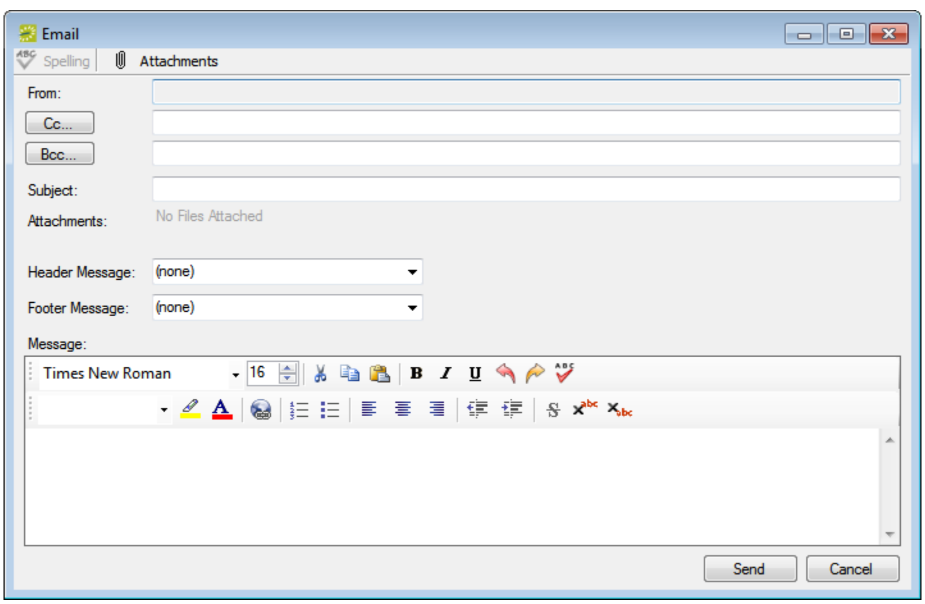
Multiple email options exist within EMS to email confirmations or invoices to groups or miscellaneous information to your EMS users or groups. If your organization uses Microsoft Outlook, you can continue to use your respective email system within EMS to send confirmations and invoices or any other individual emails to EMS users or groups. To send bulk emails to groups within an EMS Browser window (basic/advanced, transactions, calendar, and so on), however, you must use something called SMTP email. If your organization does not use Microsoft Outlook, then SMTP email is used to send all email from EMS, including emails to EMS users or groups and confirmations and invoices. EMS also provides an emailing function that you can use to send *generic* emails, which are emails that are not "tied" to a confirmation, invoice, reminder, and so on) to any recipient of your choice.

To send any email, your user account must be configured with an email address. To send generic emails, your user email preferences must also be configured. Contact your EMS administrator if you need assistance with this. See your EMS administrator or internal IT staff for information on how to enable SMTP email.

To send an email from within an EMS Browser window

1. Select a search result entry, and then click Email to open a pre-addressed SMTP email to the group that is associated with the selected reservation.

Figure 11-2: SMTP email from an EMS Browser window



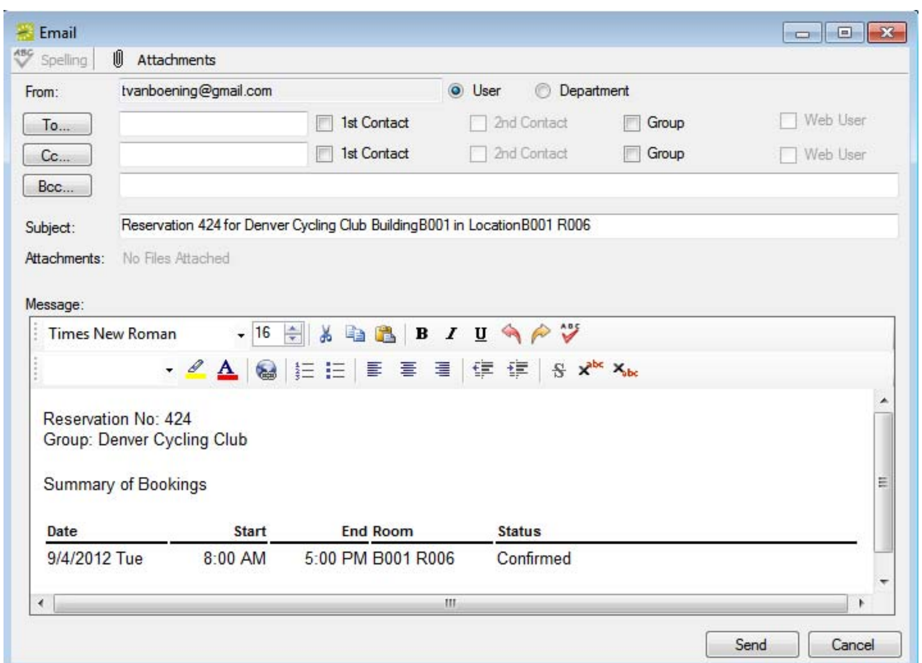
2. Enter the necessary information in the From, Subject, Message and other fields.

3. Optionally, do one or both of the following:
   - To attach a file, click Attachments at the top of the window.
   - To format the body of the email message, use the options on the Formatting toolbar.
4. Click Send.

To send a confirmation or invoice

1. On the Confirmation dialog box or on the onscreen preview of a new or reprinted invoice, click Email.
   - For a confirmation, an Email window that displays the confirmation in the body opens. The From field is populated with the user address that is associated with your user account or, based on your user preferences, the email address of the department that is associated with your user account. You can select either address. (See "Setting User Preferences and Default Values" on page 403.) The To field is blank.
   - For an invoice, an Email window that contains the invoice as an attachment opens. The From field is populated with the user address that is associated with your user account or, based on your user preferences, the email address of the department that is associated with your user account, and you cannot change this value. (See "Setting User Preferences and Default Values" on page 403.) The To is populated with the email address for the associated group, but you change this value if needed.

Figure 11-3: SMTP email window for a confirmation



For an invoice, the SMTP email window also has Header Message and Footer Message fields for including header and footer messages in the email body.

2. Select the recipients for the email.
3. Optionally, do one or both of the following:
    - To format the body of the email message, use the options on the Formatting toolbar.
    - To attach a file, click Attachments at the top of the window.
        - The default format for the attached invoice is PDF. You can select a different format if needed. Other allowed formats are HTML, Microsoft Excel (.xls), Microsoft Word (.rtf), Picture (.tiff), and Text File (.txt).
        - If the emailed *confirmation* is to include the entire confirmation as an attachment, then you must also select a file format for the attached confirmation. The default value is Adobe (.pdf). Other allowed formats are HTML, Microsoft Excel (.xls), Microsoft Word (.rtf), Picture (.tiff), and Text File (.txt).
        - If the emailed *confirmation* includes one or more attachments, then the Confirmation Title is also used for the name for all attachments *other than* an .ics file. If the confirmation includes an .ics file, then the .ics file is always named Confirmation.ics.

To include the entire confirmation as an attachment, or an .ics file in a confirmation, see “Specifying your Confirmation Settings” on page 308.

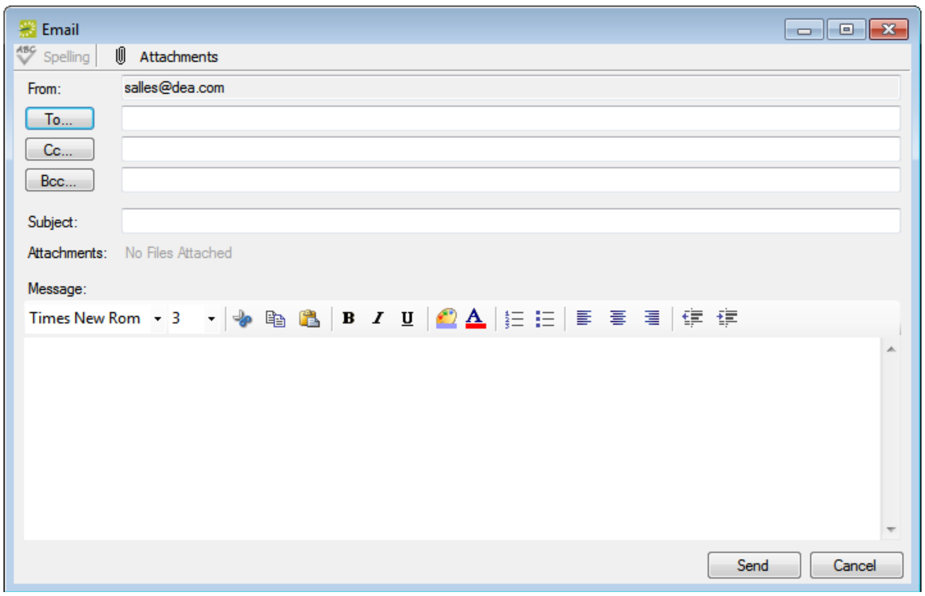
4. Click Send.

To send a generic email

1. On the EMS toolbar, click the Email icon .

   A generic email form opens. Depending on your preferences, the From field is automatically populated either with the email address that is specified for your user account, or the email address of the department that is associated with your user account. (See “Setting User Preferences and Default Values” on page 403.)

Figure 11-4: Generic email form



2. Enter the necessary information in the To, Subject, Message, and other fields.
3. Optionally, do one or both of the following:
   - To attach a file, click Attachments at the top of the window.
   - To format the body of the email message, use the options on the Formatting toolbar.
4. Click Send.

Viewing a History of Sent Emails

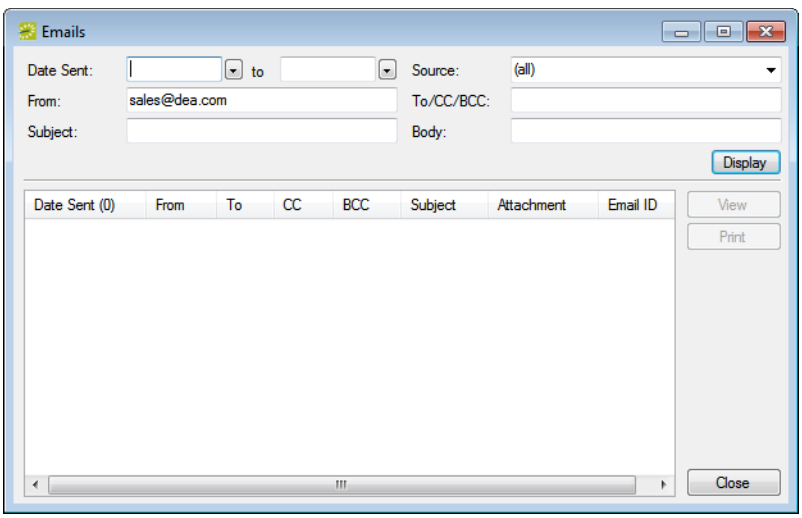
You can use the Email History function to review a list of all emails that have been sent from within your organization's EMS system via SMTP (not via Microsoft Outlook), including confirmation emails, report emails (which includes invoices, reminders, queries, web requests, and group and contact information), and generic emails. You can also view the contents of sent emails and print sent emails

To view a history of sent emails

1. On the EMS main menu, click Reservations > Other > Email History.

   The Emails window opens. Regardless of your preferences, the From field is automatically populated with the email address for your user account, but you can always change this value.

Figure 11-5: Emails window



2. Enter the search criteria for the emails, and then click Display.

Under Source, the Report option collectively refers to confirmations, invoices, reminders, queries, web requests, and group and contact information.

All of the emails that meet the search criteria are displayed in the bottom pane of the Emails window.

3. Optionally, do one or more of the following:
   - To view an email, select the mail in the search results list, and then click View.
   - To print the complete results list, click Print > List.
   - To print the contents of one or more emails in the results list, select the mail, or CTRL-click to select multiple emails, and then click Print > Emails.

Generating Multiple Confirmations

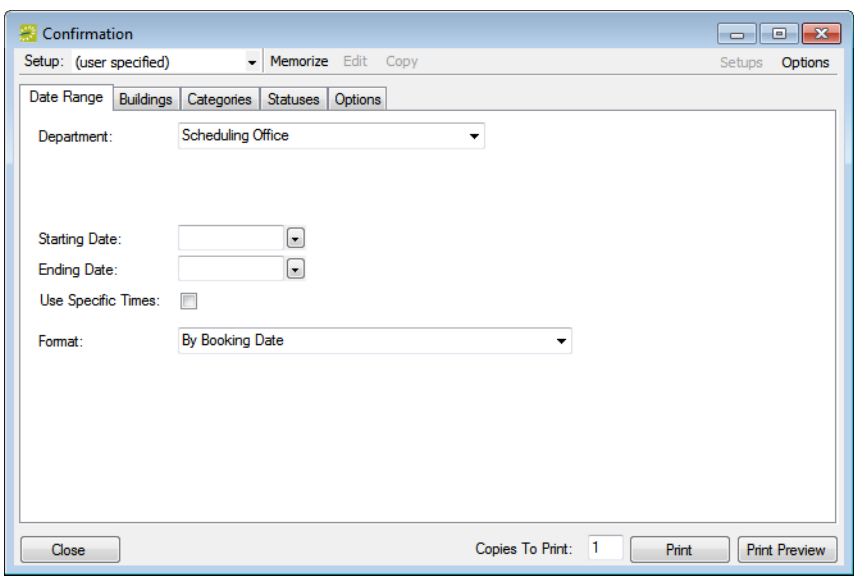
A *confirmation* is a document that details the critical information for a reservation—the date, the time, the location, the scheduled resources, and so on. Through the Navigator, you have the option of generating a single confirmation, either manually or automatically. (See "Confirmations," on page 307.) A miscellaneous reservation function is also available for manually generating multiple confirmations at the same time. When you generate multiple confirmations, all the confirmations are contained in a single file, but each confirmation begins at the top of a new page. All the confirmations are "sent" by the same office, all the confirmations use the same format (By Booking Date, By Date Added, or By Date Changed) and all the confirmations use the same print options (Confirmation Title, Header Message, and so on); however, each confirmation can contain unique information for the buildings, statuses, and/or categories that are detailed in the confirmation. Because multiple confirmations are for multiple recipients, you cannot mass email these confirmations. Instead, you can only print them, and then manually mail them. You can specify the settings for multiple confirmations "from scratch," or you can copy an existing confirmation format, and edit it as needed.

To generate multiple confirmations

1. On the EMS menu bar, click Reservations > Other > Confirmations.

   The Confirmation dialog box opens. The Date Range tab is the active tab.

Figure 11-6: Confirmation dialog box, Date Range tab



2. Do one of the following:
   - Review the selections on this dialog box, and optionally, make any needed modifications.

Field	Description
Date Range tab	
Department	The department name that appears at the top the printed confirmation.
Starting Date Ending Date	The range of dates for which you are generating the confirmations.
Use Specific Times	Available only if the Starting Date is the same as the Ending Date. If this option is selected, then two fields are displayed on the Date Range tab in which you must specify the time range. After you specify the time range, click Options > Date/Time Filter, and then indicate how the confirmation is to be limited—by bookings that start within the time range, or by bookings that occur within the time range.
Format	The format/organization of the confirmation—By Booking Date, By Date Added, or By Date Changed.
Buildings tab—Select the specific buildings that are to be included in the confirmation.	
Categories tab—Select the specific booking details that are to be included in the confirmation.	
Statuses tab—Select the specific statuses that are to be included in the confirmation.	
Options tab—Format settings for a printed confirmation.	
Confirmation Title	Appears bold and centered at the top of the confirmation.
Header Message Footer Message	Pre-configured blocks of text that appear in the header and footer of the printed confirmation. **Note:** Your EMS administrator configures these values. Contact your administrator if you need assistance with adding or editing a value.
Paper Size	The size of the paper on which the confirmation is printed. Values are Letter, Legal, and A4.
Print Comments	Include the comments for the reservation in the printed confirmation.
Print Reminders	Include the reminders for the reservation in the printed confirmation.
Print Cancel Reasons	Include the reasons for cancellation in the printed confirmation.
Print User Defined Fields	Include user-defined fields and their values in the printed confirmation.
Print Room Phone	Include the phone number for the room in which the event is being held in the printed confirmation.
Print Room Notes	Include any notes for the room in which the event is being held in the printed confirmation.
Print Building Notes	Include any notes about the building in the printed confirmation.
Print Billing Reference Allocation	Include the billing reference numbers for the event as well as the percentage of charges that is allocated to each number in the printed confirmation.

Field	Description
Print PO Number Allocation	Include the PO numbers for the event as well as the percentage of charges that is allocated to each number in the printed confirmation.
Print Category Subtotals	Include the subtotal charges by category in the printed confirmation.
Print Room Type	Include the room type for the event in the printed confirmation.
Print Item Selection Notes	Include the notes for each resource selection item for the event in the printed confirmation.
Suppress Reserved Time	Do not show the reserved time for the event in the printed confirmation.
Suppress Location	Do not show the location for the reservation in the printed confirmation.
Suppress Pricing	Do not show the reservation's room charges or resource charges in the printed confirmation.
Suppress Logo	Do no show your organization's logo in the printed confirmation.
Suppress Item Notes	Do not show notes for any booking items in the printed confirmation.
Suppress Item Special Instructions	Do not show special instructions for any booking items in the printed confirmation.
Suppress Item Selections	Do not show any resource item selections in the printed confirmation.
Always Display Time Zone	Always show the time zone for the event in the printed confirmation.
Display Messages as HTML	If you have defined any HTML messages, then select this option to display the HTML version of these messages in the printed confirmation; otherwise, the message is displayed in plain text.
Limit Bookings to Those With Details in Selected Categories	Show only those bookings in the printed confirmation that contain details for the categories that are selected on the Categories tab.

If needed, you can always save, or memorize, these settings. *See "Working with Memorized Reports" on page 323.*

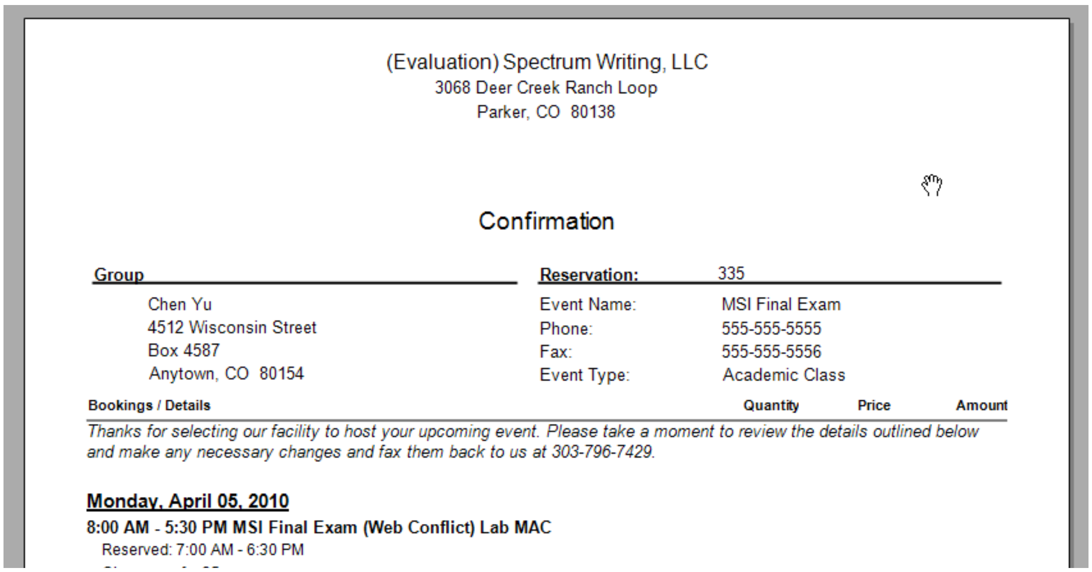
- On the Setup dropdown list, select a saved, or *memorized*, confirmation.

If you select a memorized confirmation, then the only changes that you can make are to the dates and/or times on the Date Range tab.

3. Do one or both of the following:

   - Click Print Preview to open an onscreen preview of the printed confirmation. A variety of options are available from this preview, including the options to export the confirmation to a .pdf and to print the confirmation.

Figure 11-7: Print preview of multiple confirmations



   - To manually print the confirmations, edit the number of copies to print as needed in the Copies to Print field (the default value is 1), and then click Print.

     A Print dialog box opens in which you can specify information such as the printer to use, the page range, and so on. Click Print in this dialog box to manually print the confirmations.

Managing Attendees and Visitors

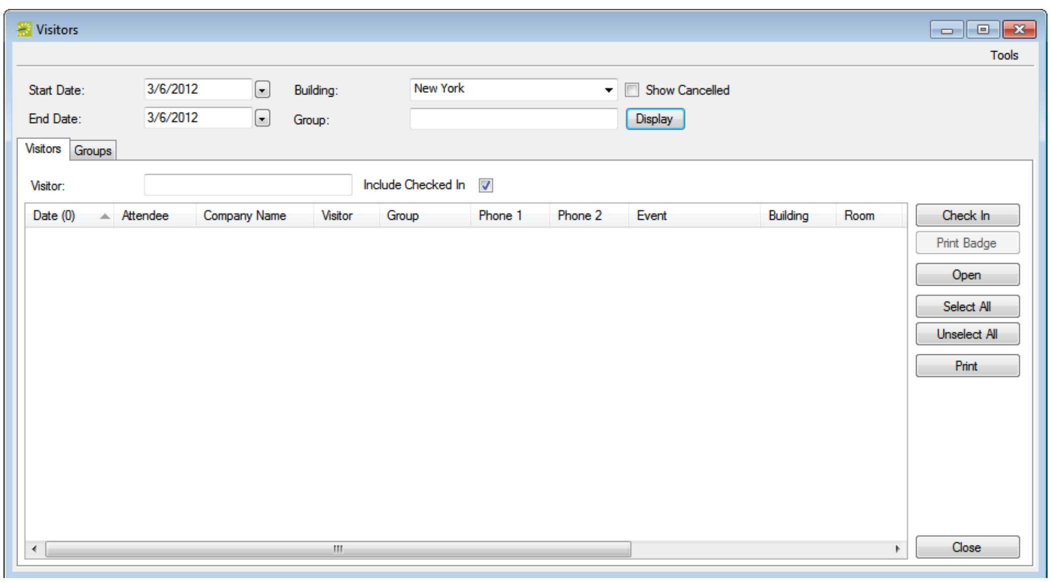
EMS provides standard functionality for managing *registered* attendees and visitors, which are attendees and visitors who have been added as an attendee type category to a booking. You can search for registered attendees and visitors, and you can check in and check out registered attendees and visitors. The *optional* Visitor Management module provides functionality for managing *unregistered* attendees and visitors. If your organization has purchased and installed this module, you can also check in unregistered visitors to an event, check out unregistered visitors from an event, print badges for all attendees and visitors (registered and unregistered), and import a list of attendees using the Add Booking Details Wizard in the Navigator.

To manage registered attendees and visitors

1. On the EMS menu bar, click Reservations > Other > Visitors.

   The Visitors window opens. By default, the Visitors tab is the active tab.

Figure 11-8: Visitors window, Visitors tab



2. Specify one or more of the following for your search criteria:

   - Start Date/End Date—The default value is the current day’s date.
   - Building—Select (all) buildings, a specific building, an area, or a view to search.
   - Show Cancelled—Select this option to search for registered attendees or visitors for canceled events.
   - Group—To search for registered attendees or visitors regardless of group, leave this field blank; otherwise, to search based on a specific group, enter a search string in the field.
   - Visitor—To search for a specific attendee or visitor, enter a search string in the field.

For both search fields, your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of ***aca*** *returns* ***Aca****demic Affairs Office, Department of* ***Aca****demic Affairs, and so on.*

   - Include Checked In—Selected by default. Clear this option to search only for registered attendees and/or visitors who have *not* yet been checked in to their events.

3. Click Display.

   The list of registered attendees and/or visitors who meet the search criteria are displayed in the bottom pane of the Visitors window.

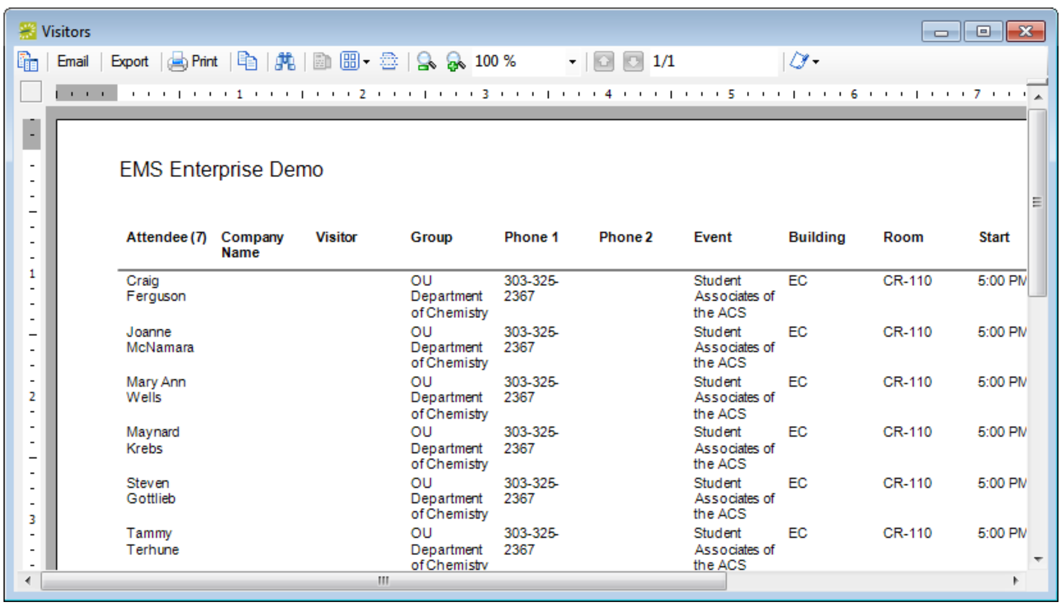
4. Optionally, do one or more of the following:

   - Select an attendee or visitor from the search results, and then click open to open the reservation in the Navigator that contains the booking that the attendee/visitor is attending.
   - Select an attendee or visitor from the search results, or CTRL-click to select multiple attendees/visitors, and then click Check In to “check in” the attendees/visitors to the event. A date and timestamp is added to each attendee’s/visitor’s record.
   - Select an attendee or visitor from the search results, or CTRL-click to select multiple attendees/visitors, and then click Check Out to “check out” the attendees/visitors from the event. A date and timestamp is added to each attendee’s/visitor’s record.

Check Out is available only if the selected attendees/visitors have been checked into the event.

- Select an attendee or visitor from the search results, or CTRL-click to select multiple attendees/visitors, and then on the Tools menu, click Undo Check In to reverse the Checked In status for the attendees/visitors. (The Check In date and timestamp is removed from each attendee's/visitor's record and if needed, you can check in the attendees/visitors again). Conversely, if an attendee or visitor has been checked out, click Undo Check Out to reverse the Checked Out status for the attendee/visitor.
- On the Tools menu, click Export to export the list of attendees/visitors to a Microsoft Excel spreadsheet.
- On the Tools menu, or from the Visitors window, click Print to generate an onscreen preview of the list of attendees/visitors. A variety of options are available from this preview, including the options to email the list, to export the list to a .pdf, and so on.

Figure 11-9: Onscreen preview of a registered attendee/visitor list



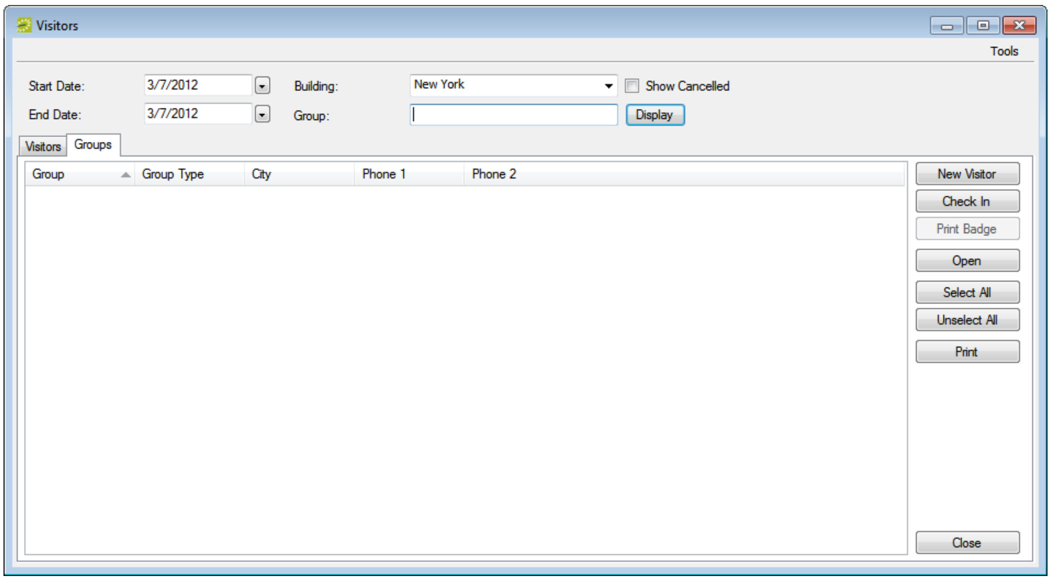
To check in/check out unregistered visitors for an event

1. On the EMS menu bar, click Reservations > Other > Visitors.

   The Visitors window opens.

2. Open the Groups tab.

Figure 11-10: Visitors window, Groups tab



3. Specify one or more of the following for your search criteria:
   - Start Date/End Date—The default value is the current day’s date.
   - Building—Select (all) buildings, a specific building, an area, or a view to search.
   - Group—Enter some or all of the hosting group’s name.

*Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **aca** returns **Aca**demic Affairs Office, Department of **Aca**demic Affairs, and so on.*

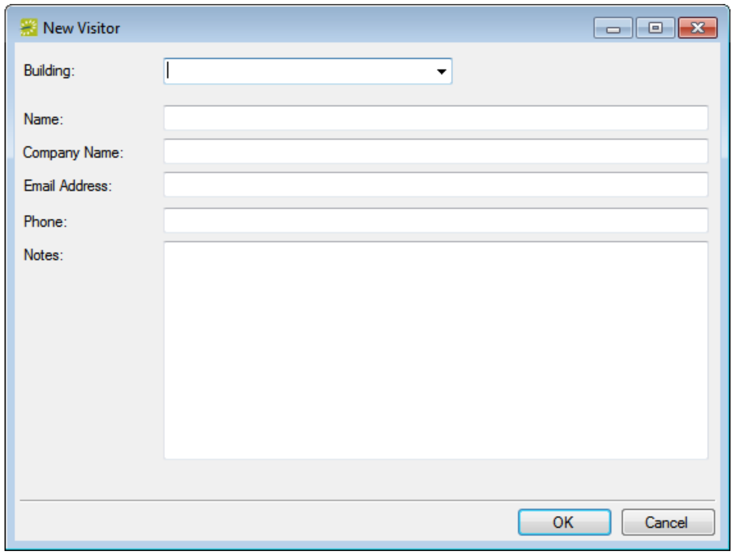
4. Click Display.

   The groups that meet your search criteria are displayed in the middle pane of the Visitors window.

5. Select the hosting group from the search results, and then click New Visitor.

   The New Visitor dialog box opens.

Figure 11-11: New Visitor dialog box



6. Enter the information for the unregistered visitor, and then click OK.

   The Visitor dialog box closes. You return to the Visitors window with the group and newly configured visitor automatically selected.

Building and Name are required fields. Depending on how your EMS administrator configured your system, Company Name, Email Address and/or Phone might be required. Notes are always optional. If you selected a specific building in Step 3, then the Building field is automatically populated with the name of the building in which the event is scheduled and you cannot edit this value; however, if you have set your preferences for buildings such that this building is not available to you, then the Building field cannot be populated with the correct value, and you cannot add the new visitor. See "Setting User Preferences and Default Values" on page 403.

7. Repeat Step 5 and Step 6 as needed to add all the unregistered visitors to the event.

   The information that is displayed in the Event column for each unregistered visitor that is added to an event is determined by the settings that your EMS administrator specified when configuring the event building. For example, "Unregistered Visitor" might be displayed. The date and time that you add an unregistered visitor to an event is used as the Check In date and time for the visitor.

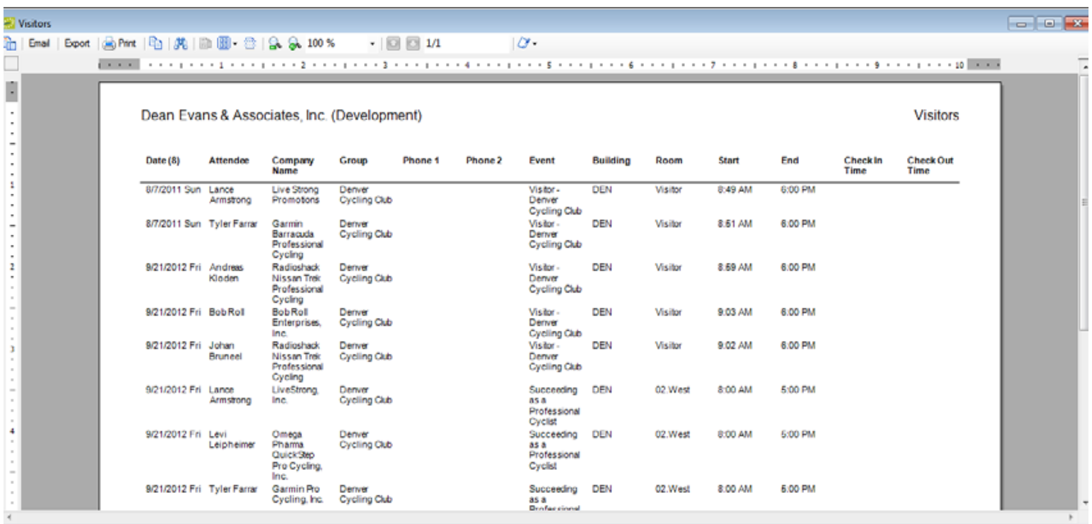
8. Optionally, before you check out or check in an unregistered visitor, do one or more of the following:

   - Select the unregistered visitor in the lower pane of the Visitors window, and then click Open to open the reservation in the Navigator that contains the booking that the unregistered visitor is attending.

   - On the Tools menu, click Export to export the list of registered attendees/visitors and unregistered visitors to a Microsoft Excel spreadsheet.

   - On the Tools menu, or from the Visitors window, click Print to generate an onscreen preview of the list of registered attendees/visitors and unregistered visitors. A variety of options are available from this preview, including the options to email the list, to export the list to a .pdf, and to list the confirmation.

Figure 11-12: Onscreen preview of a registered and unregistered attendee/visitor list



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Visitors

Date (8)	Attendee	Company Name	Group	Phone 1	Phone 2	Event	Building	Room	Start	End	Check In Time	Check Out Time
8/7/2011 Sun	Lance Armstrong	Live Strong Promotions	Denver Cycling Club			Visitor - Denver Cycling Club	DEN	Visitor	8:49 AM	6:00 PM		
8/7/2011 Sun	Tyler Farrar	Garmin Barracuda Professional Cycling	Denver Cycling Club			Visitor - Denver Cycling Club	DEN	Visitor	8:51 AM	6:00 PM		
9/21/2012 Fri	Andreas Kloden	Radioshack Nissan Trek Professional Cycling	Denver Cycling Club			Visitor - Denver Cycling Club	DEN	Visitor	8:59 AM	6:00 PM		
9/21/2012 Fri	Bob Roll	Bob Roll Enterprises, Inc.	Denver Cycling Club			Visitor - Denver Cycling Club	DEN	Visitor	9:03 AM	6:00 PM		
9/21/2012 Fri	Johan Bruneel	Radioshack Nissan Trek Professional Cycling	Denver Cycling Club			Visitor - Denver Cycling Club	DEN	Visitor	9:02 AM	6:00 PM		
9/21/2012 Fri	Lance Armstrong	LiveStrong, Inc.	Denver Cycling Club			Succeeding as a Professional Cyclist	DEN	02.West	8:00 AM	5:00 PM		
9/21/2012 Fri	Levi Leipheimer	Omega Pharma QuickStep Pro Cycling, Inc.	Denver Cycling Club			Succeeding as a Professional Cyclist	DEN	02.West	8:00 AM	5:00 PM		
9/21/2012 Fri	Tyler Farrar	Garmin Pro Cycling, Inc.	Denver Cycling Club			Succeeding as a	DEN	02.West	8:00 AM	5:00 PM		

9. To check out/check in an unregistered visitor, do one of the following:

   - Select the unregistered attendee/visitor, or CTRL-click to select multiple unregistered attendees/visitors, and then click Check Out to “check out” the attendees/visitors from the event. A date and timestamp is added to the unregistered visitors’ records.

   - Select the unregistered attendee/visitor, or CTRL-click to select multiple unregistered attendees/visitors, and then on the Tools menu, click Undo Check In to reverse the Checked In status for the unregistered attendees/visitors. (The Check In date and timestamp is removed from the unregistered visitors’ records and if needed, you can check in the unregistered visitors again). Conversely, if an unregistered visitor has been checked out, click Undo Check Out to reverse the Checked Out status for the attendee/visitor.

To print visitor badges

1. On the EMS menu bar, click Reservations > Other > Visitors.

   The Visitors window opens.

2. Do one or both of the following:

   - Locate and select the attendee as described in “To manage registered attendees and visitors” on page 424.
   - Create and select the attendee record as described in “To check in/check out unregistered visitors for an event” on page 427.

3. Click Print Badge.

To import a list of attendees and visitors to an event

1. Create a tab-delimited file that contains the information (in the order listed) for the attendees/visitors that are being imported.

Field	Description	Required/Optional
Name	Text. 50 characters maximum.	Required
Company Name	Text. 50 characters maximum.	Optional
Email Address	Text. 255 characters maximum.	Optional
Phone	Text. 50 characters maximum.	Optional
Notes	Text. No maximum.	Optional
Visitor	True/False	

Each attendee/visitor must be a separate line entry. You use the Add Booking Details Wizard to import this file. You can click Print Format on the second page of the Add Booking Details Wizard to see the required format for the tab-delimited file.

2. Open the reservation for the event in the Navigator. See:

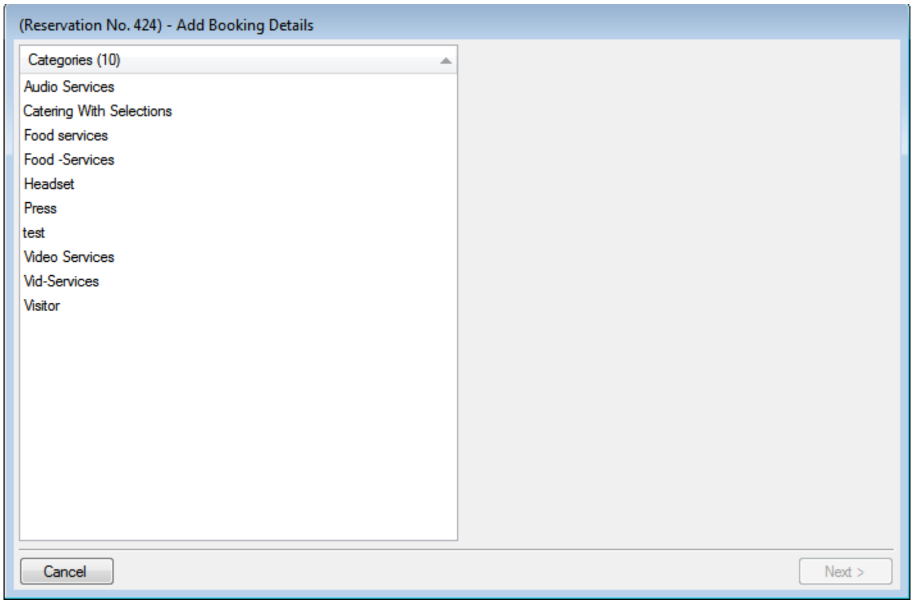
   - “Opening a reservation directly in the Navigator” on page 79.
   - “Opening a reservation through the Reservation Book” on page 80.
   - “Opening a reservation through a group” on page 80.
   - “Search Tools,” on page 195.

3. In the left pane of the Navigator, select the reservation for which you are importing the list of attendees/visitors.

4. In the Bookings pane, click Tools, and then Click Add Booking Details Wizard.

   The Add Booking Details wizard opens.

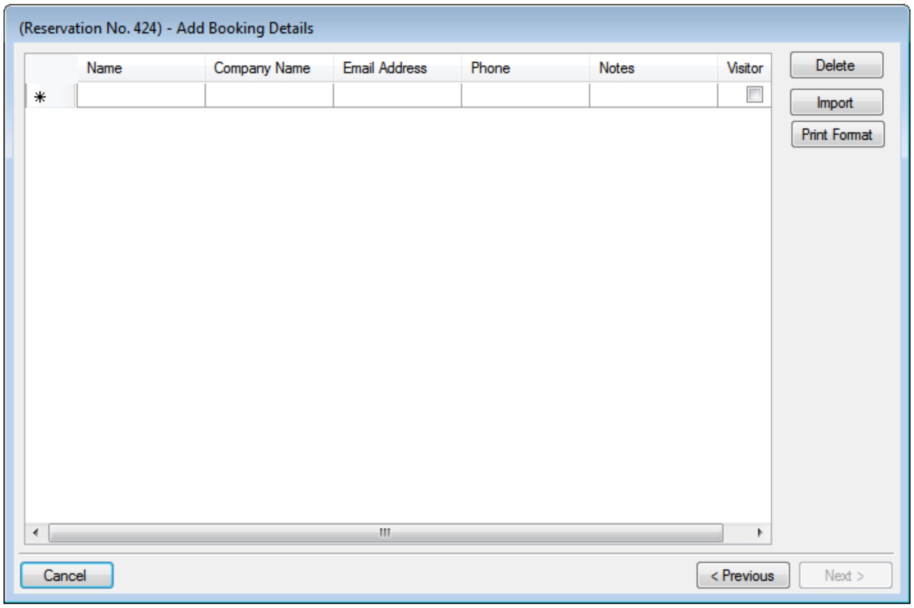
Figure 11-13: Add Booking Details wizard



5. Select Visitors or Attendees, and then click Next.

   The second page of the Add Booking Details Wizard opens with a blank row for adding an attendee/visitor to the event.

Figure 11-14: Add Booking Details Wizard, Second page



Optionally, you can click Print Format to see the required format for the tab-delimited file.

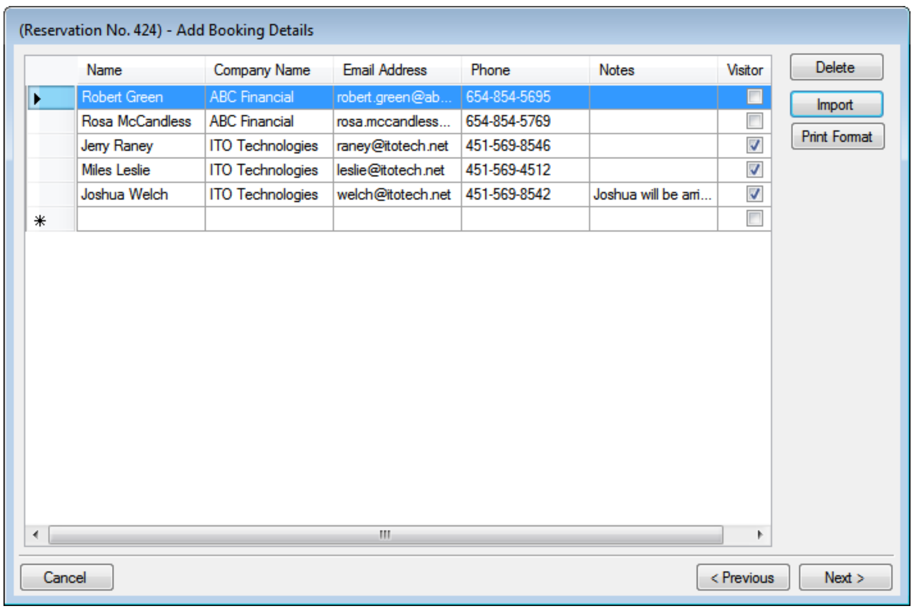
6. Click Import.

   The Open File dialog box opens.

7. Browse to and select the attendee/visitor import file, and then click Open to import the file.

   The Add Booking Details Wizard is updated with the imported attendee/visitor information. Each imported attendee/visitor is a separate line entry in the Wizard.

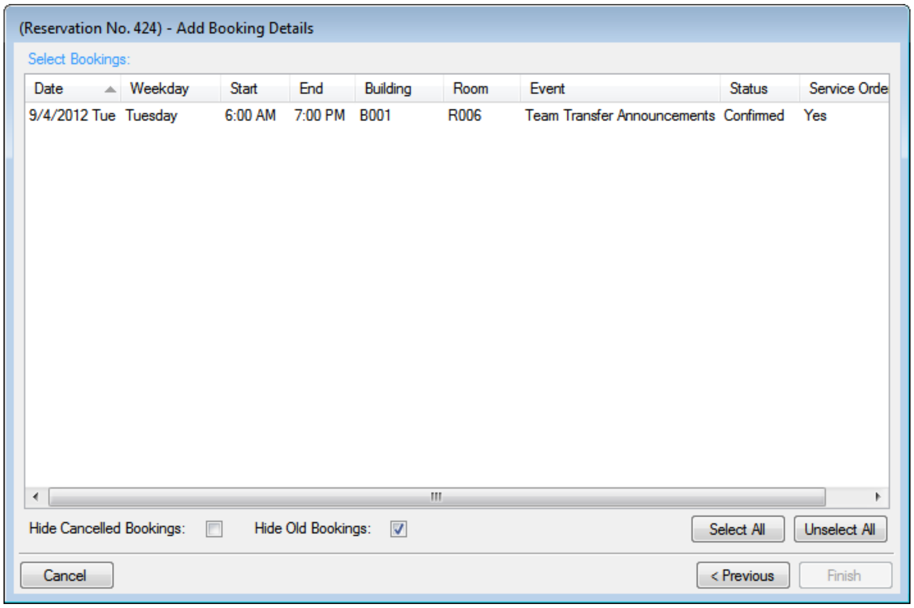
Figure 11-15: Add Booking Details wizard, Attendees/Visitors imported



8. Click Next.

   The Select Bookings window opens. This window displays all the bookings for the selected reservation with a date greater than or equal to the current day’s date, *and* that do not already have the selected booking detail added.

Figure 11-16: Add Booking Details wizard, Select Bookings window



To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

9. CTRL-click to select the bookings to which the details are being added, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens asking you if you want to add more booking details.

10. Click No.

    A message opens indicating that the changes were made successfully.

11. Click OK to close the message and return to the Navigator.

    The booking detail (Attendees/Visitors) and its items (individual attendees/visitors) are displayed as folders under the appropriate booking folders in the Navigator.

EMS Workplace

Organizations with a mobile workforce or flexible work arrangements often adopt a hoteling or hot-desking strategy—allotting workspace on an as-needed basis to accommodate more people in less space. EMS Workplace is a facility scheduling system for managing hoteling requirements, as well as the booking of meeting/event space and resources.

This chapter covers the following topics:

Managing Groups' Check In/Check Out Statuses

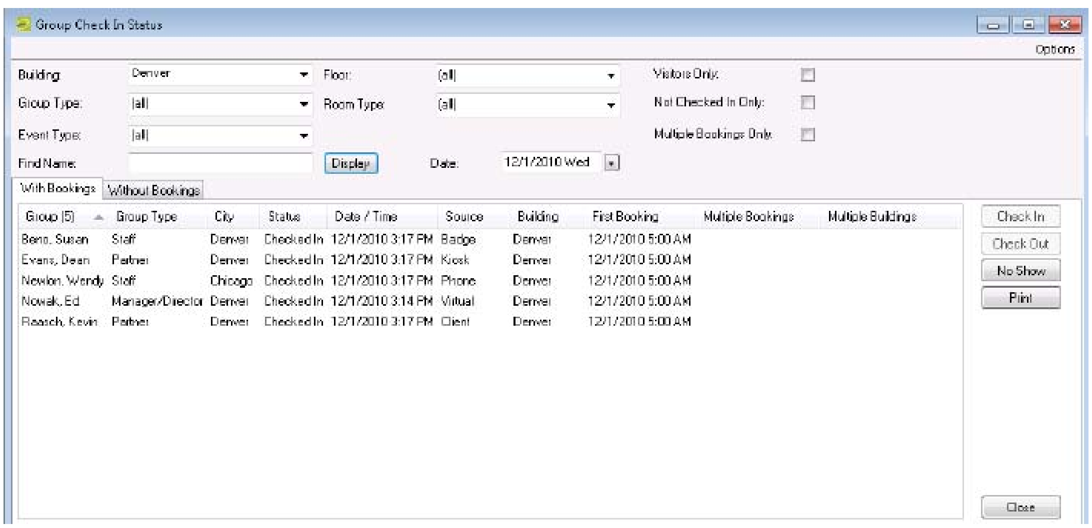
Employees (referred to as "groups" in this section) can check in using a variety of active and passive EMS Workplace methods including Virtual EMS (VEMS), the EMS Kiosk, and your security badge system. You use the Group Check In Status tool to view the status of all employees, with or without bookings, who have checked into your building. In addition, options are available to check in/check out an individual and to manually "no show" employees who either have not checked in or have checked into another building.

To manage groups' check in/check out statuses

1. On the EMS Workplace menu bar, click Reservations > Hoteling > Check In Status.

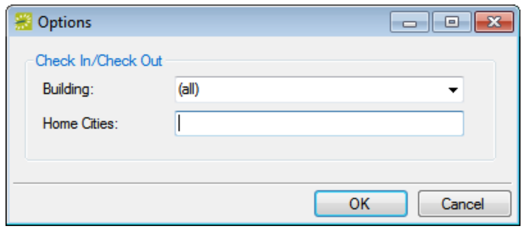
   The Group Check In Status window opens. If this is the *first* time that you have opened this window, then go to Step 2 to set the default values for your building and home city; otherwise, go to Step 3.

Figure 12-1: Group Check In Status window



2. In the upper right hand corner of the window, click Options to open the Options dialog box and specify the default values for your home building and home cities.

Figure 12-2: Options dialog box



The home building is the building that selected groups are checked in to. You must separate multiple cities by commas, for example, Denver, Chicago, Atlanta. If Visitors Only is checked as one of the search options, then when you search for groups to verify their check in/check out status, the groups that have an address using any of these home cities are not returned in the search results. Only groups that do not have an address using any of these home cities and that meet all the search criteria are returned in the search results.

3. Specify the search criteria to search for the groups that you are checking into or checking out of a building.

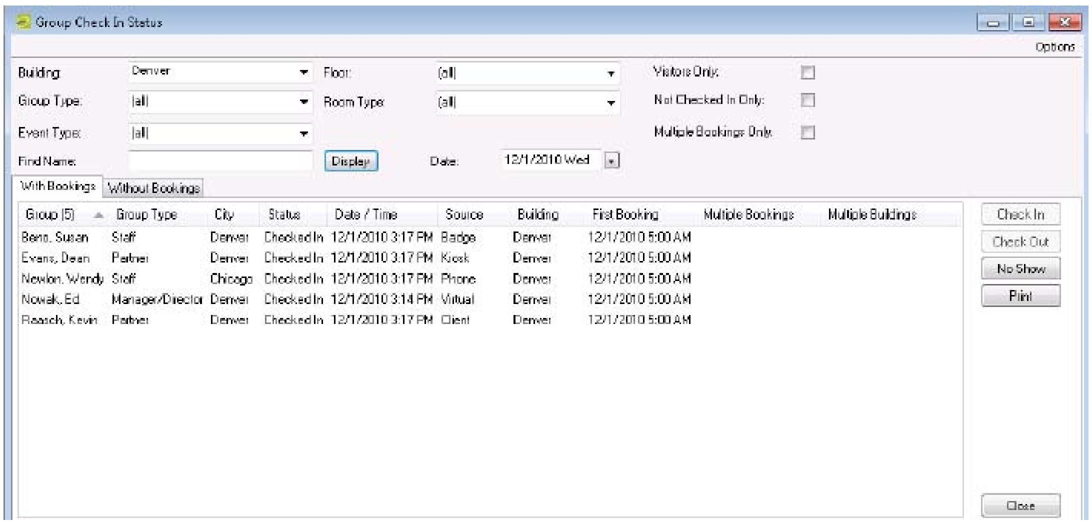
Option	Description
Building	The default value is (all), but you can select a specific building, an area, or a view.
Group Type	The default value is (all), but you can select a specific group type.
Event Type	The default value is (all), but you can select a specific event type.
Floor	The default value is (all), but you can select a specific floor.
Room Type	The default value is (all), but you can select a specific room type.
Visitors Only	Select this option only if you are searching for groups that do not have an address using any of the home cities that you have defined.
Not Checked In Only	Select this option to search only for groups that have not been checked into the building.
Multiple Bookings Only	Select this option to search only for those groups that have multiple bookings on the selected date.
Find Name	Optional field. Enter a search string by which to filter your search. The search is not case-sensitive, but the search is limited to the exact order of characters in the string and the string must begin with the information for which you are searching. For example, a search string of **ed** returns **Ed**, **Ed**ward, **Ed**die, and so on, but not Ted or Fred.
Date	The default value is the current day's date, but you can select a different value.

4. Click Display.

   All the groups that meet all the search criteria and that have a booking or bookings on the selected date are displayed on the With Bookings tab.

All the groups that meet all the search criteria but that do not have a booking or bookings on the selected date are displayed on the Without Bookings tab.

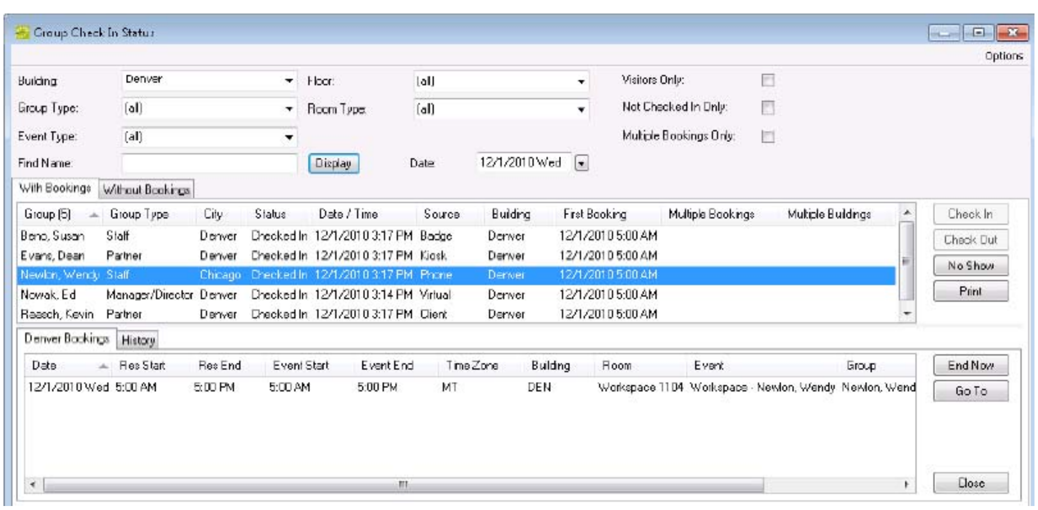
Figure 12-3: Group Check In Status window with results



5. Optionally, do one or more of the following:

   - To view all the bookings that a group has scheduled in the selected building, select the group on the With Bookings tab. The bookings are displayed on the <Building> Bookings tab in the bottom pane of the Group Check In Status window.

Figure 12-4: Viewing bookings for a selected group



- To check in a group, select the group, and then click Check In. “Checked In” is displayed in the Status column for the group on the With Bookings tab, the Date/ Time column are updated with the date and time that you clicked Check In, and “Client” is displayed in the Source column.

Remember, the group is checked in to the building that you set as your Home building, and the name of this building is displayed in the Building column.

- To check out a group, select the group, and then click Check Out. “Checked Out” is displayed in the Status column for the group on the With Bookings tab, the Date/ Time column are updated with the date and time that you clicked Check Out, and “Client” is displayed in the Source column.

If your EMS client is integrated with VEMS or EMS Kiosk, then employees can be checked in/checked out through either of these applications as well, and the Source column indicates this accordingly.

- To end a booking for a group, select the group, and then select the booking on the on the <Building> Bookings tab and click End Now. Answer “Yes” at the prompt about ending the booking immediately.
- To open an event in the Navigator, select the event entry on the <Building> Bookings tab, and then click Go To.
- To manually “no show” a group of employees, continue to “To run the No Show Wizard” on page 441.

To run the No Show Wizard

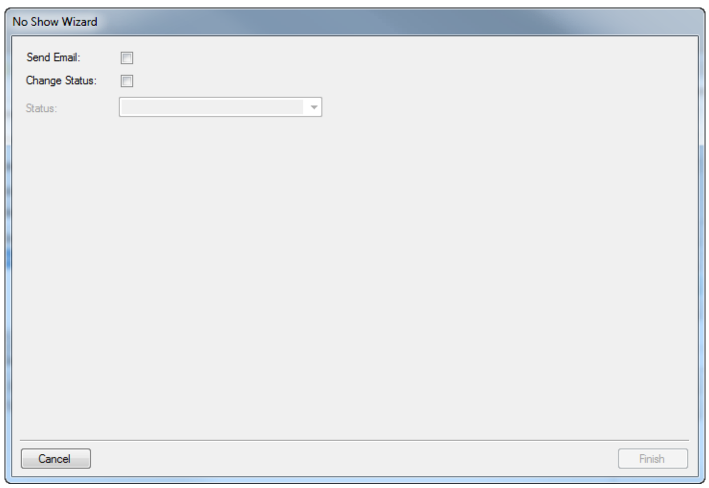
You use the No Show Wizard to email all groups that have not checked in to a specific building. It also provides options for changing the status of a group's bookings so that the group's workspace is released.

When you run the No Show Wizard from the Group Check In Status window, you must manually create and send the email, and you must manually change the status. Both of these processes can be automated by creating a No Show Notification rule. Contact your EMS administrator for assistance.

1. Select the group on the With Bookings tab, and then click No Show.

   The No Show Wizard opens.

Figure 12-5: No Show Wizard



2. Do one or both of the following:

   - To send an email to the group, select Send Email to open an email form. Complete and send the email as normally would, and then click Finish.

You can include variables in the subject line as described in the Legend. For example, %2% is the code for the group name, so "Notification for %2%" would result in "Notification for Academic Affairs" being displayed in the subject line.

   - To change the status for the group's booking, select Change Status, and then on the Status dropdown list, select a new status, and then click Finish.

Academic Planning (EMS Campus)

Academic Planning is an optional component of the EMS software that provides all the functionality that is necessary for Domain Schedulers to ensure that every class meets in a location and at a time that is acceptable to departments and instructors. The system provides automatic room assignment within user-supplied parameters, integration with your SIS/ERP software, and efficient online collaboration tools. It also simplifies final exam scheduling and offers a selection of reports to streamline and analyze the room scheduling process. When added to the functionality that meeting and event staff already have access to, it provides a complete campus-wide space management package referred to as EMS Campus.

This chapter covers the following topics:

Overview of the Academic Scheduling Process

The academic scheduling process is a multi-step process for enabling online communication between the Domain Scheduler and academic units, optimizing academic space use, and creating reservations in EMS Campus for academic courses. To use the full functionality of EMS Campus, it is important that you understand the academic scheduling specific terms that are used in EMS Campus and that you have a high-level understanding of the academic scheduling configuration process.

Academic scheduling specific terms used in EMS Campus

While meeting/event scheduling and academic scheduling have many features in common, EMS Campus uses terms that are specific to the academic scheduling configuration process.

Term	Definition
SIS	Generic acronym that is used in EMS Campus to represent a Student Information System. A system parameter controls the term “SIS,” and typically, your EMS administrator changes it to the system-specific term that your organization uses, for example, PeopleSoft, Banner, Colleague, and so on.
Academic Term	Defines a set of courses that is taught for a specific time period and is synchronized from the SIS.
Instructors	Instructors are imported from your SIS. Instructors determine who is teaching a course. They are also referred to as a “contact” after publishing.
Subject	Subjects are imported from your SIS. Subjects describe the topic of the course offered, for example, Math or English. Subjects are assigned to domains and academic units to designate who manages the courses that are taught within a subject.
Course Type	A course type is imported from your SIS. Course types categorize offerings, for example, a lecture or a lab. Course types are used for limiting the types of rooms in which a course can be taught and for reporting.
Domain	A level of organization within the institution that defines scheduling responsibility. The subjects defined within a domain determine the courses that are listed for the domain. The rooms that are defined within a domain determine all spaces that are potentially available for the courses. Functions such as synchronizing, optimizing, and running reports are carried out on a per domain basis. (A user who has this type of access is referred to as a Domain Scheduler.) The term “domain” is controlled by a parameter, and in many cases it is changed to “Campus” or “School” to better describe how course scheduling is divided.

Term	Definition
Academic Unit	A level of organization within the institution that defines responsibility for making schedule requests for a portion of a domain. The rooms that are defined within an academic unit give the unit the ability to require these spaces during optimization. The subjects that are defined within an academic unit determine the courses that are listed when filtering by the unit. Academic units are used when assigning permissions to Academic users and when filtering reports. The term “academic unit” is controlled by a parameter, and in many cases it is changed to “Department” or “Division” to better describe how course scheduling requests are divided.
Campus Planning Interface	The web-based interface that is typically used by academic units to review course schedule data and communicate changes to the domain scheduler. Any computer with a standard Internet browser can be used to access the Campus Planning Interface.
Course	Equivalent to a section in the SIS. The high level descriptor of a class, such as “CHEM 101 - Introduction to Chemistry,” and other associated information such as instructor and estimated enrollment. After a course is published, it becomes the reservation-level information.
Course Date	A unique meeting pattern that is associated with a course, such as Tuesday/Thursday, 8:00 am to 9:20 am. Courses can have multiple course dates, such as when a class has both a lecture and a lab component that meet on different days of the week and at different times. After a course date is published, it becomes the booking-level information.
Cross-listed Courses	Courses are designated in the SIS as cross-listed for a variety of reasons; however, after such a designation is made, there are implications in how EMS handles the courses. If two or more courses are cross-listed and have identical course date records (meeting patterns), then these two courses are linked and they are assigned the same room during optimization and final exam scheduling. They, in essence, share space by default.
Shared Space	If two courses that have identical course date records are to be scheduled in the same room at the same time, but they are not cross-listed in the SIS, then they can be designated as Shared Space in EMS. This designation links the courses so that they are assigned to the same room during optimization and final exam scheduling. This designation does not affect the SIS.

Academic scheduling configuration process

Before academic scheduling can even be carried out, the following must be in place in your EMS database:

- Core data—building, rooms, instructors, course types, and subjects—must be synchronized with the Student Information System (SIS).
- Academic domains and academic units must be configured.
- Academic users must be configured with the appropriate security settings.
- Default values for academic parameters must be set.

See the EMS Setup Guide for detailed instructions about configuring and synchronizing this needed academic data.

Although the academic scheduling configuration process varies from one academic site to another, typically, the same two-phase process, the Academic Planning phase and the Post-Publishing phase, is carried out, and each process typically has the same high-level steps.

Academic Planning phase

The Academic Planning Phase is the first phase carried out in the academic scheduling process. This phase typically has the following high-level steps:

1. Importing an Academic Term. See "Importing an Academic Term" on page 449.
2. Defining and Editing Courses. See "Defining and Editing Courses" on page 455.
3. Settings Preferences. See "Specifying Room Preferences" on page 485.

You can carry out Step 2 and Step 3 individually, or you can carry them out simultaneously using Dual Mode. Dual Mode is explained in detail later in this manual.

4. Assigning rooms and optimizing. See "Assigning Room Preferences and Optimizing" on page 503.
5. Publishing terms in EMS. See "Publishing a Term" on page 529.

Post-Publishing phase

The Post-Publishing Phase is the second phase carried out in the academic scheduling process. This phase typically has the following high-level steps:

1. Reviewing reservations and resolving room assignments. See "Post-Publishing Phase" on page 541.
2. Creating a synchronization schedule. See "Post-Publishing Phase" on page 541.
3. Creating and publishing a final exam session. See "Post-Publishing Phase" on page 541.

Importing an Academic Term

Section Contents

Overview of Importing an Academic Term

The first step in the academic planning phase is to import a term. Importing an academic term consists of the following three steps:

1. A new term is created in the Student Information System (SIS), either by rolling forward a previous term, or by creating it from scratch. The term is then synchronized into EMS. See "Synchronizing an Academic Term" on page 452.
2. The Domain Scheduler synchronizes course data from the SIS into EMS Campus. See "Synchronizing Courses" on page 453.
3. Synchronized courses are reviewed before the term is made available to academic units. See "Using the Academic Tools" on page 577.

Synchronizing an Academic Term

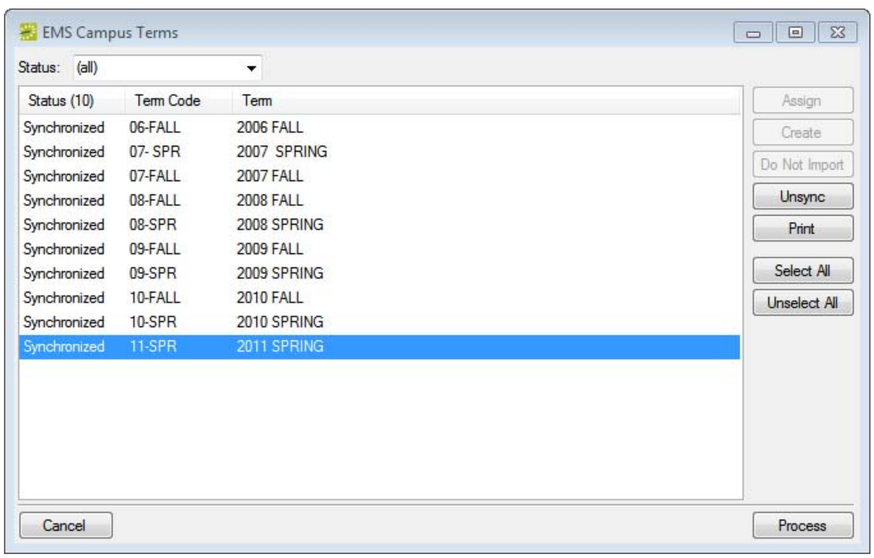
When you synchronize your Student Information System (SIS) term data, all the SIS terms are flagged with a status of New. To create these terms in your EMS database, you select each term, click Create, and then Process.

To synchronize an academic term

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Synchronize Terms.

   The EMS Campus Terms window opens.

Figure 13-1: EMS Campus Terms window



2. Select the SIS term, or CTRL-click to select the multiple SIS terms that you are creating in your EMS database, click Create, and then click Process.

If you do not want to create an SIS term in your EMS database, select the term, and then click Do Not Import.

   A message opens indicating that the terms were successfully processed.

3. Click OK to close the message and return to the EMS Campus Terms window.

   The status of the terms is set to Synchronized to indicate that the SIS data has been synchronized.

4. Click Cancel or Close (x) to close the window.

Synchronizing Courses

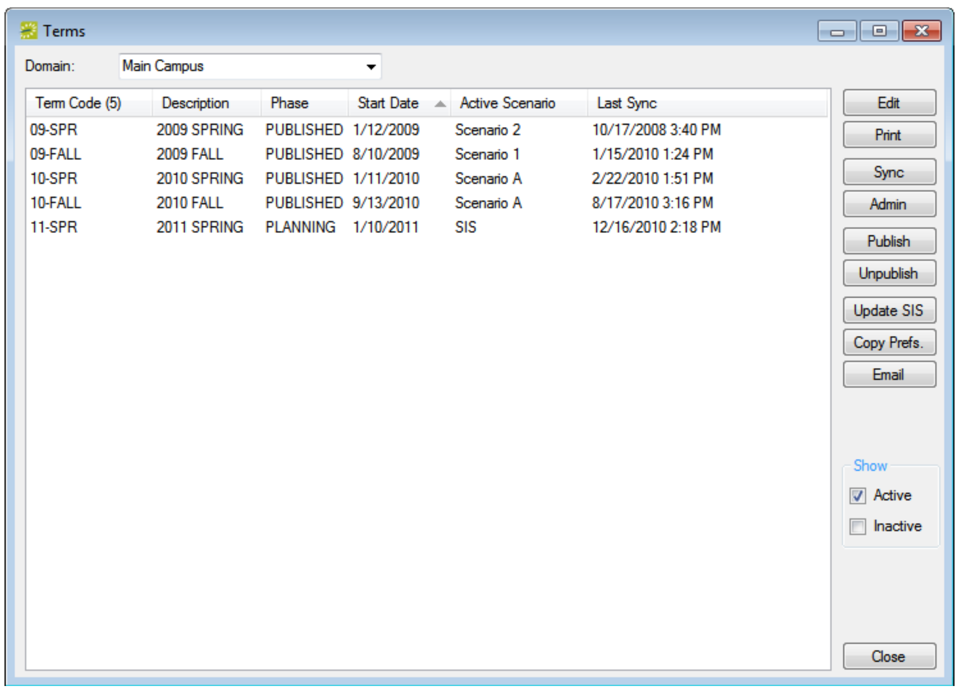
After you synchronize terms, the term record that is created in EMS is initially empty. You must then synchronize the courses.

To synchronize courses

1. On the EMS Campus menu bar, click Academic Planning > Courses > Manage Terms.

   The Terms window opens.

Figure 13-2: Terms window



2. On the Domain dropdown list, select the domain for which you are synchronizing the term.
3. Select the term for which you are synchronizing the courses, and then click Sync.

   Two results are possible:

   - If the term contains edited courses, then a message that states the following opens: WARNING: You have made changes to 'n' Course(s) in “Define & Edit Mode” that will be overwritten. Is it OK to continue. You must click Yes to continue and then a Synchronizing Courses dialog box opens that shows the progress of the course synchronization. When the courses are synchronized, a dialog box opens with the message that the courses were synchronized.
   - If the term does not contain edited courses, then a Synchronizing Courses dialog box

opens that shows the progress of the course synchronization. When the courses are synchronized, a dialog box opens with the message that the courses were synchronized.

4. Click OK to close the message and return to the Terms window.

After you synchronize the courses, you can review them in the Academic Browser. *See “Searching with the Academic Browser” on page 579.*

Defining and Editing Courses

Section Contents

Overview of Defining and Editing Courses

After the Domain Scheduler has imported a term and synchronized the courses for the term, he/she has the option of selecting the mode for the term. Each mode is optional, but each mode provides mode-specific functionality so that the mode can be carried out. Organizations use the Define & Edit mode to solicit information about new, changed, or canceled courses, or course dates for a term. Additionally, courses that share space can be indicated. After the academic units enter this information, the Domain Scheduler can run reports and based on the information in the reports, make the selected modifications in the SIS.

1. The Domain Scheduler enables Define & Edit Mode. See "Enabling/Disabling a Term for Define & Edit Mode" on page 458.
2. Academic units review the course schedule data, make change requests as appropriate for new, edited, and/or canceled courses, and mark those courses that share space. See "Reviewing and Editing Courses" on page 461 and "Working with Shared Space" on page 475.
3. The Domain Scheduler generates and reviews the Course Change report, enters the needed modifications into the SIS, and resynchronizes the courses. See "Synchronizing Courses" on page 453.
4. The Domain Scheduler reviews and/or indicates the shared space settings. See "Working with Shared Space" on page 475.

When you are defining and editing courses, you have the option of selecting Define and Edit mode, or Dual mode. Dual mode enables a term for both Define & Edit Mode and Set Preference mode at the same time. If you select Define and Edit mode, then the steps that you carry out during this mode are distinct and unique from the steps that you carry out in the next mode, which is the Set Preferences mode. Although these two modes are presented as distinct modes and discussed in two separate sections in this manual, if you select Dual mode, then the steps listed in both these sections are applicable at the same time.

Enabling/Disabling a Term for Define & Edit Mode

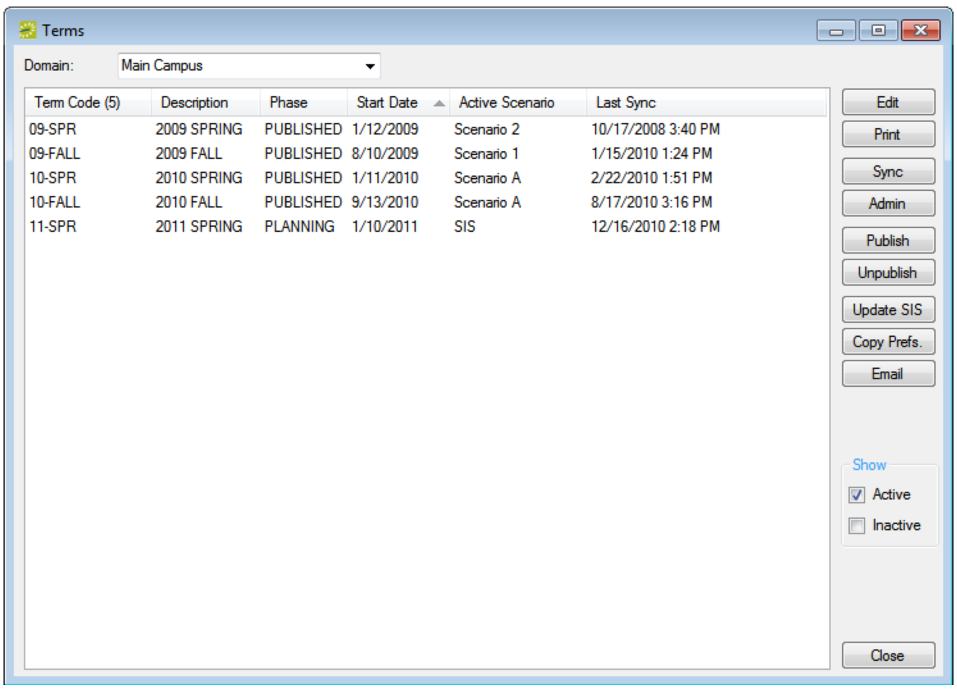
After you have imported a term and synchronized the courses for the term, you can set the mode to Define & Edit and make the term available to the academic units.

To enable/disable a term for Define & Edit mode

1. On the EMS Campus menu bar, click Academic Planning > Courses > Manage Terms.

   The Terms window opens.

Figure 13-3: Terms window

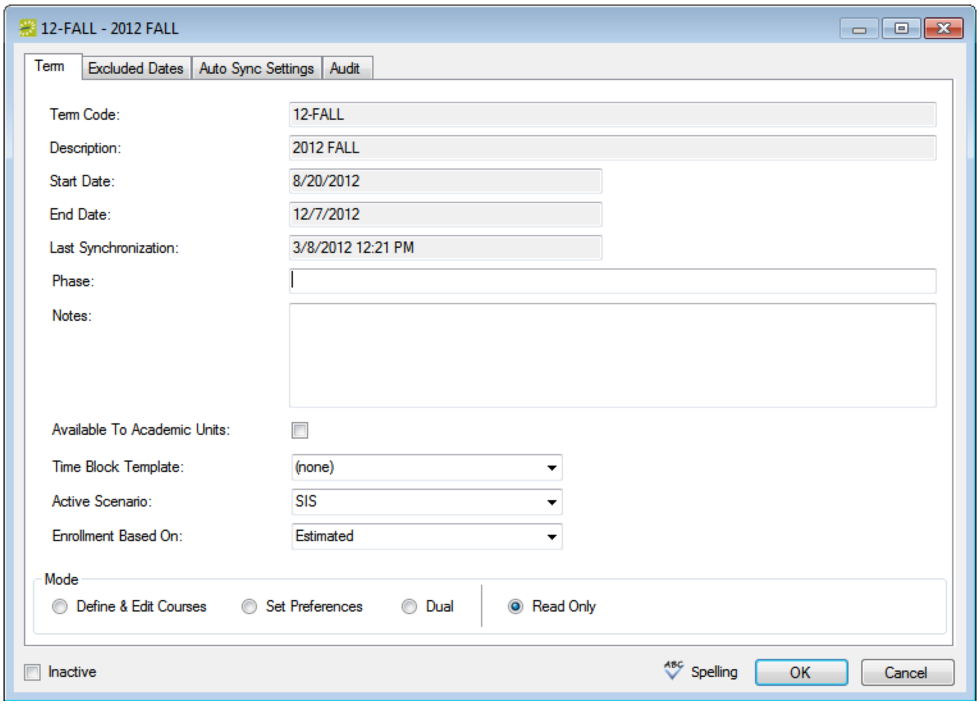


2. On the Domain dropdown list, select the appropriate domain.

3. Select the term for which you are setting Define & Edit mode, and then click Edit.

   The Term dialog box opens. The Term tab is the active tab.

Figure 13-4: Term dialog box



4. Optionally, in the Phase and Notes fields, enter information that indicates to the academic units what part of the academic scheduling process is currently taking place, for example, “Course Review,” or “Planning” along with any supporting information or instructions.

If you are going to select Dual mode, then make sure to note that both course review/planning and setting preferences are currently taking place. Academic units can view this information in the Campus Planning Interface.

5. Do one of the following:

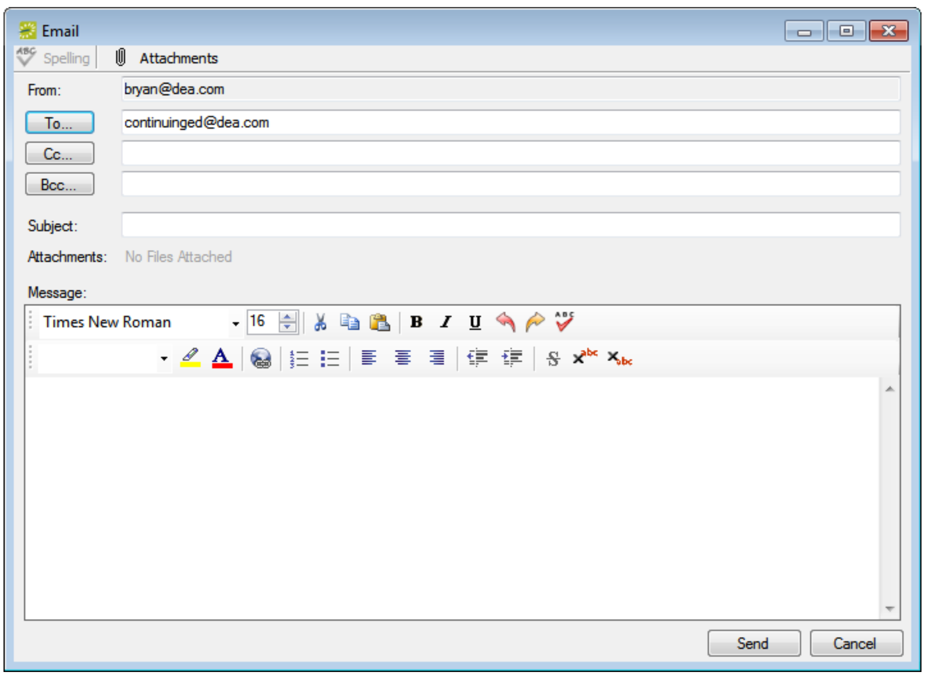
   - If academic unit-level users are to have access to the term, select Available to Academic Units.
   - To remove the users’ access to the term, clear Available to Academic Units.

6. Optionally, if you have configured time block templates, select the appropriate template for this term.

At this stage, the only active scenario that is available is SIS, and you cannot change this value.

7. Select the enrollment that is to be compared to room capacity throughout the academic planning process.
8. In the Mode section, do one of the following:
   - To enable Define & Edit mode, select Define & Edit Courses.
   - To disable Define & Edit mode, select Read Only or Set Preferences.
   - To enable both Define & Edit mode and Set Preferences mode, select Dual.
9. Click OK to close the Term dialog box and return to the Terms window, with the term still selected in the window.
10. On the Terms window, click Email to open an email that is pre-addressed to all academic unit-level users that have been defined in your EMS database. Complete and send the email as you normally would.

Figure 13-5: SMTP Email window



Reviewing and Editing Courses

After a term has been made available to the academic units, the academic units can begin reviewing their courses and requesting additions, deletions, and modifications as appropriate using the Campus Planning Interface (typical) or the EMS Campus desktop client (if granted access).

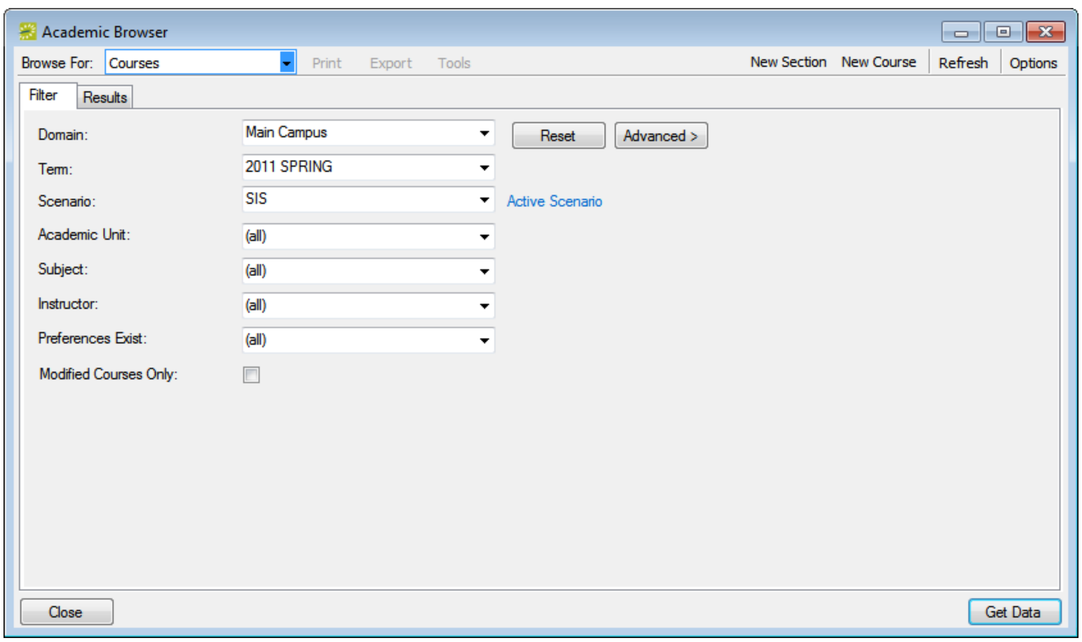
To review and edit courses

1. On the EMS Campus menu bar, click Academic Planning > Courses > Academic Browser.

   The Academic Browser opens.

2. If needed, open the Filter tab.

Figure 13-6: Academic Browser, Filter tab



3. Make sure that the Browse For option is set to Courses.

4. On the Domain dropdown list, select the appropriate domain and then on the Term dropdown list, select the appropriate term.

5. Continue to one of the following:
   - "To add a new course in EMS Campus" below.
   - "To add a new section for a course" on page 464.
   - "To add a course date in EMS Campus" on page 465.
   - "To edit a course in EMS Campus" on page 467.
   - "To edit a course date in EMS Campus" on page 469.
   - "To cancel a course date in EMS Campus" on page 471.
   - "To cancel a course in EMS Campus" on page 473.

To add a new course in EMS Campus

1. Set any other criteria (academic unit, subject, and so on) as needed to provide assistance in locating an existing course, and then click Get Data.

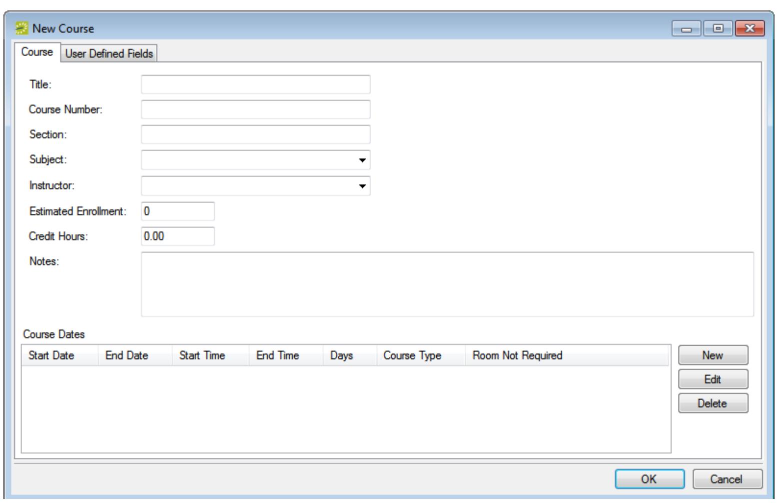
   The courses that meet your search criteria are displayed on the Results tab.

For detailed information about searching with the Academic Browser, see "Searching with the Academic Browser" on page 579.

2. Click New Course.

   The New Course dialog box opens. The Course tab is the active tab.

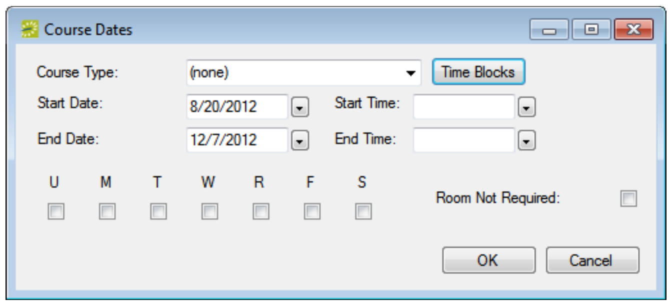
Figure 13-7: New Course dialog box



3. Complete the required information—title, course number, section, subject, instructor, estimated enrollment, credit hours, course type—on the Course tab.

4. For *each* course meeting pattern (days and times) that you are adding to the new course, do the following:
   - In the Course Dates section, click New to open the Course Dates dialog box and on the Course Type dropdown list, select the course type.
   - Do one of the following:
     - Manually enter the meeting pattern information (start and end dates, start and end times, and meeting days) for the course.
     - Click Time Blocks to open the Time Blocks dialog box, and then select a time block from a list of time blocks that have been made available for the term.

Figure 13-8: Course Dates dialog box



Make sure to select Room Not Required if the course does not require a room, for example, an independent study class, a research class, and so on.

Depending on how your EMS administrator has configured EMS Campus, only the Time Blocks option might be available to you.

5. Optionally, in the Notes field, enter any information about the course that might be relevant to the Domain Scheduler.
6. Open the User Defined Fields tab, and for any user-defined questions that are displayed on the tab, do the following:
   - Select the question, and then click Set Value to open a dialog box in which you can enter the answer to the question.
   - Click OK to close the dialog box and return to the User Defined Fields tab.

User-defined fields, or UDFs, are typically used by a Domain Scheduler to solicit additional user-supplied information about a course.

7. Click OK to close the New Course dialog box and return to the Academic Browser.

8. Click Refresh.

   "New" is displayed for the course state.

If you have selected Dual mode for the term, then you can set preferences during this step as well. See "To use the Course Navigator to set preferences and requirements" on page 498.

To add a new section for a course

To add a new section of an existing course, you must copy an existing course, and then edit the section number and any other pertinent information.

1. Set any other criteria (academic unit, subject, and so on) as needed to provide assistance in locating an existing course, and then click Get Data.

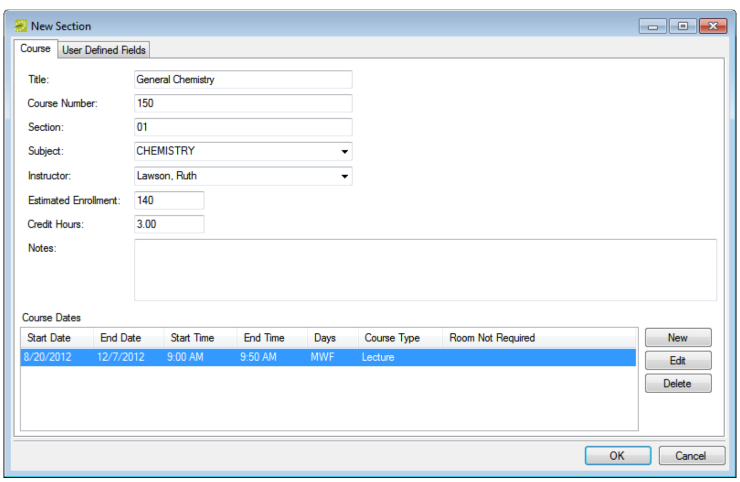
   The courses that meet your search criteria are displayed on the Results tab.

For detailed information about searching with the Academic Browser, see "Searching with the Academic Browser" on page 579.

2. Select the course that is to be copied, and then click New Section.

   The New Section dialog box opens. The fields are automatically populated with the information for the copied course.

Figure 13-9: New Section dialog box



3. Edit the section number and any other pertinent information as needed, and then click OK.

Depending on how your EMS administrator has configured EMS Campus, only the Time Blocks option might be available to you.

   A message opens indicating that the course was created successfully.

4. Click OK to close the message and return to the Academic Browser.

If you have selected Dual mode for the term, then you can set preferences during this step as well. See "To use the Course Navigator to set preferences and requirements" on page 498.

To add a course date in EMS Campus

To add a new date to a course in EMS Campus, you must find the course using the Academic Browser, and then edit the course date and other pertinent information in the Course Navigator.

1. Set any other criteria (academic unit, subject, and so on) as needed to provide assistance in locating the course, and then click Get Data.

   The courses that meet your search criteria are displayed on the Results tab.

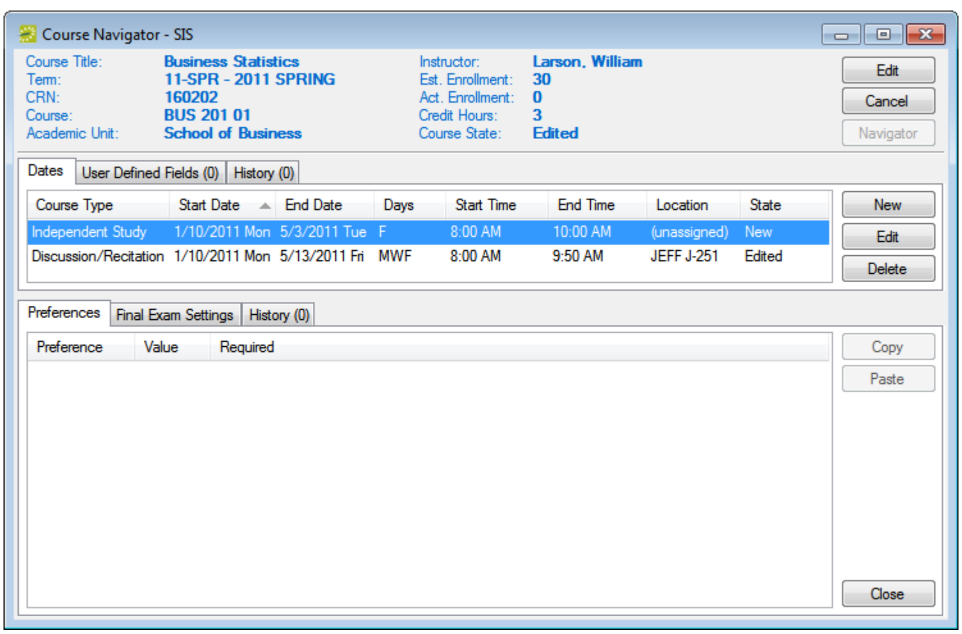
For detailed information about searching with the Academic Browser, see "Searching with the Academic Browser" on page 579.

2. In the search results, double-click the course to which you are adding a course date.

   The course opens in the Course Navigator.

For detailed information about working with the Course Navigator, see "Using the Course Navigator" on page 594.

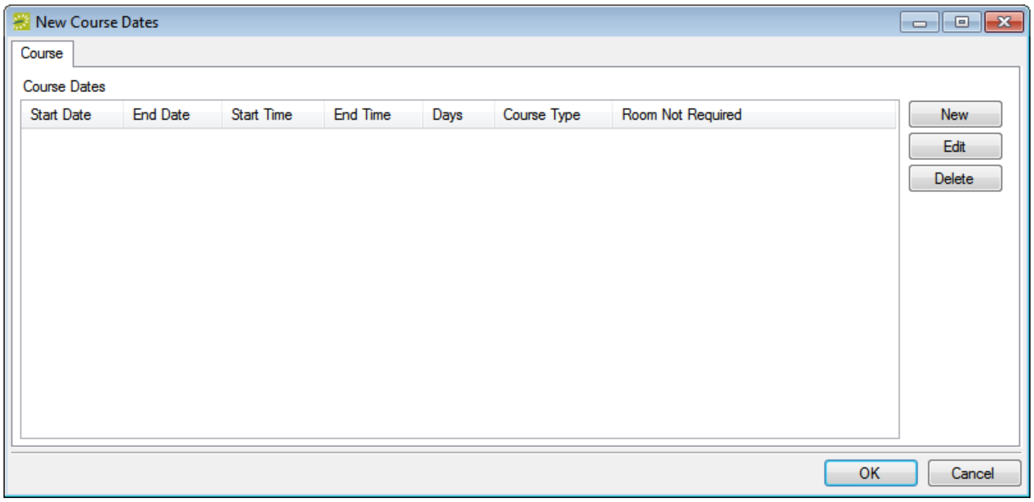
Figure 13-10: Course opened in the Course Navigator



3. Click New.

   The New Course Dates dialog box opens.

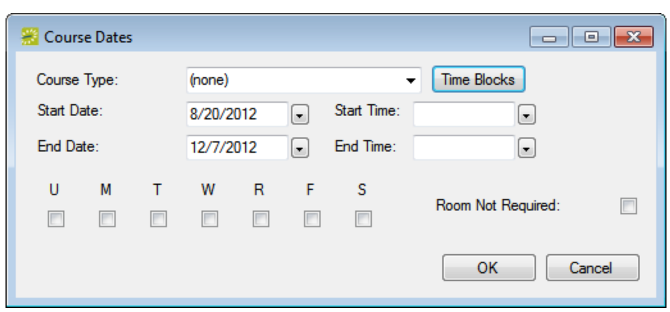
Figure 13-11: New Course Dates dialog box



4. For *each* new course meeting pattern (days and times) that you are adding to the course, do the following:

   - On the New Course Dates dialog box, click New to open the Course Dates dialog box and on the Course Type dropdown list, select the course type.
   - Do one of the following:
     - Manually enter the meeting pattern information (start and end dates, start and end times, and meeting days) for the course.
     - Click Time Blocks to open the Time Blocks dialog box, and select a time block from a list of time blocks that have been made available for the term.

Figure 13-12: Course Dates dialog box



Make sure to select Room Not Required if the course does not require a room, for example, an independent study class, a research class, and so on.

Depending on how your EMS administrator has configured EMS Campus, only the Time Blocks option might be available to you.

5. Click OK to close the Course Dates dialog box, and then click OK to close the New Course Dates dialog box and return to the Course Navigator.

   The state for each newly added course date is set to “New” in the middle pane of the Course Navigator.

If you have selected Dual mode for the term, then you can set preferences during this step as well. See “To use the Course Navigator to set preferences and requirements” on page 498.

To edit a course in EMS Campus

To edit a course in EMS Campus, you must find the course using the Academic Browser, and then edit the course information in the Course Navigator.

1. Set any other criteria (academic unit, subject, and so on) as needed to provide assistance in locating the course, and then click Get Data.

   The courses that meet your search criteria are displayed on the Results tab.

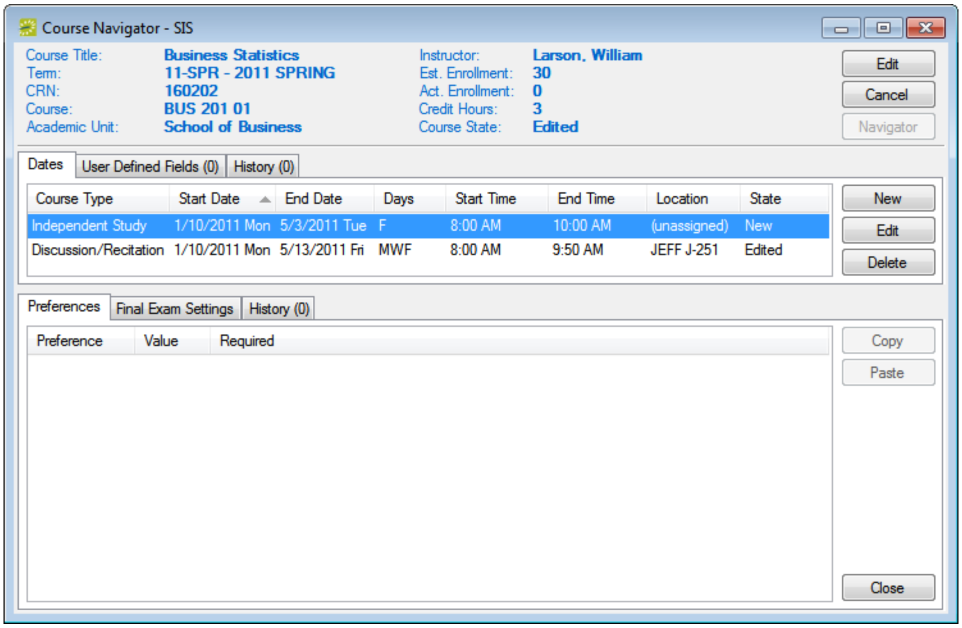
For detailed information about searching with the Academic Browser, see “Searching with the Academic Browser” on page 579.

2. In the search results, double-click the course that you are editing.

   The course opens in the Course Navigator. See Figure 13-13 on page 468.

For detailed information about working with the Course Navigator, see “Using the Course Navigator” on page 594.

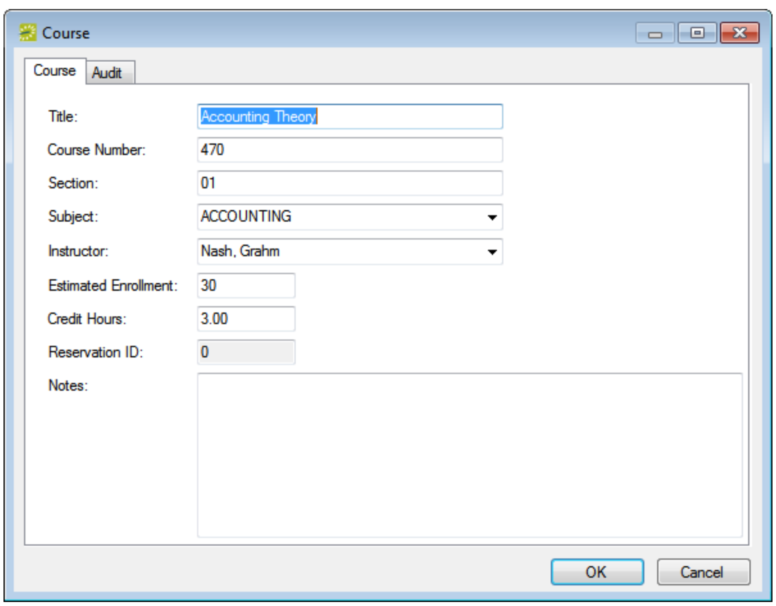
Figure 13-13: Course opened in the Course Navigator



3. Click edit *in the top pane* of the Navigator.

   The Course dialog box opens.

Figure 13-14: Course dialog box



4. Edit the course information as needed, and then click OK to close the Course dialog box and return to the Course Navigator.

   The course state is set to “Edited” in the top pane of the Course Navigator.

To edit a course date in EMS Campus

To edit a course date in EMS Campus, you must find the course using the Academic Browser, and then edit the course date in the Course Navigator.

1. Set any other criteria (academic unit, subject and so on) as needed to provide assistance in locating the course, and then click Get Data.

   The courses that meet your search criteria are displayed on the Results tab.

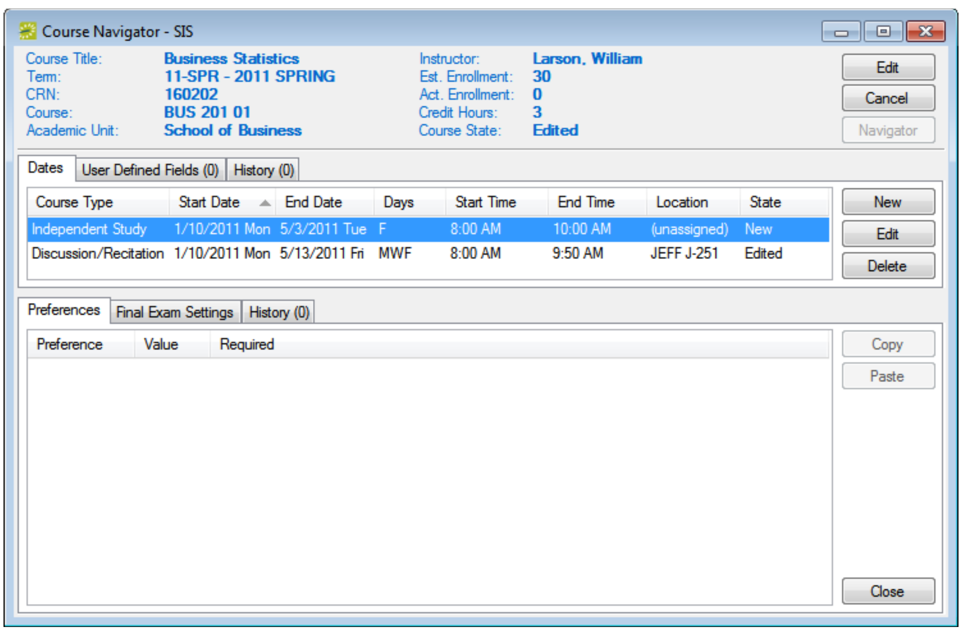
For detailed information about searching with the Academic Browser, see *"Searching with the Academic Browser" on page 579.*

2. In the search results, double-click the course for which you are editing the course date.

   The course opens in the Course Navigator.

For detailed information about working with the Course Navigator, see *"Using the Course Navigator" on page 594.*

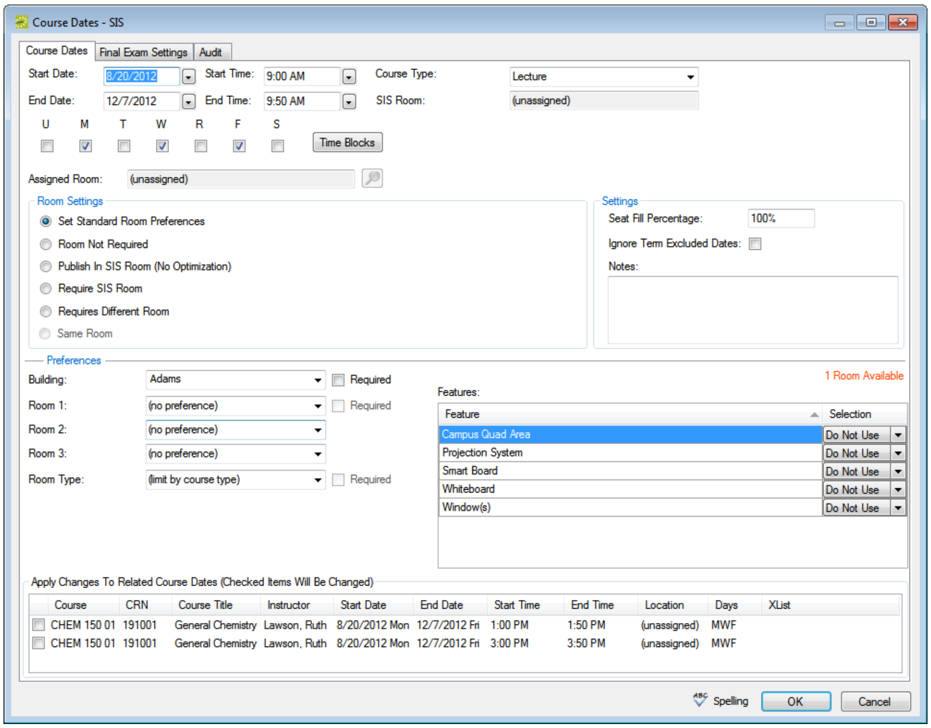
Figure 13-15: Course opened in the Course Navigator



3. In the *middle pane* of the Course Navigator, select the course date record that you are editing, and then click Edit.

   The Course Dates - (SIS) dialog box opens.

Figure 13-16: Course Dates - (SIS) dialog box



4. Edit the course dates as needed.

   - To edit the course dates, do one of the following:

     - Manually edit the start/end dates, start/end times, course type, and/or the days that the course meets.

     - Click Time Blocks to open the Time Blocks dialog box, and select a time block from a list of time blocks that have been made available for the term.

Depending on how your EMS administrator has configured EMS Campus, only the Time Blocks option might be available to you. (You cannot manually edit the course days and times.)

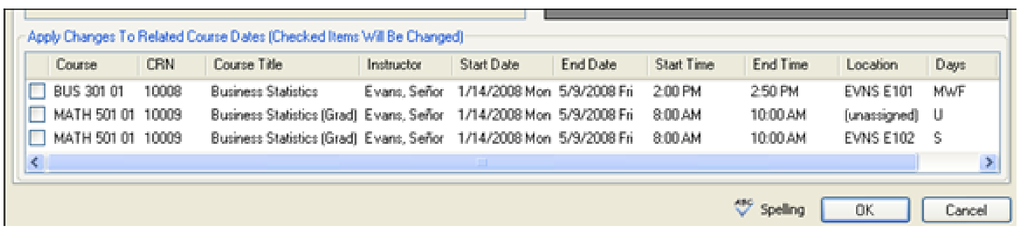
   - The room assigned to this course in the SIS is listed in the SIS Room text box. You cannot edit this value; however, make sure to select Room Not Required if this course date does not require a room (for example, independent study, research, and so on).

- The Seat Fill Percentage, in conjunction with the estimated enrollment, is used to determine the size of the room needed for the class. For example, a Seat Fill Percentage of 50% and an estimated enrollment of 100 means that the course should be held in a room that can accommodate 200 people.

The Seat Fill Percentage is initially set to the default value that is specified in EMS (Campus) system parameters, but you can update the value on a per course date basis. See System Parameters in the EMS Setup Guide.

- If you are editing a course date for a course that is cross-listed or sharing space with another course, you are provided with an option in the bottom pane of the Course Dates dialog box to apply your changes to the related course dates. To apply changes to the cross-listed courses, check the appropriate course date listings.

Figure 13-17: Applying changes to related course dates



5. Click OK to close the Course dialog box and return to the Course Navigator.

   The course date state is set to "Edited" in the middle pane of the Course Navigator.

If you have selected Dual mode for the term, then you can set preferences during this step as well. See "To use the Course Navigator to set preferences and requirements" on page 498.

To cancel a course date in EMS Campus

To cancel a course date in EMS Campus, you must find the course using the Academic Browser, and then cancel the course date in the Course Navigator.

1. Set any other criteria (academic unit, subject and so on) as needed to provide assistance in locating the course, and then click Get Data.

   The courses that meet your search criteria are displayed on the Results tab.

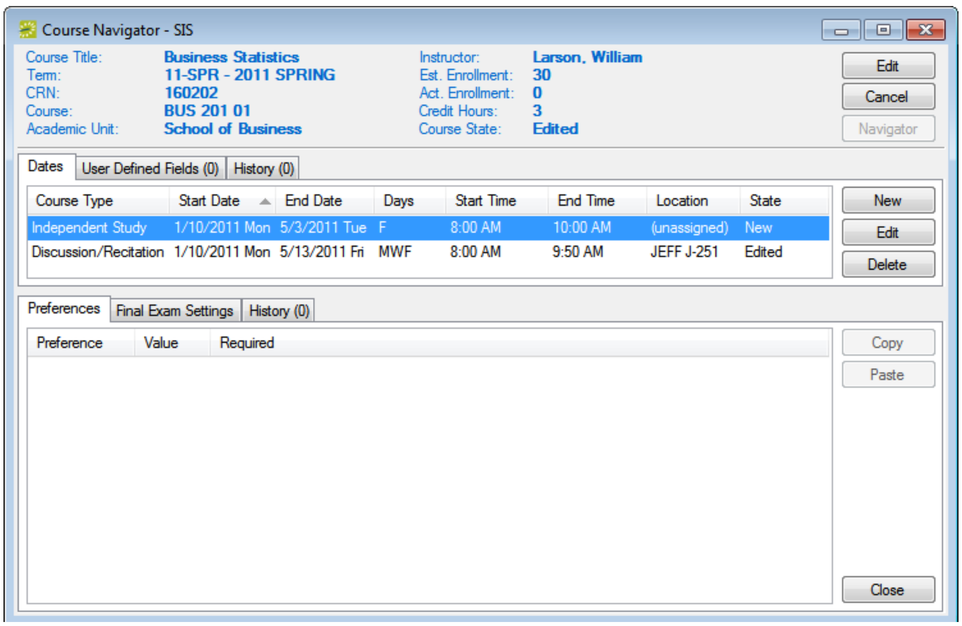
For detailed information about searching with the Academic Browser, see "Searching with the Academic Browser" on page 579.

2. In the search results, double-click the course for which you are canceling a course date.

   The course opens in the Course Navigator.

For detailed information about working with the Course Navigator, see *"Using the Course Navigator" on page 594.*

Figure 13-18: Course opened in the Course Navigator



3. In the middle pane of the Course Navigator, select the course date record that you are canceling, and then in the top pane of the Navigator, click Cancel.

   A dialog box opens, asking you if it is OK to cancel the selected course.

4. Click Yes to close the dialog box and return to the Course Navigator.

   The course date state is set to "Cancelled" in the middle pane of the Course Navigator.

To reverse a course date cancellation, select the canceled course date in the Course Navigator, and then click Uncancel.

To cancel a course in EMS Campus

To cancel a course in EMS Campus, you must find the course using the Academic Browser, and then cancel the course in the Course Navigator.

1. Set any other criteria (academic unit, subject and so on) as needed to provide assistance in locating the course, and then click Get Data.

   The courses that meet your search criteria are displayed on the Results tab.

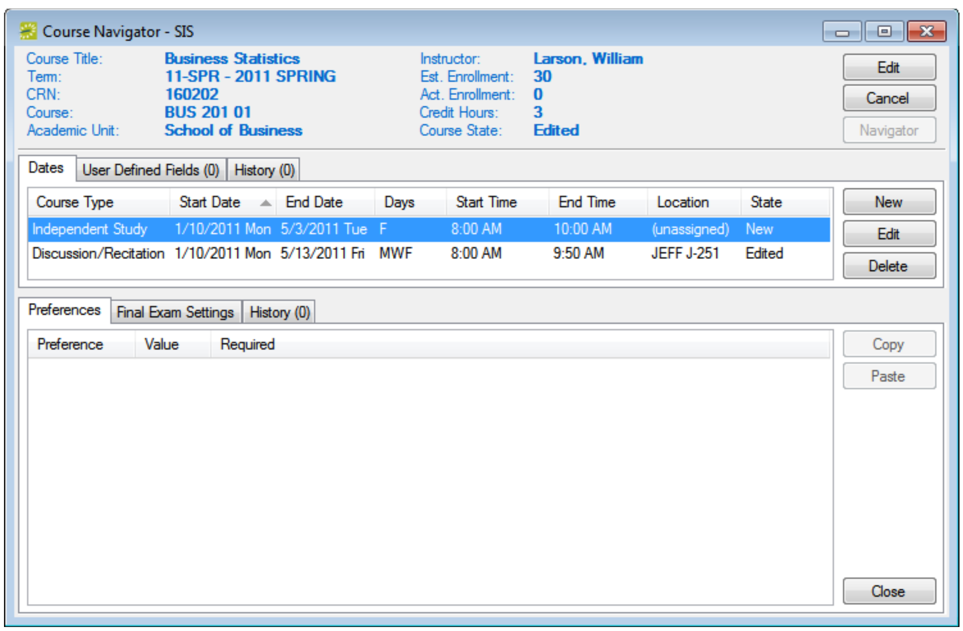
For detailed information about searching with the Academic Browser, see “Searching with the Academic Browser” on page 579.

2. In the search results, double-click the course that you are canceling.

   The course opens in the Course Navigator.

For detailed information about working with the Course Navigator, see “Using the Course Navigator” on page 594.

Figure 13-19: Course opened in the Course Navigator



3. In the *top pane* of the Navigator, click Cancel.

   A dialog box opens, asking you if it is OK to cancel the selected course.

4. Click Yes to close the dialog box and return to the Course Navigator.

   The course state is set to “Cancelled” in the top pane of the Course Navigator. The state for every course date that is displayed in the middle pane of the Course Navigator is also set to “Cancelled.”

To reverse a course cancellation, open the canceled course in the Course Navigator, and then in the top pane of the Course Navigator, click Uncancel.

Working with Shared Space

The *shared space* designation is used for two or more courses that are not cross-listed in the SIS, but that have matching patterns and are meant to be held in the same room. The shared space designation links the courses together for the set preferences, optimization, publishing, and final exam scheduling functions. Shared space is assigned in a parent-child relationship. If needed, you can change the parent designation. In addition, if a course that is cross-listed in the SIS is not meant to be held in the same room, or if courses that are marked as shared space are no longer meant to share space, then you can reverse the shared space designation. You can also review shared spaced designations.

Academic units that have the appropriate permissions can indicate shared space using the Campus Planning Interface. You might want to review these shared space settings before working with shared space.

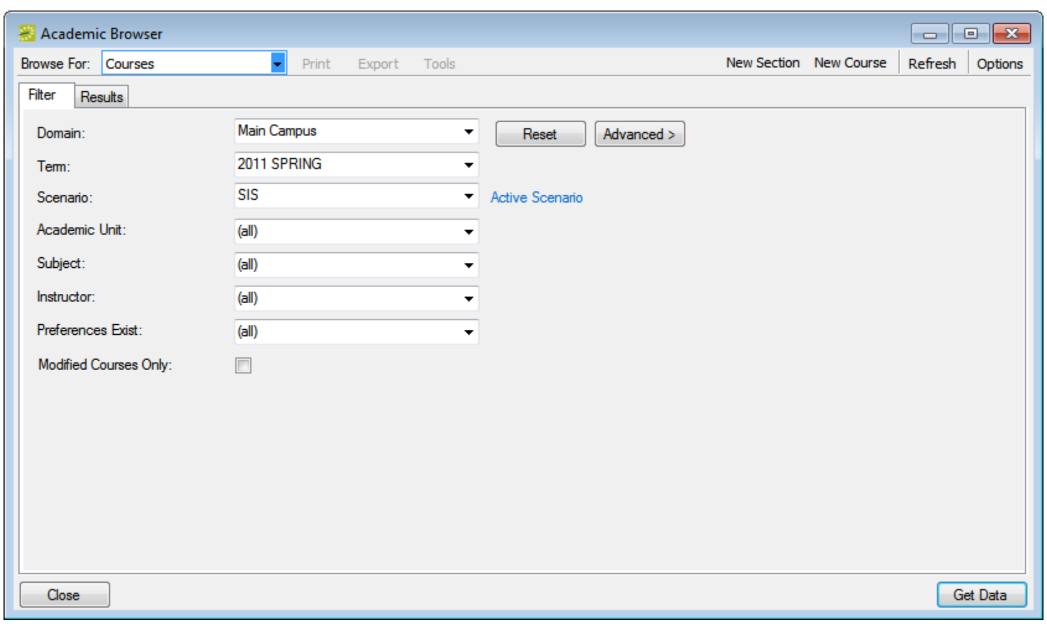
To assign shared space to courses

1. On the EMS Campus menu bar, click Academic Planning > Courses > Academic Browser.

   The Academic Browser opens.

2. If needed, open the Filter tab.

Figure 13-20: Academic Browser, Filter tab



3. On the Domain dropdown list, select the appropriate domain and on the Term dropdown list, select the appropriate term.

4. Set any other criteria (academic unit, subject, and so on) as needed to provide assistance in locating the courses that are to share space, and then click Get Data.

   The courses that meet your search criteria are displayed on the Results tab.

For detailed information about searching with the Academic Browser, see *"Searching with the Academic Browser" on page 579.*

5. CTRL-click to select the courses that are to share space.
6. On the Tools menu, click Shares Space.

   A message opens asking you if you are sure that the selected courses are to share space?
7. Click Yes.

   The message closes and you return to the Academic Browser. The Shares Spaces designation is indicated in the browser. The parent item is indicated with *Parent, and the child item is indicated with the parent's Course Number and Section Number.

To change the parent designation for shared space/cross-listed spaces

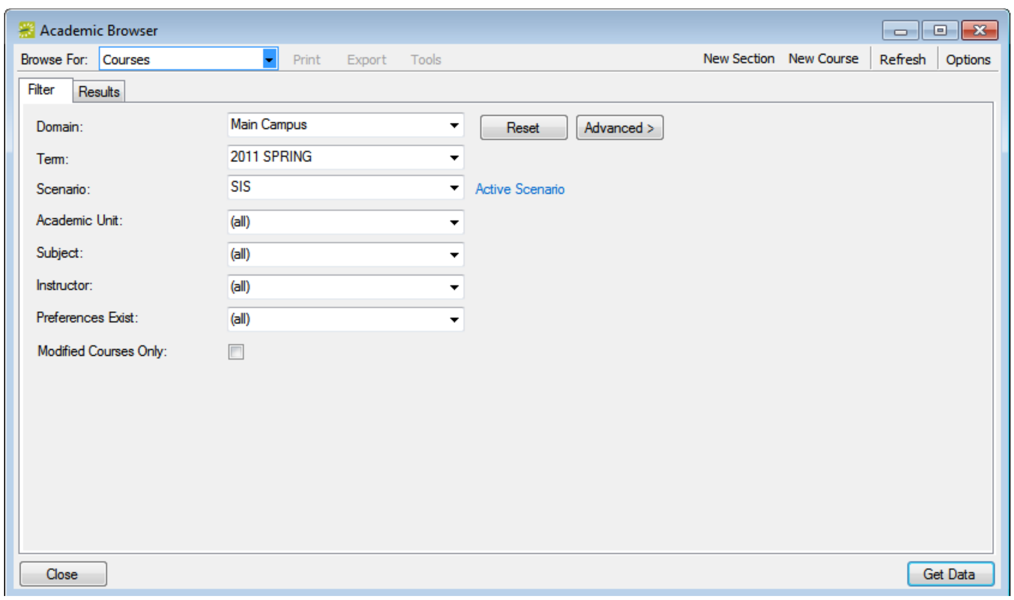
When you set the shared space designation for courses, EMS Campus arbitrarily specifies one of the courses as the parent course. The academic unit that controls the parent course is the unit that sets the preferences for the shared courses in the Set Preferences mode. If the academic unit that you want to set the preferences in the Set Preferences mode is not currently the parent course, then you can change the parent designation for the courses. Also, after you publish courses, you can change the room only for the parent course and the child course "just follows along." If the course on which you want to base the room change is not currently the parent course, then you can change the parent designation for the courses.

1. On the EMS Campus menu bar, click Academic Planning > Courses > Academic Browser.

   The Academic Browser opens.

2. If needed, open the Filter tab.

Figure 13-21: Academic Browser, Filter tab



3. On the Domain dropdown list, select the appropriate domain and on the Term dropdown list, select the appropriate term.

4. Set any other criteria (academic unit, subject, and so on) as needed to provide assistance in locating the shared spaces courses, and then click Get Data.

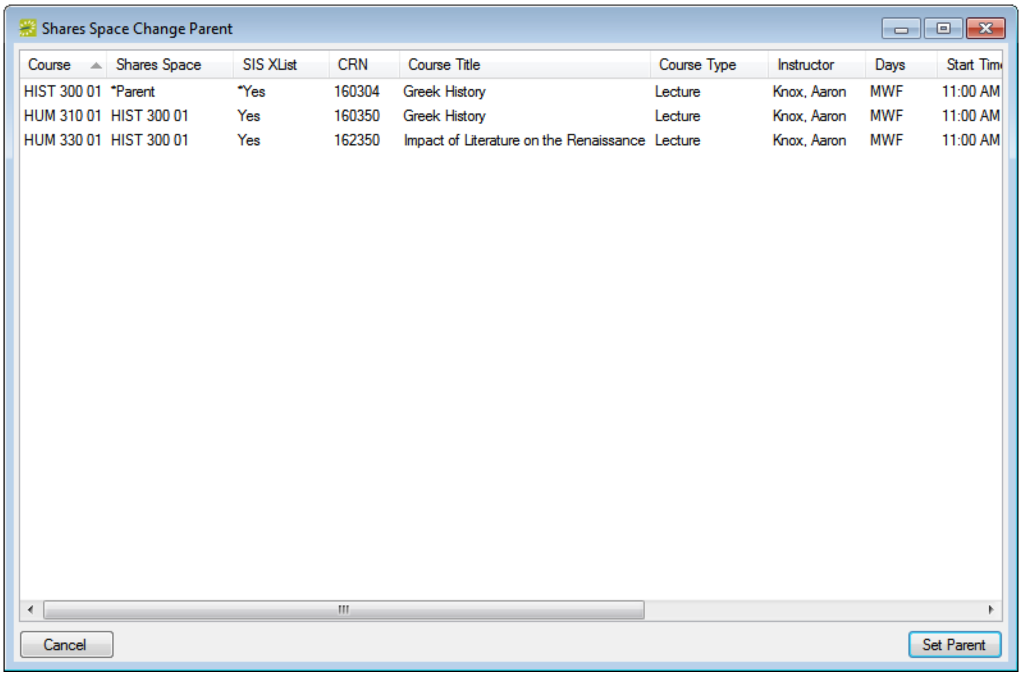
   The courses that meet your search criteria are displayed on the Results tab.

For detailed information about searching with the Academic Browser, see *"Searching with the Academic Browser" on page 579.*

5. CTRL-click to select the parent course and the child courses.
6. On the Tools menu, click Change Shared Space parent.

   The Shares Space Change Parent dialog box opens. This dialog box lists the parent class and all its child classes that share space.

Figure 13-22: Shares Space Change Parent dialog box



7. Select the course that is to be the new parent, and then click Set Parent.

   A Set Parent dialog box opens, indicating that the selected course will be set as the parent for all the listed courses, and asking you if it is OK to continue.
8. Click Yes.

   The Set Parent dialog box closes. You return to the Academic Browser with the new parent designation indicated in the browser.

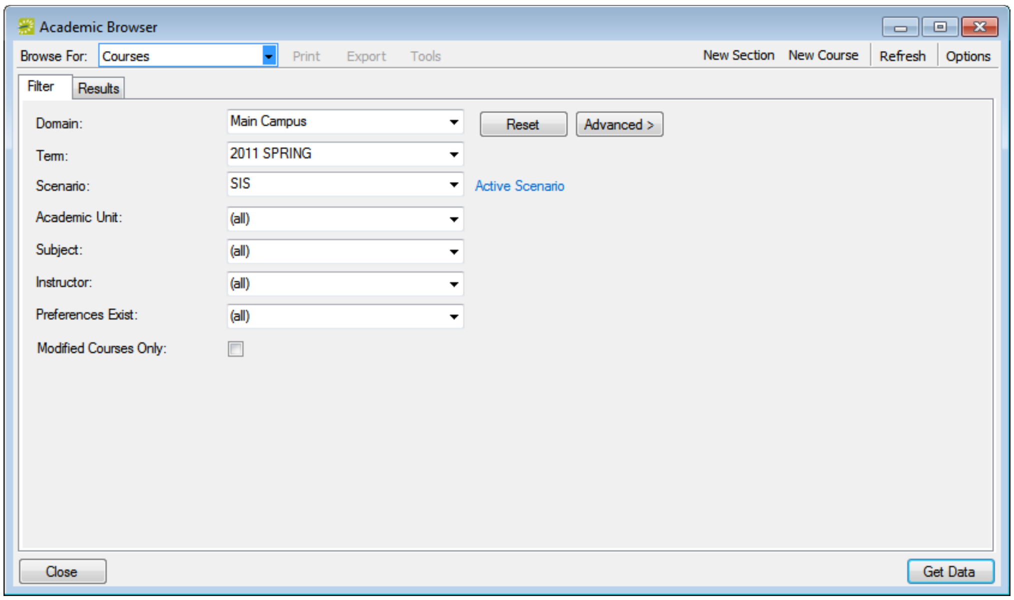
To reverse the shared space designation

1. On the EMS Campus menu bar, click Academic Planning > Courses > Academic Browser.

   The Academic Browser opens.

2. If needed, open the Filter tab.

Figure 13-23: Academic Browser, Filter tab



3. On the Domain dropdown list, select the appropriate domain and on the Term dropdown list, select the appropriate term.

4. Set any other criteria (academic unit, subject, and so on) as needed to provide assistance in locating the courses that are to no longer share space, and then click Get Data.

   The courses that meet your search criteria are displayed on the Results tab.

For detailed information about searching with the Academic Browser, see *“Searching with the Academic Browser” on page 579.*

5. CTRL-click to select the courses that are to no longer share space.

6. On the Tools menu, click Does Not Share Space.

   A message opens asking you if you are sure that the selected courses are to no longer share space.

7. Click Yes.

   The message closes. You return to the Academic Browser, with the Shared Space designation removed for the selected courses.

To review shared space designations

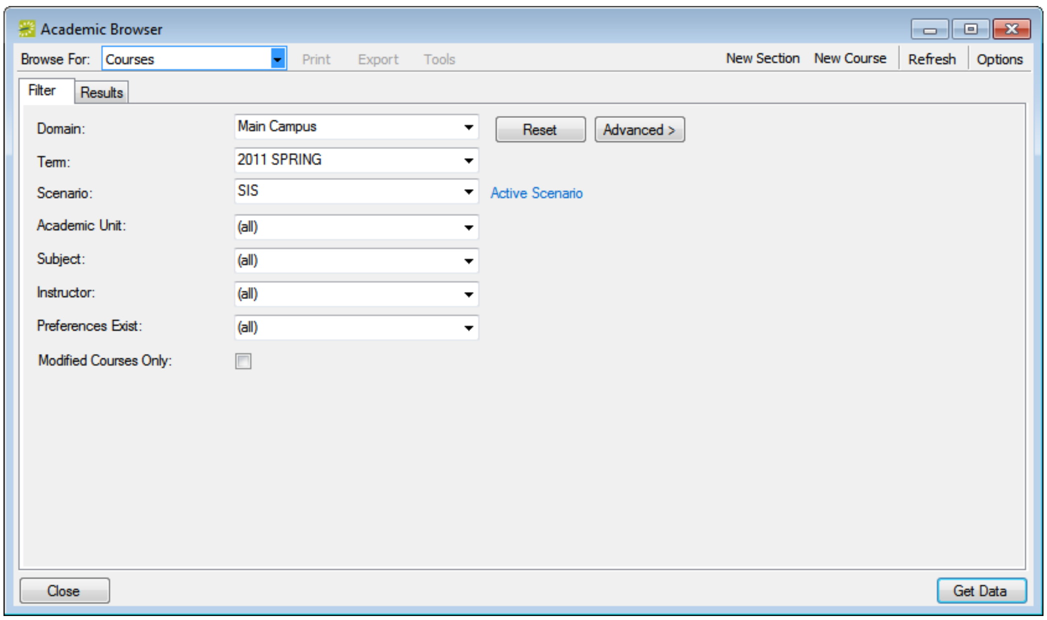
Academic units might designate shared space that they can review in the Campus Planning Interface.

1. On the EMS Campus menu bar, click Academic Planning > Courses > Academic Browser.

   The Academic Browser opens.

2. If needed, open the Filter tab.

Figure 13-24: Academic Browser, Filter tab



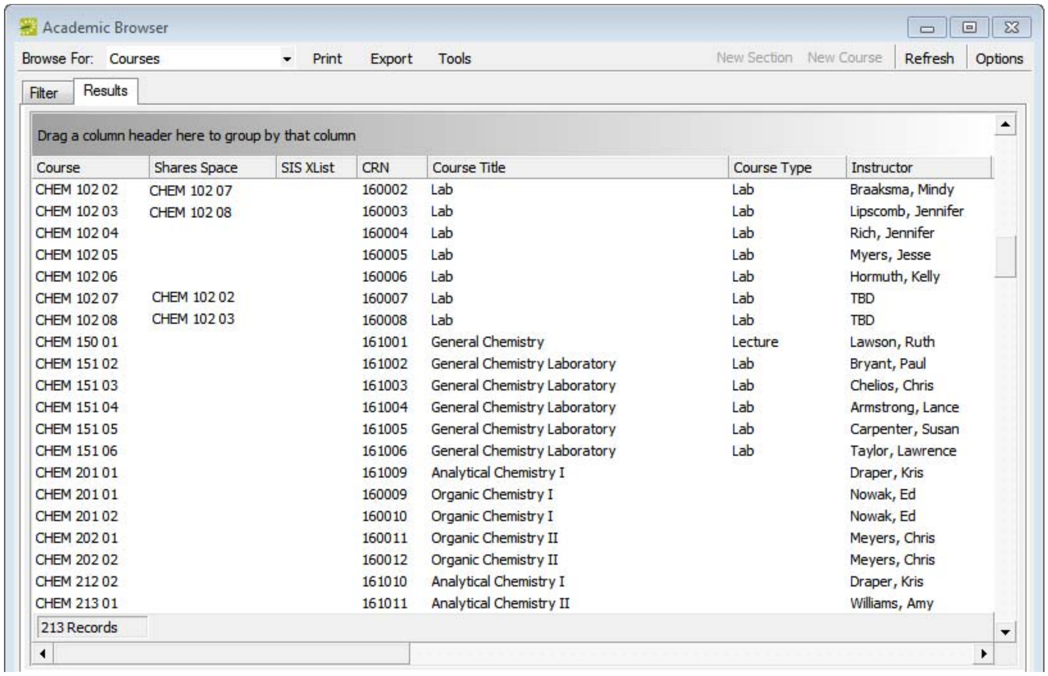
3. On the Domain dropdown list, select the appropriate domain and on the Term dropdown list, select the appropriate term.

4. Set any other criteria (academic unit, subject, and so on) as needed to provide assistance in locating the courses that you are reviewing, and then click Get Data.

   The courses that meet your search criteria are displayed on the Results tab. Use the information in the Shared Space column to identify and review the courses that share space. You can also click the column heading to sort by shared space. See Figure 13-25 on page 481.

For detailed information about searching with the Academic Browser, see "Searching with the Academic Browser" on page 579.

Figure 13-25: Academic Browser search results showing Shared Space designation



Identifying New/Edited/Canceled Courses

After the academic units have made their modifications to the course schedule, you must identify and compile a list of modifications and enter the approved changes in the Student Information System (SIS). EMS Campus flags course changes using a field named Course State. New, edited, and canceled courses are marked as “New,” “Edited,” and “Cancelled,” respectively. Typically, you generate the Course Changes report to view and identify the requested course changes; however, if further clarification is needed, then you can use the Academic Browser and/or Course Navigator.

For detailed information about generating the Course Changes report, and the information that is contained in the report, see “Generating Academic Reports” on page 601.

Prior to reviewing the modifications, you can remove access to the term from your academic units. See “Enabling/Disabling a Term for Define & Edit Mode” on page 458.

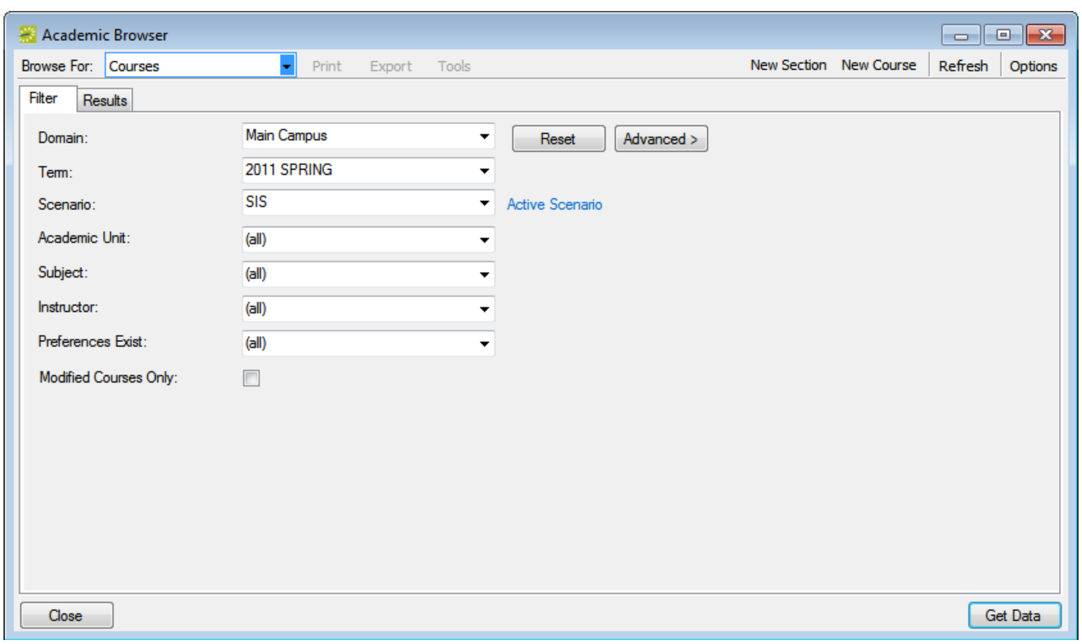
To identify new/edited/canceled courses

1. On the EMS Campus menu bar, click Academic Planning > Courses > Academic Browser.

   The Academic Browser opens.

2. If needed, open the Filter tab.

Figure 13-26: Academic Browser, Filter tab



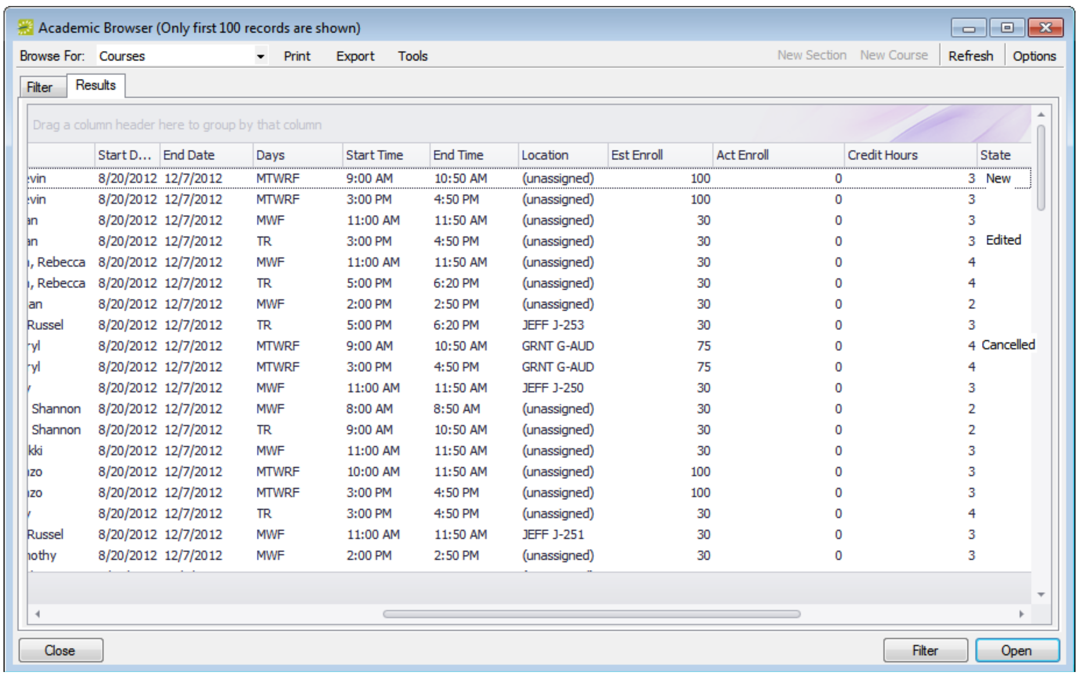
3. On the Domain dropdown list, select the appropriate domain and on the Term dropdown list, select the appropriate term.

4. Set any other criteria (academic unit, subject, and so on) as needed to provide assistance in locating the courses that you are reviewing, and then click Get Data.

   The courses that meet your search criteria are displayed on the Results tab. Use the information in the State column to identify the change made to each course that is listed.

For detailed information about searching with the Academic Browser, see "Searching with the Academic Browser" on page 579.

Figure 13-27: Academic Browser search results with State column shown



5. Optionally, double-click a course to open the course in the Course Navigator and view more detailed information about the course. See "Using the Course Navigator" on page 594.

6. After generating the list of course modifications, you must manually enter the approved course changes in the SIS. After data entry is complete, the scheduler must carry out the Sync Courses process (see "Synchronizing Courses" on page 453) to ensure that EMS Campus and the SIS are synchronized.

Specifying Room Preferences

Section Contents

Overview of Specifying Room Preferences

Set Preferences is an optional mode in which the Domain Scheduler can solicit preferences from academic units about the type of rooms that would be suitable for each course that they teach. These preferences can then be used to run an optimization, or to have EMS automate room scheduling based on preferences and additional user-specified criteria. To enable and use Set Preferences Mode, the following steps are carried out:

1. The Domain Scheduler enables Set Preferences mode. See “Enabling/Disabling a Term for Set Preferences Mode” on page 488.
2. The academic units review courses and specify their room preferences and requirements using the Campus Planning Interface (typical) or the EMS Campus desktop client (if granted access). See “Specifying Room Preferences/Requirements” on page 491.
3. The Domain Scheduler verifies and reviews the room preferences and requirements that the academic units have specified. See “Reviewing and Verifying Room Preferences” on page 501.

Enabling/Disabling a Term for Set Preferences Mode

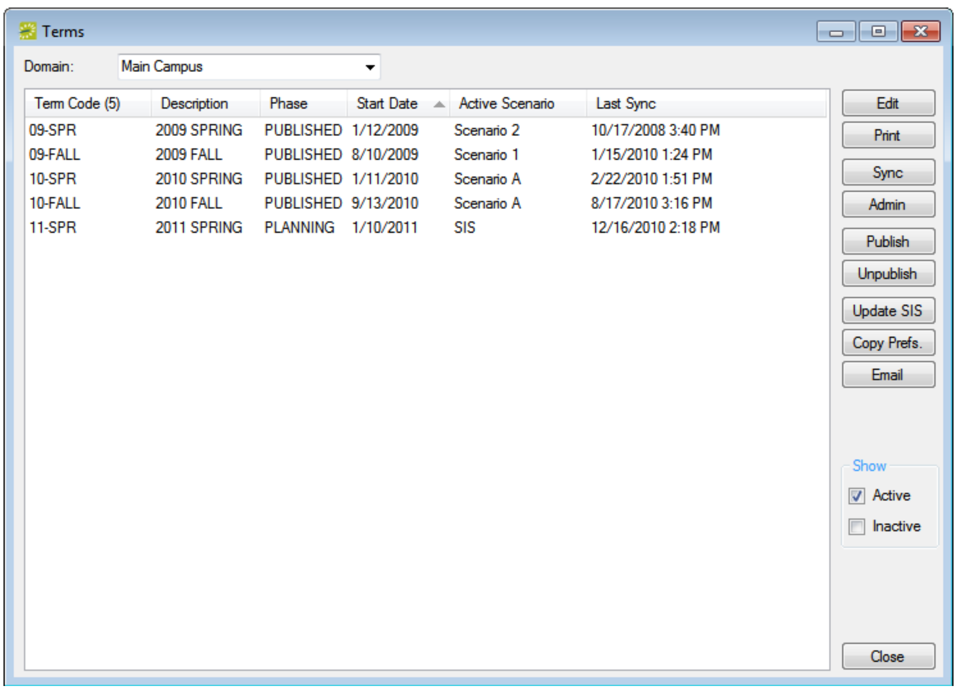
To enter the academic units' room preferences and requirements, you must enable Set Preferences mode. Additionally, if you want to solicit these preferences and requirements from the academic units, you must make the term available to the academic units. Likewise, after the deadline has been reached for expressing room preferences and requirements, you must make the term unavailable to the academic units.

To enable/disable a term for Set Preferences mode

1. On the EMS Campus menu bar, click Academic Planning > Courses > Manage Terms.

   The Terms window opens.

Figure 13-28: Terms window



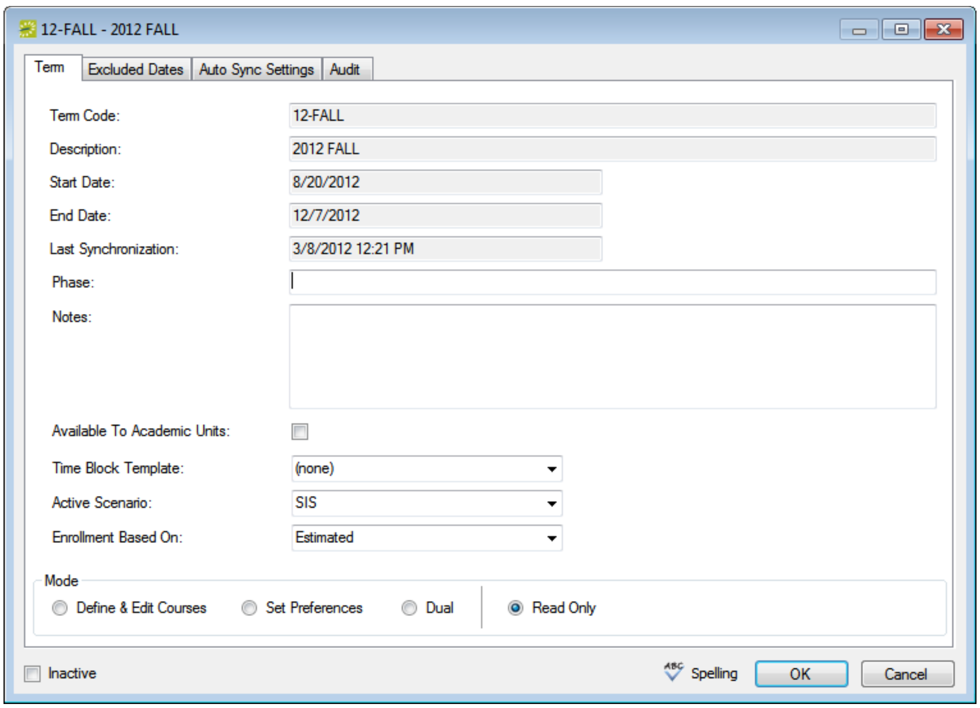
2. On the Domain dropdown list, select the appropriate domain.

3. Select the term for which you are setting the Set Preferences mode, and then click Edit.

   The Term dialog box opens. The Term tab is the active tab.

Remember, if you selected Dual mode, (see *"Specifying Room Preferences" on page 485**) then the Set Preferences mode has already been enabled for this term.*

Figure 13-29: Term dialog box



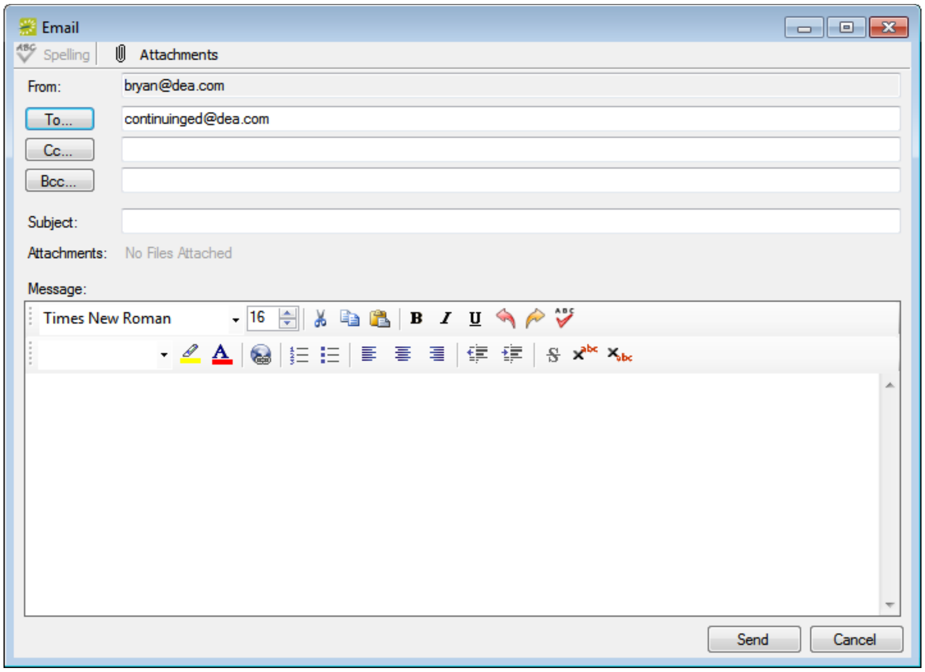
4. Optionally, in the Phase and Notes fields, enter information that indicates to the Domain Scheduler what part of the academic scheduling process is currently taking place, for example, "Enter Preferences," or "Room Information" along with any supporting information or instructions.

The Phase field and the Notes field are displayed in the Campus Planning Interface.

5. Do one of the following:
   - To give academic unit-level users access to the term, select Available to Academic Units.
   - To remove the users' access to the term, clear Available to Academic Units
6. If you did *not* select Dual mode, then in the Mode section, select Set Preferences.
7. Click OK to close the Term dialog box and return to the Terms window, with the term still selected in the window.

8. On the Terms window, click Email to open an email that is pre-addressed to all academic unit-level users that have been defined in your EMS database. Complete and send the email as you normally would.

Figure 13-30: SMTP Email window



Specifying Room Preferences/Requirements

After you place the term in Set Preferences mode, three options that can be used in conjunction with each other are available for completing the preferences and requirements phase. In addition, you can complete the phase independently, or you can solicit input from the academic units.

- You can use the Manage Terms Copy Preferences tool to copy the preferences and requirements from a previous term. See “To use the Manage Terms Copy Preferences tool” on page 493.
- You can use the Academic Browser Set Course Preferences tool to set preferences and requirements for multiple courses in a single step. See “To use the Academic Browser Set Course Preferences tool” on page 495.
- You can use the Course Navigator to set preferences and requirements on a course by course basis. See “To use the Course Navigator to set preferences and requirements” on page 498.

If a course must take place in a specific room that you plan to exclude from optimization, you can pre-assign it to a specific room. This process is outlined during the Scenario phase. See “To create a pre-assignment scenario” on page 513.

For any of these methods, the following caveats apply:

- An academic unit -level user can *request* any building, area, or view and up to three rooms that have been defined for the domain with which it is associated.

If needed, you can set the Lock Academic Unit Room Access system parameter to limit the users to their specific academic units. See System Parameters in the EMS Setup Guide.

- An academic unit can *require* only those buildings and rooms that have been assigned to its unit within the Academic Planning > Configuration > Academic Units area of EMS Campus. If the academic units specify requirements, then only a single room can be specified.
- Room types can be requested or required for all courses. By default the “limit by course type” selection is designated, but you can change it to honor a specific room type.

Configuration of the Course Types/Room Types matches is carried out in the Academic Planning > Configuration > Match Course Types/Room Types area of EMS Campus. See the EMS Setup Guide for detailed information.

- You can set features to Preferred or Required. The # of Rooms Available label that is displayed above the Features pane is dynamically updated based on the building, room type, and features selected.
- The Seat Fill Percentage, in conjunction with the estimated enrollment, is used to determine the size of the room needed for the class. For example, a Seat Fill Percentage of 50% and an estimated enrollment of 100 means that the course should be held in a room that can accommodate 200 people.

The Seat Fill Percentage is initially set to the default value that is specified in EMS (Campus) system parameters, but you can update the value on a per course date basis. See System Parameters in the EMS Setup Guide.

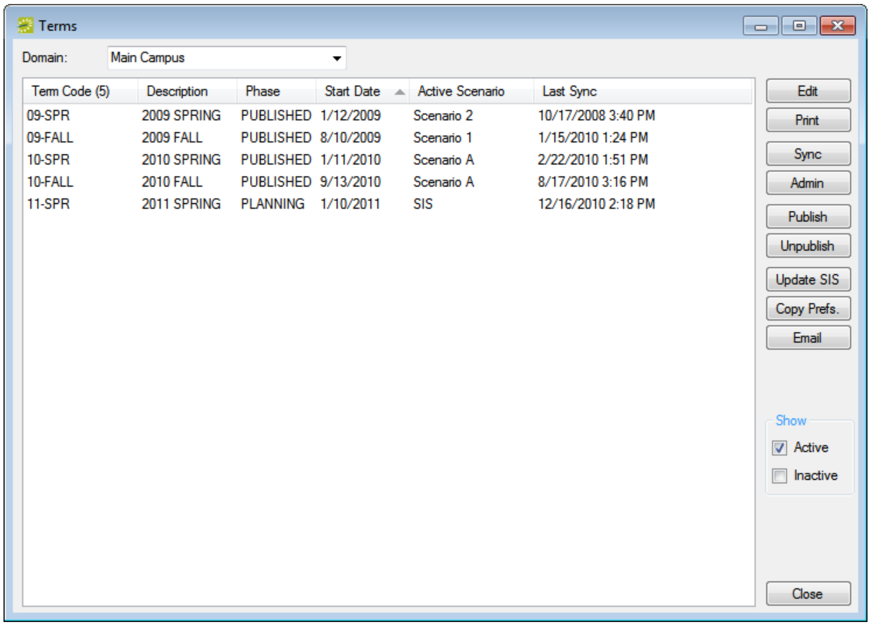
- Ignore Term Excluded Dates schedules bookings on all dates that adhere to the meeting pattern, regardless of the Excluded Dates that are marked on the term when the course dates are published.
- Publish In SIS Room (No Optimization) allows the course dates to avoid the optimization process. Bookings are published in the room that was carried over from the SIS.
- Require SIS Room flags buildings/rooms that come across from the SIS as Required. Courses with requirements still go through the optimization process.
- Requires Different Room (For Courses That Share Space) identifies a meeting pattern that should be in its own room despite the cross-listed or shared space status. You can set preferences for this room.
- Same Room (ALL Selected Course Dates are to be in the same Room) flags courses that should be in the same room but at different times when optimized.

To use the Manage Terms Copy Preferences tool

1. On the EMS Campus menu bar, click Academic Planning > Courses > Manage Terms.

   The Terms window opens.

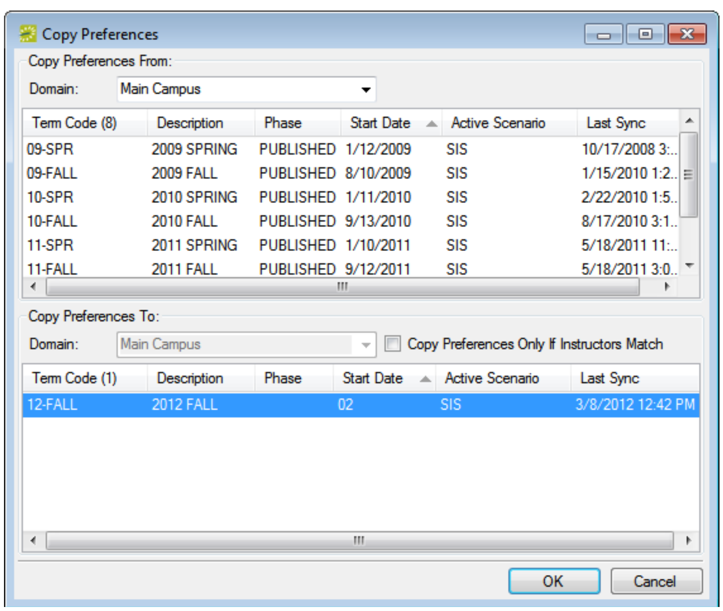
Figure 13-31: Terms window



2. Click Copy Prefs.

   The Copy Preferences dialog box opens.

Figure 13-32: Copy Preferences dialog box



3. In the Copy Preferences From pane, select the domain and term *from* which you want to copy room preferences and requirements.
4. In the Copy Preferences To pane, do the following:
   - Select the domain and term *to* which you want to copy your room preferences and requirements.

A term can be displayed in the To pane only if it is in Set Preferences mode.

   - Indicate if the preferences are to be copied only if the instructors match.
5. Click OK.

   A message opens, informing you that copying preferences will overwrite any existing preferences, and asking you if it is OK to continue.
6. Click Yes.

   The message closes. After the preferences are copied, you return to the Terms window.

Preferences are copied based on the Course Section (Math 101 01) and Course Type information (lecture or lab). If you have added new sections or changed course type designations on course dates within a section, then even after you complete this procedure, some courses still will not have preferences. Be sure to review your list of courses and set preferences where applicable.

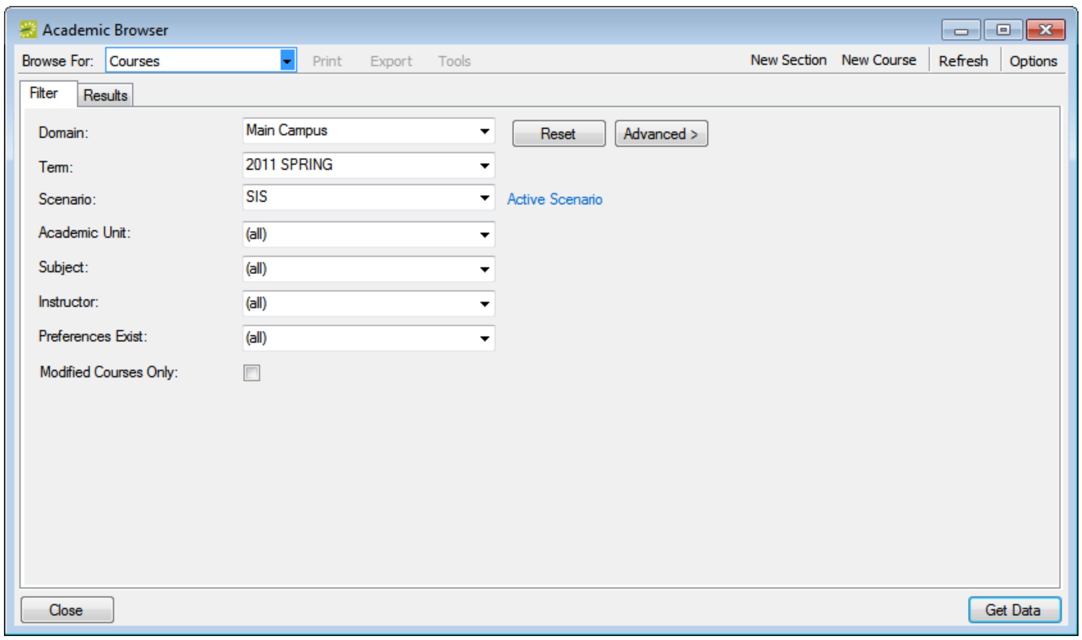
To use the Academic Browser Set Course Preferences tool

1. On the EMS Campus menu bar, click Academic Planning > Courses > Academic Browser.

   The Academic Browser opens.

2. If needed, open the Filter tab.

Figure 13-33: Academic Browser, Filter tab



3. On the Domain dropdown list, select the appropriate domain and on the Term dropdown list, select the appropriate term.

4. Set any other criteria (academic unit, subject and so on) as needed to provide assistance in locating the courses for which you want to set preferences and requirements, and then click Get Data.

   The courses that meet your search criteria are displayed on the Results tab.

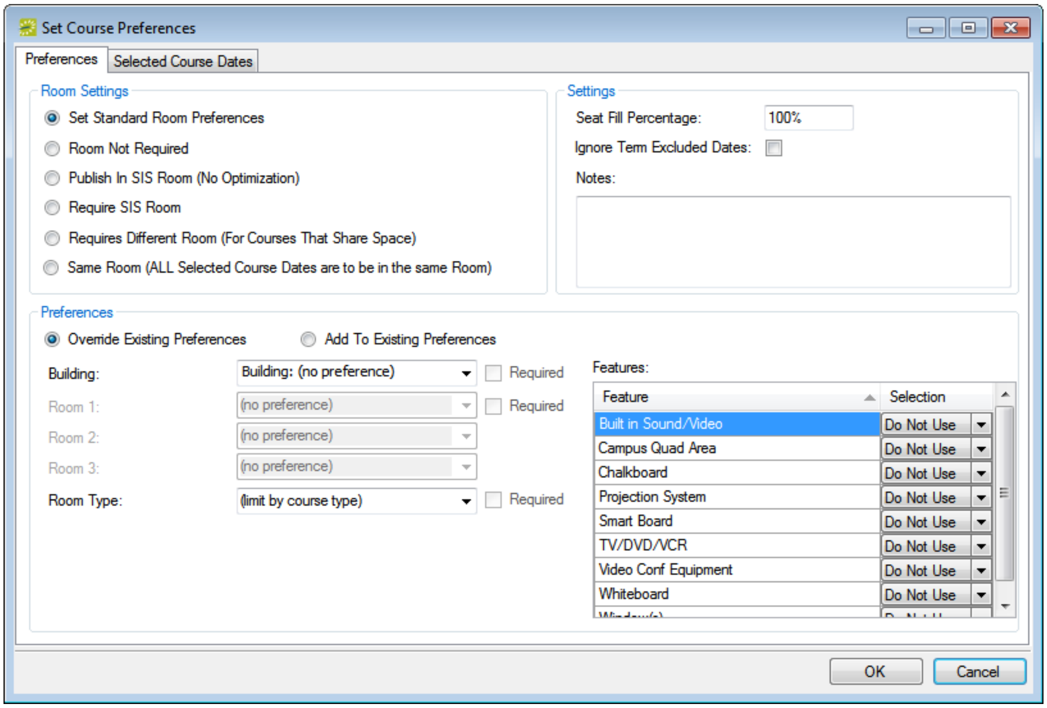
For detailed information about searching with the Academic Browser, see *"Searching with the Academic Browser" on page 579.*

5. CTRL-click to select the courses for which you are setting the room preferences and requirements.

6. On the Tools menu, click Set Course Preferences.

   The Set Course Preferences dialog box opens.

Figure 13-34: Set Course Preferences dialog box



7. Indicate whether the preferences that you set are to override any existing preferences, or whether they are to be added to existing preferences.

8. Set your preferences for the selected courses. See "Specifying Room Preferences/ Requirements" on page 491.

9. Optionally, do one or both of the following:

   - In the Notes field, enter any pertinent or supporting information that substantiates or explains your preferences.

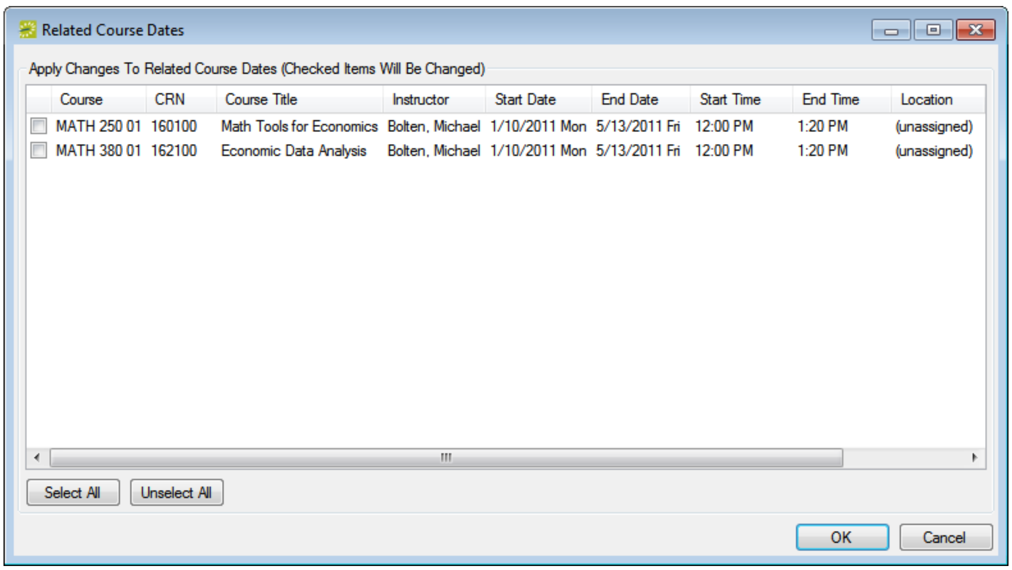
   - By default, the preferences/requirements that you specify are applied to all course dates for all selected courses. If the preferences/requirements are applicable for only specific course dates, open the Selected Course Dates tab, select the course dates for which these preferences/requirements are *not* applicable and then click Remove.

10. Click OK.

    Two results are possible:

    - If any of the selected courses are cross-listed and/or share space, and you did not select the corresponding cross-listed/shared space courses, then a Related Course Dates dialog box opens. This dialog box lists all the related courses that have not been selected. Go to Step 11.
    - If none of the selected courses are cross-listed and/or share space, then a message opens indicating whether the selected preferences will override any existing preferences, or be added to existing preferences and asking you if it is OK to continue. Go to Step 12.

Figure 13-35: Related Courses Dates



11. Optionally, select any or all of the related courses for which you want to set the same preferences/requirements, or do not select any of these related courses, and then click OK.

    A message opens indicating whether the selected preferences will override any existing preferences, or be added to existing preferences and asking you if it is OK to continue.

12. Click Yes.

    The message closes and another message opens indicating that the preferences were set successfully.

13. Click OK to close the second message and return to the Academic Browser.

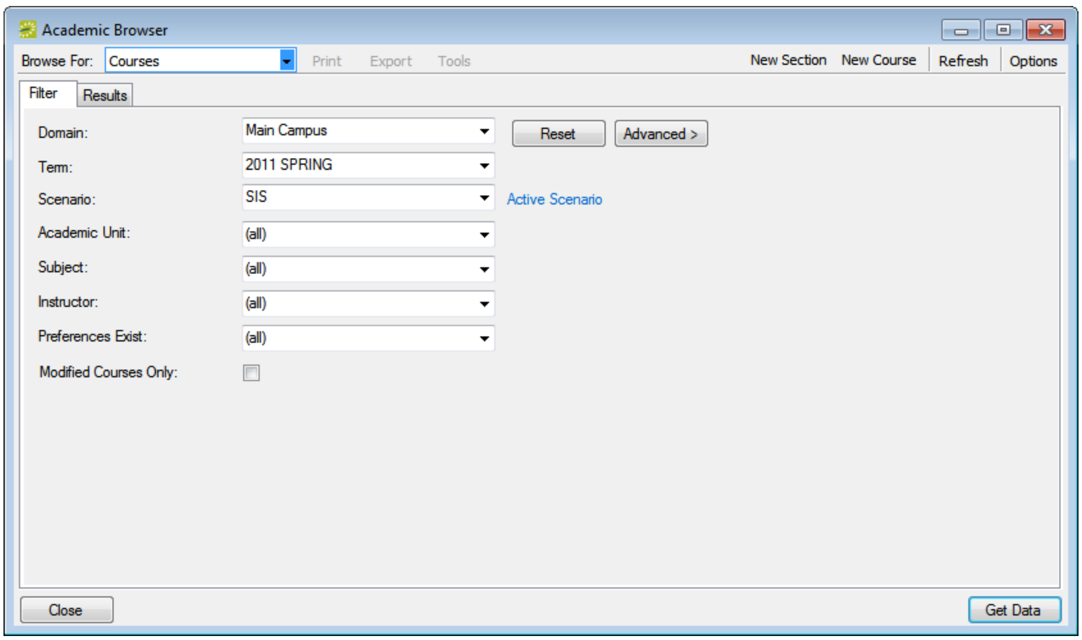
To use the Course Navigator to set preferences and requirements

1. On the EMS Campus menu bar, click Academic Planning > Courses > Academic Browser.

   The Academic Browser opens.

2. If needed, open the Filter tab.

Figure 13-36: Academic Browser, Filter tab



3. On the Domain dropdown list, select the appropriate domain and on the Term dropdown list, select the appropriate term.

4. Set any other criteria (academic unit, subject, and so on) as needed to provide assistance in locating the courses for which you want to set preferences and requirements, and then click Get Data.

   The courses that meet your search criteria are displayed on the Results tab.

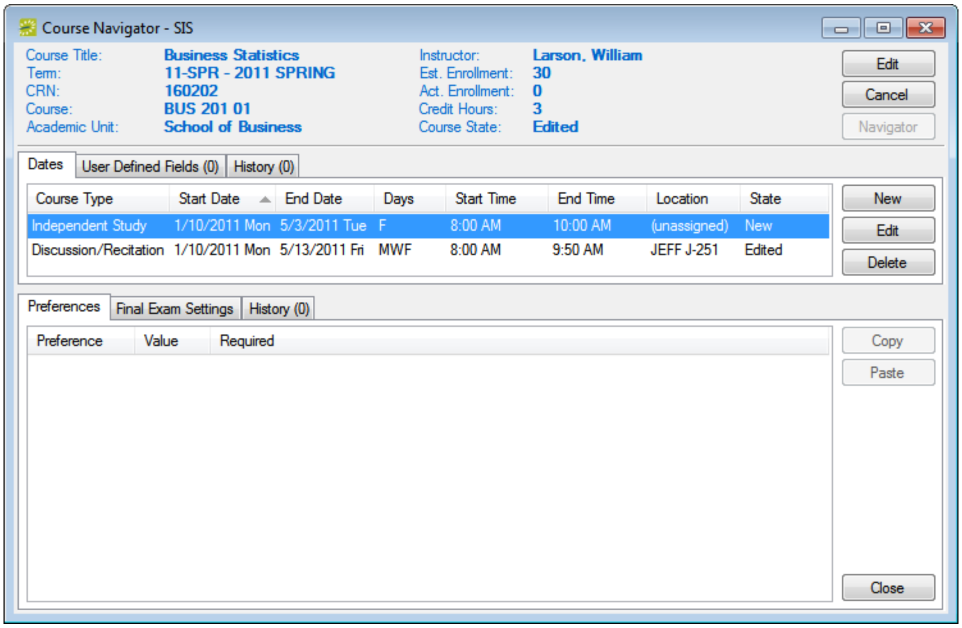
For detailed information about searching with the Academic Browser, see *“Searching with the Academic Browser” on page 579.*

5. In the search results, double-click the course for which you are setting the preferences/ requirements.

   The course opens in the Course Navigator. See Figure 13-3 on page 458.

For detailed information about working with the Course Navigator, see *“Using the Course Navigator” on page 594.*

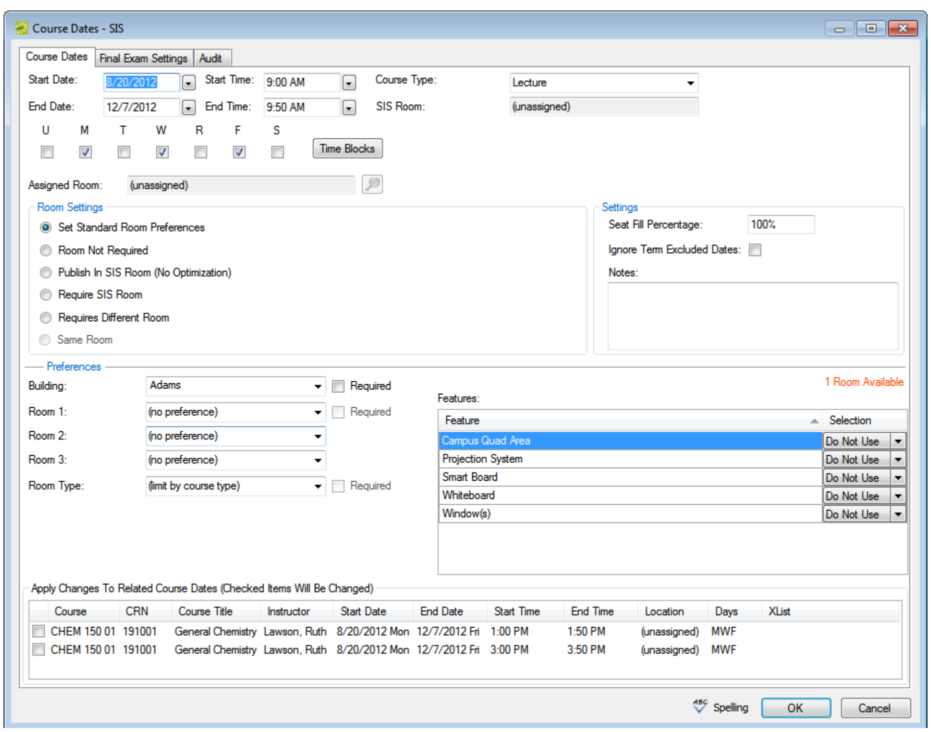
Figure 13-37: Course opened in the Course Navigator



6. In the middle pane of the Navigator, select the specific course date for which you are setting preferences/requirements, and then click Edit.

   The Course Dates dialog box opens.

Figure 13-38: Course Dates dialog box



7. Set the preferences/requirements for the course as needed, and then click OK. See “Specifying Room Preferences/Requirements” on page 491.

   The Course Dates dialog box closes and you return to the Course Navigator. The preferences/requirements that you set for the course date are displayed on the Preferences tab in the lower pane of the Navigator.

Reviewing and Verifying Room Preferences

After room preferences and requirements are set, you can review the individual course preferences, verify that the preferences are complete, and quantify these preferences. You can also run the Course Preferences report and the Course Preferences Summary report to assist in this task.

For detailed information about generating the Course Preferences and Course Preferences Summary reports and the information that is contained in each report, see "Generating Academic Reports" on page 601.

Prior to reviewing or reporting on preferences, you can make the term unavailable to the academic units. See "Enabling/Disabling a Term for Set Preferences Mode" on page 488.

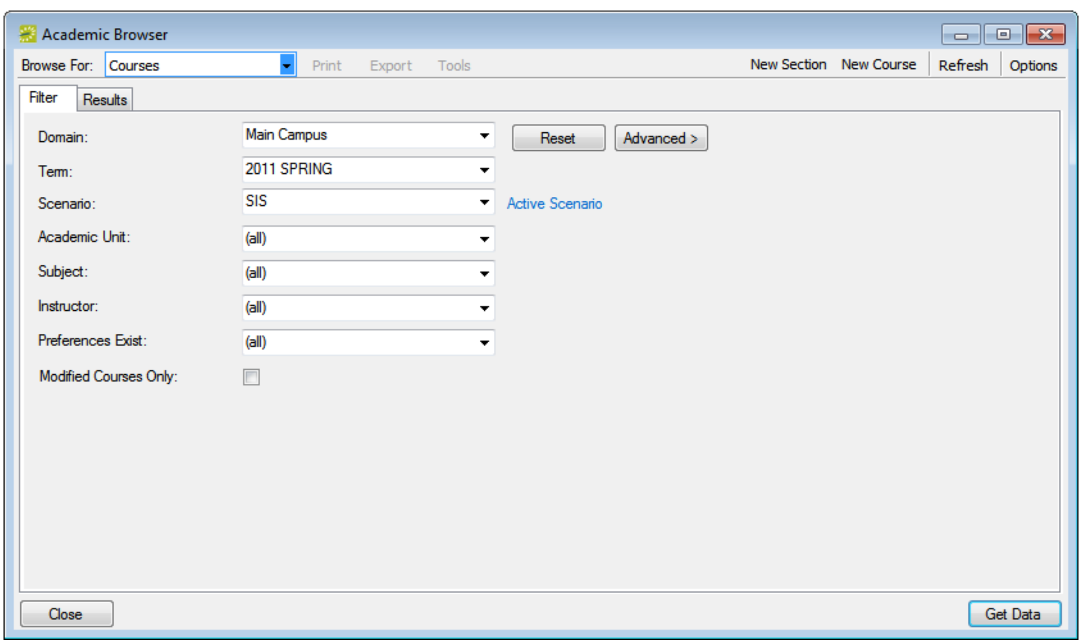
To review and verify room preferences

1. On the EMS Campus menu bar, click Academic Planning > Courses > Academic Browser.

   The Academic Browser opens.

2. If needed, open the Filter tab.

Figure 13-39: Academic Browser, Filter tab



3. On the Domain dropdown list, select the appropriate domain and on the Term dropdown list, select the appropriate term.

4. Set any other criteria (academic unit, subject, and so on) as needed to provide assistance in locating the courses for which you want to review preferences and requirements, and then click Get Data.

   The courses that meet your search criteria are displayed on the Results tab.

To identify preferences and requirements for a Basic search, you should set Preferences Exist to Yes. For an Advanced search, you should select the Preferences Exist field (a Course Dates level field), and set the Preferences Exist filter to Yes. For detailed information about searching with the Academic Browser, see *"Searching with the Academic Browser" on page 579.*

5. In the search results, double-click the course for which you are reviewing the preferences/requirements.

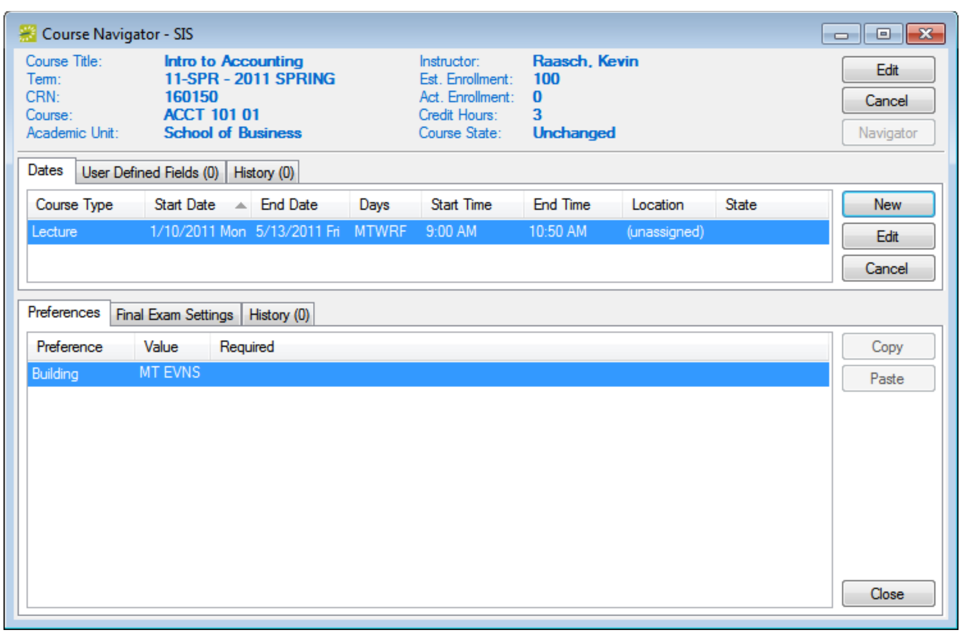
   The course opens in the Course Navigator.

6. In the middle pane of the Course Navigator, select the course date for which you are reviewing the preferences.

   The preferences for the selected course date are displayed in the bottom pane of the Course Navigator on the Preferences tab.

For detailed information about working with the Course Navigator, see *"Using the Course Navigator" on page 594.*

Figure 13-40: Course opened in the Course Navigator showing preferences



Assigning Room Preferences and Optimizing

Section Contents

Overview of Room Assignments and Optimization

After the Domain Scheduler reviews and verifies the room preferences and requirements, room assignments must take place. If the room assignment process has already occurred outside of EMS within the SIS, the Domain Scheduler could simply publish the course schedule in EMS without any further effort. In most situations, however, courses will need to be assigned a room through the optimization process before the term can be published. To optimize the room assignments, and then assign rooms, the Domain Scheduler carries out the following steps either separately or in any combination as necessary to best suit their working needs:

1. Pre-assignment—The Domain Scheduler manually assigns a selection of courses to rooms. Typically, the manual assignment takes place if these rooms are to be excluded in an optimization scenario after pre-assignment. For instance, if only a swimming course should be assigned to “Pool,” then the Domain Scheduler could manually pre-assign Swimming and then exclude the pool in the optimization scenario. See “About Creating Scenarios and Optimization” on page 506 and “Creating Scenarios” on page 513.
2. Optimization—The EMS system automatically assigns rooms to courses based on course preferences, requirements, and weighted criteria. See “About Creating Scenarios and Optimization” on page 506 and “Creating Scenarios” on page 513.
3. Locking In Assignments—After carrying out an optimization scenario, the Domain Scheduler locks in desired room assignments, and then re-optimizes the remaining portion of the optimization scenario. See “Assigning Rooms” on page 522.
4. Evaluating Optimization Scenarios—The Domain Scheduler can test an unlimited number of potential scenarios and compare results using various tools before choosing the final scenario for publishing. See “Evaluating Optimization Scenarios” on page 527.

The information in this section is presented as an ordered series of standalone procedures; however, the Domain Scheduler can carry out any of the procedures either separately or in any combination as necessary to best suit his/her working needs. This allows the Domain Scheduler to test a number of potential scenarios and compare placement results using various tools before choosing the final scenario for publishing.

About Creating Scenarios and Optimization

You create scenarios to test room assignments that have been given to courses for a term. In EMS, you can create two types of scenarios—a *pre-assignment* scenario and an *optimization* scenario. A pre-assignment scenario is a scenario in which a selection of courses are manually assigned to rooms, typically because the assigned rooms are to be excluded in an optimization scenario. In a pre-assignment scenario, the assignments are automatically considered “locked in.” An *optimization* scenario is a scenario in which EMS automatically assigns rooms to courses based on course preferences, requirements, and weighted criteria. The optimization process can support simultaneous optimization of all academic units, incremental optimization by academic unit, and/or a combination of pre-assignment and automated optimization.

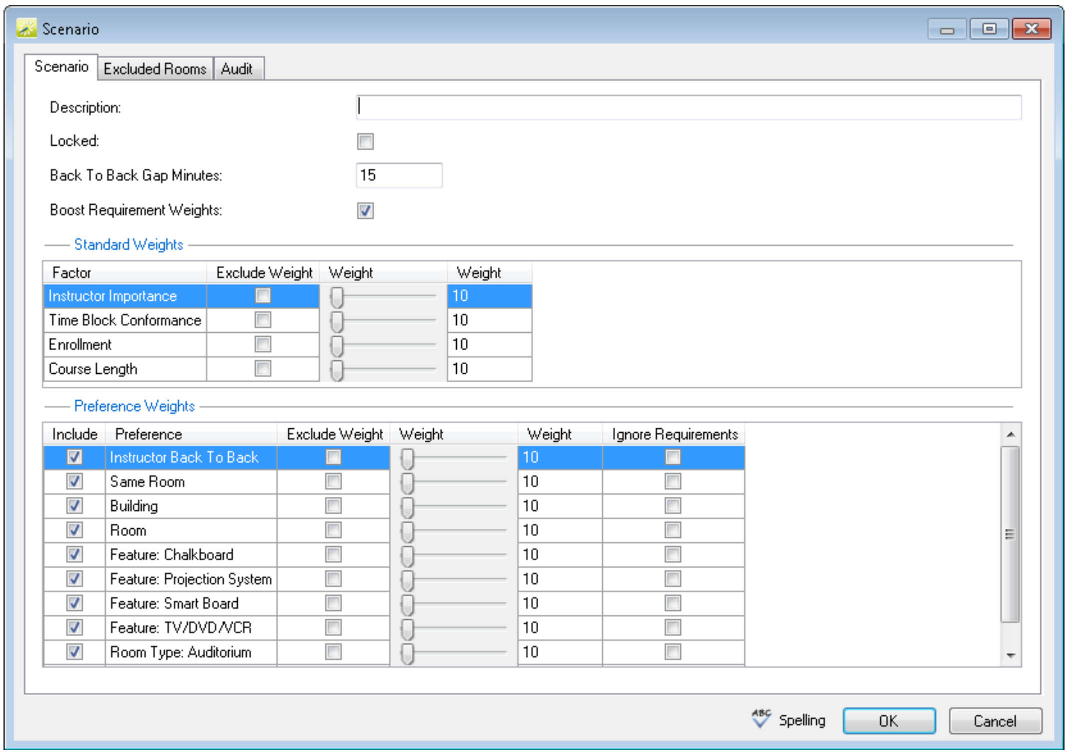
In the optimization process, a ranking is assigned to each course in a term. Rooms are assigned one course at a time based on the order of these rankings (from the most important ranking of one to the least important ranking of “n”). Throughout the optimization process, the Optimizer considers room capacity (the course’s adjusted enrollment must fit within a room’s capacity), looks for the best *seat fill* (a room with a capacity* that most closely accommodates the estimated enrollment), and the best room utilization (completely filling one room before moving on to another room with equal attributes) to achieve the best room optimization possible. You use the options that are available on the Scenario dialog box to create optimization scenarios.

***The room's capacity based on the setup type that has been defined for the Default Setup Type parameter in the Campus area.**

Scenario dialog box

The Scenario dialog box has three tabs—Scenario, Excluded Rooms, and Audit. You use the options on the Scenario tab and Excluded Rooms tab when you are creating, evaluating, and testing scenarios.

Figure 13-41: Scenario dialog box, Scenario tab



The following options are available on the Scenario tab of the Scenario dialog box for creating a scale of weighed criteria for a scenario:

Option	Description
Locked	Locks the room assignments for the selected Optimization scenario. You can clear this option to unlock the scenario and carry out optimization.
Back to Back Gap Minutes	Instructors are considered to be teaching Back to Back courses when their consecutive teaching assignments fall within the indicated time period. (The end time of one class and the start time of the next class fall within the indicated time period.) The default value is 15 minutes.
Boost Requirement Weights	Select this option to increase the weights of preferences that are marked as requirements to 150% of their assigned weights.

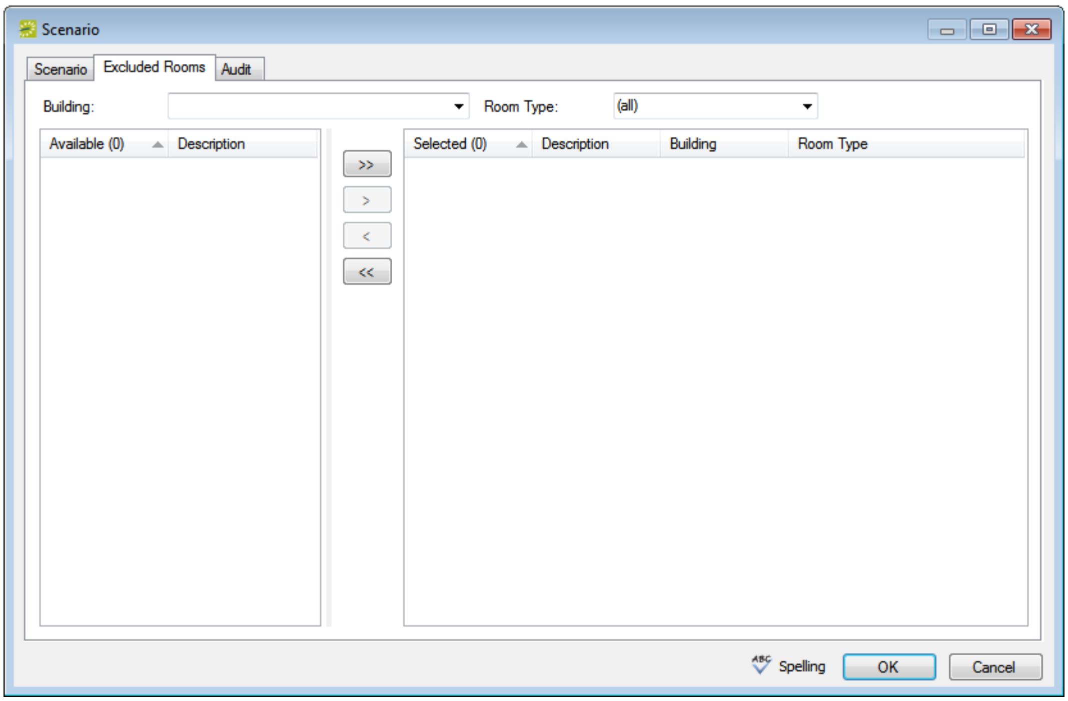
Option	Description

Standard Weights	All courses are assigned points in an optimization scenario based on factors and selected preferences. The sum total of these points determines the ranking for a course. Factors are *always* included in any optimization scenario; however, you can exclude the standard weight of a factor, which means that the factor does not contribute to the total number of points for a room assignment ranking for a course but it is still considered when searching for a room.
	• Instructor Importance—Instructor Importance is assigned in the Academic Planning (Configuration > Instructors) area of EMS Campus. The indicated weight is given to any course that is taught by an instructor who is marked as “High Importance.”
	• Enrollment—Enrollment uses a combination of the assigned weight and the following EMS Campus system parameters to determine the courses that are assigned rooms first.
	  • Small Class Size (if less than xx students) - Determines what constitutes a “small” class.
	  • Small Class Size Weight Adjustment - Subtracts this number from the Enrollment weighting that is set in the optimization scenario.
	  • Large Class Size (if more than xx students) - Determines what constitutes a “large” class.
	  • Large Class Size Weight Adjustment - Adds this number to the Enrollment weighting that is set in the optimization scenario.
	• Time Block Conformance—Ranks those courses that conform to the time block template for the term higher than those courses that do not.
	• Course Length—Course Length factors in the number of meeting occurrences for a class. For example, a class that meets five times per week might be given room assignment priority over a class that only meets twice per week.

Preference Weights	Preferences vary according to configuration but they include such things as building or room preferences, room type preferences, or feature preferences. • By default, all preferences are automatically included in an optimization scenario. To exclude a preference completely from an optimization scenario, clear the Include option for it. • You can also simply exclude the weight of a preference, which means that although the preference is not excluded from the optimization logic, it does not contribute to the total number of points for a room assignment ranking for a course. • If a preference has been marked as a requirement during the Set Preferences mode, you can select Ignore Requirements for it to downgrade it to a preference only for the optimization scenario.

When you are creating a scenario, all the rooms in your domain are eligible to hold a course. If there are rooms offline for the term that you are scheduling, or there are rooms that should not be considered for the scenario, you can exclude them from the scenario on the Excluded Rooms tab of the Scenario dialog box.

Figure 13-42: Scenario dialog box, Excluded Rooms tab



Optimization logic

After you have set the weights for the Optimization scenario factors and preferences as well as all other needed options, you can run the Optimizer. The Optimizer works as follows:

1. Courses are ranked.
   - If a course is identified as Publish in SIS Room (which means use the room to which the course is already assigned in the SIS), then the course receives a “0” ranking.
   - If a course is identified as Locked In, either from being locked in in a previous scenario or from being pre-assigned in the current scenario, then the course receives a “0” ranking.
   - All other courses are ranked according to the sum of the weights that are assigned to their factors and preferences on the Scenario tab. The larger the sum of the weights, the higher the score that is assigned to a course and therefore, the more important the room ranking, with the most important room ranking having a rank = 1.
     - If Boost Requirements Weight is selected for a course, then 100% of the indicated weight is assigned to each preference and 150% of the indicated

weight is assigned to each preference that is marked as Required. If Boost Requirements Weight is *not* selected for a course, then 100% of the indicated weight is assigned to both the preferences and the preferences that are marked as Required.

- If a course is identified as "Same Room," then the partners of the course are elevated sequentially based on the ranking of the partner course with the most important room assignment ranking. For example, with three total courses and the most important course in this set having a rank = 3, then the other two courses are set to rank = 4 and rank = 5.
- If a course is cross-listed, then the parent course is the course to which the most important (lowest) room rank is assigned and the children courses adopt the ranking of the parent course.

Because the child course always follows the parent course, children course preferences are not factored when rooms are being assigned to courses. Only the parent course is relevant in assigning room rankings.

2. Rooms are assigned to courses one course at a time based on the order of the room assignment rankings (from the most important ranking of rank = 1 to the least important ranking of "n").
   - If the course is a single room without an Instructor Back to Back or Same Room designation, then:
     - The list of rooms that meet the course's preferences and requirements criteria are identified. Of the rooms that are identified, the subset of rooms that most closely meet the course's capacity are identified. The Optimizer then looks to maximize seat fill. If multiple rooms all have the same capacity and all the rooms have the same preferences and/or requirements, the Optimizer selects the room that has already received course assignments, which increases the utilization of an already-scheduled space before scheduling another.
     - If no room meets all the requirements for a course, and no requirement has been marked as Ignore, then the course is left unassigned.
     - If no room meets all the preferences for a course, then the course preferences are removed one at a time from least important to most important based on the assigned weight until a room can be assigned to the course.
     - If all preferences are removed and no room can be assigned to the course, then the course is left unassigned and it is displayed on the Exceptions list on the Resolve Room Assignments window.

- If the course has a Same Room designation, then each course is reviewed first to determine if it has any Same Room partners before any attempt is made to assign a room to the course.
    - If all the courses in the set can be addressed with a single room that meets all the preferences and requirements for the set, then the room is assigned to the courses in the set.
    - If all the courses in the set cannot be addressed with a single room that meets all the preferences and requirements for the set, then the all the courses are left unassigned and they are displayed on the Exceptions list on the Resolve Room Assignments window.
- If the course has an Instructor Back to Back designation, then each course is reviewed first to determine if it has any Back to Back partners before any attempt is made to assign a room to the course. The partner courses are provisionally elevated to the rank of the most importantly ranked course.
    - If all the courses in the set can be addressed with a single room that meets all the preferences and requirements for the set, then the room is assigned to the courses in the set.
    - If all the courses in the set cannot be addressed with a single room that meets all the preferences and requirements for the set, then the course with the most restrictive requirements is removed from the set and an attempt is made to assign the same room to the remaining courses. (The course that is removed receives a Back to Back exclusion note and its ranking is returned to its original ranking and a room assignment is made based on this original ranking.) This process of removing the course with the most restrictive requirements and then attempting to assign the same room to the remaining courses is repeated until a single room is found for the remaining courses or until the course that is being addressed is alone. If the course that is being addressed becomes alone, then preferences are removed one at a time, beginning with the least weighted preference, until a room can be assigned to the course.

The following examples demonstrate how the Optimizer would ultimately assign rooms to courses based on this logic.

Class Size and Instructor Importance Examples - With all other weightings set to zero, consider the following configuration for these four settings:

- Weight assigned to Enrollment in scenario = 500
- Small Class Size (if less than xx students) = 10
- Large Class Size (if more than xx students) = 750
- Large Class Size Weight Adjustment = +100
- Instructor Importance = 400

The figure below summarizes how these three courses would be scored and ranked for room assignment:

Course	Instructor Importance	Instructor Importance Score	Estimated Enrollment	Class Size	Enrollment Score	Class Adjustment Size	Final Score	Room Assignment Rank
A	Yes	400	100	Large	500	+100	1000	1
B	No	0	50	Medium	500	+0	500	3
C	Yes	400	5	Small	500	-100	800	2

Back to Back Example - Four courses have been identified as Back to Back for a scenario based on the Back to Back default value of 15 minutes.

- The four courses receive an initial ranking of 2, 50, 75, and 100.
- When it is time for the course with rank = 2 to have a room assigned, the other three courses are elevated provisionally to the same rank and a room search is carried out for a room that can be assigned to all four courses.
    - No single room can be assigned to all four courses. The course with rank = 100 has the most restrictive requirements. It is removed from the set, returned to its original rank (rank = 100) and receives a Back to Back Exclusion note.
- The courses with ranks of 2, 50, and 75 are re-validated as fitting the 15 minute Back to Back criteria, and the room search is repeated for these courses.
    - No single room can be assigned to all three courses. The course with rank = 50 has the most restrictive requirements. It is removed from the set, returned to its original rank (rank = 50) and receives a Back to Back Exclusion note.
- The courses with rank = 2 and rank = 75 are re-validated as fitting the 15 minute Back to Back criteria, and the room search is repeated for these courses.
    - A single room can be assigned to both these courses. The room rankings are reset to rank = 2 and rank = 3.
- The assignment of rooms continues for courses with ranks 3 through 49.
- When it is time to assign a room to the course with rank = 50, is it re-validated as fitting the 15 minute Back to Back criteria with the course with rank = 100. The course with rank = 100 is elevated provisionally to the same rank as the course with rank = 50. A room search is carried out for a single room that can be assigned to both courses.
    - A single room cannot be assigned to both courses. The course with rank = 100 is removed from the set, returned to its original rank (rank = 100) and receives a Back to Back Exclusion note.
    - If needed, preferences are removed one at a time, beginning with the least weighted preference, until a room can be assigned to the course with rank = 50.
- The assignment of rooms continues for courses, up and to including the course with rank = 100.

Creating Scenarios

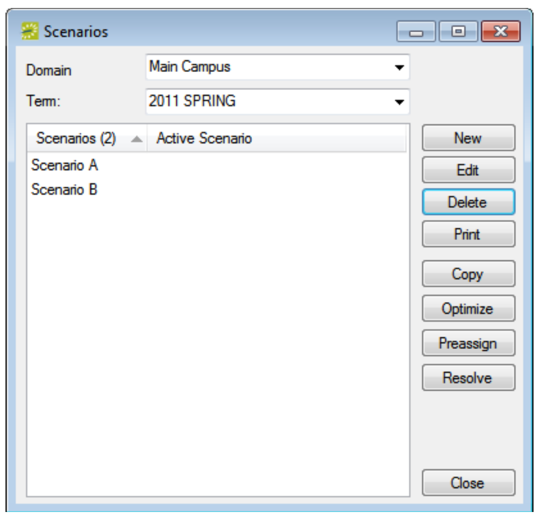
Although the process for your organization might vary, a typical approach for using scenarios to optimize room assignments is to first create a pre-assignment scenario to partially complete the assignment of rooms to courses for a term. You would then copy this pre-assignment scenario and edit it as needed to make an optimization scenario, and then run this optimization scenario to continue with the assignment of rooms to courses. You can create as many optimization scenarios as needed, either by copying an existing scenario or creating an entirely new scenario.

To create a pre-assignment scenario

1. On the EMS Campus menu bar, click Academic Planning > Courses > Optimization Scenarios.

   The Scenarios window opens. This window lists all the scenarios (pre-assignment and optimization) that are currently configured in your EMS database.

Figure 13-43: Scenarios window



2. On the Domain dropdown list, select the domain for which you are creating the scenario, and on the Term dropdown list, select the term.
3. Click New.

   The Scenario dialog box opens. The Scenario tab is the active tab.

To review the different features on the Scenario dialog box, see *"Scenario dialog box" on page 507.*

4. In the Description field, enter a name or description for the scenario, for example, Pre-assignment.

The description can be a maximum of 30 characters, including spaces.

Because all assignments in a pre-assignment scenario are manual, you do not need to set any weighted criteria or exclude any rooms.

5. Click OK.

   The Scenario dialog box closes. You return to the Scenarios window with the newly created scenario automatically selected.

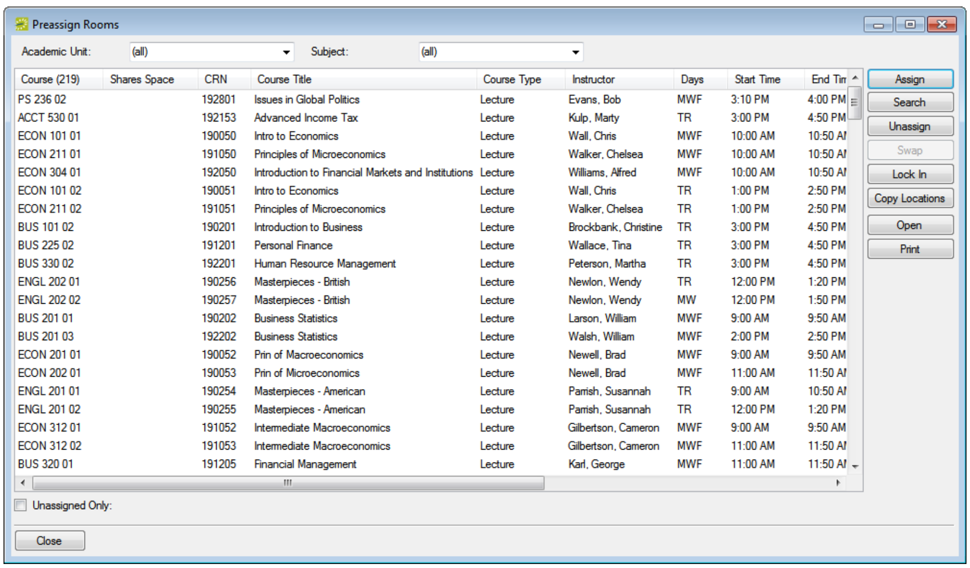
6. Click Preassign.

   A message opens informing you that preassigning will set this term to Read Only and asking you if it is OK to continue.

7. Click Yes.

   The message closes and an Initializing Scenario progress dialog box opens. After the scenario is initialized, the progress dialog box closes, and the Preassign Rooms window opens. This window lists all the courses for the selected term and domain. Any courses that were previously pre-assigned are listed as Locked In.

Figure 13-44: Preassign Rooms window



8. Optionally, do one or both of the following; otherwise, go to Step 9.

   - To view a course in the Course Navigator, double-click the course.

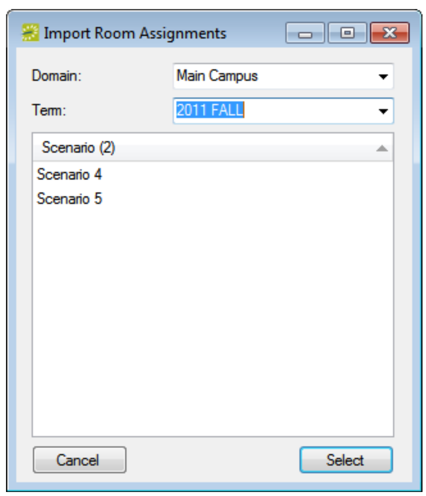
For detailed information about working with the Course Navigator, see "Using the Course Navigator" on page 594.

   - To filter this list, do one or more of the following:
     - On the Academic Unit dropdown list, select an academic unit.
     - On the Subject Dropdown list, select a subject.
     - At the bottom of the window, select Unassigned Only.
     - Click on a column heading to sort by the heading.

9. If you do *not* want to copy pre-assignments that you have carried out in a previous scenario, continue to "Assigning Rooms" on page 522; otherwise, do the following:

   - Click Copy Locations to open the Import Room Assignments dialog box.

Figure 13-45: Import Room Assignments dialog box



   - Select the appropriate Domain and Term from which you want to copy the pre-assignments.
   - Select the appropriate scenario to copy, and then click Select.

   Where possible, the locations are copied for the courses that are displayed in the Preassign Rooms window. If a location was successfully copied for a course, then (unassigned) is no longer displayed in the Locations column. Instead, the copied room assignment is displayed. If a location could not be copied for a course, then (unassigned) is still displayed in the Locations column.

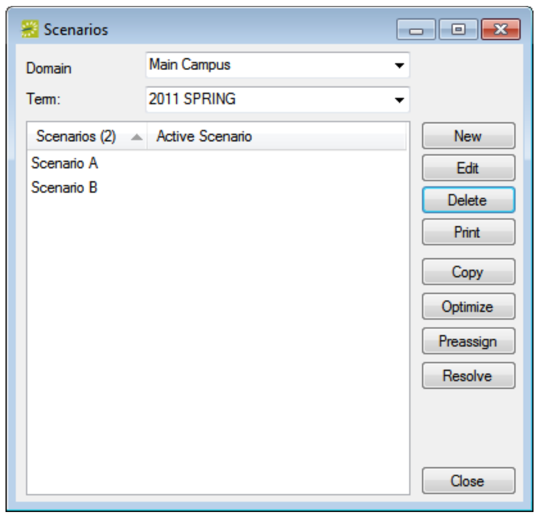
10. Continue to "Assigning Rooms" on page 522.

To create an optimization scenario

1. On the EMS Campus menu bar, click Academic Planning > Courses > Optimization Scenarios.

   The Scenarios window opens. This window lists all the scenarios (pre-assignment and optimization) that are currently configured in your EMS database.

Figure 13-46: Scenarios window



2. On the Domain dropdown list, select the domain for which you are creating the scenario, and on the Term dropdown list, select the term.
3. Do one of the following:
   - To create a new optimization scenario, click New.
   - To create an optimization scenario by copying an existing scenario, select the scenario that you want to copy, and then click Copy

   The Scenario dialog box opens. The Scenario tab is the active tab.

To review the different features on the Scenario dialog box, see *"Scenario dialog box" on page 507.*

4. In the Description field, enter a name or description for the scenario, for example, Scenario A.

The description can be a maximum of 30 characters, including spaces.

5. Do one or more of the following to set the options and weighted criteria for the optimization scenario:

   - Modify the Back to Back Gap Minutes value. (The allowed value is 0-60.)
   - Select the Boost Requirements Weight to increase the weights of preferences that are marked as requirements to 150% of their assigned preference weights.
   - Use the Weight slider bar or enter a number in the Weight field to modify the weight as needed for a factor. If you do not want the factor to contribute to room assignment ranking for a course, then select Exclude Weight for the factor. (The factor is still considered when searching for a room.)

Weights are arbitrary numbers that simply indicate the relative importance of one criterion to another. The weights do not have to add up to a particular "whole," for example, 100.

   - By default, all preferences are included in an optimization scenario. For the preferences that you are including, use the Weight slider bar to specify a weight for each preference, or enter a number in the Weight field. If you do not want a preference to contribute to room assignment ranking for a course, select Exclude Weight for the preference. (The preference is still considered when searching for a room.)

Only the features that were selected during Set Preferences mode are displayed—this is not an exhaustive list of all your features.

   - Some preferences might have been marked as Required by some academic units during the Set Preferences mode. Select Ignore Requirements to indicate that a requirement should be ignored and treated only as a preference.

6. Open the Excluded Rooms tab, and do the following to specify the rooms that *should not be assigned* to a course in this scenario (for example, rooms that have previously been assigned using a pre-assignment scenario):

   - On the Building dropdown list, select (all) buildings, or select a specific building.
   - On the Room Type dropdown list, leave the default value of (all), or select a specific room type.
   - In the Available list, select the room, or CTRL-click to select multiple rooms, and then click the Move (>) button to move the rooms to the Selected list.

If a room assignment is already "locked in" for a course, then the room assignment is maintained for the course, even if the room is excluded from the scenario.

7. Repeat Step 6 as needed until you have selected all the rooms in specific buildings that should be excluded

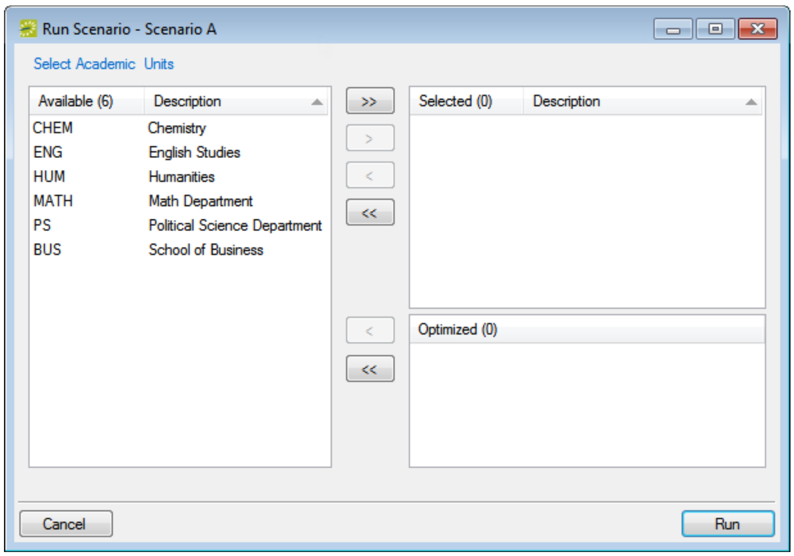
8. Click OK.

   The Scenario dialog box closes. You return to the Scenarios window with the newly created scenario automatically selected.

9. Click Optimize.

   The Run Scenario dialog box opens. This dialog box lists all the academic units that have courses for the selected term and domain.

Figure 13-47: Run Scenario dialog box



10. In the Available list, select the academic unit that you want to run in the optimization scenario, or CTRL-click to select multiple units, and then click the Move (>) button to move the units to the Selected List.

11. Click Run.

    Two results are possible:

    - If the term contains edited courses, then a message that states the following opens: WARNING: You have made changes to 'n' Course(s) in “Define & Edit Mode'” that will be overwritten. Is it OK to continue. You must click Yes to continue and then a message opens informing you that optimizing will set this term to Read Only for the selected academic units and asking you if it is OK to continue.

    - If the term does not contain edited courses, then a message opens informing you that optimizing will set this term to Read Only for the selected academic units and asking you if it is OK to continue.

12. Click Yes.

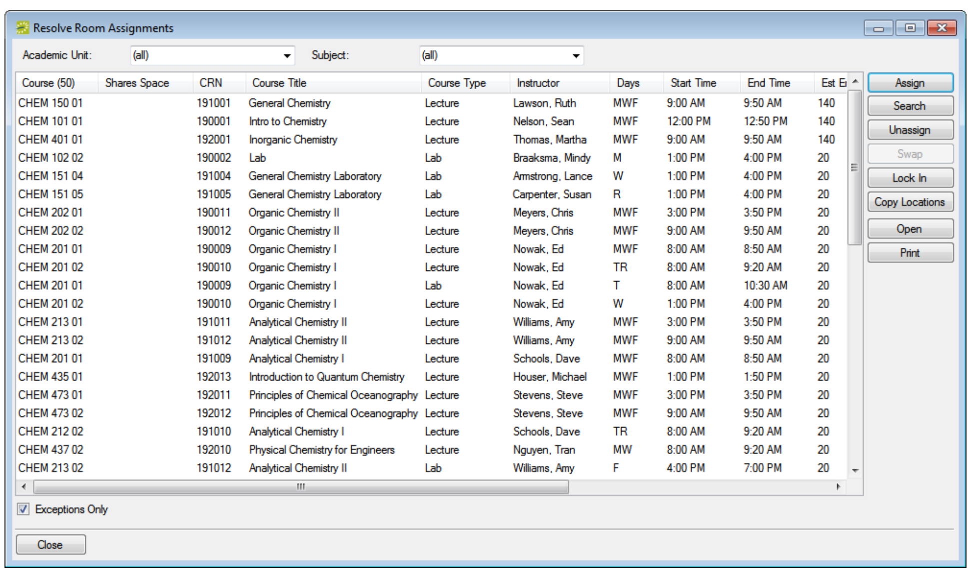
    The message closes and an Initializing Scenario progress dialog box opens. After the scenario is initialized and the term is synchronized, the progress dialog box closes. An Optimization Results dialog box opens on top of the Resolve Room Assignments window. This dialog box indicates that the optimization was complete and it also indicates the number of courses assigned, the percent of total courses assigned, and the number of exceptions (the number of courses that could not be assigned).

At any time, if you need to review this information, click Print > Scenario Results.

13. Click OK.

    The Optimization Results dialog box closes and the Resolve Room Assignments window is now the active window. By default, this window lists only those courses for which rooms could *not* be assigned.

Figure 13-48: Resolve Room Assignments window



14. If you are satisfied with the overall results of the Optimization scenario, then you can continue to resolve any remaining room assignments. (See “To resolve room assignments” on page 520.) Otherwise, you can test other potential scenarios and compare results using various tools before you choose your final scenario for publishing. See “Evaluating Optimization Scenarios” on page 527.

To resolve room assignments

After an Optimization scenario, courses can remain unassigned for the following reasons:

- Conflicts with another course: A course or courses that were ranked higher in preference criteria was assigned the room that this course required.
- No space can hold course: The course had requirements that were so specific, no room was available that met the criteria either because the room does not exist, or it was excluded from the scenario.

1. Optionally, you can do one or more of the following:
    - To view all the courses that are in conflict with a course, select the course, and then click Search to open the Search tool and carry out a filtered search of rooms that are available for the course's meeting pattern. Rooms that meet all the search criteria and that are available are displayed on an Available tab. The rooms that are already in use during the selected course’s meeting time are displayed on a Conflicts tab.
    - To view a course in the Course Navigator, double-click the course.

For detailed information about working with the Course Navigator, see *“Using the Course Navigator” on page 594.*

    - Clear Exceptions Only to view a list of *all* courses (assigned and unassigned) for the selected term and domain.
    - To view the final room assignment ranking, scroll to the Ranking column.

Remember, any room that was pre-assigned or was Publish to SIS has rank = 0.

    - To filter the course list, do one or more of the following:
        - On the Academic Unit dropdown list, select an academic unit.
        - On the Subject Dropdown list, select a subject.
        - Click on a column heading to sort by the heading.
    - To view notes about the course, scroll to the Notes field. This field displays the following information, if applicable, for a course:
        - Back to Back with Grouping ID, indicating how courses were paired as a set.
        - Back to Back Exclusion to indicate a course that was initially identified as Back to Back, but returned to its original ranking because a single room could not be assigned to the full set.
        - Same Room with Grouping ID, indicating how courses were paired as a set.
        - Publish in SIS Room.

- Locked In status for the room.

2. Continue to “Assigning Rooms” on page 522.

If you are carrying out incremental optimization by academic unit, you must repeat this procedure for every academic unit that is to be optimized.

Assigning Rooms

After you have completed pre-assignment of rooms and/or room optimization, four options are available to resolve room assignments for rooms that are not flagged as Publish in SIS or locked in to an assignment:

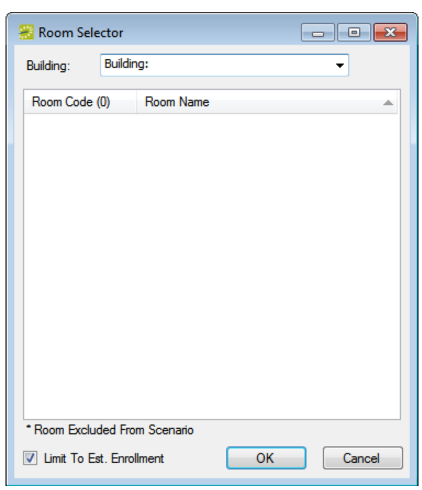
- Assign. The Assign option lists all rooms regardless of availability or preferences. It is intended to provide a means for you to quickly assign a room without going through the search process.
- Search. The Search option initially lists any preferences and requirements that were specified during the Set Preferences mode. You can use these preferences as a basis for a room search or you can specify and/or clear other criteria to complete the room search.
- Unassign. The Unassign option removes the Assigned status for a course. You can then use the Assign option or the Search option to assign a different room to the course. The Unassign option is available after you assign a room to a course, or search for a room, and then assign it to a course.
- Swap. The Swap option allows you to swap the room assignments of two courses. The swap option is only available after selecting two courses that have identical meeting patterns *and* that have been assigned to rooms.

To assign rooms to courses

1. Select the course, or CTRL-click to select the multiple courses to which a room is to be assigned.
2. On the Preassign Rooms window, or the Resolve Room Assignments window, click Assign.

   The Room Selector dialog box opens.

Figure 13-49: Room Selector dialog box



3. On the Building dropdown list, select (all) buildings or select a specific building that contains the rooms that you are considering for assignment.

   The rooms are displayed in the dialog box. By default, only those rooms that can meet the enrollment expectations, regardless of availability are displayed. Rooms that are excluded from the scenario are marked with an asterisk (*), but, if necessary, you can select an excluded room.

4. Optionally, to display all rooms in the Room Selector dialog box, clear the Limit to Est. Enrollment option.

5. Select a room, and then click OK.

   If the room could not be assigned to one or more courses because of a conflict, then a message opens indicating this. Click OK to close the message, and repeat this step until you successfully assign a room to the courses.

6. Repeat Step 2 through Step 5 until you have successfully assigned rooms to all courses for the term. After you have assigned a room to a course, at any time, you can do any of the following:

   - To change a room assignment for a course, select a course for which a room has been assigned, and then click Unassign. You can then repeat Step 2 through Step 5 to assign a room to the course.
   - Courses that were pre-assigned are listed as Locked In. To re-optimize any portion of the course assignments, select one or more assigned courses (CTRL-click to select multiple courses), and then click Lock In to lock in these additional courses, and then rerun your optimization scenario.
   - To swap the room assignments of two courses, CTRL-click to select two courses with identical meeting patterns, and then click Swap.

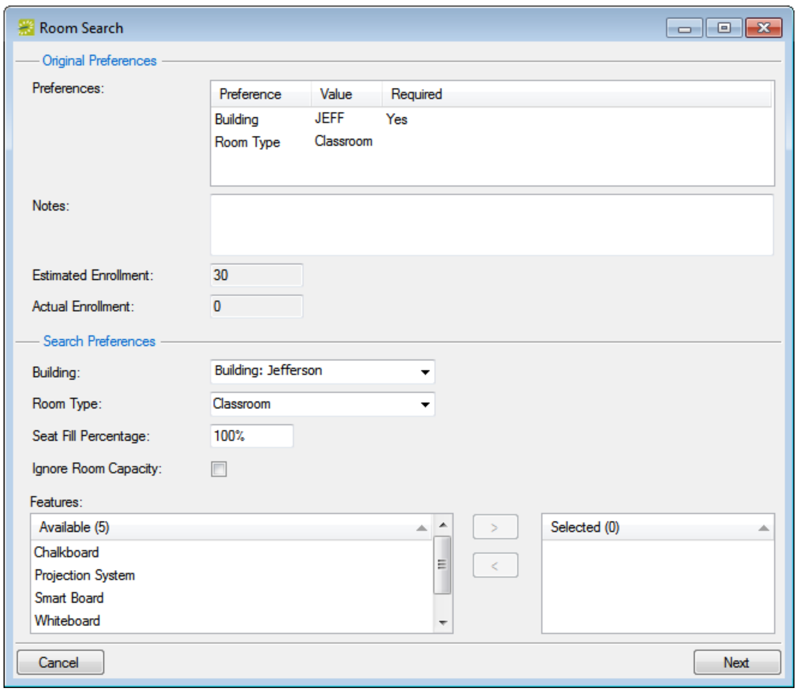
You can open the Resolve Room Assignments window at any time by clicking Resolve on the Scenarios window. The system does not require all courses to be assigned to rooms. Those courses that are left unassigned are placed in a special TBD room when publishing and can be assigned post-publish.

To search for rooms to assign to a course

1. Select the course to which a room is to be assigned.
2. On the Preassign Rooms window, or the Resolve Room Assignments window, click Search.

   The Room Search dialog box opens. The preferences or requirements that the academic unit specified for the selected course during the Set Preferences mode are displayed at the top of the dialog box. By default, these preferences are included in the search criteria.

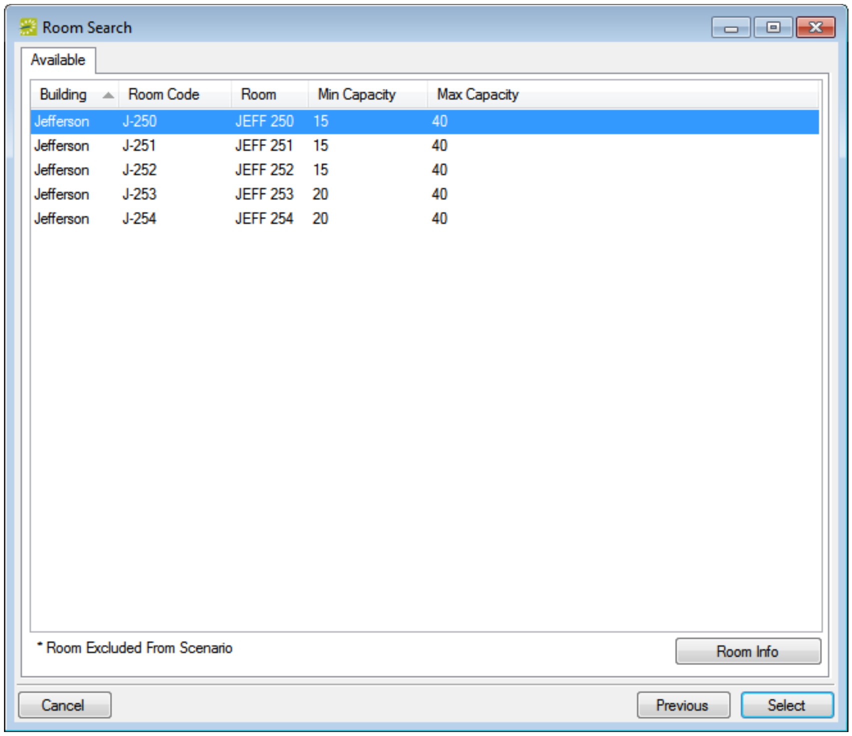
Figure 13-50: Room Search dialog box



3. In the Search Preferences (lower) pane of the dialog box, edit the search criteria as needed, and then click Next.

   The Room Search dialog box is updated with a list of rooms that meet your search criteria. Rooms that have been excluded from the scenario are marked with an asterisk (*). See Figure 13-51 on page 525.

Figure 13-51: Room Search dialog box



4. Optionally, to view information about a room, select the room, and then click Room Info; otherwise, go to Step 5.

   The Room Info dialog box opens. The dialog box displays information about the room, including the room's properties, the setup type, the room's features, and so on. After you are done viewing the room's information, click Close to close the Room Info dialog box.

5. On the Room Search dialog box, select the room that is to be assigned to the course, and then click Select.

   The room is assigned to the course. You remain on the Preassignment window or the Resolve Assignments window. If the room is assigned from the Preassigned window, then it is also marked as Locked In.

If there are rooms that meet your search criteria, but they have already been scheduled by other courses, then a Conflicts tab opens. Open the tab to review a list of these rooms.

6. Repeat this procedure as needed to assign rooms to courses. After you have assigned a room to a course, at any time, you can do one or both of the following:
    - If you want to change a room assignment for a course, select a course for which a room has been assigned, and then click Unassign. You can then repeat Step 2 through Step 5 to assign a room to the course.
    - Courses that were pre-assigned are listed as Locked In. If you would like to re-optimize any portion of the course assignments, select one or more assigned courses (CTRL-click to select multiple courses), and then click Lock In to lock in these additional courses, and then rerun your optimization scenario.
    - To swap the room assignments of two courses, CTRL-click to select two courses with identical meeting patterns, and then click Swap.

You can open the Resolve Room Assignments window at any time by clicking Resolve on the Scenarios window. The system does not require all courses to be assigned to rooms. Those courses that are left unassigned are placed in a special TBD room when publishing and can be assigned post-publish.

Evaluating Optimization Scenarios

You can test an unlimited number of potential scenarios and compare results using various tools before you choose your final scenario for publishing. Both the Academic Browser and the Academic Book contain a Scenario dropdown list from which a specific scenario can be selected for viewing and evaluation. (See "Searching with the Academic Browser" on page 579 and "Using the Academic Book" on page 586.) The Scenarios window contains a Print option that provides access to the following reports that can be used to for evaluating scenarios—Scenario Results, Scenario Exceptions, Unmet Preferences, and Preferences Summary. Additional reports within the Academic Planning > Reports area are also available, including Classroom Optimization, Hourly Classroom Utilization, and Course Preferences. (See "Generating Academic Reports" on page 601.)

Publishing a Term

Section Contents

Overview of Publishing an Academic Term

After the Domain Scheduler has finalized the assignment of courses to rooms, either with the help of the EMS room optimization process or by using the scenario that was pulled from the SIS, the next step is to publish the course schedule for the term in EMS Campus. Publishing the course schedule causes the system to book the space in EMS, creating reservations and bookings. If the EMS Campus system parameter Manually update SIS is set to “No,” then the publishing process also updates course location information directly in the SIS; otherwise, the Domain Scheduler must manually update the SIS. Publishing an academic term consists of the following steps:

1. The Domain Scheduler publishes the term, which includes specifying statuses for courses in conflict and cross-listed courses. See “Publishing a Term” on page 533.
2. If needed, the Domain Scheduler manually updates the course locations in the SIS. See “Manually Updating Course Locations in the SIS” on page 537.
3. If needed, the Domain Scheduler can unpublish a previously published term. See “Unpublishing a Previously Published Term” on page 539.

Publishing a Term

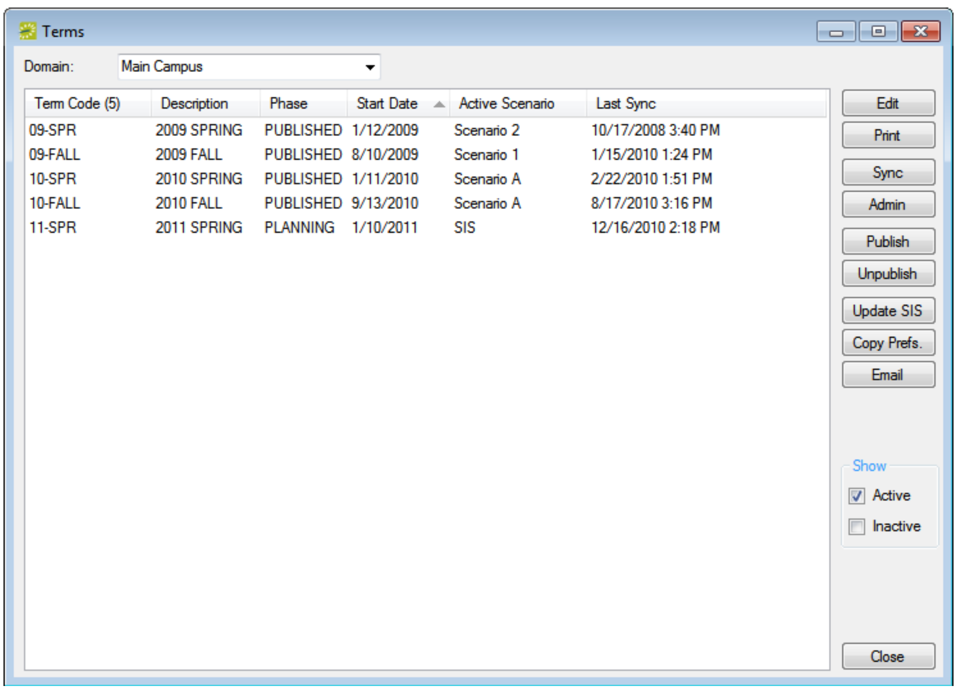
After you have finalized the assignment of courses to rooms, either with the help of the EMS room optimization process or by using the scenario that was pulled from the SIS, the next step is to publish the course schedule for the term in EMS Campus. Publishing the course schedule causes the system to book the space in EMS, creating reservations and bookings.

To publish a term

1. On the EMS Campus menu bar, click Academic Planning > Courses > Manage Terms.

   The Terms window opens.

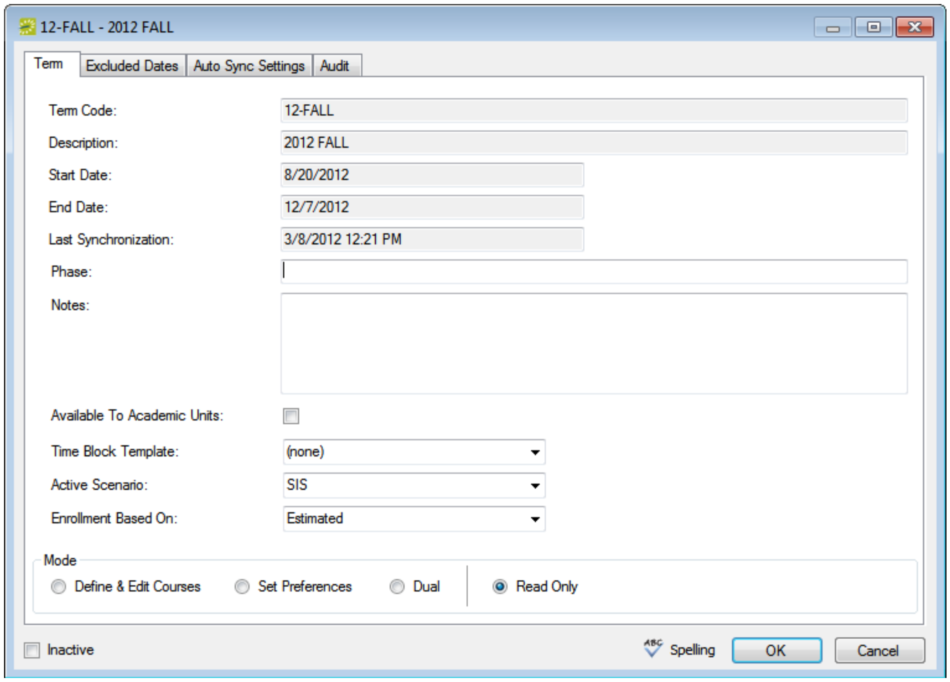
Figure 13-52: Terms window



2. On the Domain dropdown list, select the domain for which the term is being published.
3. Select the term that is being published, and then click Edit.

   The Term dialog box opens. The Term tab is the active tab. See Figure 13-53 on page 534.

Figure 13-53: Term dialog box, Term tab



4. Do the following:
   - Make sure that the Mode is set to Read Only and if the academic unit-level users are to have View access to the term, make sure that Available to Academic Units is selected.
   - On the Active Scenarios dropdown list, select the scenario that is being published.

The SIS scenario publishes room assignments that were previously defined in the SIS.

5. Optionally, in the Phase field and the Notes field, enter any information that is pertinent to the published schedules, for example, “Published” in the Phase field.
6. Open the Excluded Dates tab.
7. Select the dates that should be excluded during the publishing process.

This would include any dates where regularly scheduled classes do not take place, for example, breaks, holidays, and if applicable, final exams week.

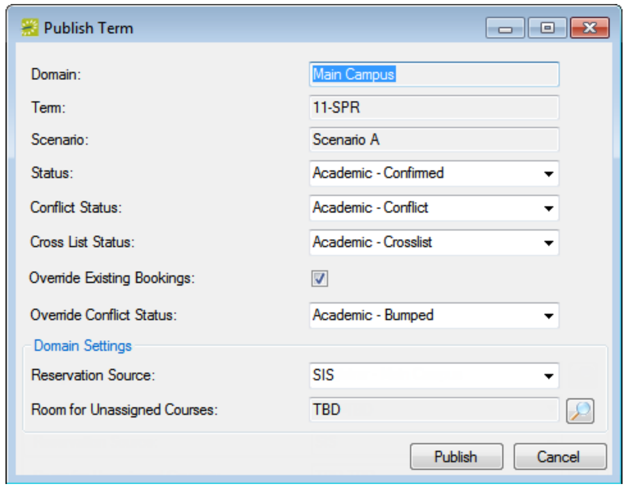
The Term dialog box closes. You return to the Terms window with the term that is to be published automatically selected.

Bookings are not created for excluded dates, which means that rooms can be scheduled for events and meetings, if needed.

8. Click Publish.

   The Publish Term dialog box opens. The Domain field, the Term field, and the Scenario field are automatically populated with the values that you previously selected and you cannot edit them.

Figure 13-54: Publish Term dialog box



9. Select the statuses required for publishing the term.

Status	Description
Status	The status that is used to book all rooms for course reservations and bookings that are created during the publishing process. **Note:** The status should be a Booked Space type.
Conflict Status	If you are publishing course room placements that were assigned in your SIS (the SIS scenario), then potentially you could have room booking conflicts created. If a double booking is encountered during the publishing process, then the reservation and bookings for the conflicting course are published in this conflict status. **Note:** The status should be an Info Only type.
Cross List Status	The status that is used to book all cross-listed and shared space course reservations and bookings that are created during the publishing process. **Note:** The status should be an Info Only type.
Override Existing Bookings/Override Conflict Status	If another scheduling unit on campus, for example, the Student Union, is allowed to book events in academic space before the publishing process has taken place, then an event and course might be assigned to the same space. If Override Existing Bookings is selected and this situation is encountered during the publishing process, the event is “bumped” and its reservation and bookings are booked into this status. If Override Existing Bookings is not selected, then the conflicted bookings for the course are placed into the Override Conflict Status. **Note:** The Override Conflict Status should be an Info Only type.

10. Specify the Domain Settings for the term.

Setting	Description
Reservation Source	Select the reservation source that is used for the course reservations and bookings that are created during the publishing process.
Room for Unassigned Courses	Click the Search icon to open the Room Selector dialog box and select the room in which to book the courses that have not been assigned in the SIS or in an optimization scenario. **Note:** Unassigned courses are typically booked in a special To Be Determined (TBD) room. Some organizations create a specific TBD building and/or room to accommodate this situation. The room must be an override description room. See the *EMS Setup Guide* for information about configuring a TBD building and/or room.

11. Click Publish.

    A message opens stating that publishing the term will set the term to Read Only and asking you if it is OK to continue.

12. Click Yes.

    A Publishing progress dialog box opens. After the term is published, the progress dialog box closes, and a message opens indicating that the term was published successfully.

13. Click OK to close the message and return to the Terms window.

If any errors are encountered during the publishing process, or if the EMS Campus system parameter Manually Update SIS/ERP System After Publishing is set to "Yes," then you can access your course list and manually update the course locations in your SIS. See *Manually Updating Course Locations in the SIS on page 537*

Manually Updating Course Locations in the SIS

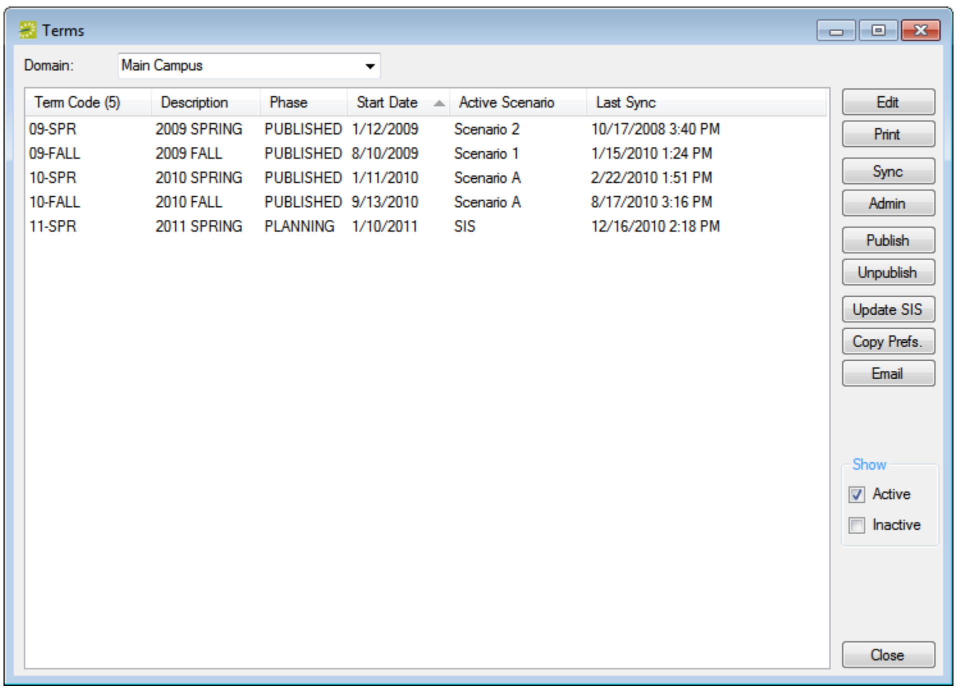
If any errors are encountered during the publishing process, or if the EMS Campus system parameter Manually Update SIS/ERP System After Publishing is set to “Yes,” then you can access your course list and manually update the course locations in your SIS.

To manually update course locations in the SIS

1. On the EMS Campus menu bar, click Academic Planning > Courses > Manage Terms.

   The Terms window opens.

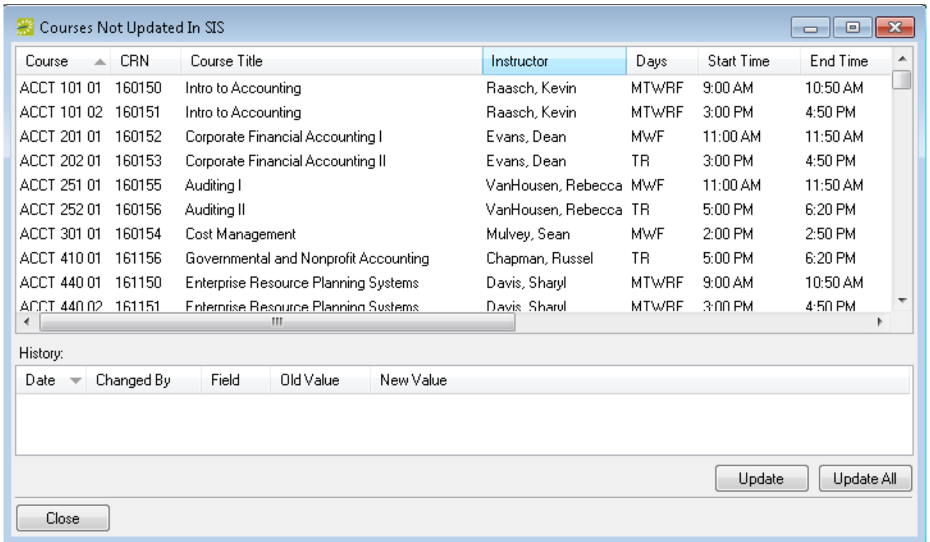
Figure 13-55: Terms window



2. On the Domain dropdown list, select the domain for which you are manually updating the course locations.
3. Select the term for which you are manually updating the course locations, and then click Update SIS.

   The Courses Not Updated in SIS window opens. This window lists all the courses that were not updated in the SIS along with an accompanying reason. If the reason is an error, you must resolve the error before you can continue with the manual publishing. If “Manual Publish” required is listed, then you can continue with this procedure. See Figure 13-56 on page 538.

Figure 13-56: Courses Not Updated in the SIS window



4. Select the course record or CTRL-click to select multiple records that you are updating, and then click Update, or click Update All to update all records in a single step.

   A message opens indicating that the updates were successful.

5. Click OK to close the message and return to the Terms window.

Unpublishing a Previously Published Term

For a variety of reasons, you might need to unpublish a previously published term, for example, you accidentally published the term using the wrong scenario, or you forgot to mark excluded dates before you published the term.

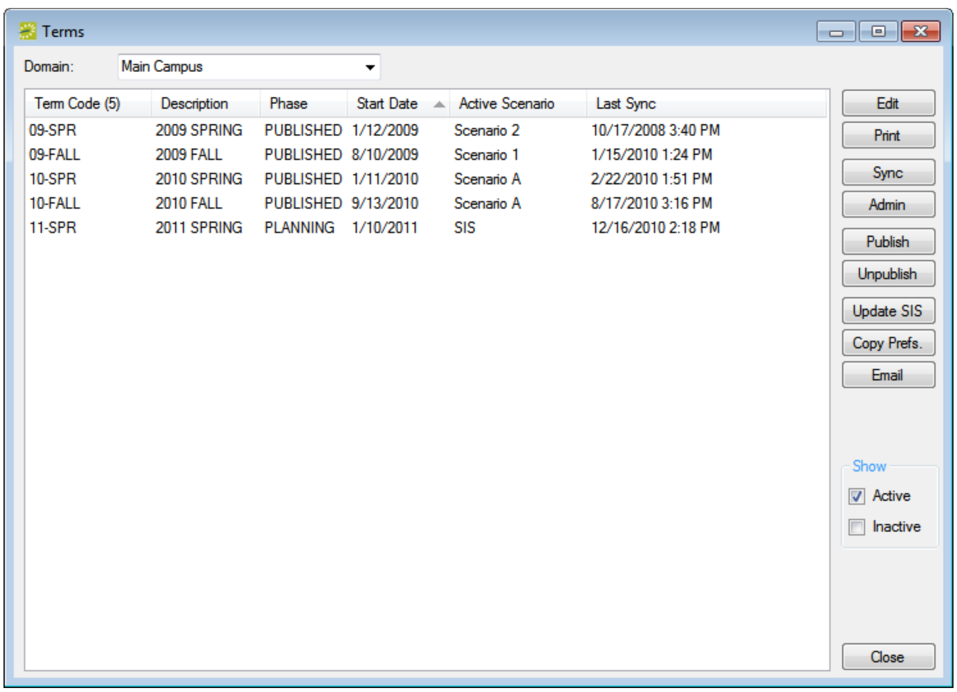
Even though you might have a valid reason for unpublishing a term, do not do so without great consideration. Unpublishing a term deletes all reservations and bookings that are associated with the term.

To unpublish a term

1. On the EMS Campus menu bar, click Academic Planning > Courses > Manage Terms.

   The Terms window opens.

Figure 13-57: Terms window



2. On the Domain dropdown list, select the domain for which you are unpublishing the term.
3. Select the term that you are unpublishing, and then click Unpublish.

   A message opens indicating that unpublishing will remove all reservations and bookings for the selected term, and asking you if it is OK to continue.

4. Click Yes.

   The message closes. After the term is unpublished, a second message opens indicating that the term was successfully unpublished.

5. Click OK to close the second message and return to the Terms window.

Post-Publishing Phase

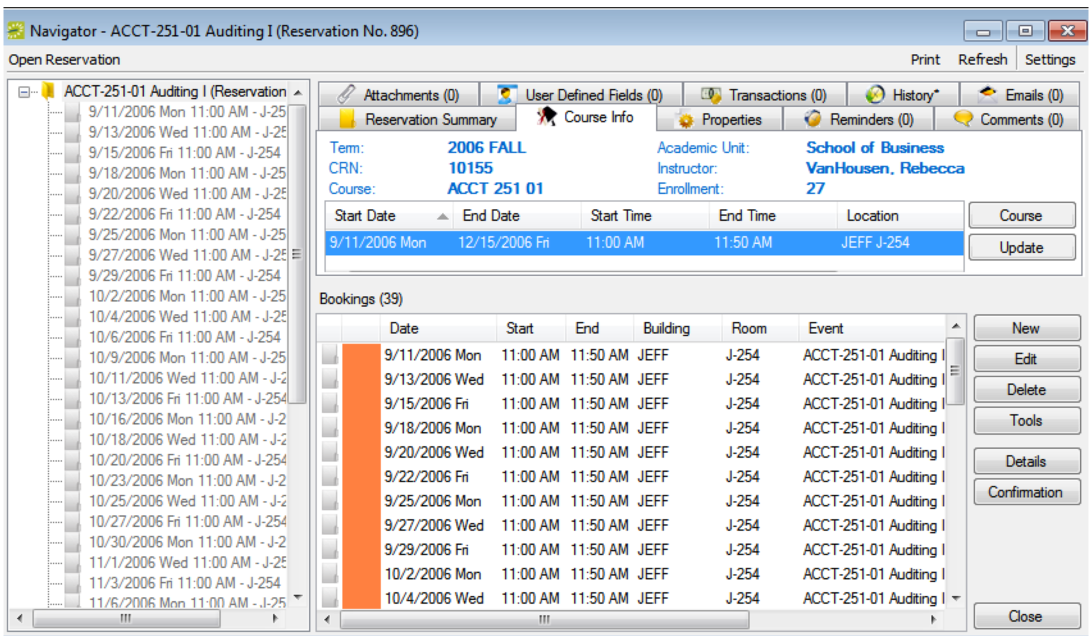
Section Contents

Reviewing Reservations and Resolving Room Assignments

After a course has been published, you can use the EMS Navigator (referred to simply as the Navigator) or the Reservation Book (referred to simply as the Book) to manage it just like any other EMS reservation and/or booking. The Course Info tab on the Navigator displays the course and the course date records for the course as it exists in your SIS. If you open a course in the Navigator that is cross-listed or shares space with another course, the Navigator displays both sets of reservations and bookings. You can review the reservations that have been made for a course and if needed, change the course room (location) for one or more of its bookings. If courses have an identical meeting pattern, you can also swap rooms (locations) between courses.

If you select a course date record, on the Course Info tab, and then click Course, the course opens in the Course Navigator.

Figure 13-58: Navigator with reservation and bookings for a course



After a term has been published, you can continue using the Academic Browser, the Academic Book and/or the Course Navigator to locate courses; however, for automation reasons, after a term is published, you should make room changes in EMS Campus and not in your SIS.

In a typical process, you would want to locate and review the following types of courses immediately after publishing:

- Courses in conflict—Use the Browser to search for bookings in the academic conflict status that you designated, for example, Academic Conflict. (See "Searching with the Browser or with the Web Reservation Tool" on page 197.) You can change the location to resolve the conflict (see "To change the course rooms (locations) for one or more bookings" below), or if the conflict was intentional, you can change the status to the academic share status that you designated, for example, Academic Shared. (See "To edit a booking in the Navigator" on page 110 or "To edit multiple bookings in the Navigator" on page 112.)

When you manually update the status to Shared, the courses are not linked in the same way as when marking them as Shared Space prior to publishing; however, manually updating the status does not result in these course being "cleared" from your Conflict list.

- Courses or events that were overridden by publishing—Use the Browser to search for bookings in the status that you designated for override bookings, for example, Academic Bumped. (See "Searching with the Browser or with the Web Reservation Tool" on page 197.) You might want to move these bookings to another location. (See "To change the course rooms (locations) for one or more bookings" below.)
- Courses that were left unassigned—Use the Browser to search for bookings in the TBD room (See "Searching with the Browser or with the Web Reservation Tool" on page 197.) You might want to move these courses to an actual room. (See "To change the course rooms (locations) for one or more bookings" below.)

You can also use the Advanced search features in the Academic Browser to locate and review the three types of courses that are listed above after publishing. See "Searching with the Academic Browser" on page 579.

To change the course rooms (locations) for one or more bookings

1. Open the course reservation in the Navigator. See:
   - "Viewing and Editing Reservations in the Reservation Book" on page 62.
   - "Opening a reservation directly in the Navigator" on page 79.
   - "Opening a reservation through a group" on page 80.
   - "Search Tools," on page 195.

2. Do one of the following:
   - To update a course location for a single booking, see "To edit a booking in the Navigator" on page 110.
   - To update course locations for multiple bookings, see "Editing Multiple Bookings in the Navigator" on page 112.

The course location in the SIS does not update automatically unless all bookings that are specific to a meeting pattern within a reservation are changed to an identical alternate location. If for some reason, you want to manually update the SIS with a new location that was not assigned to all bookings, select the course date record on the Navigator Course Info tab, and then click the Update button.

To swap rooms between courses

If courses have an identical meeting pattern, you can also swap rooms between courses.

1. Open the Reservation Book. See "Viewing and Editing Reservations in the Reservation Book" on page 62.
2. In the Reservation Book, locate your course bookings.
3. Right-click one of the two bookings that you want to swap, and on the context menu that opens, click Swap Rooms With Another Course.
4. Select the second of your two bookings.

   A message opens asking you if you are sure that you want to swap rooms for the two courses.
5. Click Yes.

   The message closes. After the locations are swapped, the Reservation Book is updated to reflect the swap.

Post-Publish Processing of Courses

In most cases, courses are added, changed, or canceled in the SIS after the course schedule has been published in EMS. You can manually resynchronize and process these courses, or you can set options in EMS Campus to automatically resynchronize these courses. After these course are automatically resynchronized, they can be automatically processed as well, or you can manually process them. Also, at the point that actual enrollment should determine room assignment (that is, can a room's capacity handle the actual enrollment), you can process courses post-publish so that the courses are updated with the actual enrollment.

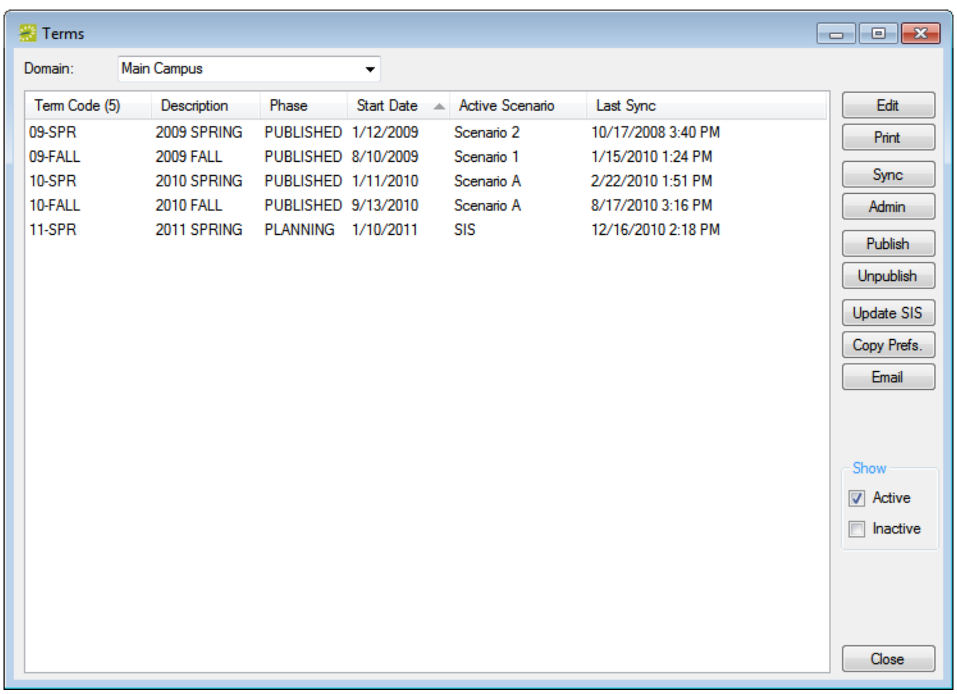
For automatic synchronizing to occur, the EMS Campus Auto Sync Service must be installed and configured. Refer to the EMS Installation manual for details.

To manually process courses post-publish

1. On the EMS Campus menu bar, click Academic Planning > Courses > Manage Terms.

   The Terms window opens.

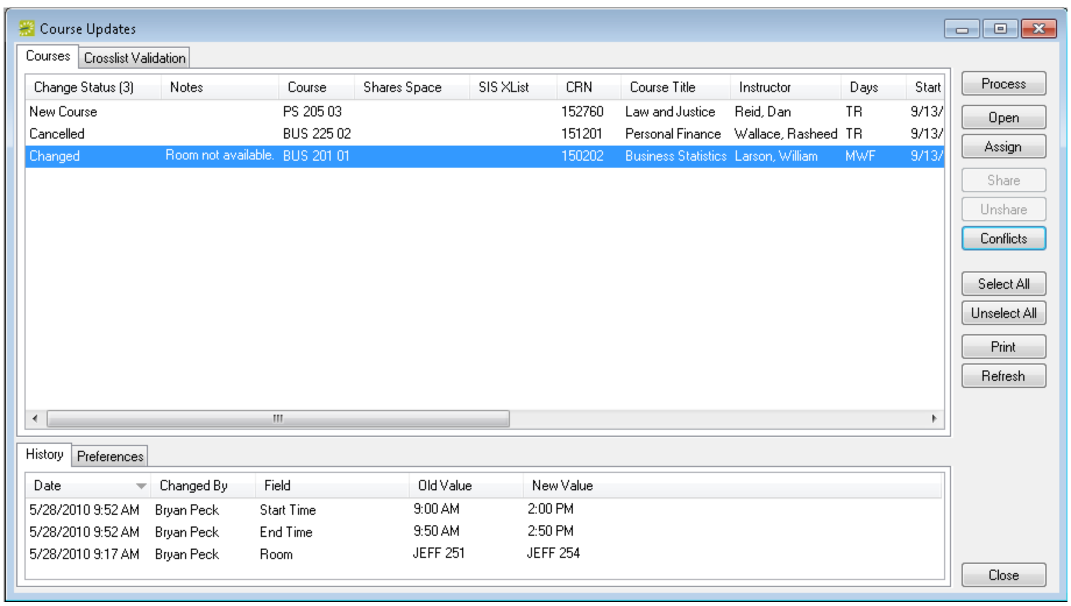
Figure 13-59: Terms window



2. Select the term which requires post-publish processing, and then click Sync.

   The Course Updates window opens. The Course tab is the active tab. This tab displays all the new courses, new course dates, changed courses, or canceled courses from the SIS. After processing, it also lists “Room Capacity Violations,” or courses in which the designated enrollment (estimated or actual) has surpassed the capacity of the room. The Course Updates window also has a Crosslist Validation tab. When EMS changes a cross-list parent to accommodate a new course, course date, or change that is being processed, the cross-listed courses are displayed on the Crosslist Validation tab. The Crosslist Validation tab is for informational purposes only so that you are kept abreast of parent changes. If you are satisfied with the parent assignments, you can simply click Reviewed and the cross-listed courses are cleared from the tab; otherwise, a Set Parent option is available.

Figure 13-60: Course Updates window, Courses tab



3. Continue to one of the following:

   - “To process a canceled course post-publish” on page 548.
   - “To process a changed course post-publish” on page 548.
   - “To process a new course date post-publish” on page 550.
   - “To process a new course post-publish” on page 553.
   - “To process a Room Capacity Violation post-publish” on page 555.

The following procedures are presented in the order in which the post-publish processing should be carried out—cancellations, changes, new course dates, new courses, and then Room Capacity Violations.

To process a canceled course post-publish

1. Select the canceled course, or CTRL-click to select multiple courses.
2. Click Process.

   A message opens asking you if you are sure that you want to process the selected course dates.
3. Click Yes.

   After processing is complete, the message closes and the canceled courses are removed from the Course Updates window. The bookings are canceled in EMS.

To process a changed course post-publish

A course is listed as changed if there has been a change to the start or end date, a day of the week, the start or end time, and/or the room in the SIS.

1. Select the changed course, or CTRL-click to select multiple courses.

   The change history for the selected courses is displayed on the History tab in the lower pane of the Course Updates window.
2. Click Process.

   A message opens asking you if you are sure that you want to process the selected course dates.
3. Click Yes.

   Two results are possible:

   - If the changes were successfully completed for the reservations and bookings, then the courses are removed from the Course Updates window.
   - If the changes resulted in a room conflict, Room Not Available is displayed in the Notes column. Go to Step 4.
4. Click Conflicts to view the conflicts for the course.

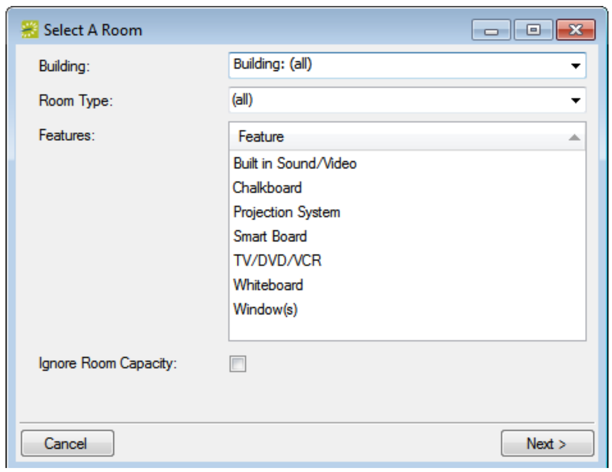
   The View Conflicts dialog box opens. Each course and/or event that is causing the conflict is displayed.
5. If the conflict was caused by the switching of the rooms in the SIS, select the two course dates that are in conflict, and then click Swap to swap and process the rooms in the same step; otherwise, go to Step 6.

6. Do one of the following:
   - Click Process again to process the course with conflicts. A Warning message op ens asking you if you are sure that you want to process with conflicts. Click Yes to close the message and complete the processing.

If needed, at a later date, you can use the Browser to manually search for these conflicts and resolve them. See *Courses in Conflict on page 544.*

   - Click Assign to search for a new room. The Select a Room dialog box opens. Go to Step 7.

Figure 13-61: Select A Room dialog box



7. Specify your search criteria, and then click Next.

   A list of rooms that meets your search criteria is displayed.

8. Select the room that is to be assigned to the new courses, and then click Finish.

   The Select a Room dialog box closes and you return to the Course Updates window with the new courses still selected.

9. Click Process.

   A message opens asking you if you are sure that you want to process the selected course dates.

10. Click Yes.

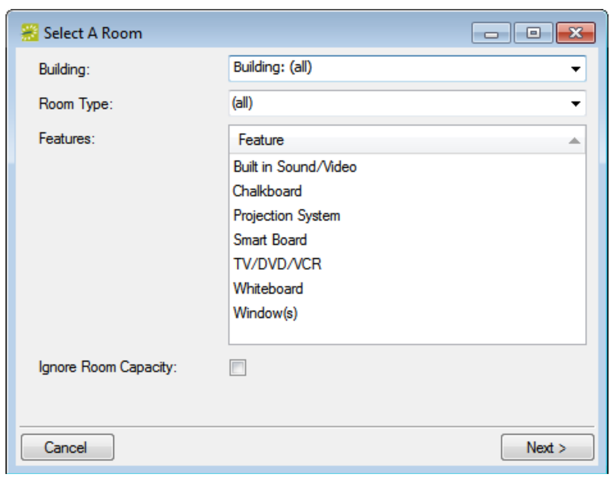
    After processing is complete, the message closes and the changed courses are removed from the Course Updates window. If a Day of the Week change has been made, then processing course changes deletes and recreates the bookings that were previously made in EMS.

If bookings are deleted and recreated, then any manual changes that have been made to these bookings and/or any services that have been added to the booking are lost.

To process a new course date post-publish

1. Select the new course dates, or CTRL-click to select multiple new course dates.
2. If rooms have already been assigned to the course dates in the SIS and you want to keep these rooms, then go to Step 5; otherwise, click Assign to open the Select A Room dialog box, and then go to Step 3.

Figure 13-62: Select A Room dialog box



3. Specify your search criteria, and then click Next.

   A list of rooms that meets your search criteria is displayed.

4. Select the room that is to be assigned to the new courses, and then click Finish.

   The Select a Room dialog box closes and you return to the Course Updates window with the new courses still selected.

Rooms can be processed without a room assignment. In this case, the course date is published in the TBD room that was specified when the term was published.

5. Click Process.

   A message opens asking you if you are sure that you want to process the selected course dates.

6. Click Yes.

   Two results are possible:

   - If the changes were successfully completed for the reservations and bookings, then the courses are removed from the Course Updates window.
   - If the changes resulted in a room conflict, Room Not Available is displayed in the Notes column. Go to Step 7.

7. Click Conflicts to view the conflicts for the course.

   The View Conflicts dialog box opens. Each course and/or event that is causing the conflict is displayed.

8. If the conflict was caused by the switching of the rooms in the SIS, select the two course dates that are in conflict, and then click Swap to swap and process the rooms in the same step; otherwise, go to Step 9.

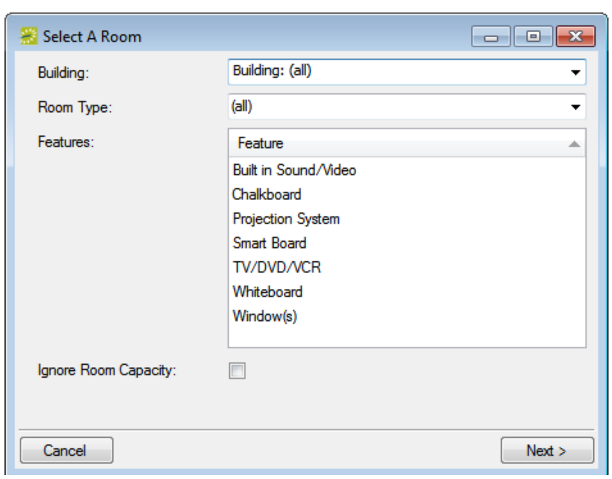
9. Do one of the following:

   - Click Process again to process the course with conflicts. A Warning message opens asking you if you are sure that you want to process with conflicts. Click Yes to close the message and complete the processing.

If needed, at a later date, you can use the Browser to manually search for these conflicts and resolve them. *See Courses in Conflict on page 544.*

   - Click Assign to search for a new room. The Select a Room dialog box opens. Go to Step 10.

Figure 13-63: Select A Room dialog box



10. Specify your search criteria, and then click Next.

    A list of rooms that meets your search criteria is displayed.

11. Select the room that is to be assigned to the new courses, and then click Finish.

    The Select a Room dialog box closes and you return to the Course Updates window with the new courses still selected.

12. Click Process.

    A message opens asking you if you are sure that you want to process the selected course dates.

13. Click Yes.

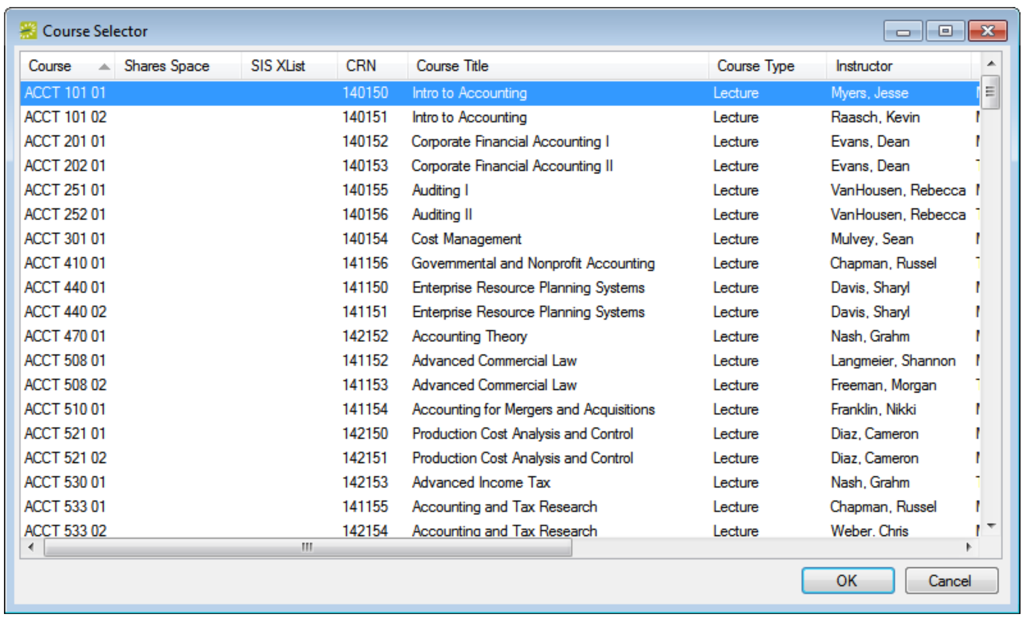
    After processing is complete, the message closes and the changed courses are removed from the Course Updates window. If a Day of the Week change has been made, then processing course changes deletes and recreates the bookings that were previously made in EMS.

If bookings are deleted and recreated, then any manual changes that have been made to these bookings and/or any services that have been added to the booking are lost.

To process a new course post-publish

1. Select the new course, or CTRL-click to select multiple new courses.
2. Do one of the following:
   - If rooms have already been assigned to the courses in the SIS and you want to keep these rooms, then go to Step 6.
   - If a room has already been assigned to the course (the first course) in the SIS, but it is meant to share a room with another course (the second course), then click Share to open the Course Selector dialog box, and then go to Step 5.

Figure 13-64: Course Selector dialog box

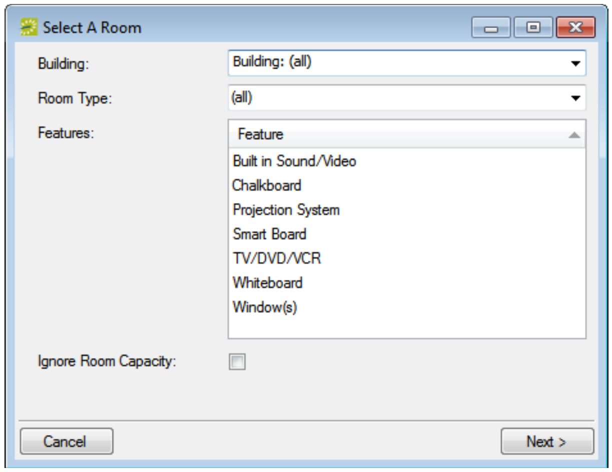


Course	Shares Space	SIS XList	CRN	Course Title	Course Type	Instructor
ACCT 101 01			140150	Intro to Accounting	Lecture	Myers, Jesse
ACCT 101 02			140151	Intro to Accounting	Lecture	Raasch, Kevin
ACCT 201 01			140152	Corporate Financial Accounting I	Lecture	Evans, Dean
ACCT 202 01			140153	Corporate Financial Accounting II	Lecture	Evans, Dean
ACCT 251 01			140155	Auditing I	Lecture	VanHousen, Rebecca
ACCT 252 01			140156	Auditing II	Lecture	VanHousen, Rebecca
ACCT 301 01			140154	Cost Management	Lecture	Mulvey, Sean
ACCT 410 01			141156	Governmental and Nonprofit Accounting	Lecture	Chapman, Russel
ACCT 440 01			141150	Enterprise Resource Planning Systems	Lecture	Davis, Sharyl
ACCT 440 02			141151	Enterprise Resource Planning Systems	Lecture	Davis, Sharyl
ACCT 470 01			142152	Accounting Theory	Lecture	Nash, Grahm
ACCT 508 01			141152	Advanced Commercial Law	Lecture	Langmeier, Shannon
ACCT 508 02			141153	Advanced Commercial Law	Lecture	Freeman, Morgan
ACCT 510 01			141154	Accounting for Mergers and Acquisitions	Lecture	Franklin, Nikki
ACCT 521 01			142150	Production Cost Analysis and Control	Lecture	Diaz, Cameron
ACCT 521 02			142151	Production Cost Analysis and Control	Lecture	Diaz, Cameron
ACCT 530 01			142153	Advanced Income Tax	Lecture	Nash, Grahm
ACCT 533 01			141155	Accounting and Tax Research	Lecture	Chapman, Russel
ACCT 533 02			142154	Accounting and Tax Research	Lecture	Weber, Chris

   - If a room has not been assigned to the course in the SIS, and you want to search for a room, then click Assign to open the Select A Room dialog box and then go to Step 3. See Figure 13-65 on page 554.

Rooms can be processed without a room assignment. In this case, the course date is published in the TBD room that was specified when the term was published.

Figure 13-65: Select A Room dialog box



3. Specify your search criteria, and then click Next.

   A list of rooms that meets your search criteria is displayed.

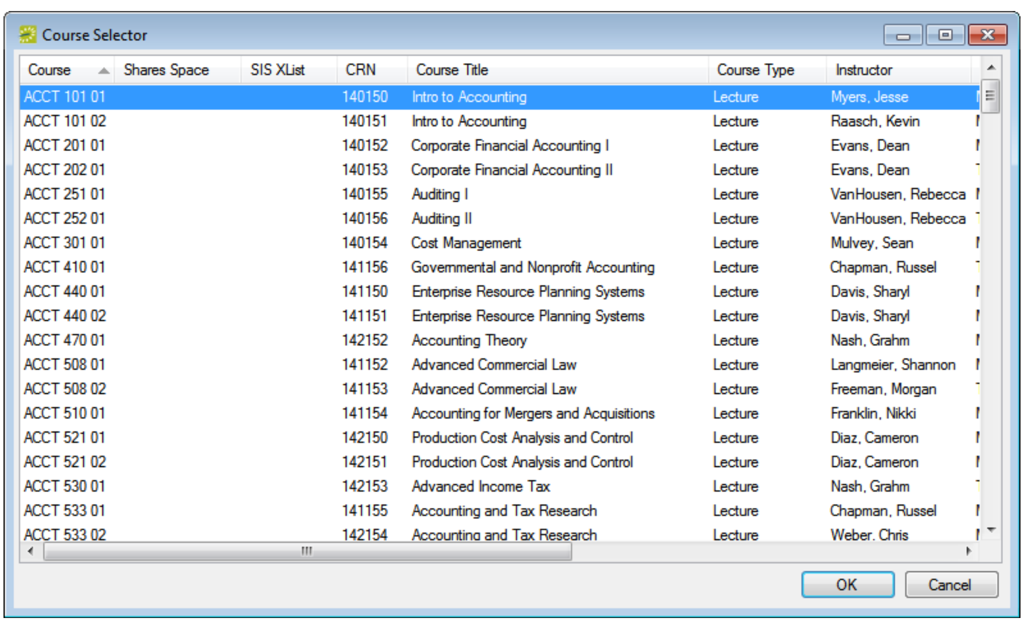
4. Select the room that is to be assigned to the new course, and then click Finish.

   The Select a Room dialog box closes and you return to the Course Updates window with the new course still selected.

5. If the course is not meant to share a room with another course, go to Step 6; otherwise, if the course is meant to share a room with another course, then do the following:

   - Click Share to open the Course Selector dialog box.

Figure 13-66: Course Selector dialog box



- Enter the appropriate search criteria (CRN, Course Title, Subject and/or Instructor) to search for the second course.
- Select the second course, and then click OK.

You are returned to the Course Updates window.

6. Click Process.

   A message opens asking you if you are sure that you want to process the selected course dates.

7. Click Yes.

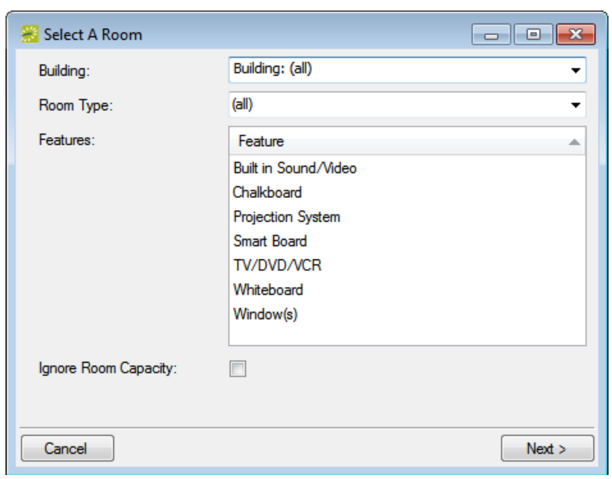
   After processing is complete, the message closes and the new courses are removed from the Course Updates window.

To process a Room Capacity Violation post-publish

If the enrollment for a class violates the minimum or maximum capacity for its assigned room, then the course is displayed on the Course Updates window with a change status of Room Capacity Violation.

1. Select the course, or CTRL-click to select multiple courses.
2. Do one of the following:
   - To assign the course to a new room, click Assign to open the Select a Room dialog box, then go to Step 3; otherwise, to leave the course in the same room, go Step 5.

Figure 13-67: Select A Room dialog box



3. Specify your search criteria, and then click Next.

   A list of rooms that meets your search criteria is displayed.

4. Select the room that is to be assigned to the new course, and then click Finish.

   The Select a Room dialog box closes and you return to the Course Updates window with the new course still selected.

5. Click Process.

   A message opens asking you if you are sure that you want to process the selected course dates.

6. Click Yes.

   After processing is complete, the message closes and the new courses are removed from the Course Updates window.

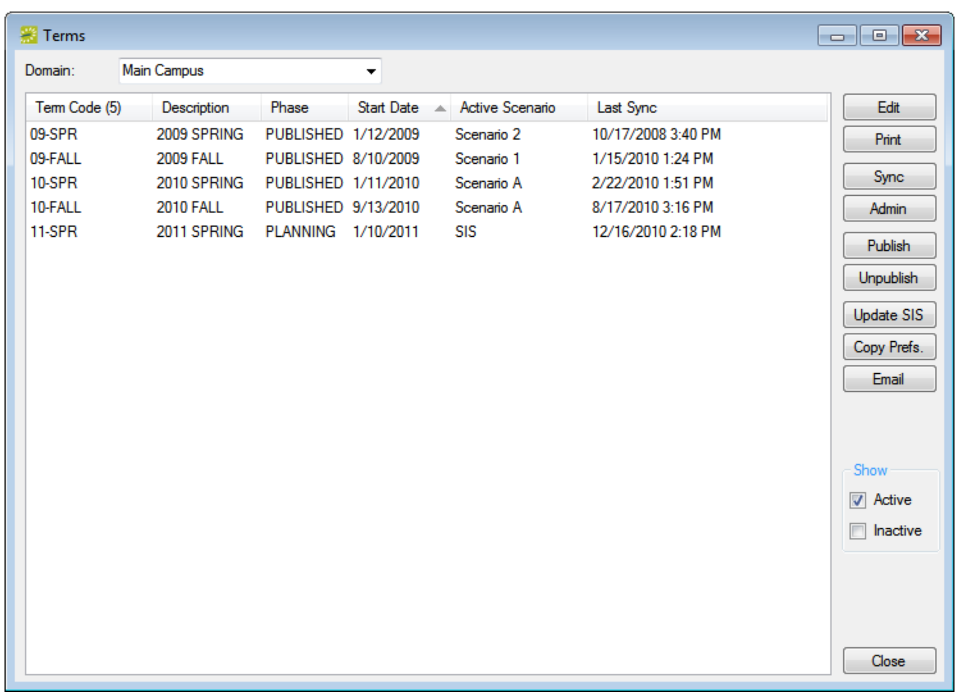
If you did not assign a new room to the course, then clicking Process merely acknowledges the room violation. The course remains in its same room.

To automatically process courses post-publish

1. On the EMS Campus menu bar, click Academic Planning > Courses > Manage Terms.

   The Terms window opens.

Figure 13-68: Terms window

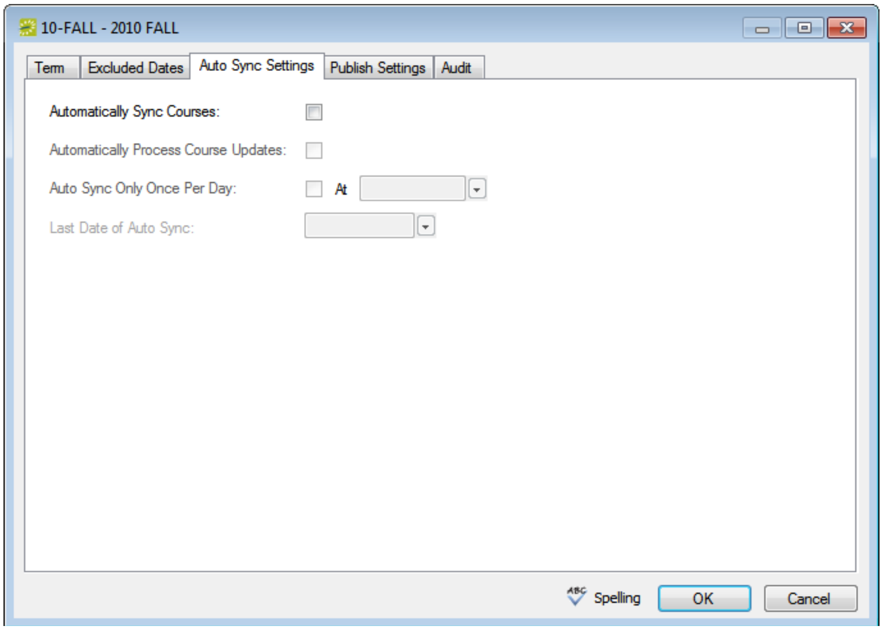


2. Select the term which requires post-publish processing, and then click Edit.

   The Term dialog box opens. The Term tab is the active tab.

3. Open the Auto Sync Settings tab.

Figure 13-69: Auto Sync Settings tab



4. Specify your auto sync settings.

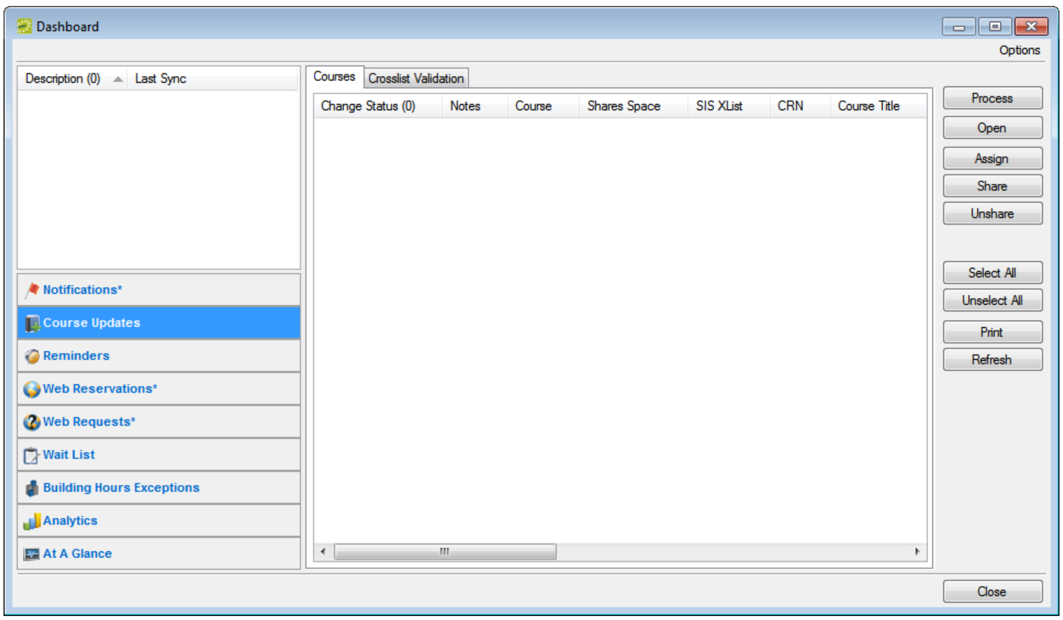
Setting	Description
Automatically Sync Courses	Select this option to automatically synchronize courses in your SIS. **Note:** To automatically synchronize courses, a user who can carry out this function must be created, and this user must be specified for the Auto Sync User EMS (Campus) system parameter. See EMS system parameters (Campus) in the *EMS Setup Guide*.
Automatically Process Course Updates	Select this option if EMS is to automatically process new courses, changes, and cancellations if possible. Leave the option blank to manually process new courses, changes and cancellations from the EMS Dashboard. (See "To manually process courses post-publish" on page 546.) **Note:** If this option is selected, and EMS *cannot* automatically process new courses, course dates and/or changes because of a conflict (for example, a room is not available), then you must manually process these courses. You must open the Course Updates tab on the EMS Dashboard, and then open the Courses sub-tab to view the courses in conflict that you must manually process. (See Figure 13-70 on page 558.) The Courses sub-tab is identical to the Course Updates window. See "EMS Dashboard," on page 227 for information about working with tabs on the Dashboard window. **Note:** In addition to this setting, three Campus system parameters determine the specific types of updates that you are auto-processing. See EMS system parameters (Campus) in the *EMS Setup Guide*.

Setting	Description
Auto Sync Only Once Per Day	If you do not select this option, then EMS automatically synchronizes the courses in your SIS according to the settings for the EMS Campus Auto Sync service.
Last Date of Auto Sync	Required value. Enabled after Automatically Synch Courses is selected. Select the last date on which synchronization is to be automatically carried out by EMS for this term, which typically corresponds to the last date of the term.

5. Click OK.

   The Term dialog box closes. You return to the Terms window.

Figure 13-70: Dashboard window, Course Updates tab



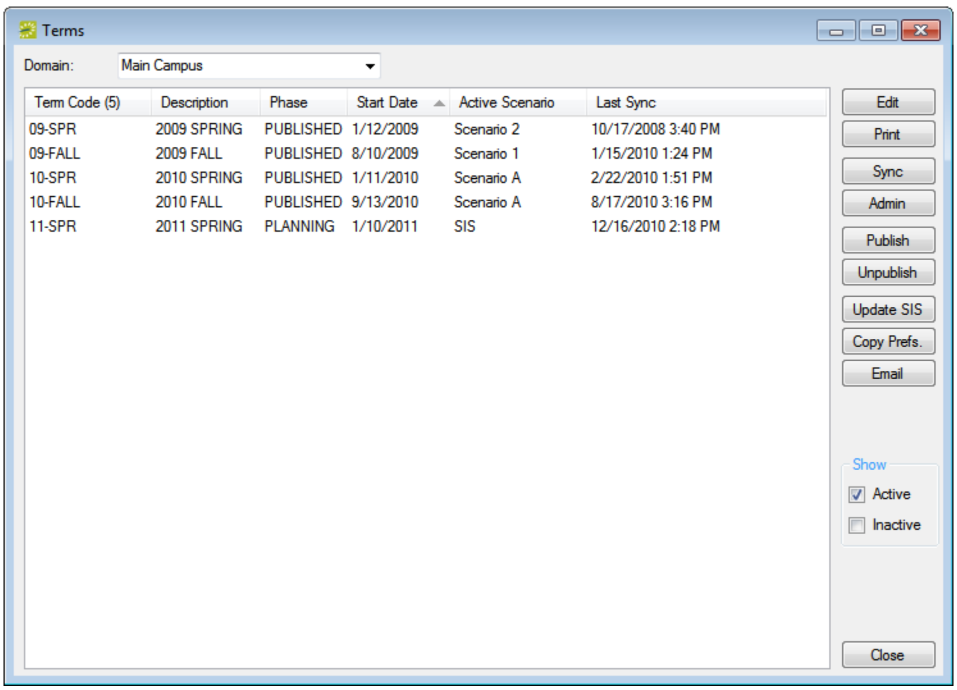
To process courses post-publish for enrollment

Typically, you publish your term in EMS prior to registration beginning. As a result, estimated enrollment is the most relevant value for searching for rooms with appropriate capacities. Closer to the start of the term, however, actual enrollment might become more relevant and you might need to change the setting so that EMS uses this value when searching for new rooms in the Navigator wizards and Course Updates window.

1. On the EMS Campus menu bar, click Academic Planning > Courses > Manage Terms.

   The Terms window opens.

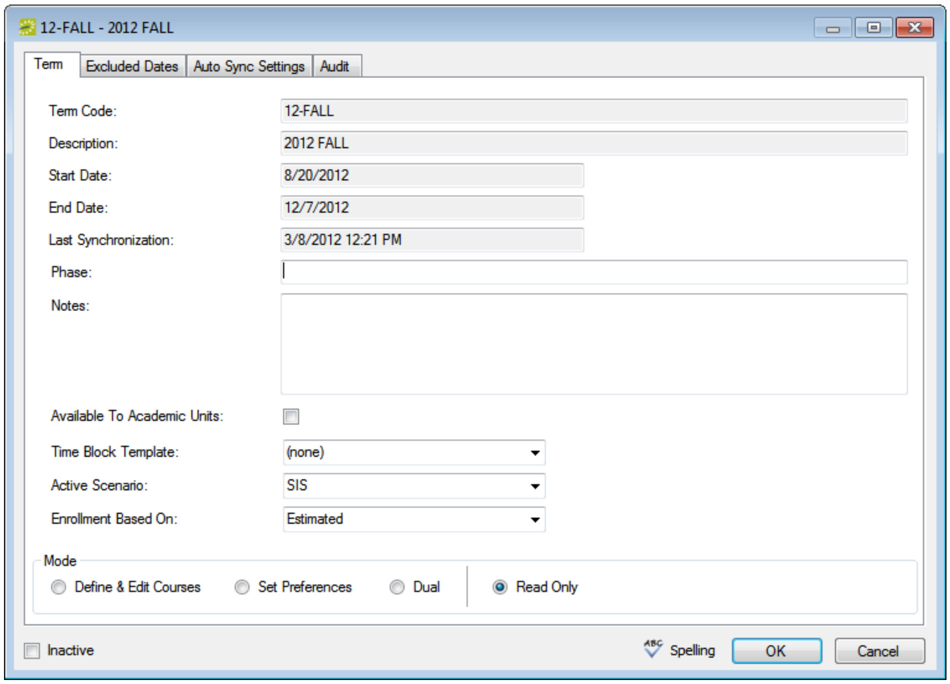
Figure 13-71: Terms window



2. Select the term which requires post-publish processing, and then click Edit.

   The Term dialog box opens. The Term tab is the active tab.

Figure 13-72: Term dialog box, Term tab



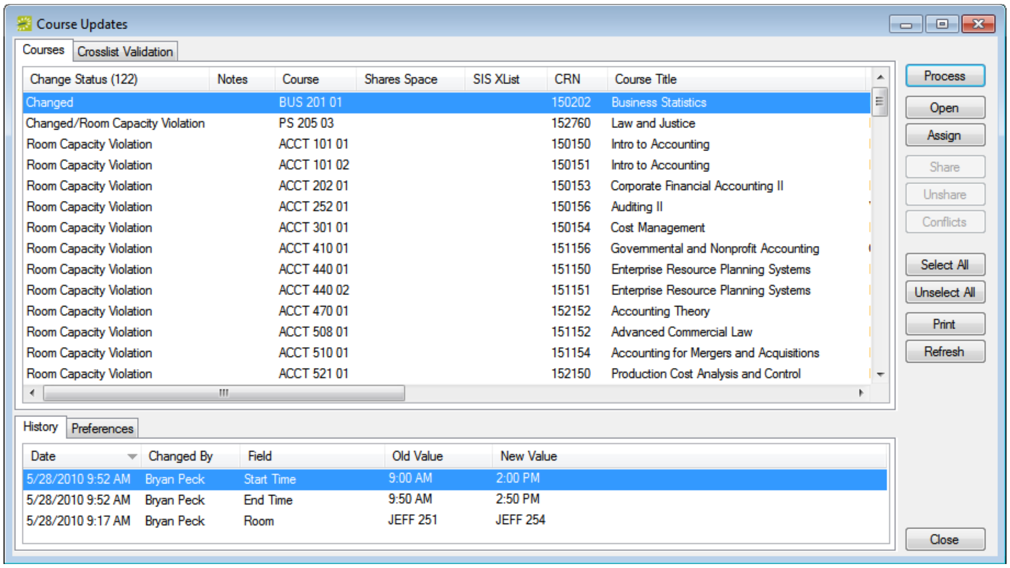
3. On the Post Publish Enrollment dropdown list, select Actual, and then click OK.

   The Term dialog box closes. You return to the Terms window with the term still selected.

4. Click Sync.

   A Synchronizing progress dialog box opens. After the synchronization is complete, the Course Updates window opens. If the actual enrollment for a class violates the minimum or maximum capacity for its assigned room, then the course is displayed on the window with a Change Status of Room Capacity Violation. See Figure 13-73 on page 561.

Figure 13-73: Course Updates window showing rooms with capacity violations



5. To assign the course to a new room, click Assign; otherwise, go to Step 8.

   The Select A Room dialog box opens.

6. Specify your search criteria, and then click Next.

   A list of rooms that meets your search criteria is displayed. The list includes any TBD rooms that have been configured.

7. Select the room that is to be assigned to the new courses, and then click Finish.

   The Select a Room dialog box closes and you return to the Course Updates window with the new courses still selected.

8. Click Process.

   A message opens asking you if you are sure that you want to process the selected course date.

9. Click Yes.

   After processing is complete, the message closes and the courses are removed from the Course Updates window.

If you did not assign a new room to the course, then clicking Process merely acknowledges the room violation. The course remains in its same room.

Setting a Final Exam Schedule

At some point after a term has been published in EMS Campus, you must schedule the final exams for the term. EMS Campus provides the functionality to automate the final exam scheduling process using templates. You create a final exam schedule template based on all unique course schedule patterns (for example, MWF 9am-9:50am, TR 1pm-2:20pm, and so on), and their corresponding final exam days and times. In addition to creating a template, you have the flexibility to define common exams, specify the final exam schedules for specific courses, specify the final exam for multiple courses, and/or exclude certain courses from the final exam scheduling process.

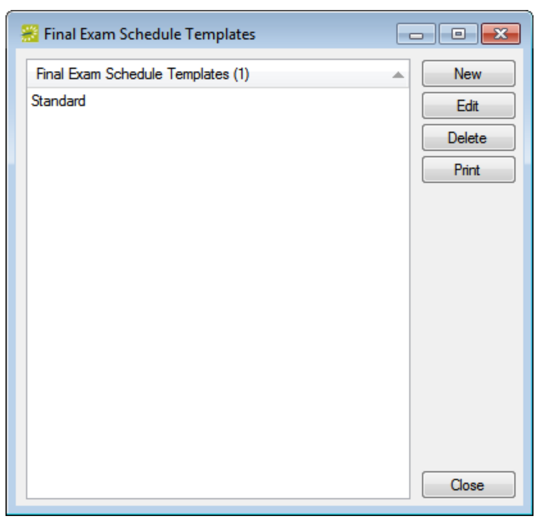
Unless otherwise specified in Final Exam Settings, EMS Campus attempts to schedule the final exam for a course in the same room that the course has been using for the term. The final exam session publishing process adds the final exam as a separate booking in the course's reservation.

To create a final exam schedule template

1. On the EMS Campus menu bar, click Academic Planning > Courses > Final Exam Schedule Templates.

   The Final Exam Schedule Templates window opens. This window lists all the final exam schedule templates that are currently configured in your EMS database.

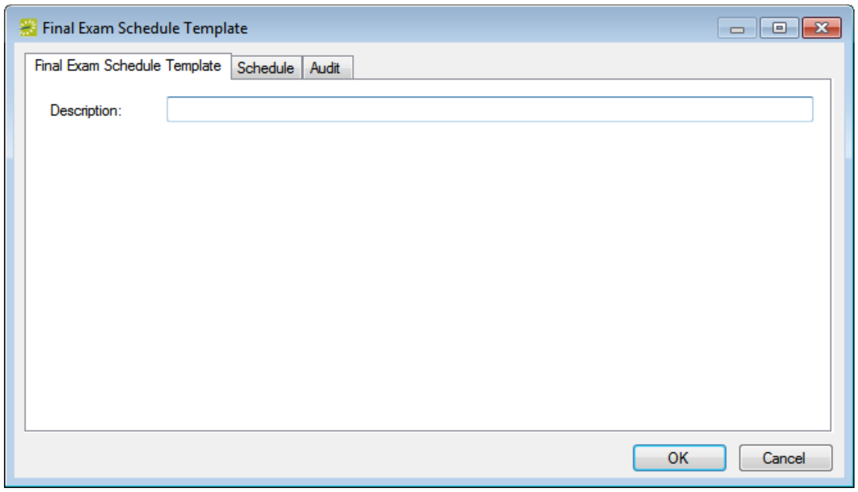
Figure 13-74: Final Exam Schedule Templates window



2. Click New.

   The Final Exam Schedule Template dialog box opens. The Final Exam Schedule Template tab is the active tab.

Figure 13-75: Final Exam Schedule Template dialog box, Final Exam Schedule Template tab

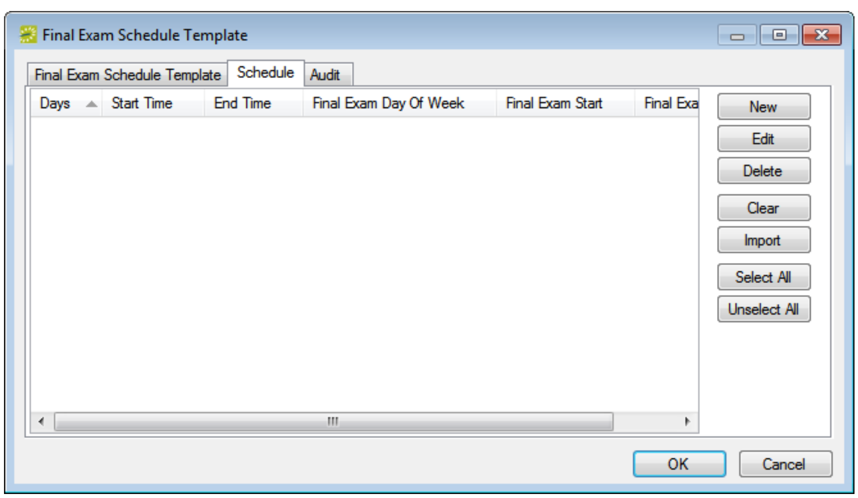


3. In the Description field, enter a name or description for the final exam schedule template, for example, Fall Finals.

The description can be a maximum of 50 characters, including spaces.

4. Open the Schedule tab.

Figure 13-76: Final Exam Schedule Template dialog box, Schedule tab



5. Continue to one of the following to create a list of unique course schedule patterns:
    - “To manually create a final exam schedule template” below.
    - “To import a term to create a final exam schedule template” on page 565.
    - “To import a file to create a final exam schedule template” on page 566.

To manually create a final exam schedule template

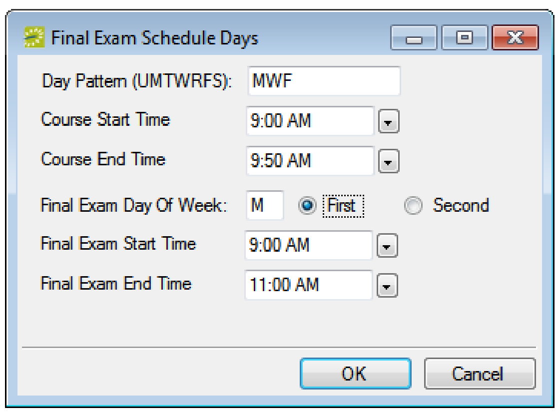
1. Click New.

    The Final Exam Schedule Days dialog box opens.

2. Enter the information for a unique course schedule pattern and the corresponding final exam day and time, and then click OK.

    The Final Exam Schedule Days dialog box closes. You return to the Schedule tab with the pattern displayed on the tab.

Figure 13-77: Final Exam Schedule Days dialog box (shown with information for a final exam schedule)



3. Repeat this procedure as many times as needed to create a final exam schedule template for each unique course schedule pattern in the term.

4. Click OK on the Final Exam Schedule Template dialog box.

    The dialog box closes. You return to the Final Exam Schedule Templates window with the newly configured final exam schedule template automatically selected.

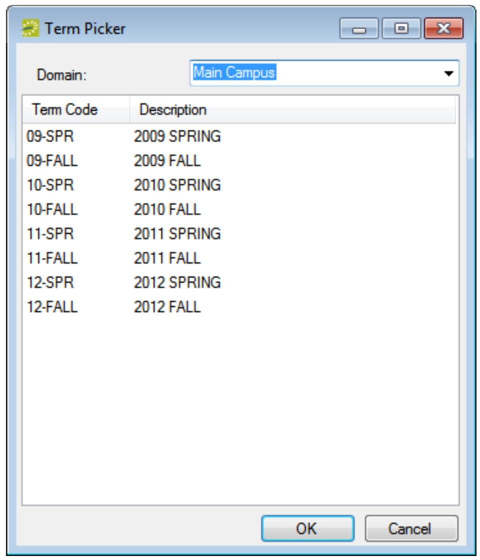
If any meeting patterns are left without a corresponding final exam time, then courses that fit that meeting pattern in the term will not have a final exam scheduled for them.

To import a term to create a final exam schedule template

1. Click Import, and on the dropdown list that opens, select Term.

   The Term Picker dialog box opens. The dialog box lists all the terms that are currently configured in your EMS database.

Figure 13-78: Term Picker dialog box



2. Select your Domain and Term for which you are creating the final exam schedule template, and then click OK.

   EMS scans the term and identifies unique meeting patterns to begin the template building process. After the import is complete, a message opens indicating this.

3. Click OK to close the message and return to the Schedule tab.

   The imported patterns are displayed on the Schedule tab.

4. Select an individual pattern, or CTRL-click to select multiple patterns, and then click Edit to open the Final Exam Schedule Days dialog box and assign the final exam day of the week and the final exam start and end times.

5. Click OK to close the Final Exam Schedule Days dialog box and return to the Schedule tab.

6. Click OK on the Final Exam Schedule Template dialog box.

   The dialog box closes. You return to the Final Exam Schedule Templates window with the newly configured final exam schedule template automatically selected.

If any meeting patterns are left without a corresponding final exam time, then courses that fit that meeting pattern in the term will not have a final exam scheduled for them.

To import a file to create a final exam schedule template

You can import your course schedule patterns from a tab-delimited text file. To view the import file specifications, on the Final Exam Schedule Templates window, click Print > Import Format.

See Appendix E, Import File Specifications in the EMS Setup Guide for a table that details the Course Schedule Patterns import file specifications.

Figure 13-79: Course Schedule Patterns import file format

EMS Campus Demo — Final Exam Template Import Format

(import file must be tab delimited)

Sequence	Column	Type	Required	Unique	Max Chars.
1	Day Pattern	Text (UMTWRFS)	Yes		7
2	Start Time	Text (HHMM)	Yes		4
3	End Time	Text (HHMM)	Yes		4
4	Final Exam Day Of Week	Text (UMTWRFS)	Yes		1
5	Final Exam Start Time	Text (HHMM)	Yes		4
6	Final Exam End Time	Text (HHMM)	Yes		4

1. Click Import, and then on the dropdown list that opens, click File.

   The Open File dialog box opens.

2. Browse to and select the import file, and then click Open.

   The Open dialog box closes and the course schedule patterns are imported. After the import is complete, a message opens indicating this.

3. Click OK to close the message and return to the Schedule tab.

   The imported patterns are displayed on the Schedule tab.

4. Select an individual pattern, or CTRL-click to select multiple patterns, and then click Edit to open the Final Exam Schedule Days dialog box and assign the final exam day of the week and the final exam start and end times.

5. Click OK to close the Final Exam Schedule Days dialog box and return to the Schedule tab.

6. Click OK on the Final Exam Schedule Template dialog box.

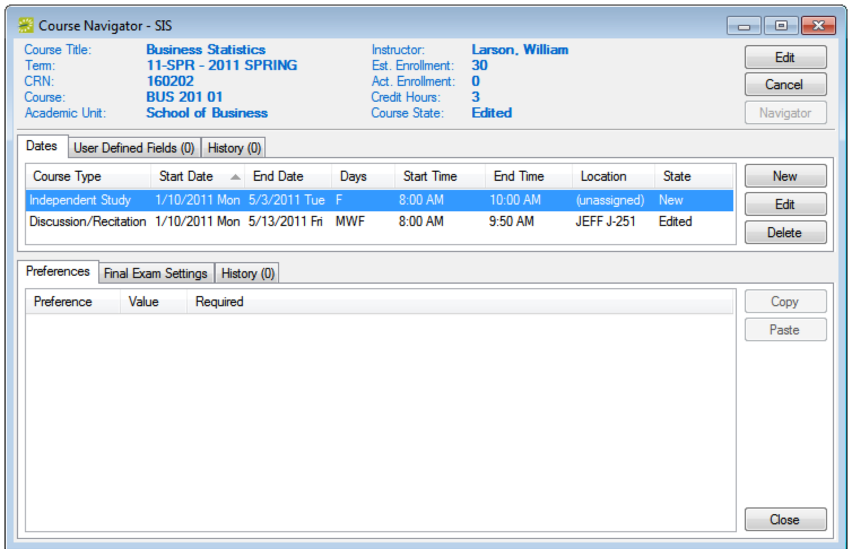
   The dialog box closes. You return to the Final Exam Schedule Templates window with the newly configured final exam schedule template automatically selected.

If any meeting patterns are left without a corresponding final exam time, then courses that fit that meeting pattern in the term will not have a final exam scheduled for them.

To specify final exam settings for a specific course

1. Open the specific course in the Course Navigator through either the Academic Browser, the Academic Book, or the Navigator.

Figure 13-80: Course opened in the Course Navigator

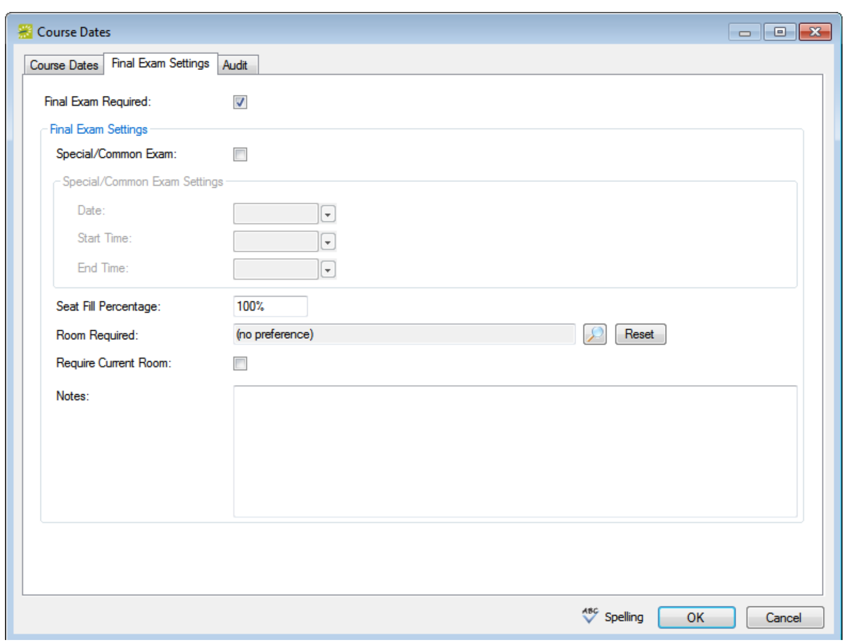


2. In the middle pane of the Navigator, select a course date record, and then click Edit.

   The Course Dates dialog box opens. The Course Dates tab is the active tab.

3. Open the Final Exam Settings tab.

Figure 13-81: Course Dates dialog box, Final Exam Settings tab



4. Do any of the following:

   - If a final exam is not required for the course, then clear the Final Exam Required option, and go to Step 5.

Typically, courses with multiple course dates, lab components, or short-term courses are marked as “No Exam Required.”

   - If the course is having a final exam at a day/time other than what is specified by the template (see “To create a final exam schedule template” on page 562), select Special/Common Exam, and then enter the date, and start and end times for the special/common exam.
   - Optionally, if you would like the seat fill percentage to be a different value than the default value, update the seat fill percentage for the exam.
   - If the exam is to take place in a different room (not the same room that the course has been using all semester), click the Search icon next to Room Required to open the Room Selector dialog box and select a different room for the exam.
   - If the exam is to take place in the same room that the course has been using all semester, then select Require Current Room.

During publishing of the final exam session, if the same room is unavailable, EMS leaves the course unassigned for a manual search.

5. Optionally, in the Notes field, enter any information that is pertinent to the course or final exam.
6. Click OK.

   The Course Dates dialog box closes. You return to the Course Navigator with the course date still selected.

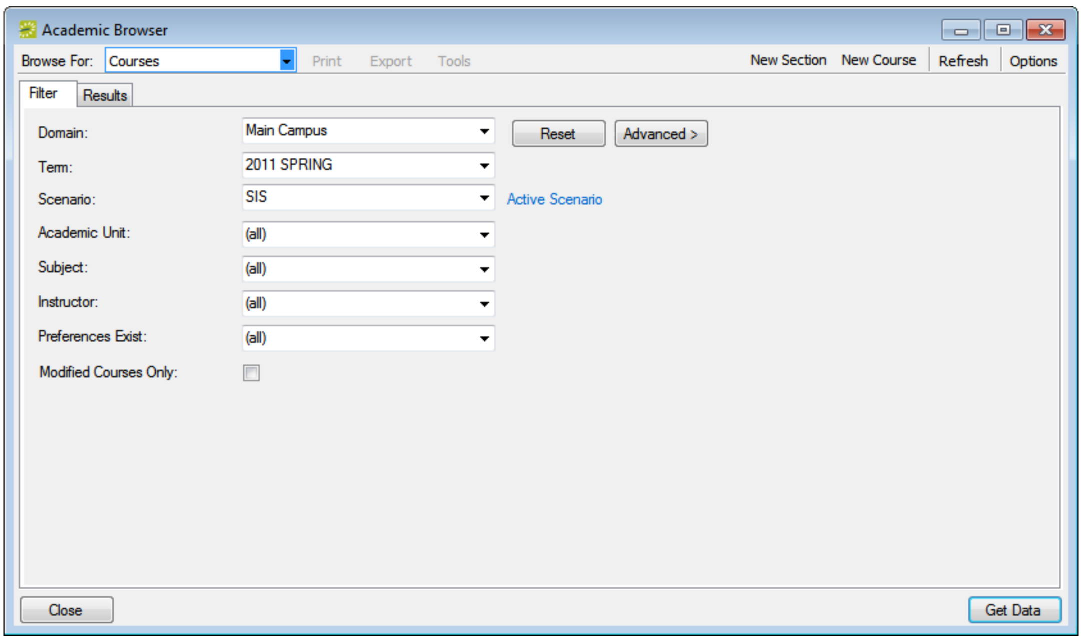
To specify final exam settings for multiple courses

1. On the EMS Campus menu bar, click Academic Planning > Courses > Academic Browser.

   The Academic Browser opens.

2. If needed, open the Filter tab.

Figure 13-82: Academic Browser, Filter tab



3. On the Domain dropdown list, select the appropriate domain and on the Term dropdown list, select the appropriate term.

4. Set any other criteria (academic unit, subject, and so on) as needed to provide assistance in locating the courses for which you want to set preferences and requirements, and then click Get Data.

   The courses that meet your search criteria are displayed on the Results tab.

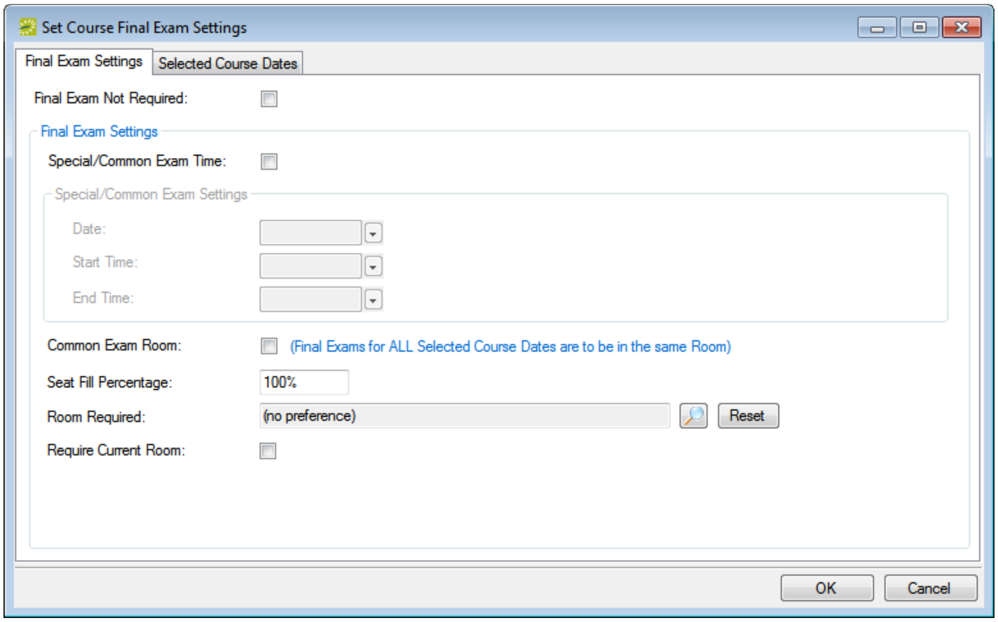
For detailed information about searching with the Academic Browser, see "Searching with the Academic Browser" on page 579.

5. In the search results, CTRL-click to select the multiple courses for which you are setting the final exam schedule.

6. On the Tools menu, click Set Final Exam Settings.

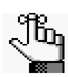
   The Set Course Final Exam Settings dialog opens. See Figure 13-83 on page 570.

Figure 13-83: Set Course Final Exam Settings dialog box



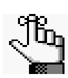
7. Do one of the following:

   - If a final exam is not required for the courses, then select Final Exam Not Required, and then go to Step 8.



Typically, courses with multiple course dates, lab components, or short-term courses are marked as "No Exam Required."

   - If the courses are having their final exams at a day/time other than what is specified by the template (see "To create a final exam schedule template" on page 562), select Special/Common Exam, and then enter the date, and start and end times for the special/common exam.



All the selected courses will meet at the date/time specified

   - If the final exams for *all* the selected courses are to be in the same room, then select Common Exam Room.
   - If the exam/exams are to take place in a different room (not the same rooms that the courses have been using all semester), click the Search icon  next to Room Required to open the Room Selector dialog box and select a different room for the exams.

All courses will meet in this room for the final exams.

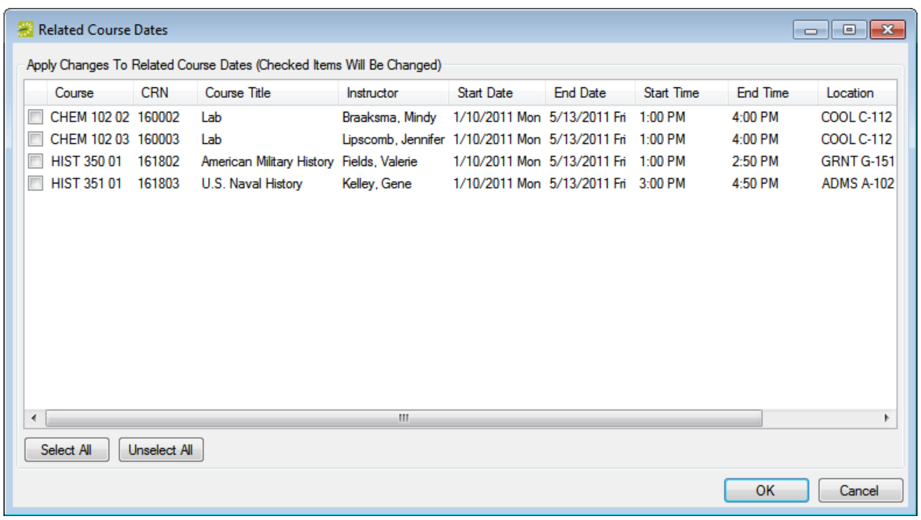
- If the exams are to take place in the same rooms that the courses have been using all semester, then select Require Current Room.

If no room is requested, or Require Current Room is selected, then each course will have the final exam in its own room. During publishing of the final exam session, if the same room is unavailable, EMS leaves the course unassigned for a manual search.

8. Optionally, do one or both of the following:
    - If you want the seat fill percentage to be a different value than the default value, update the seat fill percentage for the exam.
    - In the Notes field, enter any information that is pertinent to the course or final exam.
9. Click OK.

   The Related Courses Dates dialog box opens. This dialog box lists all the courses that you selected on the Results tab of the Academic Browser.

Figure 13-84: Related Course Dates dialog box



10. Select the courses to which the final exam settings are to be applied, or click Select All to select all the courses in a single step, and then click OK.

    A message opens indicating that any final exam settings that exist for the selected courses will be overwritten, and asking you if it is OK to continue.
11. Click Yes.

    A second message opens indicating that the final exam settings were successfully set.
12. Click OK to close the second message and the Related Course Dates dialog box.

    You return to the Results tab of the Academic Browser, with the courses still selected on the tab.

Publishing a Final Exam Session

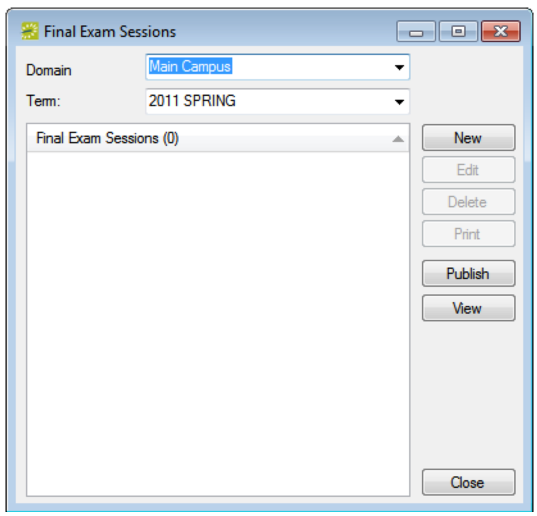
After you have created the final exam schedule template for the term, and updated any final exam settings, you must publish the final exam session. Publishing a final exam session is a two part process. First, you must create a final exam session and specify a start date for the session. Second, you must then apply a final exam schedule template to the final exam session and then you can publish the session.

To create a final exam session

1. On the EMS Campus menu bar, select Academic Planning > Courses > Final Exam Sessions.

   The Final Exam Sessions window opens. The window lists all the final exam sessions that have been published in your EMS database.

Figure 13-85: Final Exam Sessions window

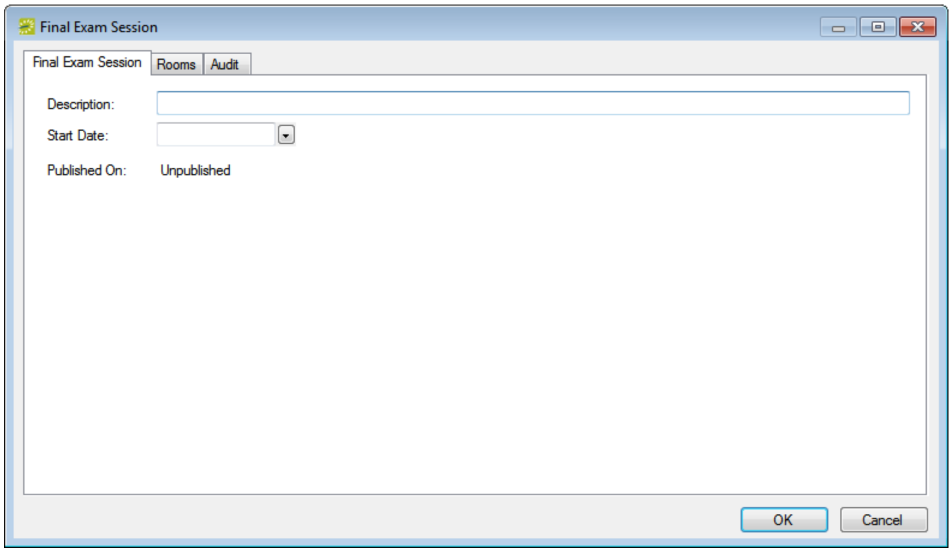


2. On the Domain dropdown list, select the campus for which you are publishing the final exam session, and on the Term dropdown list, select the term.

3. Click New.

   The Final Exam Session dialog box opens. The Final Exam Session tab is the active tab.

Figure 13-86: Final Exam Session dialog box, Final Exam Session tab



4. In the Description field, enter a name or description for the session, for example, Fall Finals 2011.

The description can be a maximum of 30 characters, including spaces.

5. Select a start date for the final exam session.

The final exam session will start on this date. Use the final exam template day of the week to schedule specific final exam dates. EMS can accommodate up to a two week final exam session.

6. Open the Rooms tab and select the rooms that are available to host final exams by doing the following:

   - On the Building dropdown list, select (all) buildings, or select a specific building, area, or view.
   - On the Room Type dropdown list, leave the default value of (all), or select a specific room type.
   - In the Available list, select the room, or CTRL-click to select multiple rooms, and then click the Move (>) button to move the rooms to the Selected list.

If needed, you can repeat these steps for specific buildings until you have selected all the rooms in specific buildings that can host a final exam.

7. Click OK.

   The Final Exam Session dialog box closes. You return to the Final Exam Sessions window with the newly configured session automatically selected.

8. Continue to “To publish the final exam session” below.

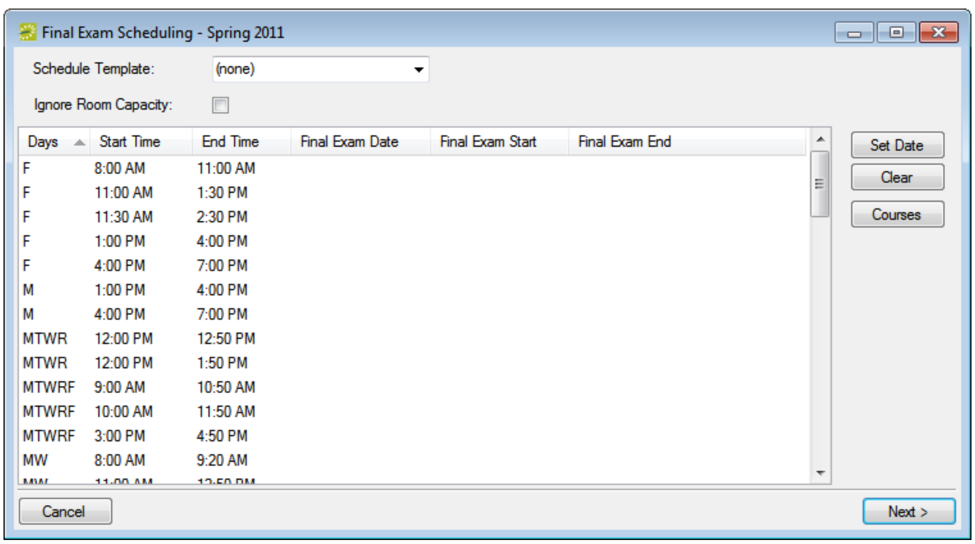
To publish the final exam session

1. If you have not already done so, open the Final Exam Session dialog box and select the session that is to be published.

2. Click Publish.

   The Final Exam Scheduling window opens. This window lists all the unique course schedule patterns for the term for which you are publishing the final exam session.

Figure 13-87: Final Exam Scheduling window



3. On the Schedule Template dropdown list, select the final exam template that is to be used for the term, and optionally select Ignore Room Capacity if you do not want EMS to consider room capacity when assigning final exam sessions.

   The Final Exam Date, Final Exam Start, and Final Exam End columns are automatically populated based on the applied template.

4. If necessary, do one or more of the following:
    - Select a unique course schedule pattern and click Set Date to open the Final Exam Date dialog box and edit a pattern setting, or create a course schedule pattern that was not in the selected template.
    - Select a unique course schedule pattern and click Clear to clear the pattern setting, and then click Set Date to open the Final Exam Set dialog box and edit the pattern as needed.
5. Click Next.

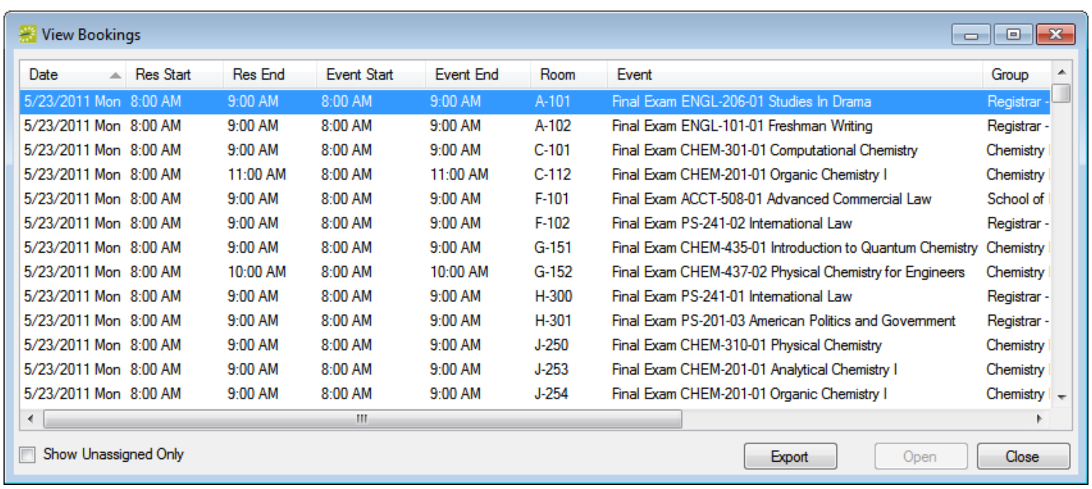
    The Final Exam Scheduling window lists the summarizing information for any special/common exams that have been set for specific courses.
6. Optionally, select a course, and then click Open to view the course in the Course Navigator.
7. Click Finish.

    A message opens, indicating that you are about to publish the final exam schedule, and asking you if it is OK to continue.
8. Click Yes.

    The message closes. After the final exam session is published, a second message opens indicating this.
9. Click OK.

    The second message closes and the View Bookings window opens. By default, the window initially shows only those final exam bookings for which a room could *not* be scheduled.

Figure 13-88: View Bookings window



Date	Res Start	Res End	Event Start	Event End	Room	Event	Group
5/23/2011 Mon	8:00 AM	9:00 AM	8:00 AM	9:00 AM	A-101	Final Exam ENGL-206-01 Studies In Drama	Registrar -
5/23/2011 Mon	8:00 AM	9:00 AM	8:00 AM	9:00 AM	A-102	Final Exam ENGL-101-01 Freshman Writing	Registrar -
5/23/2011 Mon	8:00 AM	9:00 AM	8:00 AM	9:00 AM	C-101	Final Exam CHEM-301-01 Computational Chemistry	Chemistry
5/23/2011 Mon	8:00 AM	11:00 AM	8:00 AM	11:00 AM	C-112	Final Exam CHEM-201-01 Organic Chemistry I	Chemistry
5/23/2011 Mon	8:00 AM	9:00 AM	8:00 AM	9:00 AM	F-101	Final Exam ACCT-508-01 Advanced Commercial Law	School of
5/23/2011 Mon	8:00 AM	9:00 AM	8:00 AM	9:00 AM	F-102	Final Exam PS-241-02 International Law	Registrar -
5/23/2011 Mon	8:00 AM	9:00 AM	8:00 AM	9:00 AM	G-151	Final Exam CHEM-435-01 Introduction to Quantum Chemistry	Chemistry
5/23/2011 Mon	8:00 AM	10:00 AM	8:00 AM	10:00 AM	G-152	Final Exam CHEM-437-02 Physical Chemistry for Engineers	Chemistry
5/23/2011 Mon	8:00 AM	9:00 AM	8:00 AM	9:00 AM	H-300	Final Exam PS-241-01 International Law	Registrar -
5/23/2011 Mon	8:00 AM	9:00 AM	8:00 AM	9:00 AM	H-301	Final Exam PS-201-03 American Politics and Government	Registrar -
5/23/2011 Mon	8:00 AM	9:00 AM	8:00 AM	9:00 AM	J-250	Final Exam CHEM-310-01 Physical Chemistry	Chemistry
5/23/2011 Mon	8:00 AM	9:00 AM	8:00 AM	9:00 AM	J-253	Final Exam CHEM-201-01 Analytical Chemistry I	Chemistry
5/23/2011 Mon	8:00 AM	9:00 AM	8:00 AM	9:00 AM	J-254	Final Exam CHEM-201-01 Organic Chemistry I	Chemistry

10. Optionally, do one or more or all of the following:
    - To view all final exam bookings, clear the Show Unassigned Only option.
    - To view a course in the Navigator, select the course, and then click Open.
    - To export the course list to a Microsoft Excel spreadsheet, click Export.

Unless the option to require the same room was selected for a course, course preferences can be considered and the final exam for the course can be scheduled in another room through optimization. Courses can be assigned to TBD if no rooms were available. Those courses that are in a different room than they were all semester have the NO flag in the same room column.

11. Click Close to close the View Bookings window and return to the Final Exam Sessions window.

The final exam session publishing process adds the final exam for each course as a separate booking in the course's reservation. After you publish a final exam session, you can find the final exam booking for a course by opening the course in the Navigator and expanding the reservation and scrolling to the bottom of the Reservation (left) pane, or to the bottom of the Bookings (lower right) pane. You can use the Final Exam Schedule report to review the final exam schedule or the Final Exam Settings report to view optional settings. (See “Generating Academic Reports” on page 601.) To open the View Bookings window again, click View on the Final Exam Sessions window. If you delete a final exam session, then all final exam bookings that are associated with the session are deleted.

Using the Academic Tools

Section Contents

Searching with the Academic Browser

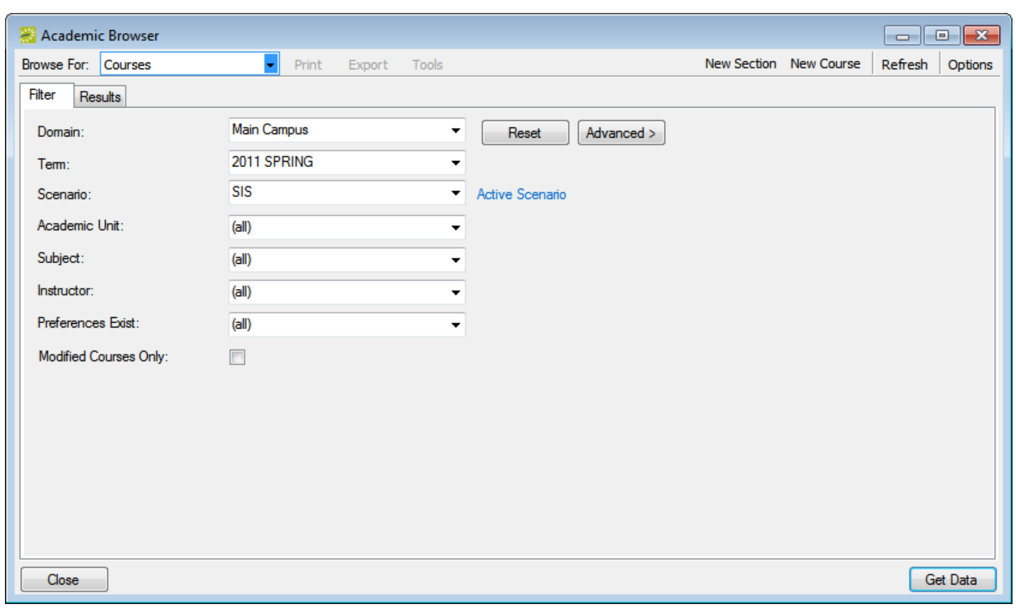
You can use the Academic Browser to search for courses or course dates. The results are displayed in a list view. When you carry out a search in the Academic Browser, you can carry out a basic search or an advanced search. A basic search is based on the basic information that you specify for a course when you first create it, such as the domain, the term, the academic unit, the subject, and so on. An advanced search is a field level search that is carried out at the course level, the course dates level, or the preference level or for published terms, at the reservation, booking or booking detail levels. For example, in an advanced search, you can specify criteria as granular as “courses with credit hours greater than 3.0.” After the search results are returned, you have a variety of options for working with the results, including sorting and grouping information or using the Tools menu to perform functions. The actions that you can carry out in the Academic Browser depend upon the mode (Read Only, Define and Edit Courses, or Set Preferences) that is enabled for the academic term with which you are working in EMS Campus.

To carry out a search in the Academic Browser

1. Do one of the following to open the Academic Browser:
   - On the EMS Campus toolbar, click the Academic Browser icon.
   - On the EMS Campus menu bar, click Academic Planning > Configuration > Academic Browser.

   The *first* time that the Academic Browser window opens, the Filter tab is set by default to a basic search; otherwise, the Filter tab is set to the search type (Basic or Advanced) that you last carried out.

Figure 13-89: Academic Browser, Basic Search options



2. Click the Basic/Advanced toggle to select the type of search that is to be carried out, and then continue to one of the following:
   - "To carry out a basic search in the Academic Browser" below.
   - "To carry out an advanced search in the Academic Browser" on page 582.

To carry out a basic search in the Academic Browser

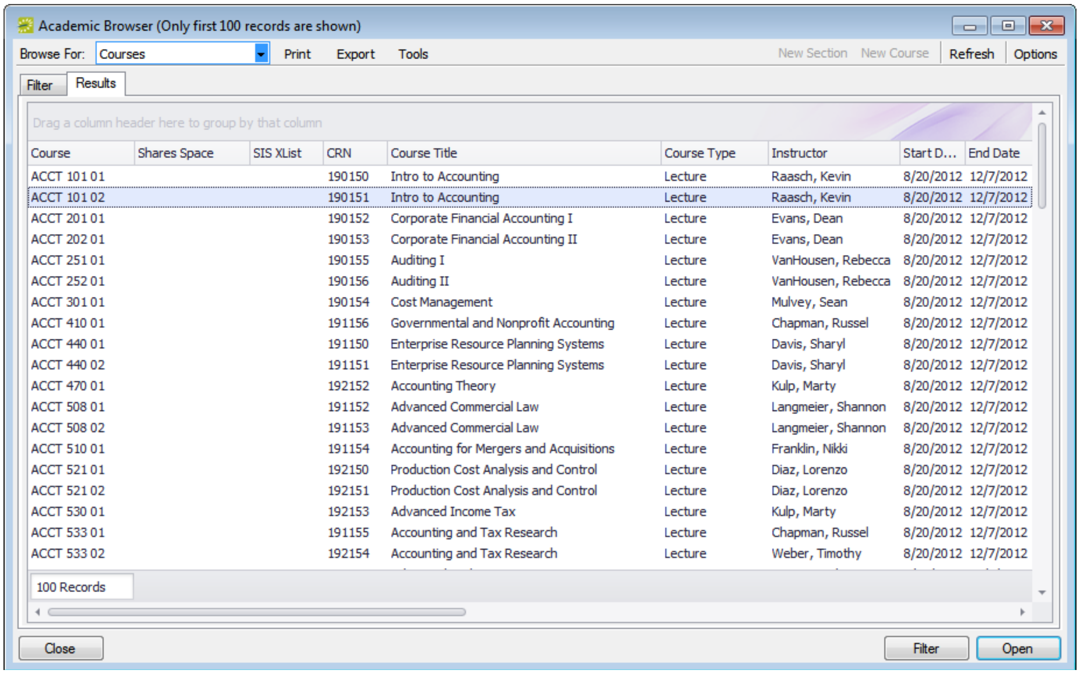
1. On the Browse For dropdown list, select the item for which to search.
2. Enter the search criteria.

Field	Description
Domain	The domain for the course or course date.
Term	The term for the course or course date.
Scenario	Displays results for the specific optimization scenario selected. The "SIS" scenario displays room assignment information from your SIS.
Academic Unit	The academic unit for the course or course date.
Subject	The subject for the course or course date.
Instructor	The instructor for the course or course date.
Preferences Exist	Used to identify the rooms for the courses/course dates that have/do not have room preferences/requirements specified.
edited Courses Only	Used during the Define and Edit mode to identify courses or course dates that have changed (new, canceled, and/or edited courses/course dates).

3. Optionally, click Options and edit the default value for the additional search option Number of Records to Return.
4. Click Get Data or Refresh.

   The search results are displayed on the Results tab. If you have searched for courses, then the results include courses without course dates (meeting patterns). "Multiple" is displayed for those courses with more than one course date. If you have searched for course dates, courses without course dates are suppressed while courses with multiple meeting patterns are expanded. EMS schedules rooms only for courses with course dates. See Figure 13-91 on page 582.

Figure 13-90: Academic Browser window, Results tab



5. Optionally, do one or more of the following:
   - The Results tab is an EMS browser window. See “An EMS Browser Window” on page 35 for all the features that are available for this tab.
   - To open a course in the Course Navigator, double-click the course entry on the Results tab.
   - Click Print to print the search results.
   - Click Export to export the search results to a Microsoft Excel spreadsheet.
   - In Define & Edit mode or Dual mode, use the New Course and New Section options as needed.
   - Select a course, or CTRL-click to select multiple courses, and depending on the mode, the following options are available on the Tools menu:
     - Set Preferences mode—Set Course Preferences (see “Specifying Room Preferences/Requirements” on page 491) and Clear Course Preferences. Click Clear Course Preferences to clear all the current preferences/requirements for the selected courses in a single step.
     - All Modes (including Read Only)—Shares Space, Does Not Share Space, Change Shares Space Parent (see “Working with Shared Space” on page 475) and Set Final Exam Settings. (See “Setting a Final Exam Schedule” on page 562.)

- All Modes (including Read Only)—Unsync Selected Courses, which deletes the selected course records and the corresponding reservations and bookings from EMS.

You should use this option sparingly; however, it might be required post-publish if an error occurred in your SIS or during publish.

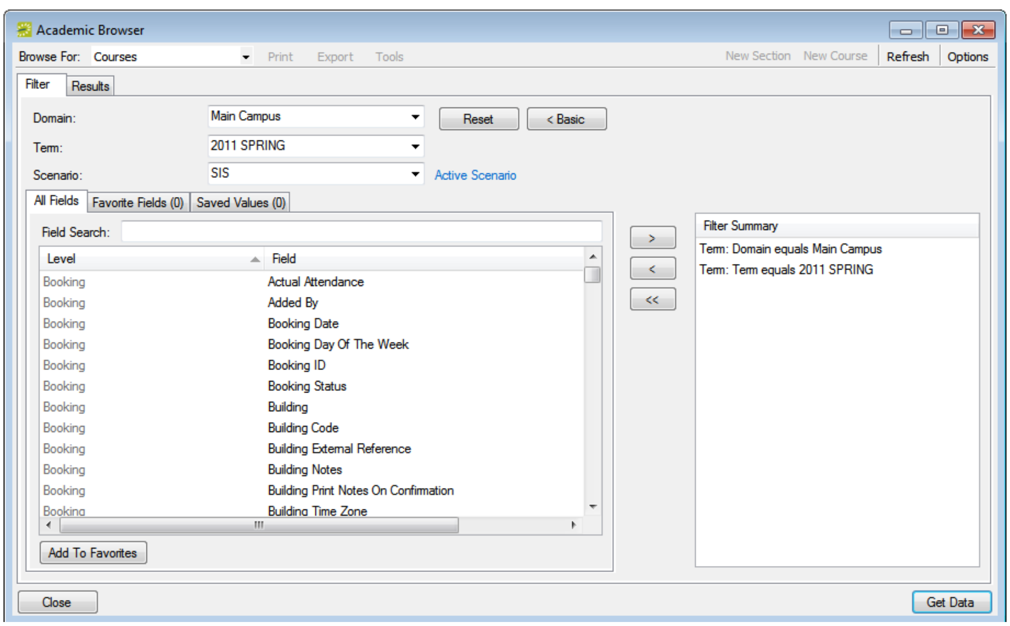
- In the Browse For field, select a different item for which to search. The Results tab is refreshed with the search results based on the item that you selected *and* the search criteria on the Filter tab.
- Click Filter to return to the Filter tab, make any necessary changes to the search criteria and repeat the search.
- Click Refresh to requery the database based on the current search criteria.

6. Click Close.

   Any changes that you made to the search results columns (position, width, and so on) remain in effect for any other searches that you carry out. To reset the columns to their default values, see “Resetting Column Settings” on page 408.

To carry out an advanced search in the Academic Browser

Figure 13-91: Browser window, Advanced search options



1. On the Browse For dropdown list, select the item for which to search.
2. Select a domain, term, and/or scenario to search.

3. For *each* field level option by which to carry out the search:
   - Select the field level option, and then click the Move button (>).

---

*To filter the list of available fields, in the Field Search field, enter a search string. Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **add** returns **Add**ed by, Date **Add**ed, and Group **Add**ress Line 1. The list of fields that meets your search criteria is dynamically updated as you enter your search criteria.*

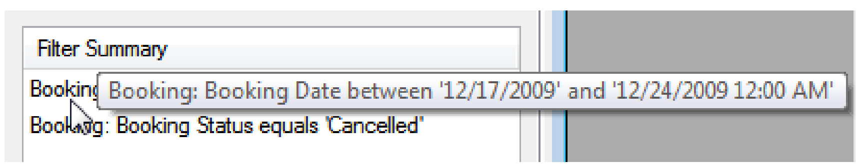
   - When prompted, enter a value or define the limits for the option, and then click OK.

   The option is moved to the Filter Summary list.

If you have specific fields and/or values by which you always want to carry out a search, then you can set up these fields to be your Favorite fields. See *"To set up favorite fields for an Academic Browser search" on page 585.*

To view a selected field option in its entirety in the Filter Summary list, rest the mouse pointer on the entry. A tooltip showing the complete field option information opens.

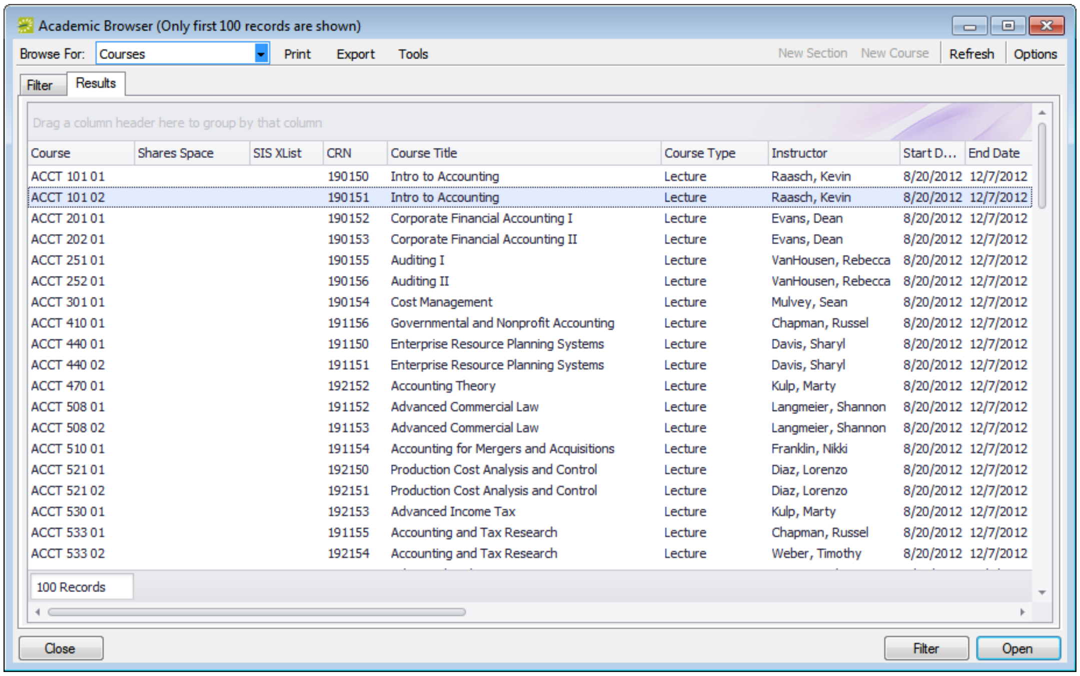
Figure 13-92: Viewing a selected field option in the Filter Summary list



4. Optionally, click Options and edit the default value for the additional search option Number of Records to Return.
5. Click Get Data or Refresh.

   The search results are displayed on the Results tab. If you have searched for courses, then the results include courses without course dates (meeting patterns). "Multiple" is displayed for those courses with more than one course date. If you have searched for course dates, courses without course dates are suppressed while courses with multiple meeting patterns are expanded. EMS schedules rooms only for courses with course dates. See Figure 13-93 on page 584.

Figure 13-93: Academic Browser window, Results tab



6. Optionally, do one or more of the following:
   - The Results tab is an EMS browser window. See "An EMS Browser Window" on page 35 for all the features that are available for this tab.
   - To open a course in the Course Navigator, double-click the course entry on the Results tab.
   - Click Print to print the search results.
   - Click Export to export the search results to a Microsoft Excel spreadsheet.
   - In Define & Edit mode or Dual mode, use the New Course and New Section options as needed.
   - Select a course, or CTRL-click to select multiple courses, and depending on the mode, the following options are available on the Tools menu:
     - Set Preferences mode—Set Course Preferences (see "Specifying Room Preferences/Requirements" on page 491) and Clear Course Preferences. Click Clear Course Preferences to clear all the current preferences/requirements for the selected courses in a single step.
     - All Modes (including Read Only)—Shares Space, Does Not Share Space, Change Shares Space Parent (see "Working with Shared Space" on page 475) and Set Final Exam Settings. (See "Setting a Final Exam Schedule" on page 562.)

    - All Modes (including Read Only)—Unsync Selected Courses, which deletes the selected course records and the corresponding reservations and bookings from EMS.

You should use this option sparingly; however, it might be required post-publish if an error occurred in your SIS or during publish.

    - In the Browse for field, select a different item for which to search. The Results tab is refreshed with the search results based on the item that you selected *and* the search criteria on the Filter tab.

- Click Filter to return to the Filter tab, make any necessary changes to the search criteria and repeat the search.
- Click Refresh to requery the database based on the current search criteria.

7. Click Close.

   Any changes that you made to the search results columns (position, width, and so on) remain in effect for any other searches that you carry out. To reset the columns to their default values, see “Resetting Column Settings” on page 408.

To set up favorite fields for an Academic Browser search

If you have specific fields and/or values by which you always want to carry out an Academic Browser search, you do not have to filter the list of fields on the All Fields tab for every search. Instead, you can set up each of these fields to be a favorite field with a specific value or limit if needed.

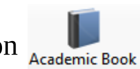
1. Open the Academic Browser, and make sure that the Advanced search features are displayed.
2. For each field that you are setting up as favorite field, select the field on the All Fields tab, and then click Add to Favorites.

   The field is added to the Favorite Fields tab.
3. Optionally, after you define a value or define the limits for a field, click Save Value on the Filter dialog box.

   The next time that you carry out a search, you can simply open the Favorite Fields tab or the Saved Values tab to carry out a search based on your customized list of search fields.

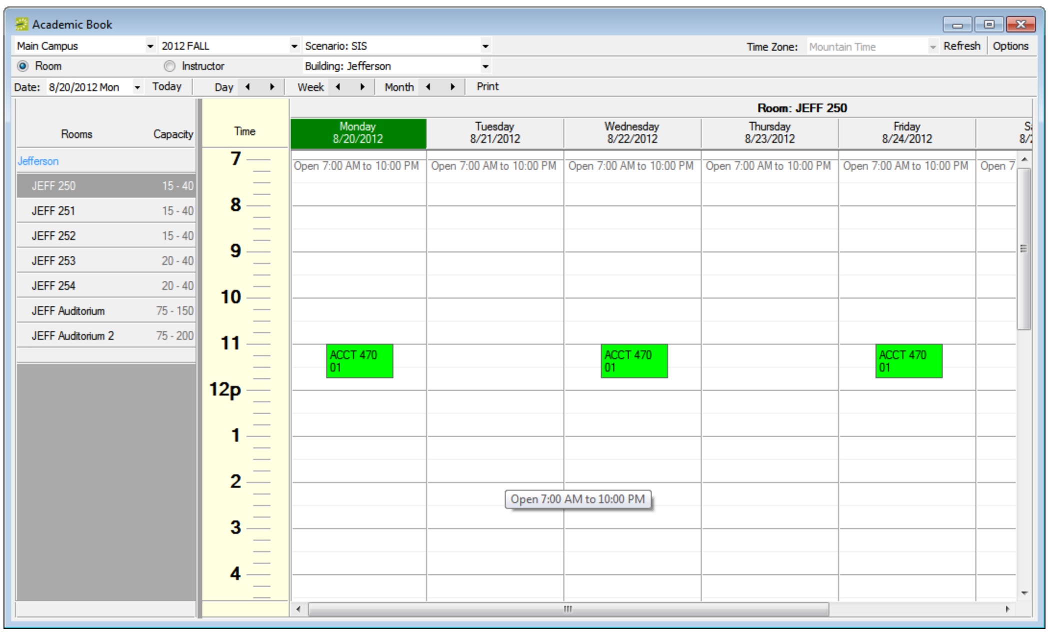
Using the Academic Book

The Academic Book provides a week-at-a glance graphical view of the courses that are assigned to a specific room or instructor. The view is for one room at a time as opposed to the Reservation Book, which shows all rooms one day at a time. The Academic Book shows only classes during the Planning phase of academic scheduling, but it shows both classes and events post-publish. To open the Academic Book, do one of the following:

- On the EMS Campus toolbar, click the Academic Book icon 

.
- On the EMS Campus menu bar, click Academic Planning > Courses > Academic Book.

Figure 13-94: Academic Book



When the Academic Book first opens, if you are working with a future term, then the date is set to the first Sunday or Monday of a full week of the term; otherwise, if you are working with a current term, then the date is set to the first Sunday or Monday of the current week.

Whether the date is set to Sunday or Monday is determined by the setting for the Day Label - First Day of the Week EMS system parameter. See the EMS Setup Guide.

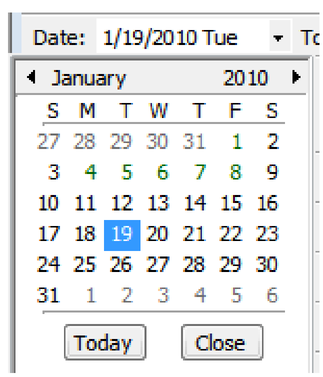
In both cases, the display is filtered by Room and Building. You have many options for changing the view in the Academic Book to better meet your working needs, including:

- Changing the display date. See "To change the date display" below.
- Changing the view of courses by room. See "To change the view of courses by room" on page 588.
- Changing the view of courses by instructor. See "To change the view of courses by instructor" on page 589.
- Setting options that specify such things as what is displayed in the book when it first opens, mouse actions in the book, what information is displayed in course tooltips, and so on. See "To set options for the Academic Book" on page 590.
- Opening a course in the Course Navigator. See "To open a course in the Course Navigator" on page 592.
- Displaying the details for a room. See To "To display the details for a room" on page 593.

To change the date display

- On the Date field, click the dropdown arrow to open the Calendar. Use the scroll features (< and >) at the top of the calendar to change the month or year. To select a different date for a month, click the date.

Figure 13-95: Academic Book calendar



- Use the scroll features at the top of the reservation book display to scroll to a different day, week, month, year, or any different combination of these.

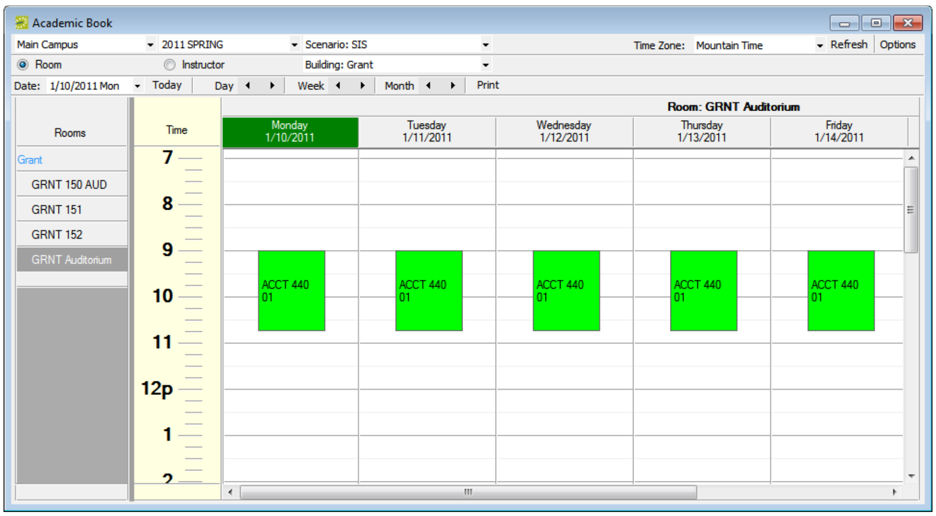
Figure 13-96: Academic Book calendar scroll features

You can also manually enter a new date into the field. In all cases, the date that you choose specifies the start of the week that you are viewing. To view a full week, always select a Sunday or a Monday.

To change the view of courses by room

If the Academic Book is in the Room view, then the default minimum and/or maximum capacities that have been configured for a room are displayed next to the room. To change the view of courses by room, change any and all of the available display options—Domain, Term, Scenario (SIS by default or an Optimization scenario if optimization has taken place), the Building/Domain/View, and/or the Time Zone.

Figure 13-97: Academic Book, courses grouped by room

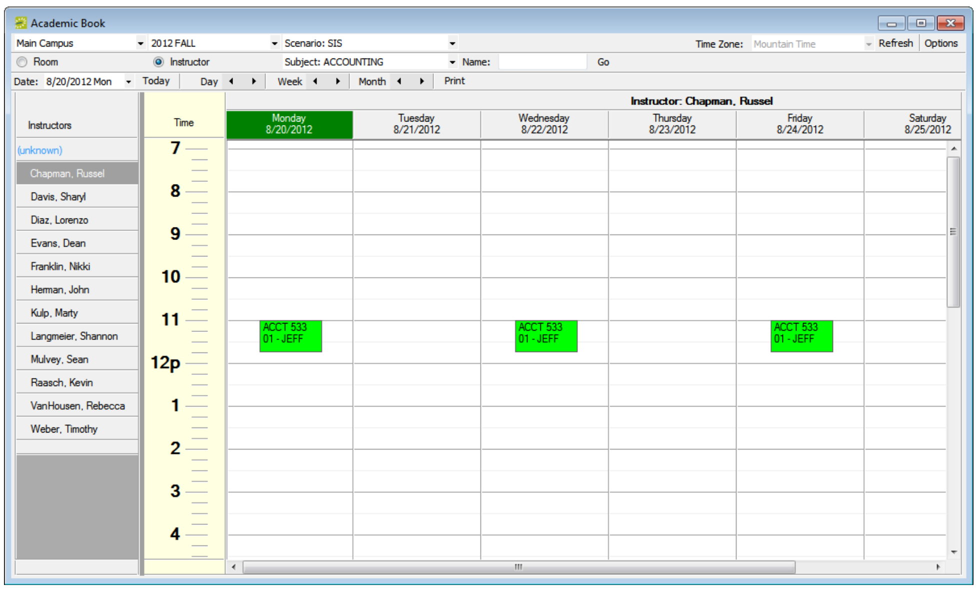


To change the view of courses by instructor

To change the view of courses to that by Instructor, click Instructor, and then, change any and all of the available display options—Domain, Term, Subject, and/or Time Zone. To filter the list by a specific instructor, enter a search string in the Name field, and then click Go. Click the name of an instructor in the left pane to see a list of courses that are scheduled for the instructor.

Your search is limited to the exact order of the characters in the string, but the search is not case-sensitive and it can appear anywhere in the search results. For example, a search string of ***and*** *returns* ***And****erson, Scott, S****and****ers, Barry, and so on.*

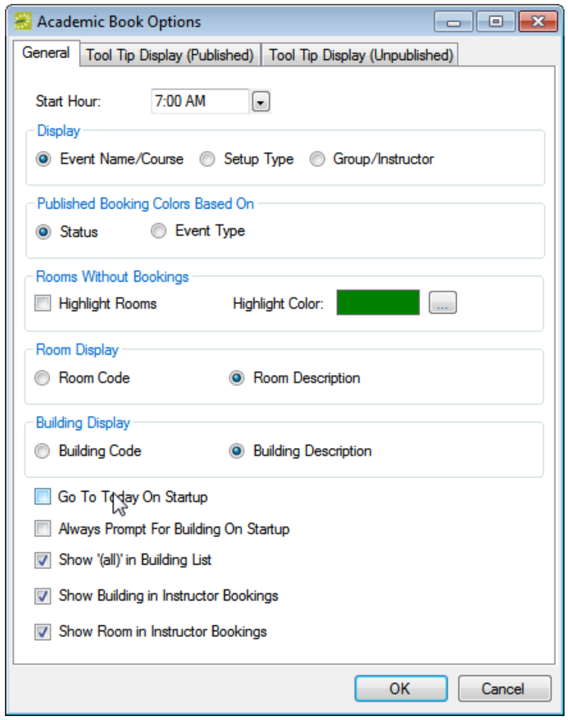
Figure 13-98: Academic Book, courses grouped by instructor



To set options for the Academic Book

Click Options in the upper right hand corner of the Academic Book to open the Academic Book options dialog box. You use the options on this dialog box to specify such things as what is to be displayed in the book when it first opens, mouse actions in the book, and so on.

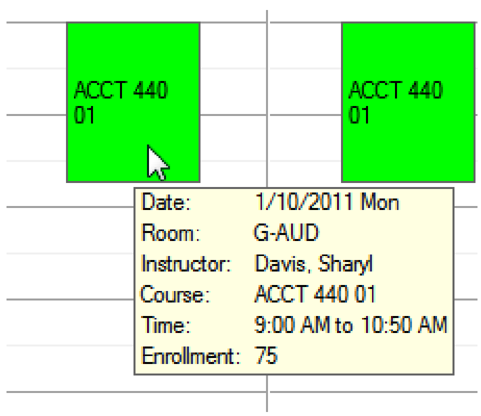
Figure 13-99: Academic Book Options dialog box, General tab



Option	Description
General tab	
Start Hour	The starting time for the Time grid that is displayed in the Academic Book.
Display	• Event Name/Course—Display the event name/course in the course entry. • Setup Type—Show the setup type and count in the course entry. • Group/Instructor—Show the group name/instructor name in the course entry.
Published Booking Colors Based On	For published courses, whether the fill color for a course entry is to be based on the Status color palette or on the Event Type color palette that has been determined in Configuration.
Rooms Without Bookings	The color with which rooms without bookings are highlighted in the Academic Book.

Option	Description
Room Display	• Room Code—Show the room code in the Room list when the courses are grouped by room. • Room Description—Show the room description in the Room list when the course are grouped by room.
Building Display	• Building Code—Show the building code in the Rooms list when the courses are grouped by room. • Building Description—Show the building description in the Rooms list when the coursed are grouped by room.
Go to Today on Startup	Not applicable.
Always Prompt for Building on Startup	Opens the Building dropdown list when the Academic Book first opens, which requires that you select a building, domain, or view before you can continue, as opposed to simply opening the building that you last viewed in the Academic Book.
Show (all) in Building list	Make (all) buildings an available option in the Building dropdown list, as opposed to having to choose a single building.
Show Building in Instructor Bookings	Show the Building Code in the course entry when courses are grouped by instructor (space permitting).
Show Room in Instructor Bookings	Show the Room Code in the course entry when courses are grouped by instructor (space permitting).
Tooltip Display (Unpublished)—Select the information that is to be displayed when the mouse pointer is placed on the entry for an unpublished course in the Academic Book.	
Tooltip Display (Published)—Select the information that is to be displayed when the mouse pointer is placed on the entry for a published course in the Academic Book.	

Figure 13-100: Tooltip for a course entry in the Academic Book

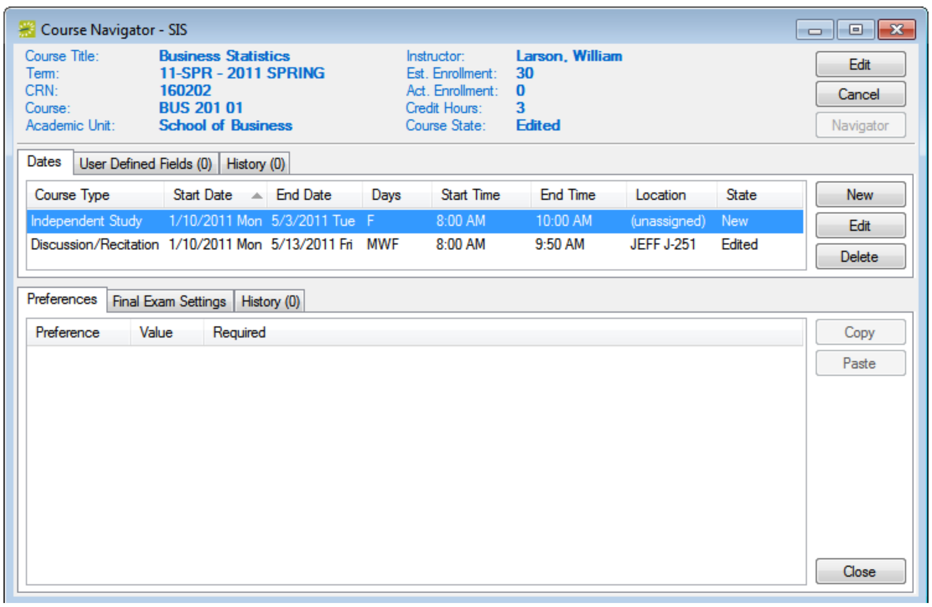


To open a course in the Course Navigator

- Double-click a course entry for a *non-published* course in the Academic Book to open the course in the Course Navigator.
- Double-click a course entry for a *published* course in the Academic Book to open the course in the Navigator, select the course on the Course Info tab, and then click Course to open the course in the Course Navigator.

For detailed information about working with the Course Navigator, see "Using the Course Navigator" on page 594.

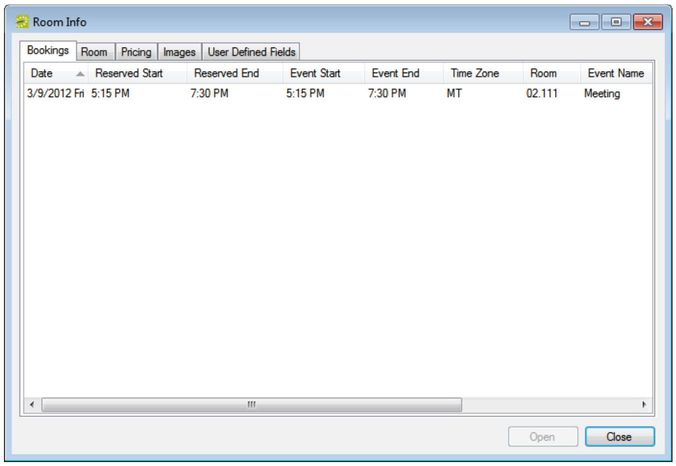
Figure 13-101: Course opened in the Course Navigator



To display the details for a room

To display details about a room, make sure that the Academic Book is in the Rooms view, and then right-click on any room in the Rooms list to open a Room Info dialog box that provides the following information on the appropriate tabs—the bookings for the room, the properties for the room, the pricing for the room, any images of the room and any user defined fields (UDFs) that are associated with the room.

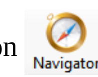
Figure 13-102: Room Info dialog box



Using the Course Navigator

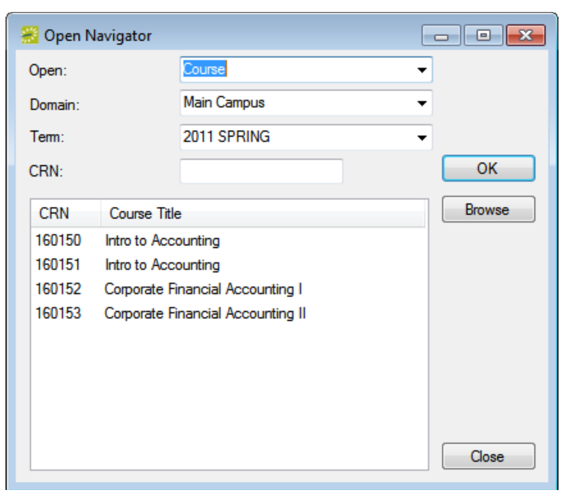
The Course Navigator is a window in EMS Campus that you use to view and manage all aspects of a course. You can access the Course Navigator from the Academic Browser, the Academic Book, and the EMS Navigator. Different tabs and panes on the Course Navigator provide different information about a course and course dates. The actions that you can carry out in the Course Navigator depend upon the mode (Read Only, Define and Edit Courses, Set Preferences, or Dual) that is enabled for the academic term with which you are working in EMS Campus.

To access the Course Navigator

- To access the Course Navigator from the Academic Browser, for an *unpublished* course, double-click the course in the search results to open the course in the Course Navigator.
- To access the Course Navigator from the Academic Book, for a *published* course, double-click the course entry in the Academic Book to open the course in the Navigator, and then click Course on the Course Info tab to open the course in the Course Navigator.
- To access the Course Navigator from the EMS Navigator, do the following in the order indicated:
    - On the toolbar, click the Navigator icon 

 to open the Open Navigator dialog box.
    - On the Open dropdown list, select Course to open a Domain dropdown list and a Term dropdown list.

Figure 13-103: Open Navigator dialog box

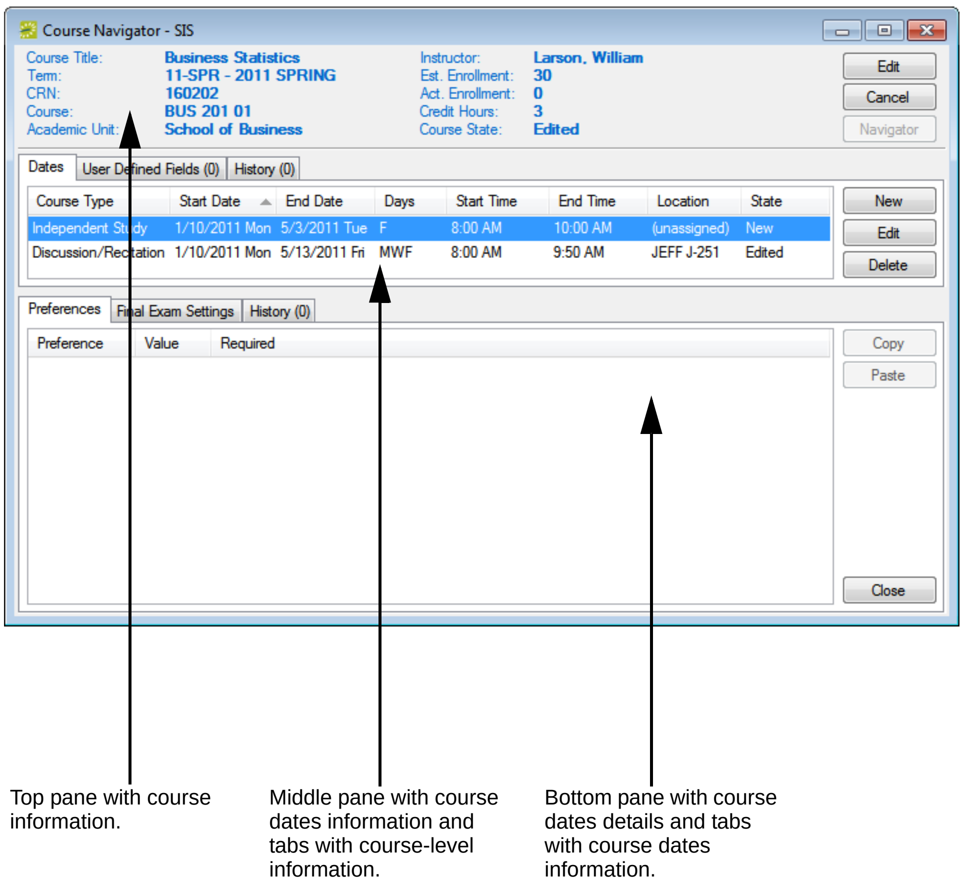


    - Select a domain and a term.
    - In the CRN field, enter the CRN (course reference number) for the course.

- Click OK.
  - If the course is a *non-published* course, then the course opens in the Course Navigator.
  - If the course is a *published* course, then the course opens in the Navigator. Select the course on the Course Info tab, and then click Course to open the Course in the Course Navigator.

Course Navigator window layout

Figure 13-104: Course Navigator



The top pane of the Course Navigator displays information about a selected *course*—the course title, the course term, the current course state (New, Edit, Unchanged, or Cancelled), and so on. The middle pane of the Course Navigator displays information about each of the *course dates* for the course. To view the indicated information for a course date, select a course date in the middle pane of the Course Navigator, and then open the appropriate tab (Dates, User Defined Fields, Shares Spaces, Preferences, or Final Exam Settings). The History tabs in the middle and lower pane provide audit information for course records and course date records. To view changes made to *course-level* information, open the History tab in the *middle* pane of the Course Navigator. To view changes made to *course date-level* information, select a course date in the middle pane, and then open the History tab in the *bottom* pane of the Course Navigator.

Available Actions in the Course Navigator

The actions that you can carry out in the Course Navigator depend upon the mode (Read Only, Define and Edit Courses, Set Preferences) that is enabled for the academic term with which you are currently working with in EMS Campus.

Mode	Available Actions
Read Only	The default mode in which the Navigator is placed if you have not selected any other mode. No actions are available.
Define and Edit	• Add course dates • Edit a course • Edit course dates • Cancel course dates • Cancel courses **Note:** These changes require an update in the SIS. See “Enabling/ Disabling a Term for Define & Edit Mode” on page 458 for more information.
Set Preferences	Set preferences for a course on a course date by course date basis.

Using the Search for Rooms Tool

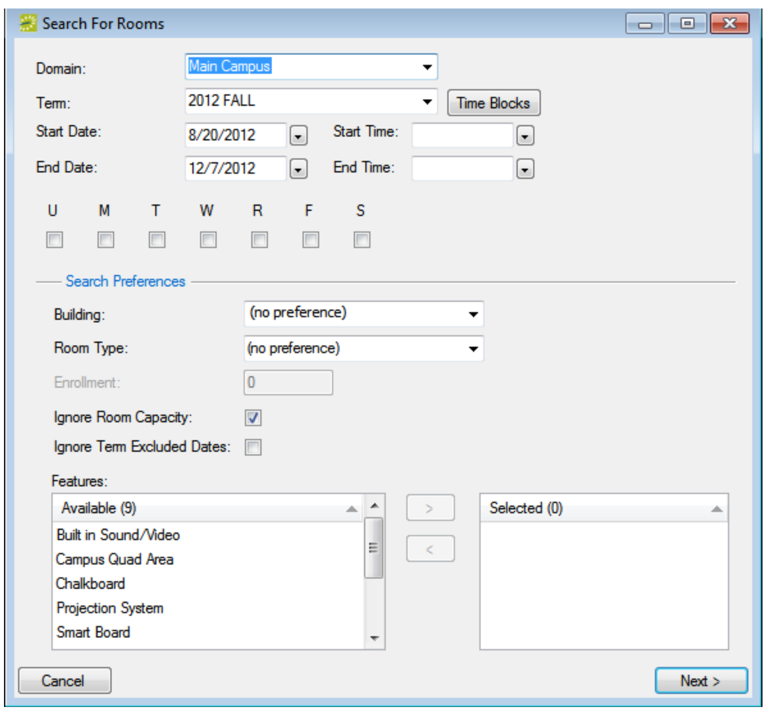
After you publish a term, there are times when you need to identify which rooms are available for a particular meeting pattern and set of criteria. For example, an academic unit might need to add a new section for a course or an instructor might be looking to change the times for a course. The Search for Rooms tool significantly simplifies the process of searching for classrooms in these situations.

To search for rooms using the Search for Rooms tool

1. On the EMS Campus menu bar, click Academic Planning > Courses > Search For Rooms.

   The Search For Rooms dialog box opens.

Figure 13-105: Search For Rooms dialog box



2. On the Domain dropdown list, select the appropriate domain and on the Term dropdown list, select the appropriate term.

3. Do one of the following:
    - Manually enter the meeting pattern information (start and end dates, start and end times, and meeting days) for the course.
    - Click Time Blocks to open the Time Blocks dialog box, and then select a time block from a list of time blocks that have been made available for the term.
4. Enter your search criteria.

Option	Description
Building	The default value is (no preference). You can select a specific building, area, or view.
Room Type	The default value is (no preference), but you can select from a list of pre-configured types.
Enrollment Ignore Room Capacity	Available only if Ignore Room Capacity is not selected. You can enter a specific room capacity by which to search.
Ignore Term Excluded Dates	Not selected by default. Select this option to search for rooms that are available even on dates that have been marked as “Excluded” for the term.

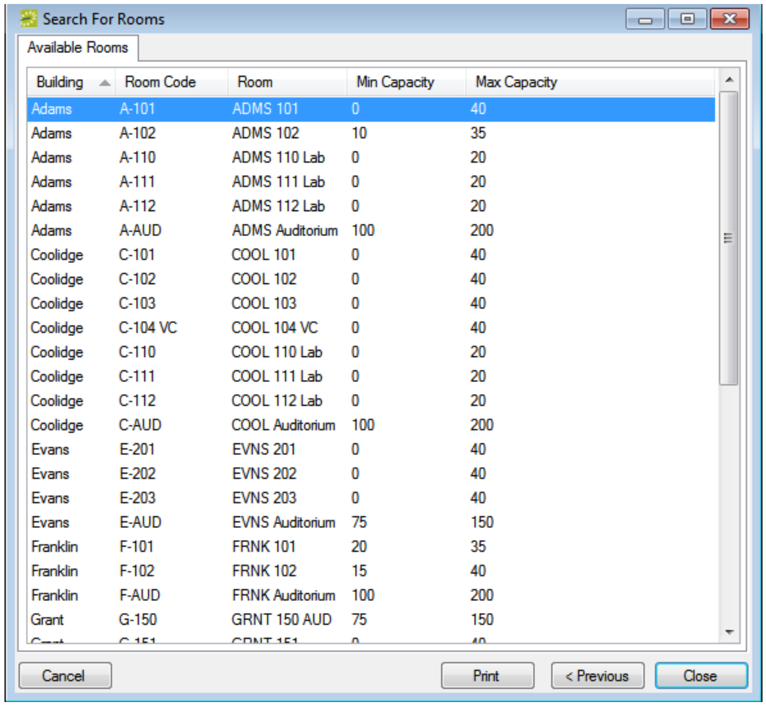
5. In the Available list, select the feature, or CTRL-click to select the multiple features that the rooms are to have, and then click the Move button (>) to move the selected features to the Selected list.
6. Click Next.

    The Search for Rooms dialog box opens with up to three tabs displayed:

    - Available Rooms tab. By default, the Available tab is always displayed and it is always the active tab.This tab displays all the rooms that meet all your search criteria.
    - Academic Conflicts tab. The Academic Conflicts tab is displayed only if there are rooms that meet all your search criteria but they are in academic conflict (a course has already been scheduled in a room for the selected day and time pattern). Optionally, you can open the Academic Conflicts tab to view the list of rooms that are in academic conflict.
    - Event Conflicts tab. The Event Conflicts tab is displayed only if there are rooms that meet all your search criteria but they are in event conflict (a non-academic event has already been scheduled in a room for the selected day and time pattern). Optionally, you can open the Event Conflicts tab to view the list of rooms that are in event conflict.

    See Figure 13-106 on page 600.

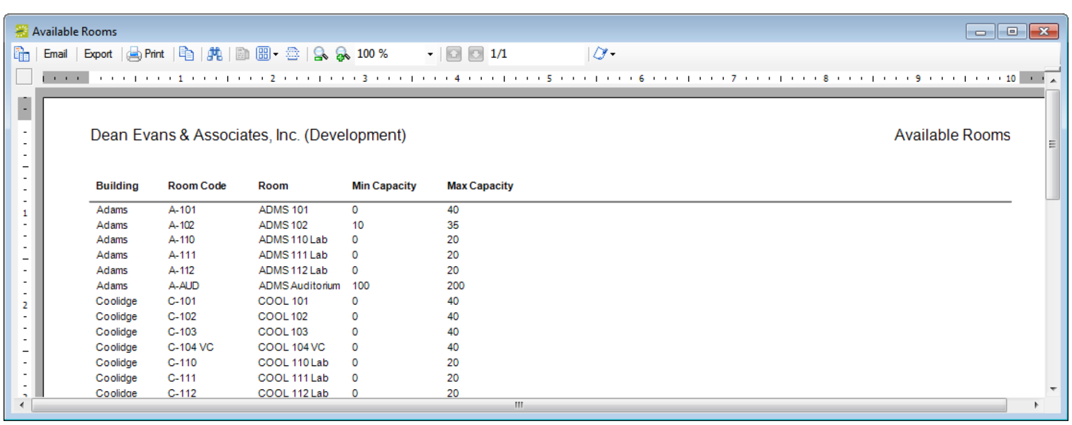
Figure 13-106: Search For Rooms dialog box, Available tab



7. Optionally, you can do one or more or all of the following on this tab:

   - Use the Scroll feature to scroll the list of available rooms, and then click Close to close the dialog box.
   - Click Previous to return to the Search For Rooms dialog box, modify your search criteria, and repeat the search.
   - Click Print to open an onscreen preview of the list of available rooms. The preview window contains options for printing a hard copy of the room list, emailing the list, and so on.

Figure 13-107: Onscreen preview of the Available Rooms list



Generating Academic Reports

For any academic report, you can specify the parameters, options, and format for the report, or you can generate the report according to *memorized* settings. (For detailed information about a memorized report, see “Working with Memorized Reports” on page 323.) Not all reports require the same parameters, nor do they all have the same options available. In addition, you can generate different reports in different formats.

All subjects must belong to an academic unit to be displayed on an academic report. Refer to the EMS Setup Guide for detailed information about configuring academic units and synchronizing subjects.

To generate an academic report

1. On the EMS Campus menu bar, click Academic Planning > Reports to open the Reports menu, and then click the option for the report that you are generating. For example, to generate the Course List report, click Academic Planning > Reports > Course List.

All academic reports are also available under Reports >Academic Planning.

2. On the Setup dropdown list, do one of the following:

   - To generate the report according to the filter settings that you want (parameters, options, and so on), leave user-specified selected, then go to Step 3.

For brevity and ease, the parameters that are available for each report are not detailed in this section. If you need help with generating any of these reports, contact your EMS administrator.

   - To run the report with filter settings that have been saved, or *memorized*, select the memorized report, and then go to Step 4.

For detailed information about memorized reports, see “Working with Memorized Reports” on page 323.

3. Specify the report parameters, options, and format. See:

"Course List" on page 603.	"Time Block Violations" on page 607.	"Academic Unit Statistics" on page 610.
"Course Changes" on page 604.	"Time Block Room Availability/ Usage" on page 607.	"Course Type Analysis" on page 610.
"Course Preferences" on page 605.	"Academic Class Meeting Utilization" on page 608.	"Final Exam Settings" on page 611.
"Preferences Summary" on page 605.	"Classroom Utilization" on page 608.	"Final Exam Schedule" on page 611.
"Unmet Preferences" on page 605.	"Hourly Classroom Utilization" on page 608.	"Trend Report" on page 612.
"Instructor Back to Back" on page 606.	"Over/Under Utilization" on page 609.	
"Instructor Summary" on page 606.	"Prime Time Usage" on page 609.	

4. Optionally, do one or more or all of the following:

   - In the Report Comment field, enter a comment that is to be printed on the report.

The comment can be a maximum of 255 characters, including spaces.

   - Click Print Preview.

     A preview of the report opens onscreen.

   - To print a hard copy of the report, specify the number of copies that you are printing, and then click Print.

5. Click Close.

   Unless you change the setup, all subsequent reports will be generated and printed according to the parameters and options that you have specified and in the format that you specified. If you want to save certain settings so that you do not have to adjust the filter settings every time you run the report, you can memorize the report. (See "Working with Memorized Reports" on page 323.)

Course List

Description	Options
Provides a list of courses and course dates. **Note:** This report is often sent out to academic units for review when the Domain Scheduler is finished with room assignments.	There are options to include courses without room assignments and to print User Defined Fields that are associated with courses. Formats include: • By Course • By Instructor • By Academic Department By Course • By Academic Department By Instructor • By Day of Week • By Location • By Estimated Enrollment • By Start Time • By Subject • By Course Type

Course Changes

Description	Options

Used during Define and Edit Mode to capture changes made by the academic units to courses and course dates so that the Domain Scheduler can data enter these changes into the SIS.	• Show Changes
	  • All Changes For Term—If selected, all changes for the term (even changes that have possibly already been data-entered into the SIS) are included in the report.
	  • *Changes Since Last Synchronization—If selected, the report includes only changes that have been made since the last time that the term was synchronized.
	• Show Room Changes—If selected, the report includes changes to rooms (post-publish only).
	• Show Cancelled Courses Only—If selected, the report includes only cancellations.
	• Show New Courses Only—If selected, the report includes only new courses.
	• Show Edited Courses Only—If selected, the report includes only changes.
	• Show Latest Changes Only—If this option is selected, and a single value has been changed multiple times, the report includes only the most recent change for the field.
	• Hide Change Details—If selected, audit trail details are hidden on the report.
	• Show All Courses—If selected, all courses, even those without changes, are shown in the report.
	• Show User Defined Fields—If selected, the report includes any user defined fields that have been completed.
	• *Show Notes—If selected, any user-supplied notes are shown in the report.
	Note: The options that are marked with an asterisk (*) are the recommended options for the most inclusive reports.

Course Preferences

Description	Options
Used after Set Preferences mode to provide a list of courses and course dates with their preferences and requirements.	Format Choices: • By Course • By Academic Department By Course • By Academic Department by Instructor

Preferences Summary

Description	Options
After running an optimization scenario, this report is used to summarize the following information: • The number of each type of preference or requirement. • The number of the preferences that can be met from the optimization process. • The number of preferences that cannot be met from the optimization process. You can generate this report for each different scenario that was optimized.	N/A

Unmet Preferences

Description	Options
After running an optimization scenario, this report is used to list the courses that had preferences or requirements that were not met during the optimization process. You can generate this report for each different scenario that was optimized.	Format Choices: • By Course • By Academic Department By Course • By Academic Department by Instructor

Instructor Back to Back

Description	Options
Lists the courses that have instructors who are scheduled to teach two courses at the same time (Conflicts) and instructors who are teaching back to back in different locations within the time gap that is specified in Options.	• The days of the week that are to be included in the instructor's schedule. • The time gap (in minutes) between classes on the specified days that determines "back to back."

Instructor Summary

Description	Options
This report includes the following values per instructor: • Number of sections. • Number of teaching hours. • Number of credit hours. • Total estimated enrollment. • Total actual enrollment. • Number of sections in Prime Time. • Number of Time Block violations,.	N/A

Time Block Violations

Description	Options

Lists the courses that are in violation of the Time Block template. In the Summary format, the following values are included:
• Total number of course dates
• Total in violation
• Percent in violation
• Total that meet the Time Block template
• Percent that meet the Time Block template
• Percent of total violations per academic unit
	• Format options:
	  • By Course
	  • By Instructor
	  • By Academic Unit By Course
	  • By Academic Unit By Instructor
	  • Summary
	  • Chart - Violation Count
	  • Chart - Violation Totals
	• Show All Courses
	• Include Courses Not Assigned To Rooms
	• Show User Defined Fields

Time Block Room Availability/Usage

Description	Options

Displays the number of rooms that are either available or in use for each room size (Small, Medium, or Large) for each time block.
Note: To generate this report, a Time Block template must be indicated on the term.
	• Format options:
	  • Availability
	  • Usage
	• Indicate Low Availability and High Availability Thresholds
	• Include All Active Scenarios in other Domains

Academic Class Meeting Utilization

Description	Options
Used after publishing to view the percent utilization of your rooms based on the number of class meetings that you specify. For instance, if you hold 50 minute courses from 8:00 - 5:00 (9 meetings) and have one evening course from 6:00 - 9:00 (1 meeting) Monday through Friday (x5), you would have 50 class meetings per week.	N/A

Classroom Utilization

Description	Options

Used to analyze the percent that your rooms are utilized compared to a number of hours and the percentage of seats full (selected enrollment compared to room capacity).
Note: In Manage Terms, you can specify either estimated enrollment or actual enrollment. The value that you selected is the value that is used to calculate the values for this report.
	• Format Options:
	  • Detail
	  • Chart - By Building
	  • Chart - By Room Type
	  • Chart - By Room Size
	• The days of the week that are to be included in the report
	• The Hours Per Day that are to be considered
	• Include All Active Scenarios in other Domains

Hourly Classroom Utilization

Description	Options

Calculates the percent that a room is used during each hour of the day. Formats include detailed (percent for each hour of each room specified) and chart (a chart of each hour for overall).	• Format Options:
	  • Detail
	  • Chart
	• The days of week that are to be reviewed
	• Include All Active Scenarios in other Domains

Over/Under Utilization

Description	Options
Displays those courses that have an adjusted enrollment that is either over the maximum capacity for the room or under the minimum capacity for the room and seat fill. **Note:** In Manage Terms, you can specify either estimated enrollment or actual enrollment. The value that you selected is the value that is used to calculate the values for this report.	To show or not to Show All Courses (regardless if they fall outside capacity thresholds)

Prime Time Usage

Description	Options

This report displays the number of sections (course dates) with room assignments that fall within the specified time range (Prime Time) or that have been indicated as Prime Time on the Time Block template.
Note: In Manage Terms, you can specify either estimated enrollment or actual enrollment. The value that you selected is the value that is used to calculate the values for this report.
	• Format options:
	  • Detail
	  • Chart - Sections
	  • Chart - Class Meetings
	  • Chart - Class Hours
	• The days of the week that are to be included in the report
	• Include courses that have not been assigned into a room

Academic Unit Statistics

Description	Options

Displays the following statistics for course dates that have been scheduled into rooms:
• Number of sections per unit
• Percentage of the total sections
• Number of class meetings
• Percentage of the total class meetings
• Number of class hours
• Percentage of class hours
• Average estimated enrollment
• Average actual enrollment
• Average seat fill
Note: In Manage Terms, you can specify either estimated enrollment or actual enrollment. The value that you selected is the value that is used to calculate the values for this report.
	• Format options:
	  • By Academic Unit
	  • By Academic Time Block
	• The days of the week that are to be included in the report
	• Include course dates that have not been assigned into a room

Course Type Analysis

Description	Options

Displays the following statistics indicated by course type:
• Number of sections
• Percentage of the total sections
• Number of class meetings
• Percentage of the total class meetings
• Number of class hours
• Percentage of class hours
• Average estimated enrollment
• Average actual enrollment
	• Format options:
	  • Detail
	  • Chart - Sections
	  • Chart - Class Meetings
	  • Chart - Class Hours
	  • Chart - Actual Enrollment
	• The days of the week that are to be included in the report
	• Include course dates that have not been assigned into a room

Final Exam Settings

Description	Options
Outlines any final exam settings that are marked on courses for preparation of publishing the final exam schedule.	• Show All Courses - Displays all courses and their corresponding settings • Show Final Exam Not Required - Limits the report to those courses that had “No Exam Required” specified • Show Special/Common Exams - Limits the report to only those courses with special/common exams settings

Final Exam Schedule

Description	Options
Displays a list of courses with the corresponding final exam date, time, and room as assigned by the final exam session.	• All Assigned - All courses that have been assigned to a room by the final exam session • Different Rooms - All courses that have been scheduled in room that was not the same that was used all semester for the course for the final exam • Unassigned - All courses that have not been scheduled in a room for the final exam • Final Exam Not Scheduled - All courses for which no final exam was scheduled

Trend Report

Description	Options

Shows how the following statistics are trending term by term:
• Percent utilization
• Percent estimated seat fill
• Percent actual seat fill
• Percent sections in Prime Time
• Percent sections over maximum capacity
• Percent sections under minimum capacity
• Percent Time Block violations
	• Format options:
	  • By Term
	  • By Term By Academic Unit
	  • Chart
	• The days of the week that are to be included in the report
	• The number of hours per day that are to be used to calculate utilization
	• Include course dates that have not been assigned into a room

EMS Web Client Installation Instructions

EMS Workplace 7.0
EMS Campus 7.0
EMS Enterprise 7.0
EMS Legal 7.0
EMS District 7.0
EMS Professional 13.0

Event Management Systems
Schedule Clarity

Introduction

This document lists the steps you must take to install the EMS Web Client. The EMS Web Client is an optional component that extends functionality currently available within the EMS desktop client to the web.

Note: The EMS Web Client is included with your existing licensing agreement. **An active EMS user account** is required to log into the EMS Web Client. Users logging into the EMS Web Client will count against the total EMS user count that your organization is registered for.

IMPORTANT: With the EMS desktop client, processing is distributed across all client workstations. When planning your server infrastructure, please keep in mind that processing for all EMS Web Client sessions is concentrated on the web server. Hardware and CPU requirements should be taken into account to address scalability demands. System requirements can be found on our website.

IMPORTANT: Please see the *What's New* document for important information regarding the Web Client. Existing versions of the Web Client are **not** compatible with this release.

Unlimited toll-free customer support is available to EMS users who have a current Annual Service Agreement (ASA). If you are unable to resolve a problem or answer a question by reading the EMS documentation, contact us at:

Email:	**support@emssoftware.com**
Web:	**www.emssoftware.com**
Phone:	**(800) 288-4565**
Fax:	**(303) 796-7429**

Hardware and Software Requirements

System requirements can be found on our website. Please see the **IMPORTANT** message above.

Obtaining the Latest Release of the EMS Web Client

The latest release of the EMS Web Client can be downloaded from the online Support Center.

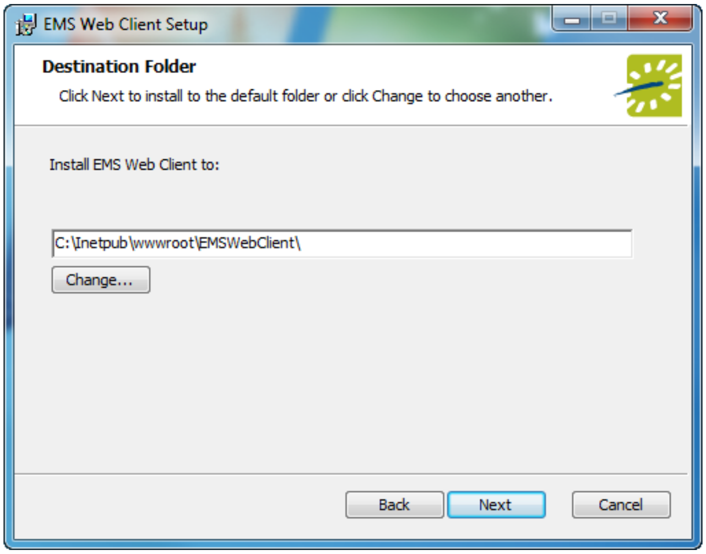
1. Go to www.emssoftware.com and enter your Email Address and Password in the Support Center area.
2. Click the Software downloads link.
3. Download **EMS Web Client (EMSWebClient.msi)**. Required for both first time installations and upgrades.

Installing/Upgrading the EMS Web Client

Important: Before beginning the installation process, please do the following:

- Install or upgrade your EMS databases as outlined in the *EMS Installation Instructions*.
- Apply the latest EMS Patch against your EMS database. Please see the *EMS Release Notes* for details.
- Manually **uninstall** any previous versions of the EMS Web Client on your web server.

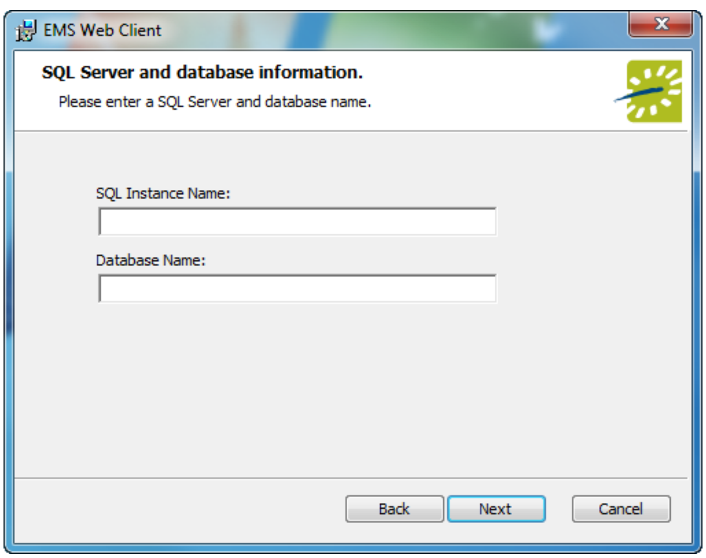
1. Verify that the prerequisite software has been installed.
2. Download the **EMSWebClient.msi** file onto the web server that will be running the EMS Web Client.
3. Run **EMSWebClient.msi**.
4. The first screen welcomes you to the EMS Web Client Setup Wizard. Click **Next** to begin the installation process. The *Destination Folder* screen will appear.



5. Select the destination folder. The installation process will create a new physical directory on your web server based on the destination folder path entered ("EMSWebClient" in the example above.) Click **Next**.

   Note: The EMS Web Client should <u>not</u> be installed in the same physical directory as other EMS web-based products OR under a site running another version of the EMS Web Client.

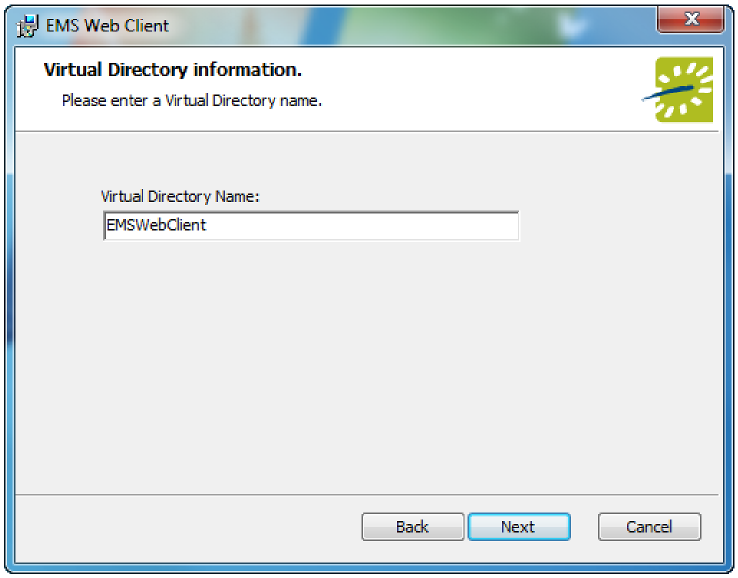
6. The *SQL Server and database information* screen will appear.



7. Enter your SQL Instance Name.
8. Enter your Database Name:

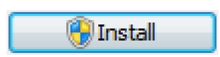
- EMS Professional customers – enter “EMSData”
- EMS Workplace, EMS Campus, EMS Enterprise, EMS District, and EMS Legal customers - typically named “EMS”

9. Click **Next**.
10. The *Virtual Directory information* screen will appear.



11. The Virtual Directory Name will default to the destination folder specified in Step 5. It is recommended that you keep the default setting. The installation process will create a virtual directory on your web server based on the virtual directory entered (“EMSWebClient” in the example above.) Click **Next.**

    Note: The EMS Web Client should not be installed in the same virtual directory as other EMS web-based products OR under a site running another version of the EMS Web Client.

12. The *Ready to install EMS Web Client* screen will appear. Click 

to install the EMS Web Client.
13. The *Completed the EMS Web Client Setup Wizard* screen will appear. Click **Finish**.

Note: The Web Client can export standard EMS reports into PDF, RTF, XLS, TXT and HTML formats. If you’re planning on exporting EMS reports in HTML format, the NETWORK SERVICE account must have Read, Write and Modify permissions on the Export folder (e.g. \\[ServerName]\inetpub\wwwroot\EMSWebClient\Export).

Starting the EMS Web Client

After following the steps above, verify your EMS Web Client installation by opening a browser and entering the EMS Web Client address:

http://[ServerName]/EMSWebClient/ (replace [ServerName] with the name of your web server)

The first time you launch the EMS Web Client, it may take a few extra moments for the website to display. If you encounter any issues, please contact Customer Support for assistance.

For information on how to use the EMS Web Client, please refer to your *EMS User Manual*.

EMS Web Client

User’s Manual
Version 2.0

Preface

Welcome to the *EMS Web Client User's Manual*. The purpose of the *EMS Web Client User's Manual* is to answer your questions and guide you through the procedures necessary to use the EMS Web Client application efficiently and effectively.

Using the manual

You will find the *EMS Web Client User's Manual* easy to use. You can simply look up the topic that you need in the table of contents or the index. Later, in this Preface, you will find a brief discussion of each chapter to further assist you in locating the information that you need.

Special information about the manual

The *EMS Web Client User's Manual* has a dual purpose design. It can be distributed electronically and then printed on an as-needed basis, or it can be viewed online in its fully interactive capacity. If you print the document, for best results, it is recommended that you print it on a duplex printer; however, single-sided printing will also work. If you view the document online, a standard set of bookmarks appears in a frame on the left side of the document page for navigation through the document. For better viewing, decrease the size of the bookmark frame and use the magnification box to increase the magnification of the document to your viewing preference.

If you do print the document using a single-sided printer, you might see a single blank page at the end of some chapters. This blank page has been added solely to ensure that the next chapter begins on an odd-numbered page. This blank page in no way indicates that your book is missing information.

Conventions used in the manual

The *EMS Web Client User's Manual* uses the following conventions:

- The EMS Web Client features that are described in this manual are described for the Enterprise version of the desktop client. Not all of these features are available in the Professional version.
- Information that can vary in a command—variable information—is indicated by alphanumeric characters enclosed in angle brackets; for example, <Location>. Do not type the angle brackets when you specify the variable information.
- A new term, or term that must be emphasized for clarity of procedures, is *italicized*.

- Configuration of the necessary items for the EMS Web Client is identical to the configuration that is carried out for the Enterprise version of the desktop client. Refer to the *EMS Setup Guide* for further information.
- Page numbering is "online friendly." Pages are numbered from 1 to x, *starting with the cover* and ending on the last page of the index.

Although numbering begins on the cover page, this number is not visible on the cover page or front matter pages. Page numbers are visible beginning with the first page of the table of contents.

- This manual is intended for both print and online viewing.
  - If information appears in blue, it is a hyperlink. Table of Contents and Index entries are also hyperlinks. Click the hyperlink to advance to the referenced information.

Assumptions for the manual

The *EMS Web Client User's Manual* assumes that:

- You are familiar with web-based applications and basic web functions and navigational elements.

Organization of the manual

In addition to this Preface, the *EMS Web Client User's Manual* contains the following chapters:

- "Getting Started with EMS Web Client," on page 21 details the procedures for opening and logging on to the EMS Web Client application.
- "Reservations and Bookings," on page 29 details the two essential EMS components for meeting and event scheduling—reservations and bookings. It explains the structure of a reservation in EMS, it explains the concept of an event timeline for a reservation booking, and it describes the different ways to make a reservation in EMS.
- "The Navigator," on page 65 details the Navigator, which is a page in EMS that you use to view and manage all aspects of a reservation including bookings and booking details. It also provides detailed procedures for using the Navigator to add one or more bookings to a reservation, edit and copy reservations, edit and copy one or more bookings, cancel one or more bookings, add comments to reservations and bookings, and to manage booking details and items.
- "Search Tools," on page 177 details the variety of options that are available to you for searching for reservations and bookings in your EMS database, including the Browser, the Navigator, Groups, and Web Requests.

- “EMS Dashboard,” on page 207 details the EMS Dashboard, which is a page that centralizes critical information about reservations and web requests in a single location. The information that is displayed on this page provides you with the necessary input to manage your work in the EMS application.
- “Groups and Contacts,” on page 229 details the procedures for adding and editing groups and contacts in your EMS database. It also details the procedures for sending an email to a group or a contact, deleting a group or a contact, and printing and exporting group and contact information.
- “Confirmations,” on page 279 details a confirmation, which is a document that details the critical information for a reservation—the date, the time, the location, the scheduled resources, and so on. The chapter describes how to specify the settings for confirmations and how to generate a confirmation.
- “Reports,” on page 289 details the six different categories of general reports that are available to assist you in monitoring and maintaining your organization’s reservation records and associated transactions.
- “Billing,” on page 319 details the variety of functions that are available for working with invoices and transactions for reservations and bookings as well as for reporting on this information.
- “User Settings,” on page 357 describes how you can manage many aspects of your account to better suit your working needs.
- “Other Reservation Functions,” on page 363 details the miscellaneous standalone functions that are available to assist you in managing and maintaining reservations and bookings in your system as well as managing your general work requirements.
- “EMS Workplace,” on page 389 details the EMS Workplace module, which is a facility scheduling system for managing hoteling requirements, as well as the booking of meeting/event space and resources.

Getting Started with EMS Web Client

The EMS Web Client is the web-based version of the EMS Desktop client. Just like the EMS Desktop client, you can use the web client to manage the meetings and events that take place in your facility. Standard features, which you use to create, manage, and report on events, include the following:

- The Reservation Wizard room booking tool
- A graphical reservation book
- The Browser and month-at-a-glance Calendar Inquiry
- Numerous daily, sales, and statistical reports

This chapter covers the following topics:

- “Logging in to and out of the EMS Web Client” on page 23.
- “An EMS Browser Page” on page 25.

Logging in to and out of the EMS Web Client

You can access EMS Web Client through any standard Internet browser.

If you are using Internet Explorer 8, then to use the full functionality of the EMS Web Client, you must enable the following setting: Tools -> Internet Options -> Security -> Custom Level -> Downloads -> Automatic prompting for file downloads.

To log in to the EMS Web Client

1. Open an Internet browser session.
2. In the browser's address field, enter the EMS Web Client URL.

Contact your EMS administrator if you need assistance.

The EMS Web Client Login dialog box opens.

Figure 1-1: EMS Web Client Login dialog box

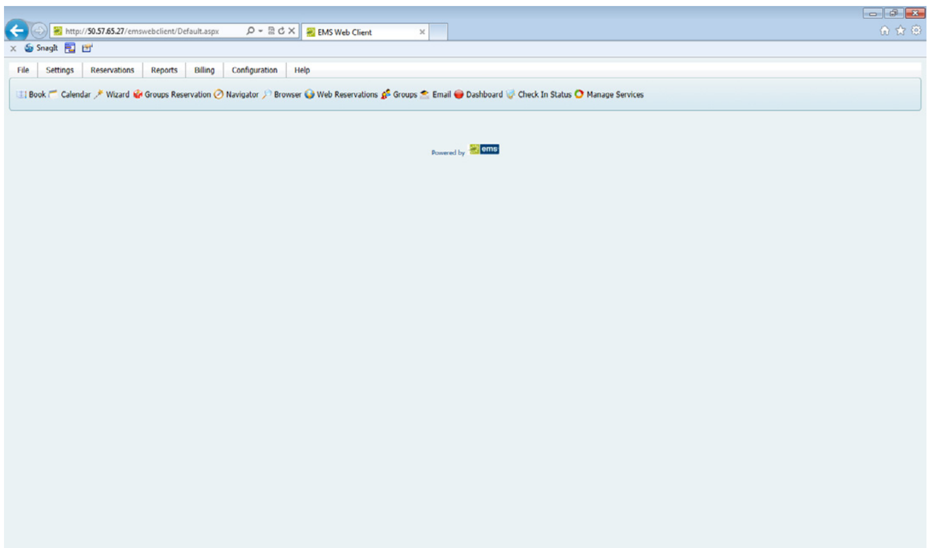
3. In the User ID field, enter your User ID.
4. In the Password field, enter your password.

If you do not know your User ID or password, contact your EMS administrator.

5. Click OK.

   The EMS Web Client Home page opens. Seven tabs are displayed at the top of the page——File, Settings, Reservations, Reports, Billing, Configuration, and Help. The toolbar contains at least nine icons—Book, Calendar, Wizard, Navigator, Browser, Web Reservations, Groups, Dashboard, and Manage Services. If you open the web client for EMS Workplace, then the toolbar also contains a Group Reservations icon and a Check In Status icon.

Figure 1-2: EMS Web Client Home page



To log out of the EMS Web Client

To log out of the EMS Web Client, click File > Logout.

An EMS Browser Page

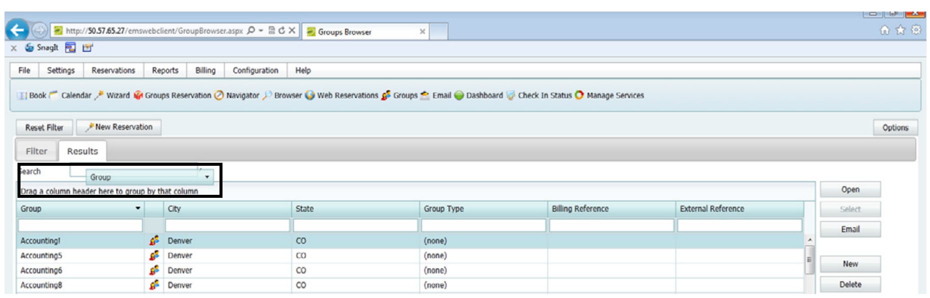
If a page in the EMS Web Client has the phrase "Drag a column header to group by that column" at the top of the page, this indicates that this page is a EMS Browser page. Several data sorting and grouping options are available on an EMS Browser page. You can:

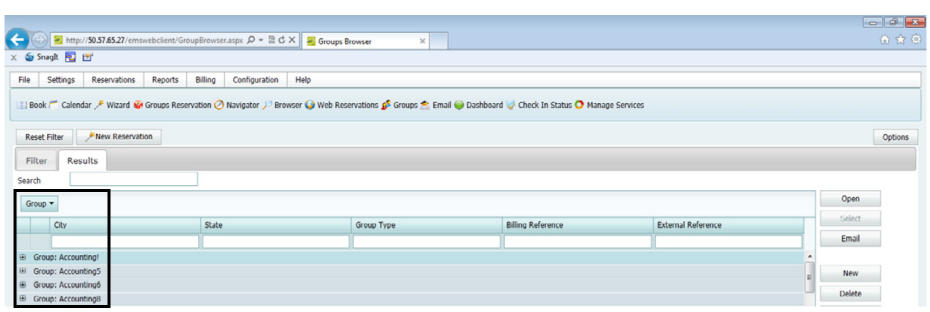
- Group data by columns. See "Grouping data by columns on an EMS Browser page" below.
- Rearrange columns on the page. See "Rearranging columns on an EMS Browser page" on page 26.
- Change the width of data columns on the page. See "Changing the width of data columns on an EMS Browser page" on page 26.
- Change the sort order of the data on the page. See "Changing the sort order of data on an EMS Browser page" on page 27.

Grouping data by columns on an EMS Browser page

On an EMS Browser page, you can drag a column header to the indicated location and group the data by the selected column.

Figure 1-3: Grouping data by columns on an EMS Browser page

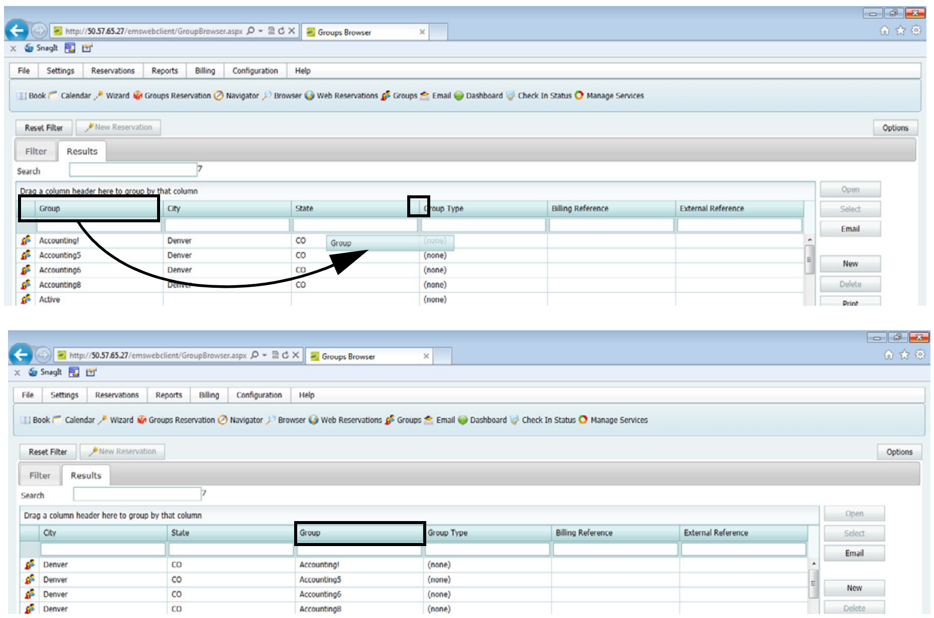




Rearranging columns on an EMS Browser page

On an EMS Browser page, you rearrange the column order by dragging a column to a new location using the column heading.

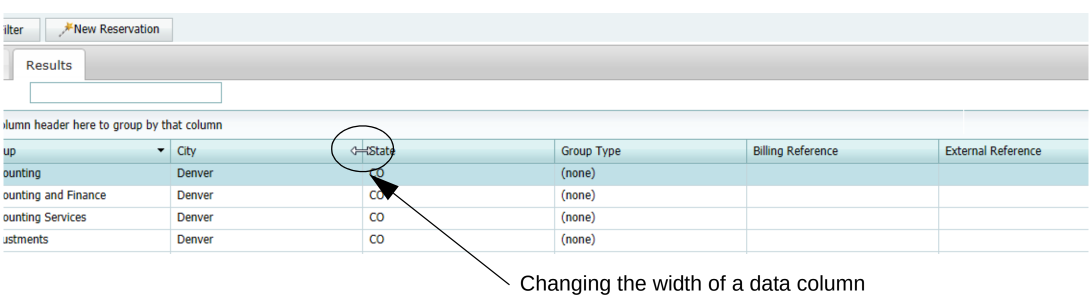
Figure 1-4: Rearranging columns on an EMS Browser page



Changing the width of data columns on an EMS Browser page

For almost all EMS Browser pages, you can change the width the columns on the page. To change the width of a column, rest the mouse pointer on the right side of a column heading until the pointer changes to a double-headed arrow, and then dragging the boundary until the column is the width that you want.

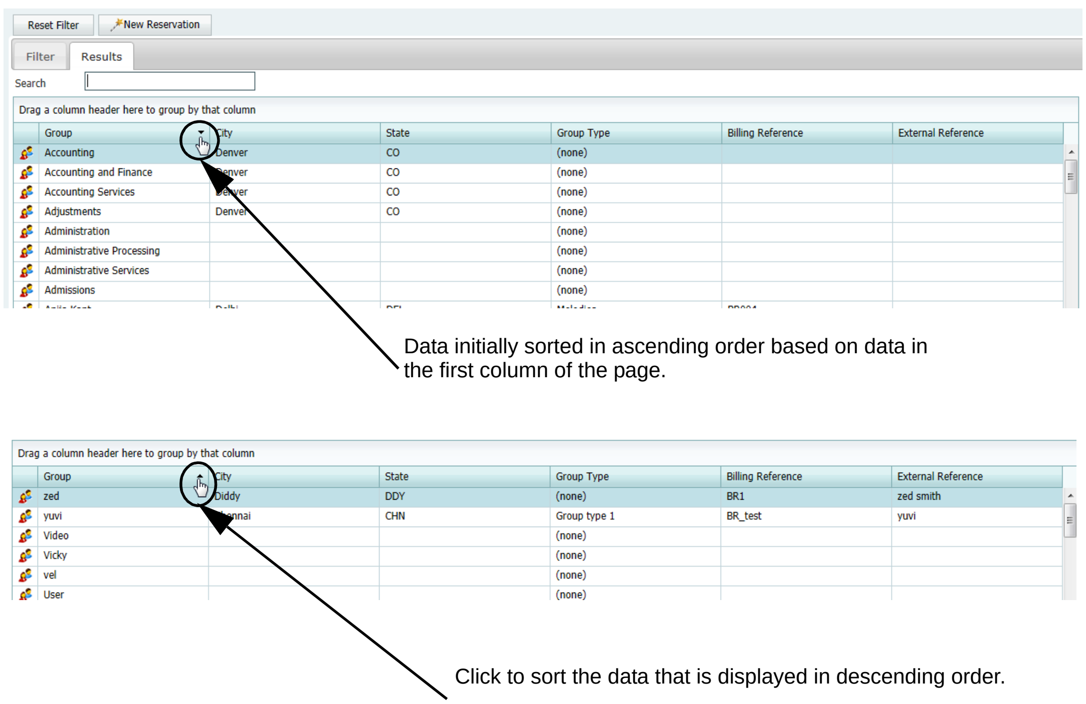
Figure 1-5: Changing the width of a data column on an EMS Browser page



Changing the sort order of data on an EMS Browser page

When an EMS Browser page first opens, data are sorted in ascending order based on the data in the *first* column of the page. For example, when the Groups page first opens, the group records are displayed on the Results tab alphabetically by Group name. To change the sort order of the data in a browser page, click in a column header to sort the display based on the descending order of data in the column. Click the column header again to sort based on the ascending order of data in the column.

Figure 1-6: Changing the sort order of data on an EMS Browser page



Reservations and Bookings

The two essential EMS components for meeting and event scheduling are reservations and bookings. To use the EMS Web Client efficiently and effectively, you must understand the structure of a reservation in EMS, you must understand the concept of an event timeline for a reservation booking, and you must know how to make a reservation.

This chapter covers the following topics:

- “Reservation Structure” on page 31.
- “Event Timeline” on page 32.
- “Making a Reservation Using the Reservation Wizard” on page 33.
- “Viewing and Editing Reservations in the Reservation Book” on page 50.

Reservation Structure

An event in EMS is comprised of the following:

- A reservation
- One or more bookings
- Booking details

These three components exist in a hierarchy—a reservation contains one or more bookings and each booking can have one or more details associated with it.

Reservation and bookings

A *reservation* is the who and the what of an event. For example, Group X (the who) can reserve some space for an Event Y (the what). A *booking* is the where and the when of an event. For example, Group X can schedule the conference room (the where) for a staff meeting on the second Monday in January (the when). Group X now has a single reservation with a single booking in EMS. If, however, Group X schedules the conference room (the where) for a staff meeting on the second Monday of each month for a calendar year (the when), then Group X now has a single reservation with twelve bookings in EMS.

Booking details

A booking can have one or more booking details associated with it. *Booking details* are the resources or services that are needed for an event, the notes for the event, the activities for the event, the room charges for the event, or any combination of these. For example, for Group X's staff meeting, the resources could include the requested catering (coffee service, bagels and muffins, and so on) and the A/V equipment (a projector, a speaker's podium, and so on).

Event Timeline

The following time designators are used for an event in EMS:

- Event Time: The time period during which the event actually takes place.
- Setup/Teardown Hours: The hours, or fractions of hours, that you add to the event time to allow staff to prepare a room for the event or to clean up after the event.
- Reserved Time: The total time for which the space (the where) is reserved. This time is the event time *plus* the setup/teardown time.

For example:

Variable	Time
Reserved Start Time	8:00 am
Setup Hours	1 hour
Event Start Time	9:00 am
Event End Time	4:00 pm
Teardown Hours	1.5 hours
Reserved End Time	5:30 pm
Reserved Time	9.5 hours

Making a Reservation Using the Reservation Wizard

You use the Reservation Wizard to check for available space for an event and to make a reservation for the event. You can search for rooms that are available for a particular time on one day (a simple reservation with one booking) or on multiple days (a series reservation with multiple bookings). You can also create a series reservation by selecting one date and time, but multiple rooms. To make a reservation using the wizard, you must:

- Specify the event date and time information. See “To specify the event date” on page 34.
- Specify the event time and status. See “To specify the event time and status” on page 37.
- Select the event location. See “To select the event location” on page 38.
- Specify the event information. See “To specify the event information” on page 45.

The following procedure describes how to make a reservation by selecting values for the required and optional fields.

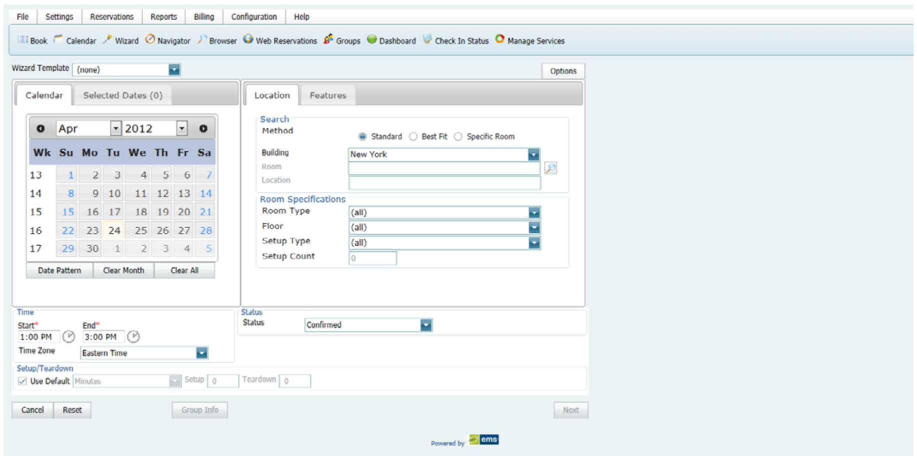
- *If your EMS administrator has configured reservation wizard templates, then a Reservation Wizard Template dropdown list is displayed at the top of the Reservation Wizard. You can facilitate the making of a reservation in the Reservation Wizard by selecting the appropriate template from the list, which automatically sets the default values for many of the fields in the Reservation Wizard.*
- *If your job entails making multiple reservations that require the same information, and you are not using reservation wizard templates, then you can set your own default values for many of the fields in the Reservation Wizard. See “Setting User Preferences and Default Values” on page 359.*

To specify the event date

1. On the EMS toolbar, click the Wizard icon Wizard .

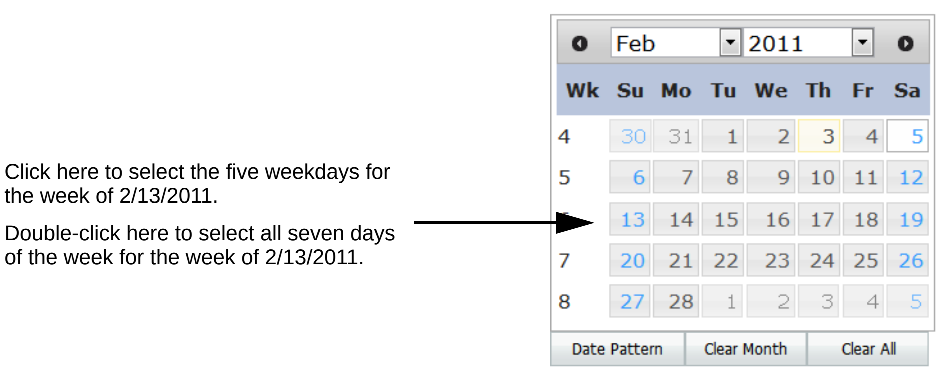
   The Reservation Wizard page opens.

Figure 2-1: Reservation Wizard page



2. If needed, use the scroll features on the top of the Calendar to open the calendar for a different month (< or >), or click a month at the top of the calendar to open a dropdown list from which you can select a different month. You can also click a year at the top of the calendar to open a dropdown list from which you can select a different year.
3. If the event dates do *not* follow a pattern, use one or more of the following options for entering a date; otherwise, go to Step 4.
   - Click on the dates on the calendar that the event is to take place.
   - To select all five weekdays in a week, click in the blank space that is to the left of the week.
   - To select all seven days in a week, double-click in the blank space that is to the left of the week.

Figure 2-2: Example of selecting the days of the week

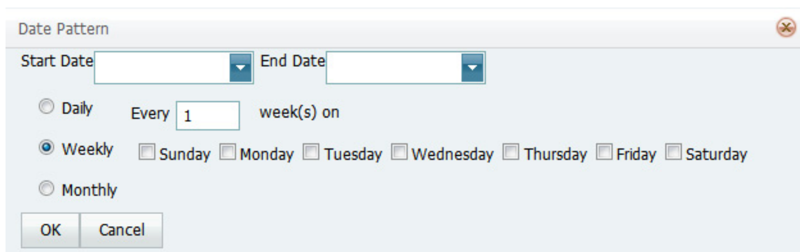


- To select every occurrence of a specific day of the week for the displayed month (for example, all Sundays in February, 2011), click the heading (S, M, T, and so on) for the day.
- To select every occurrence of a specific day of the week that is currently displayed onscreen (regardless if the day falls within the same month), double-click the heading (S, M, T, and so on) for the day.

If you need to clear a single selected date, click the date again. To clear multiple selected dates in a single step, click Clear Month to clear all currently selected dates for the currently displayed month or click Clear All to clear all currently selected dates regardless of month or year.

4. If the event dates do follow a pattern, (for example, the third Friday of every month), click Date Pattern to open the Date Pattern dialog box and enter your event date information.

Figure 2-3: Date Pattern dialog box



As you specify the event dates, the following occurs:

- The Selected Dates tab is automatically updated with the selected dates.
- If your EMS administrator has configured any of the dates as a holiday or closed, then holiday dates are displayed in green on the Calendar tab and closed dates are displayed in red.

For any date, after you select the date on the Calendar tab, you can:

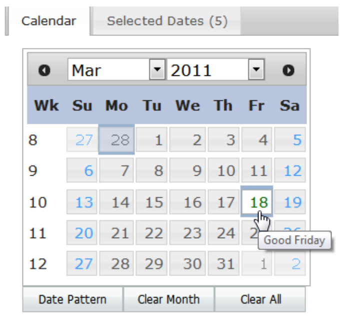
- Toggle between the Calendar tab and the Selected Date tab. Open the Selected Dates tab, select the date, and then click Go To Date.
- Remove the date from the list of selected dates. Open the Selected Dates tab, select the date, or CTRL-click to select multiple dates, and then click Remove.

When you make a reservation for multiple dates, the process is easier if you first remove all holidays or closed dates from the list of selected dates; however, be very careful when selecting dates for removal as you are not prompted to confirm your selection before you click Remove.

For dates that are configured as a holiday or as closed, you can:

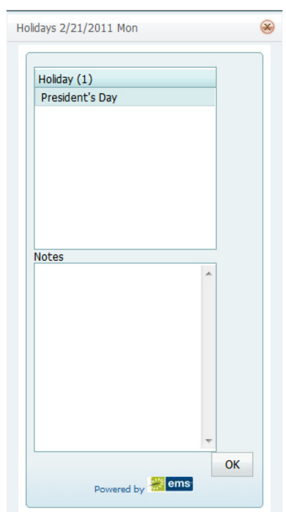
- Place your cursor on a holiday date to open a tooltip that shows the name of the holiday.

Figure 2-4: Viewing information about a holiday from the Calendar tab



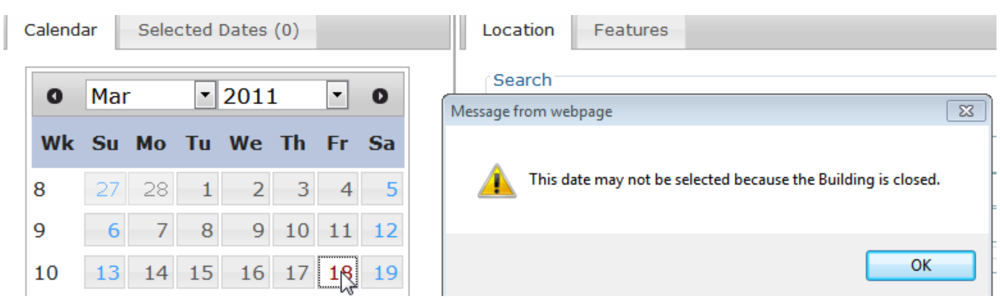
- View information about the date from the Selected Dates tab. Open the Selected Dates tab, scroll to the date, and then click Holidays to open a Holidays dialog box that displays information about the holiday.

Figure 2-5: Holidays dialog box



- Place your cursor on a closed date to open a message that states that you cannot select the date because the date is closed.

Figure 2-6: Viewing information about a closed date from the Calendar tab



5. Continue to "To specify the event time and status" below.

To specify the event time and status

1. Do one of the following to specify the start time and end time for the event:

    - Click the Time Picker icon to open a dropdown list from which you can select a time for each field.
    - Manually enter the time in each field.

When you manually enter the time, you can use a shortcut. For example, for 9:00 am, you need to enter only "9a" and for 2:00 pm, you need to enter only "2p," and so on. If you enter an end time that is earlier than the start time, then the system assumes that the end time is the next day and the phrase "Next Day" is displayed to the right of the End time field.

Time zone is discussed in "To select the event location" on page 38.

2. Do one of the following to specify the Setup and Teardown times.

    - To use the default setup and teardown times that your EMS administrator has assigned to the rooms in your system, leave Use Default selected.
    - To override the default setup/teardown times, clear Use Default, select Minutes or Hours, and then enter your own setup and teardown times.

Remember, setup and teardown times are the hours, or fractions of hours, that you add to the event time to allow staff to prepare a room for the event or to clean up after the event. For example, for a 30 minute setup time, you can enter 30 minutes or 0.5 hours.

3. Indicate the status for the event.

Depending on the status that you select, for example, Tentative or Hold, you might be required to enter a reconfirm date. You can monitor reservations that must be reconfirmed on the Reconfirm Dates tab on the EMS Dashboard. See "EMS Dashboard," on page 207.

Time zone is discussed in "To select the event location" on page 38.

4. Continue to "To select the event location" on page 38.

To select the event location

You have three options for selecting the event location, which are indicated on the first page of the Reservation Wizard:

Search Method	Description
Standard	Use this option to display a list of all the available rooms that meet all the requested dates. See "To search for a standard room" below.
Best Fit	Use this option if no one room can meet all the requested dates. The system lists rooms along with the number of bookings for which you can reserve the room. You can piece together the entire reservation using Best Fit, or just part of it. See "To search for a best fit room" on page 40.
Specific Room	Use this option to confirm the availability and reserve of one specific room for the scheduled event. See "To search for a specific room" on page 43.

By default, the EMS Web Client looks for an available room or rooms in only the first 1000 rooms that it finds in the pre-configured Rooms list. To search more than 1000 rooms, before you begin any search, click Options > Max. Number of Rooms to Search, and then select a different number of rooms to search.

To search for a standard room

By default, when you search for a standard room, rooms that are available all day are marked with an asterisk (*). To set or clear this option, click Options > Standard Search > Show Available All Day Indicator.

1. Select Standard.
2. Leave Building set to the default value of (all), or select a specific building, area, or view in which to search for a standard room.
3. If applicable, select the appropriate time zone for the event.

Your selection on the Building dropdown list determines the options that are available on the Time Zone dropdown list. If you select (all) buildings, then you can select a time zone. If you select a specific building, then by default, a time zone is selected for the building, and you cannot select a different value.

4. Do one of the following for room specifications:

    - *Type* is the class or category of the room, for example a meeting room, a workspace, and so on. Leave Type set to the default of (all) to search for all pre-configured room types or select a specific room type from the Type dropdown list.

    - *Floor* is optional information when you are searching for a room. Leave Floor set to the default value of (all) to search for all pre-configured floors or select the floor from the Floor dropdown list.

    - *Setup Type* is the physical layout or arrangement of a room, for example, rounds of 6 or theater-style. Leave Setup Type set to the default value of (all) to search for all pre-configured setup types or select the setup type from the Setup Type dropdown list.

    - *Setup count* is the anticipated attendance for the event. If you selected a specific setup type, then you must enter the setup count.

The selected setup type and setup count are applied to all the bookings that you add to this reservation. If any of the bookings require a different setup type or count, you can change this information after you complete the reservation. See "To edit a booking in the Navigator" on page 97 or "Editing Multiple Bookings in the Navigator" on page 99.

5. Optionally, open the Features tab, and then select the feature, or CTRL-click to select the multiple features that the room must have.

6. Click Next.

    Up to two tabs are displayed:

    - The Available tab, which is the active tab and is always displayed, lists all the rooms that meet *all* your event criteria.

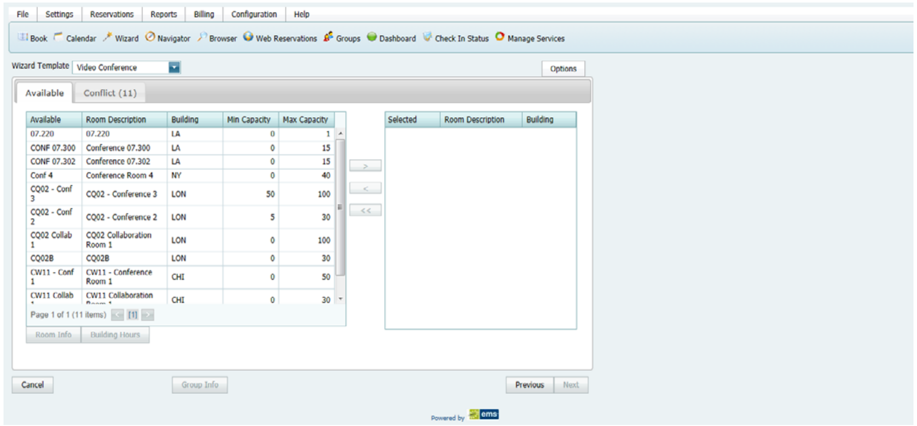
        - If you have elected to show the Available All Day Indicator, the rooms that are available all day are marked with an asterisk (*).

        - By default, the available rooms are sorted alphabetically by room code. If your EMS administrator has configured the rooms for your EMS implementation with a book sequence, then under Options, select Sort Rooms by Book Sequence to sort the rooms from lowest to highest book sequence. (If two rooms have the same sequence, then the rooms are sorted alphabetically by name within the sequence.)

    - The Conflicts tab is displayed only if there are rooms that are not available for the requested dates/times. Optionally, you can open the Conflicts tab to view the list of rooms that were not available for scheduling as well as list of the events that are scheduled for each room.

    See Figure 2-7 on page 40.

Figure 2-7: Example of standard room search results



7. Select the room, or CTRL-click to select the multiple rooms that you are scheduling for the event.

If the reservation is for a video conferencing meeting, then you must select a minimum of two rooms. You must designate one of these rooms as the Host Location on the Video Conference tab on the last page of the Reservation Wizard.

8. Optionally, do one or both of the following; otherwise, go to Step 9.
   - Click Room Info to open the Room Info dialog box and view information about the room properties, setup type, features, and pricing.
   - Click Building Hours to open the Building Hours dialog box which displays the hours that the selected room/building is open on the reserved date.
9. Click the Move button (>) to move the rooms to the Selected list.

If you select more than one room, all the selected rooms are booked for all the event dates.

10. Click Next to continue to “To specify the event information” on page 45.

To search for a best fit room

1. Select Best Fit.
2. Leave Building set to the default value of (all), or select a specific building, area, or view in which to search for a standard room.
3. If applicable, select the appropriate time zone for the event.

Your selection on the Building dropdown list determines the options that are available on the Time Zone dropdown list. If you select (all) buildings, then you can select a time zone. If you select a specific building, then by default, a time zone is selected for the building, and you cannot select a different value.

4. Do one of the following for room specifications:
   - *Type* is the class or category of the room, for example a meeting room, a workspace, and so on. Leave Type set to the default of (all) to search for all pre-configured room types or select a specific room type from the Type dropdown list.
   - *Floor* is optional information when you are searching for a room. Leave Floor set to the default value of (all) to search for all pre-configured floors or select the floor from the Floor dropdown list.
   - *Setup Type* is the physical *layout* or *arrangement* of a room, for example, rounds of 6 or theater-style. Leave Setup Type set to the default value of (all) to search for all pre-configured setup types or select the setup type from the Setup Type dropdown list.
   - *Setup count* is the anticipated attendance for the event. If you selected a specific setup type, then you must enter the setup count.

The selected setup type and setup count are applied to all the bookings that you add to this reservation. If any of the bookings require a different setup type or count, you can change this information after you complete the reservation. *See “To edit a booking in the Navigator” on page 97 or “Editing Multiple Bookings in the Navigator” on page 99.*

5. Optionally, open the Features tab, and then select the feature, or CTRL-click to select the multiple features that the room must have.

6. Click Next.

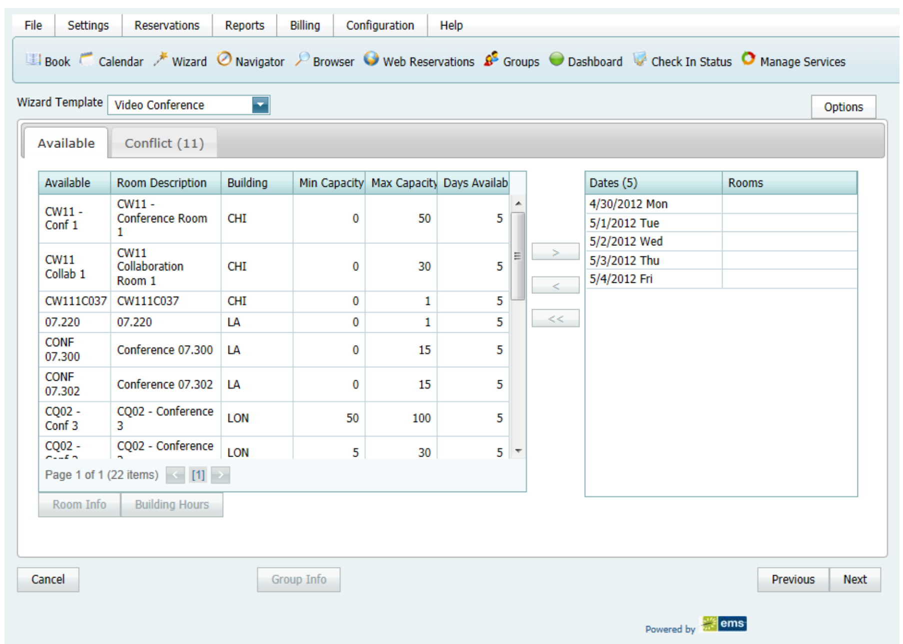
   Up to two tabs are displayed:

   - The Available tab, which is the active tab and is always displayed, has two lists. The list in the left pane is a list of all the rooms that meet *some or all* of your event criteria. The list in the right pane is a list of all the event dates that must be fulfilled.

By default, the available rooms are sorted alphabetically by room code. If your EMS administrator has configured the rooms for your EMS implementation with a book sequence, then under Options, select Sort Rooms by Book Sequence to sort the rooms from lowest to highest book sequence. (If two rooms have the same sequence, then the rooms are sorted alphabetically by name within the sequence.)

   - The Conflicts tab is displayed only if there are rooms that are not available for the requested dates. Optionally, you can open the Conflicts tab to view the list of rooms that were not available for scheduling for the event as well as list of the events that are scheduled for each room.

Figure 2-8: Example of best fit room search results



7. Optionally, do one or both of the following; otherwise, go to Step 8.

   - Click Room Info to open the Room Info dialog box and view information about the room properties, setup type, features, and pricing.
   - Click Building Hours to open the Building Hours dialog box which displays the hours that the selected room/building is open on the reserved date.

8. Do one of the following:
    - If one is available, select the single room that is available for all the requested dates, and then click the Move button (>) to move the room to the Event Dates list.
    - If a single room is not available, select a room that is available for *some* of your requested dates, and then click the Move button (>) to move the room to the Event Dates list. Repeat this step as needed to fulfill all the event dates.
9. Click Next to continue to “To specify the event information” on page 45.

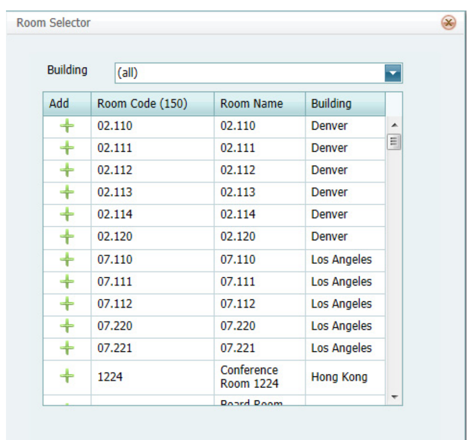
To search for a specific room

You can use the specific room search to book a standard EMS room or a room or area that is not managed in EMS. An override room, or “override description,” is used to book an event in a space that has not been configured in your EMS system. For example, your EMS administrator might have configured an override room named “Other Area” in the Engineering building. To book an event in Dr. Wilson's office, which is a room that is not defined in EMS, in the Engineering building, you can select the “Other Area” room and specify “Dr. Wilson's Office” for the location. EMS does not track availability for events booked in override rooms; however, EMS reports on events that are scheduled in an override room just like any other event scheduled for any other room.

1. Select Specific Room.

    The Room Selector dialog box opens. By default, (all) buildings is selected.

Figure 2-9: Room Selector dialog box



2. Do one of the following:
    - To select a room from a list of all rooms in all available buildings:
        - Leave (all) selected on the Buildings dropdown list.
        - Click the Add icon next to a room to select it.
        - If the room is configured as an override room, go to Step 3; otherwise, go to Step 4.
    - To select a room from a list of rooms in a specific building, area, or view:
        - Select a specific building, area, or view.
        - Click the Add icon next to a room to select it.
        - If the room is configured as an override room, go to Step 3; otherwise, go to Step 4.
3. In the Location field, enter the location of the override room, and then click Next to continue to “To specify the event information” on page 45.
4. Click Next.

    Two results are possible:
    - If the event is scheduled for a single date and the room is available, then continue to “To specify the event information” on page 45.
    - In all other cases, (for example, the event is scheduled for a single date but the room is not available or it is a multiple date event), the Available tab opens. This tab lists all the event dates for which the specific room is available. Continue to Step 5.

You can open the Conflicts tab to view the list of dates for which the specific room is not available as well as list of the events that are scheduled for the room.

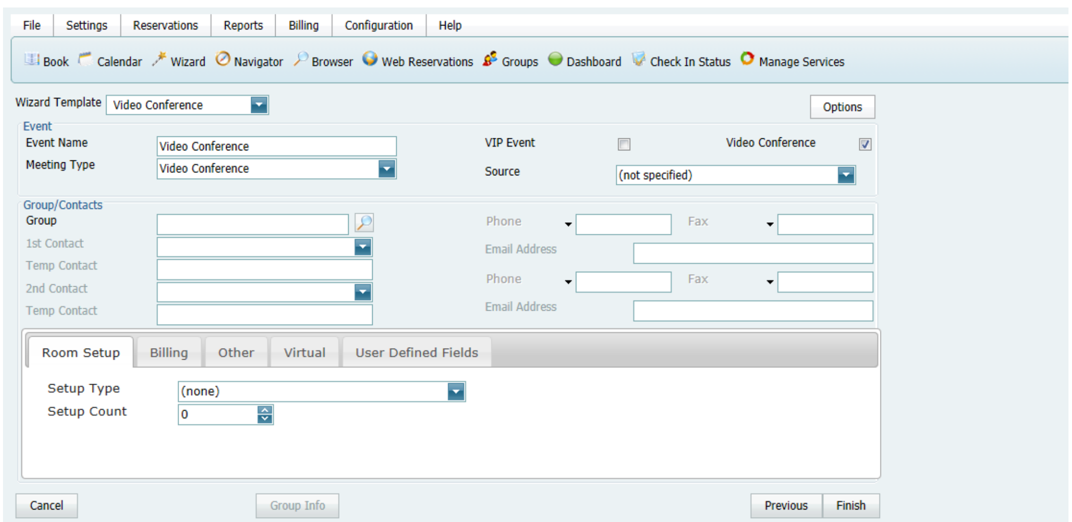
5. Optionally, before you move a date to the Selected list, click Building Hours to open the Building Hours dialog box which displays the hours that the selected room/building is open on the selected date; otherwise, do one of the following:
6. Optionally, before you move a date to the Selected list, do one or both of the following; otherwise, go to Step 7.
    - Click Room Info to open the Room Info dialog box and view information about the room properties, setup type, features, and pricing.
    - Click Building Hours to open the Building Hours dialog box which displays the hours that the selected room/building is open on the reserved date.

7. Do one of the following:
    - If the specific room is available for all the event dates, then click the Move All button (>>) to schedule the room for all the event dates.
    - If the specific room is not available, try another approach such as reserving a different specific room, or using the Standard or Best Fit search method.
8. Click Next to continue to continue to "To specify the event information" below.

To specify the event information

After you select an event location or locations, you must specify other information for the event.

Figure 2-10: Event Information page



1. Enter the event information.

Field	Description
Event	
Event Name	A name or description for the event.
Event Type	The classification for the event.
VIP	Select this option to mark the event as a Very Important event.
Source	The reservation source.
Video Conference	Select this option for a video conference event.

Field	Description
Group/Contact	
Group	Click the Search icon to open a Lookup dialog box in which you search for and select a specific group from a list all groups that are available in your system for hosting/sponsoring an event. • To search a list of all groups, leave the Find field in the Lookup dialog box blank, and then click the Search icon. • To search for a specific group, enter a search string in the Find field, and then click Search icon. Your search is limited to the exact order of the characters in the string, but the string can appear anywhere in the search results and it is not case-sensitive. For example, the search string **sim** returns Paske, **Sim**on and **Sim**ington, Chance. • To select a group, click the Add icon next to the group. • If the group that you want to select for the reservation is not available on the pre-configured list, then you can click the Group icon to open the Group dialog box and add the group. See “Searching for and Configuring Groups” on page 231. **Note:** After you select a group, you can click Group Info at the bottom of the Reservation Wizard page to open a <Group> dialog box that displays the properties for the group, any user-defined fields for the group, and any comments that are associated with the group.
1st Contact Temp Contact	When you select a group, if a *default* contact has been defined for the group, then this field is automatically populated with the name of the contact; otherwise, the field is blank. You have several options for defining the 1st Contact for a reservation: • If the field is blank, but contacts have been configured for the group, you can select a contact from the pre-configured list. • If the field is populated with a default value, but other contacts have been configured for the group, you can select a different contact from the pre-configured list. • If you want to create a *temporary* contact just for this event, then select (temporary contact), and in the Temp Contact field, enter the name for the temporary contact. **Note:** If a default contact has been configured for the group, then any modifications that you make for the contact apply to this reservation only. The next time you or anyone else creates a reservation for this group, the 1st Contact field is again automatically populated with the name of the default contact.
2nd Contact Temp Contact	Define if necessary for the event.

Field	Description
Phone Fax Email Address	One more of these fields might be automatically populated depending on how a selected contact has been configured. You can manually edit these values if needed. **Note:** The Phone and Fax fields have a dropdown list available on which you can select a different value (Fax, Mobile, Other, Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label. **Note:** If default values have been configured for a selected contact, then any modifications that you make apply to this reservation only. The next time you or anyone else creates a reservation for the same contact, these fields are again automatically populated with the default information.
Room Setup tab	
Setup Type	If you selected a specific value for the setup type when searching for an event location, this value is carried forward to this field; otherwise, the field is blank. You can select a setup type for this field, or if the field is already populated, you can select a different setup type.
Setup Count	If you entered a specific value for the setup type when searching for an event location, this value is carried forward to this field; otherwise, the field is blank. You can enter a value in this field, or if the field is populated, modify the value.
Billing tab	
Note: Depending on the group that you select, one or more of these fields might be automatically populated with default values. You can edit these default values but any modifications that you make apply to this reservation only. The next time you or anyone else creates a reservation for the same group, these fields are again automatically populated with the default billing information.	
Pricing Plan	Indicates what type of pricing is to be used for the event.
Billing Reference	The internal alphanumeric billing code that is associated with the group. You can manually enter a value in this field, or if a master list of billing reference numbers has been configured for the group, you can click the Search icon to open a Billing Reference Numbers dialog box, and select the appropriate value from this list. **Note:** To search for a specific billing reference number, enter a search string in the Find field, and then click the Search icon . The string is not case-sensitive, but your search is limited to the exact order of characters in the string and it must begin with the information for which you are searching. For example, a string of **co** returns **CO**-123, but not 123-**CO**.
Sales Category	How the group is sorted for purposes of tracking sales figures, for example, local, regional, national, and so on.
Payment Type	Indicates how the group paid for the event (cash, check, charged, and so on).

Field	Description
PO Number	The internal alphanumeric purchase order number that is associated with the group. You can manually enter a value in this field, or if a master list of purchase order numbers has been configured for the group, you can click the Search icon to open a Purchase Order Numbers dialog box, and select the appropriate value from this list. **Note:** To search for a specific purchase number, enter a search string in the Find field, and then click the Search icon. The string is not case-sensitive, but your search is limited to the exact order of characters in the string and it must begin with the information for which you are searching. For example, a string of **co** returns **CO**-123, but not 123-**CO**.
Salesperson	The user who “sold” the event to the group.
Other tab	
Event Coordinator	The Event Coordinator who is assigned to the event.
Estimated Event Attendance	The estimated number of people who are expected to attend the event.
Calendar Style	Dropdown list of all the available formats for printing this event on the Event Calendar and Event Schedule reports.
URL	The event URL.
Virtual tab	
Web User	To specify the web users who can view/manage this reservation in VEMS, click the Search icon to open the Web Users search dialog box and search from a list of registered web users. • You can search by User Name or Email Address. • To search a list of all available web users, leave the Find field in the Lookup dialog box blank, and then click the Search icon. • To search for a specific web user, enter a search string in the Find field, and then click Search icon. **Note:** The string is not case-sensitive, but your search is limited to the exact order of characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of **bb** returns **bb**osworth@emssoftware.com but not dbobbett@emssoftware.com. • To select a web user, click the Add icon next to the user. **Note:** To return this field to the (no change) value at any time, click Reset.
Web Process Template	The web process template that defines the functions that are available for the selected web user. **Note:** A web user might be assigned to more than one web process template, so make sure to select the template that is applicable for this reservation.

Field	Description
User Defined Fields tab	
	User-defined fields are additional fields that store custom data for a reservation. Your EMS administrator configures the types of fields that are available as well as the allowed values for these fields. • To enter or modify a value for a field, select the field, and then click Set Value. • To clear a value for a field, select the field, and then click Clear Value. **Note:** If a user-defined field is not required here, you can always supply a value for it at a later date in the Navigator. See "Working with User Defined Fields in the Navigator" on page 167.

2. Click Finish.

   Two results are possible:

   - If you did not enter information into required fields, then these fields are outlined in red. You must enter values into these fields and then click Finish again to open the Navigator page.
   - The Navigator opens.

   The reservation information is displayed in the Navigator. You use the Navigator to add booking details and to make any needed modifications to the reservation and its bookings. See "The Navigator," on page 65.

A reservation is not complete and rooms are not removed from the Available list until you click Finish. Although unlikely, it is possible for another user to select and reserve a room during the time period after you have selected the room but before you have finalized the reservation. If this occurs, after you click Finish, a message opens stating that your reservation conflicts with an existing reservation.

Depending on how your EMS administrator has configured your system, user defined questions (UDFs), comments, and/or reminders might be automatically displayed for the reservation in the Navigator. Contact your EMS administrator if you have any questions about this.

Viewing and Editing Reservations in the Reservation Book

The Reservation Book provides a graphical view of all the confirmed reservations (the reserved time as well as the room for which the reservation is scheduled) for your organization. (Cancelled bookings are not shown.) You use the Reservation Book to the view information for a reservation, to edit an existing reservation, and to make a new reservation. In addition, when the Reservation Book first opens, before you edit or make a reservation, you can change the Reservation Book view so that it better suits your working needs.

Reservation Book

To open the Reservation Book, on the toolbar, click the Book icon . The *first* time that you open the Reservation Book for your EMS implementation, by default, the Filter dialog box opens on top of a blank Reservation Book. You can leave the room filtering criteria set to their default values, or you can select different values as needed, and then click OK. All reservations that meet the filtering criteria and that are scheduled for the current day's date are displayed in the book in the *Daily* view.

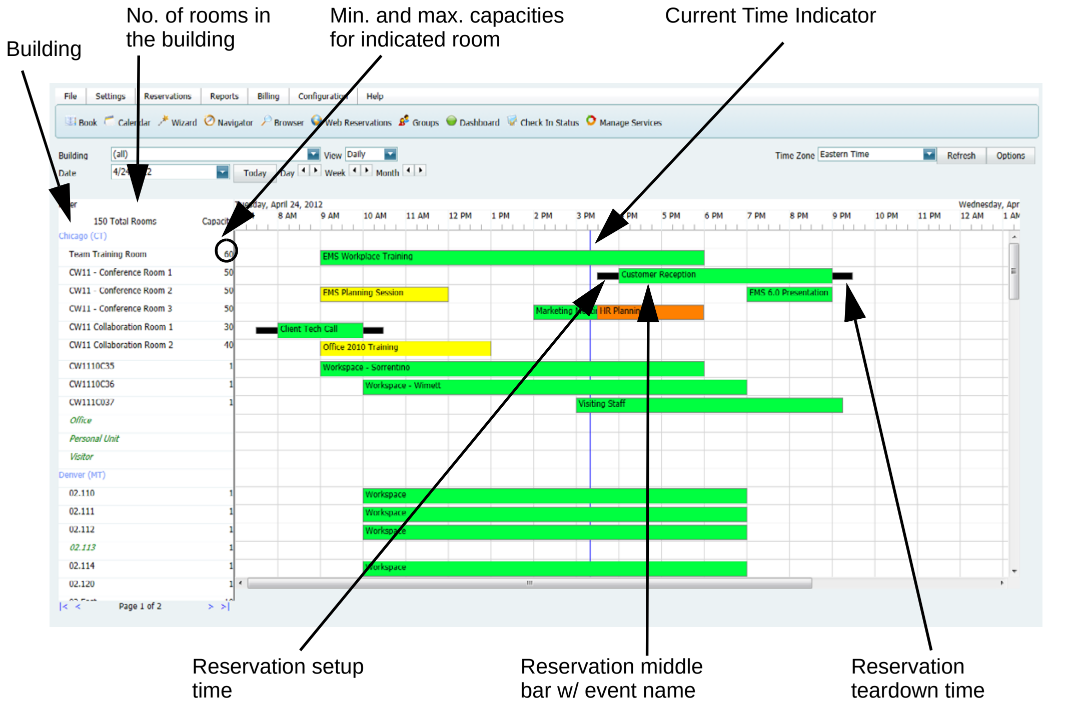
You might need to use the book's scroll features to scroll through all the reservations that are scheduled for the current day's date.

The Reservation Book has the following appearance:

- Minimum and maximum capacities are displayed next to room descriptions.
- The current time is shown by a vertical line in the grid, called the Current Time Indicator.
- If building hours have been configured for a building, then this information is displayed for the building.
- The reservations are displayed with three components:
    - A left bar that indicates the setup time.
    - A middle bar that indicates, by default, the event name.
    - A right bar that indicates the teardown time.

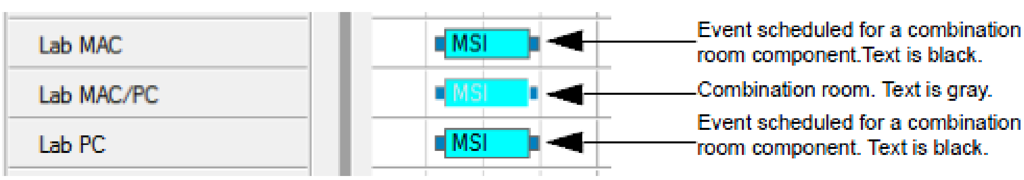
See Figure 2-11 on page 51.

Figure 2-11: Reservation Book



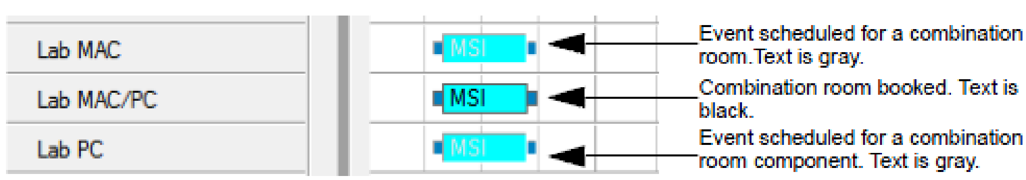
If an event is scheduled for a room that is a component of a combination room, then the reservation text is displayed in black. A duplicate reservation is also shown for the combination room; however, the reservation text is displayed in gray to indicate that a component of the combination room is currently booked for the indicated time and therefore, the combination room is not available.

Figure 2-12: Components booked and combination room unavailable



Conversely, if an event is scheduled for a combination room, then the reservation text for the combination room is displayed in black and the reservation text for each component is displayed in gray. This reversed color coding indicates that the component room is currently booked for the selected time and that none of the components is available.

Figure 2-13: Combination room booked and components unavailable



You can carry out the following actions in the Reservation Book:

- Change the Reservation Book view. See “To change the Reservation Book display” on page 52.
- View reservation information. See “To view reservation information” on page 58.
- Make a new reservation. See “To make a new reservation” on page 62.
- Edit an existing reservation. See “To edit an existing reservation” on page 63.

To change the Reservation Book display

1. On the EMS Web Client toolbar, click the Book icon 

.

   The Reservation Book opens in the Daily view. See Figure 2-11 on page 51.

2. Optionally, you can do one or more of the following to change the Reservation Book display:

   - Change the list of rooms that are displayed in the Reservation Book based on room properties. See “List of Rooms (Room Properties)” on page 53.
   - Change the list of rooms that are displayed in the Reservation Book based on a specific room or rooms. See “List of Rooms (Specific Rooms)” on page 54.
   - Change the Reservation Book view. See “Reservation Book view” on page 54.
   - Change multiple display options for a reservation. See “Display Options” on page 55.
   - Select which items to include in the tooltip that opens when you place the cursor over an event in the Reservation Book. See “Tooltips” on page 57.
   - Change the display date using the calendar. See “Display Date (Calendar)” on page 57.
   - Change the display date using the Reservation Book scroll features. See “Display Date (Scroll Features)” on page 58.

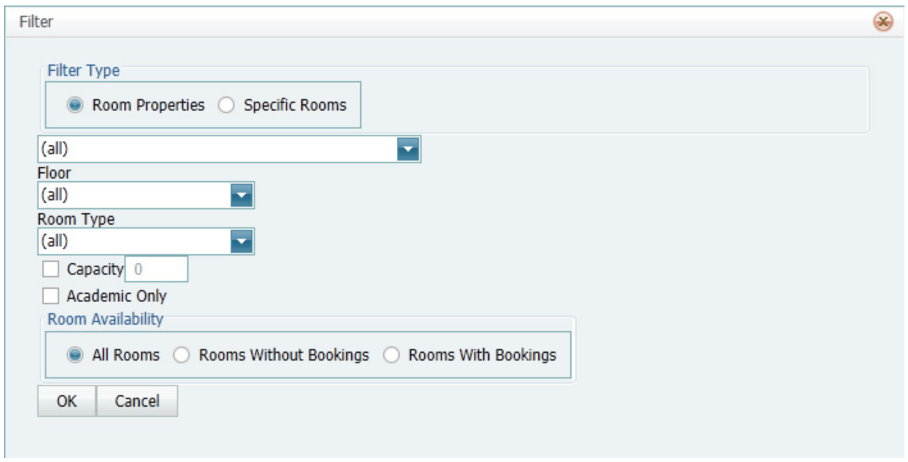
List of Rooms (Room Properties)

If the Filter dialog box is not already open, then above the Rooms list, do the following:

1. Click Filter.

   The Filter dialog box opens.

Figure 2-14: Filter dialog box, Room Properties selected

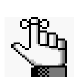


2. Select Room Properties, and then do one or more of the following

   - Leave the Building dropdown list set to the default value of (all) buildings, or select a specific building, area, or view.
   - Select a specific floor.
   - Select a specific room type.
   - Select Capacity and then enter a capacity.
   - Select Academic to limit the search to academic rooms.
   - Select a Room Availability option.

3. Click OK.

   The Filter Rooms dialog box closes. The room display in the Reservation Book is changed accordingly.

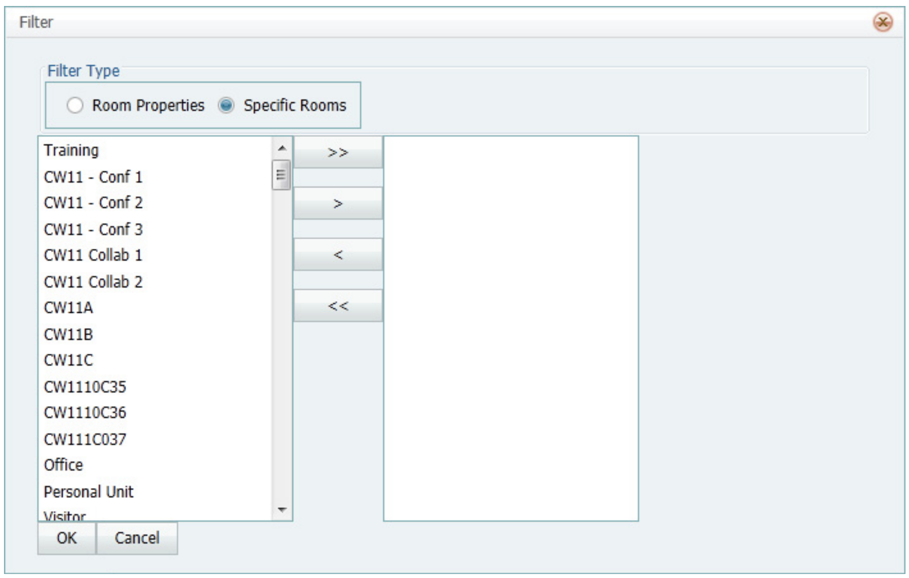


After you carry out a search, you can click Reset at the top of the Rooms list to reset all room filtering criteria (Filter Type, Room Type, and Room Availability) to their default values,

List of Rooms (Specific Rooms)

If the Filter Rooms dialog box is not already open, then above the Rooms list, click Filter to open the dialog box and select Specific Room. Select the room, or CTRL-click to select multiple rooms on the Available list, and then click the Move (>) button to move the selected rooms to the Selected list. The Reservation Book is updated to show bookings only for the selected rooms.

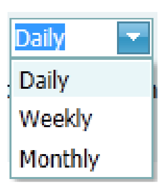
Figure 2-15: Filter Rooms dialog box, Specific Room selected



Reservation Book view

On the View dropdown list, select Daily, Weekly, or Monthly.

Figure 2-16: View dropdown list

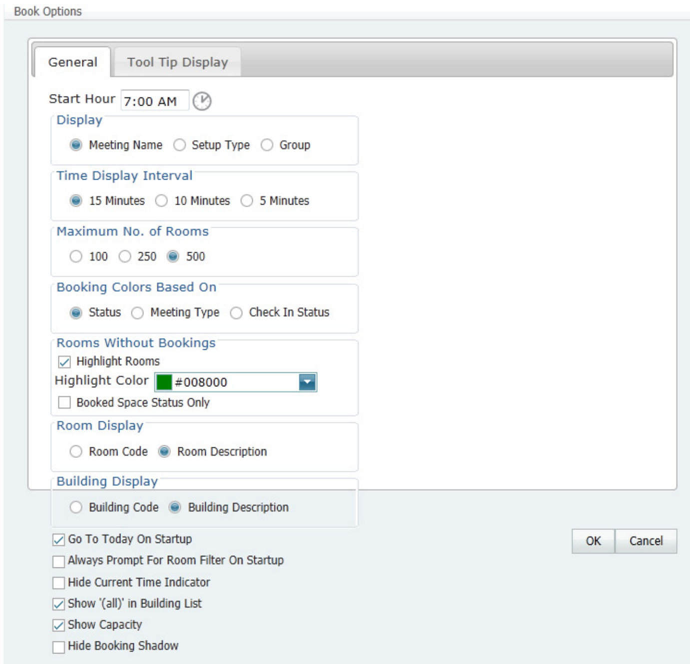


Although you can view currently scheduled reservations in either the daily, weekly, or monthly view, you can make a new reservation only in the daily view.

Display Options

Click Options (upper right hand corner of Reservation Book) to open the Book Options dialog box (the General tab is the active tab) and change multiple display options not only for the Reservation Book, but also a reservation in the book.

Figure 2-17: Book Options dialog box, General tab



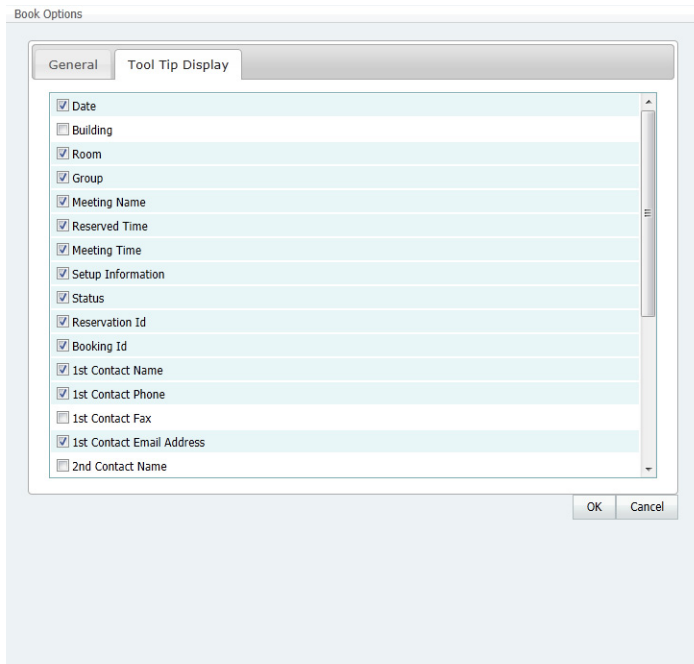
Option	Description
Start Hour	The daily start time for the Reservation Book display.
Display	The information that is displayed in the middle bar for a reservation.
Time Display Interval	Changes the granularity of the time display interval.
Maximum No. of Rooms	The maximum number of rooms to display in the Reservation Book.
Booking Colors Based On	The color of the bookings in the reservation. Select one: Status, Event Type, or Check-in Status (for EMS Workplace only.)
Rooms Without Bookings	Whether to highlight rooms without bookings and if so, the highlight color. If both Highlight Rooms and Booked Space Status Only are selected, then only those rooms that do *not* have a Booked Space status are highlighted.
Room Display	Display the room code or the room name for a reservation.
Building Display	Display the building code or the building name for a reservation.
Go To Today on Startup	If selected, the Reservation Book opens to the current day’s date; otherwise, it opens to the last date viewed.

Option	Description
Always Prompt for Room Filter on Startup	If Show '(all)' in Building List is also selected, then when you open the Reservation Book, the Filter dialog box opens on top of the Reservation Book. You can select different options on this dialog box to display only specific reservations in the book, for example, bookings only for selected rooms. If you do not select any options on this dialog box, but instead simply close it, then all reservations for all rooms in all buildings are displayed in the book.
Hide Current Time Indicator	Show or hide the vertical bar that indicates the current time for current day. **Note:** The Current Time indicator is displayed only if the view is the Daily or Weekly view and the view includes the current day's date.
Show '(all)' in Building LIst	Show the "all" option on the Building dropdown list; otherwise, a user must select a specific building. If this option is selected in conjunction with Always Prompt for Room Filter on Startup, then when you open the Reservation Book, then the Filter dialog box always opens on top of the Reservation Book. If you are setting your Reservation Book options, and you do not want to the Filter dialog box to open on top of the Reservation Book when you open the book, then do the following: • Clear Always Prompt for Room Filter on Startup. • Clear Show ('all') in Building List. • On the Building dropdown list in the Reservation Book, select any building, area, or view. **Note:** The building, area, or view that you select is not important. This last step just clears the "all" building option from the Reservation Book cache and ensures that the Filter dialog box does not open on top of the Reservation Book. Going forward, you can always select all buildings, or any specific building, area, or view as needed when you are working in the Reservation Book.
Show Capacity	Show the minimum and maximum capacities next to the room description.
Hide Booking Shadow	Hide the vertical shadow bar that highlights the reserved and/or event start times and end times when a user moves a booking in the Reservation Book.

Tooltips

Click Options (upper right hand corner of Reservation Book) to open the Book Options dialog box, and then open the Tooltip Display tab and select which items to include in the tooltip that opens when you rest the mouse pointer on an event in the Reservation Book.

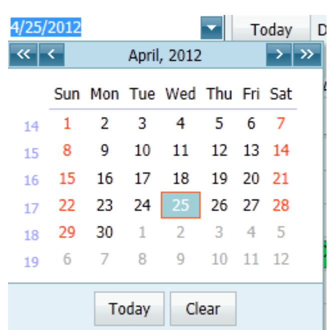
Figure 2-18: Book Options dialog box, Tooltip Display tab



Display Date (Calendar)

On the Date field, click the dropdown arrow to open the Calendar. Use the (< and >) scroll features at the top of the calendar to change the month or use the (<< or >>) scroll features at the top of the calendar to change the year. To select a different date for a month, click the date.

Figure 2-19: Reservation Book calendar



Display Date (Scroll Features)

Use the scroll features at the top of the reservation book display to scroll to a different day, week, month, or any different combination of these. To reset the display immediately to the current day's date, click Today.

Figure 2-20: Reservation Book calendar scroll features

To view reservation information

1. On the EMS toolbar, click the Book icon Book.

   The Reservation Book opens in the Daily view. See Figure 2-11 on page 51.

Optionally, when the Reservation Book first opens, before you view, edit or make a reservation, you can change the Reservation Book view so that it better suits your working needs. See "To change the Reservation Book display" on page 52.

2. Optionally, you can do one or more of the following to view the reservation information:

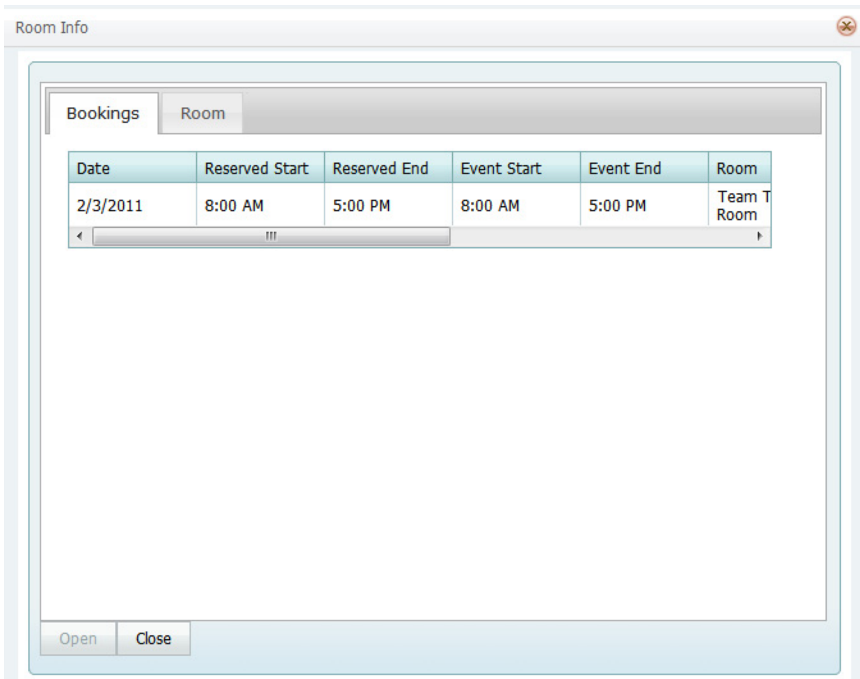
   - View the reservation in the Navigator by doing one of the following:
     - Double-click the middle bar for the reservation entry.
     - Right-click the reservation entry and on the context menu that opens, click Open.

     See "The Navigator," on page 65.
   - View the bookings for a room. See "Room Bookings" on page 59.
   - View the properties for a room. See "Room Properties" on page 60.
   - View the pricing for a booked room. See "Room Pricing" on page 61.
   - View the setup information, event information, or teardown information for a reservation. See "Room Information" on page 61.
   - Change the time zone in which to view all your bookings. See "Time Zone" on page 62.

Room Bookings

Click the room name or code in the Rooms list to open the Bookings tab for the Room Info dialog box. The tab on this dialog box lists all the bookings for the selected room based on the current view (Daily, Weekly, Monthly) and on the date that is shown in the Date field. To view a booking in the Navigator, select the booking, and then click Open.

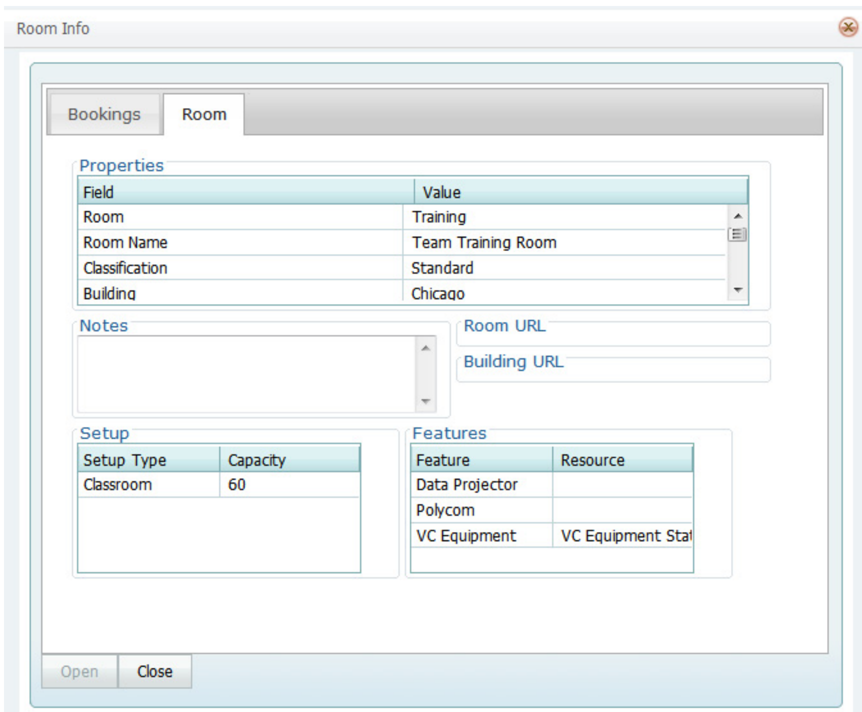
Figure 2-21: Room Info dialog box, Bookings tab



Room Properties

Click the room name or code in the Rooms list to open the Bookings tab for the Room Info dialog box, and then open the Room tab. The tab on this dialog box lists all the properties for the room, such as the room code, the room name, the room classification, and so on. It also lists the setup type and capacity for the room, and any notes that have been entered for the room.

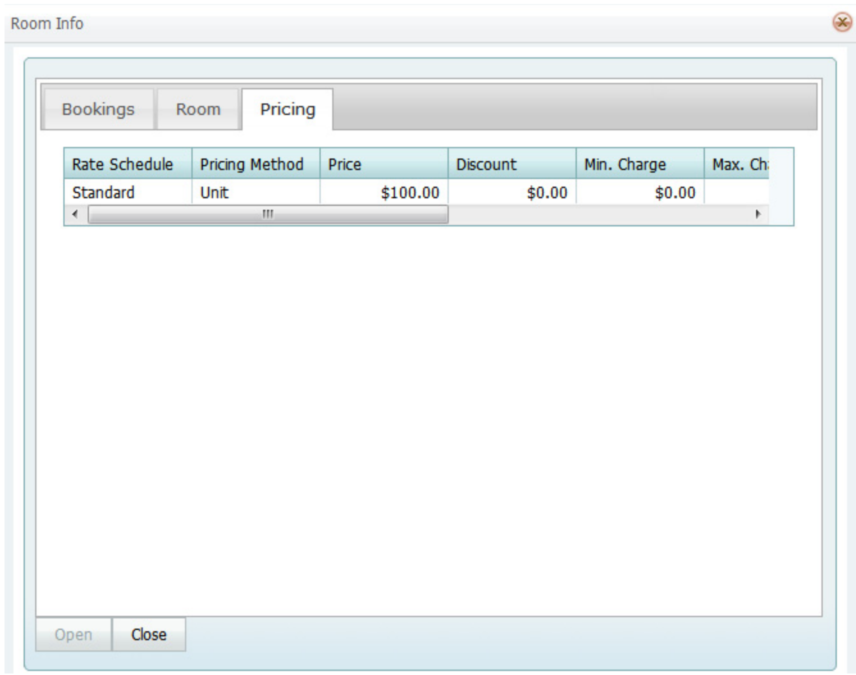
Figure 2-22: Room Info dialog box, Room tab



Room Pricing

Click the room name or code in the Rooms list to open the Bookings tab for the Room Info dialog box, and then open the Pricing tab. This tab displays any pricing information that was defined for the room.

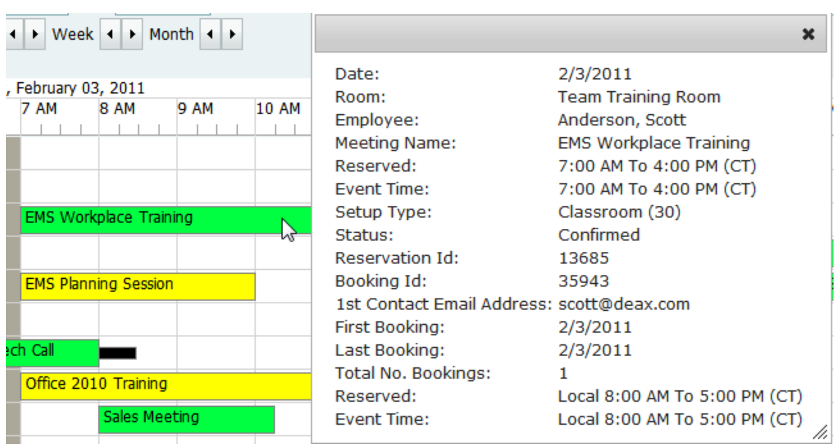
Figure 2-23: Room Info dialog box, Pricing tab



Room Information

Rest the mouse pointer on the left bar, middle bar, or right bar for the reservation entry. A tooltip showing the respective setup, event, or teardown information opens.

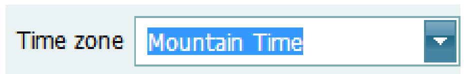
Figure 2-24: Viewing event information



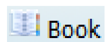
Time Zone

If buildings that are located in multiple time zones are currently displayed, you can specify the time zone in which to view all of your bookings.

Figure 2-25: Changing the time zone



To make a new reservation

1. On the EMS toolbar, click the Book icon 
.

   The Reservation Book opens in the Daily view. See Figure 2-11 on page 51.

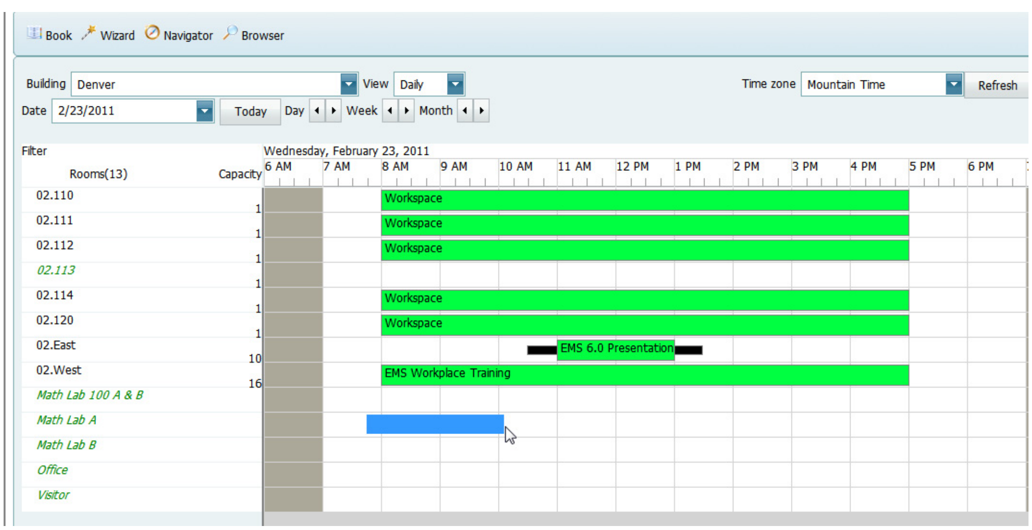
2. Change the display to show the room for which you are making the reservation.
3. Select the date for which you are making the reservation.

You must leave the Date view in the Daily display.

4. In the Time Grid for the room, click and hold the left mouse button, drag the mouse to schedule the room and time, and then release the mouse button to open the Reservation Wizard.

As you drag the mouse, a blue horizontal bar is displayed.

Figure 2-26: Making a new reservation in the Reservation Book



5. Continue to "Making a Reservation Using the Reservation Wizard" on page 33.

To edit an existing reservation

1. On the EMS toolbar, click the Book icon Book.

   The Reservation Book opens in the Daily view. See Figure 2-11 on page 51.

Optionally, when the Reservation Book first opens, before you view, edit or make a reservation, you can change the Reservation Book view so that it better suits your working needs. *See "To change the Reservation Book display" on page 52.*

2. Optionally, you can do one or more of the following to edit an existing reservation:

Step	Action
Change the setup time for a reservation	• Drag the left bar horizontally to a new time. • Click Yes in the Confirm Change dialog box.
Change the event time	• Drag the middle bar horizontally to a new time. • Click Yes in the Confirm Change dialog box.
Change the teardown time for a reservation	• Drag the right bar horizontally to a new time. • Click Yes in the Confirm Change dialog box.
Edit the reservation building, room, time, or both	• Drag and drop the reservation to a new room that is the same building or in a different building, and/or to a new time. • Click Yes in the Confirm Change dialog box.

3. Optionally, you can right-click on a reservation in the Reservation Book, and on the context menu that opens, select one of the following:

Option	Description
Open	Opens a reservation in the EMS Navigator.
Move Forward	Move the reservation date forward by one day or one week.
Move Backward	Move the reservation date backward by one day or one week.
Move to Specific Date	Move the reservation to a specific date.
Change Status	Change the status of the reservation.
Copy Bookings	N/A. **Note:** Although this option is available on the context menu for a reservation, its associated functionality is currently under development.
Swap Rooms with Another Booking	Swap the room assignments of two events. The swap option is applicable only for two events that have identical meeting patterns.
Highlight Related Reservations	Highlights the bookings that belong to the same reservation.

The Navigator

The Navigator is a page in EMS that you use to view and manage all aspects of a reservation including bookings and booking details.

This chapter covers the following topics:

- “Working with User Defined Fields in the Navigator” on page 167.
- “Working with Attachments in the Navigator” on page 170.
- “Running the Resource Utility Conflicts Tool” on page 176.

Navigator Overview

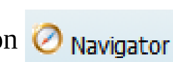
This section provides an overview of opening a reservation the Navigator, the Navigator's folder structure, and the commands that are available in the Navigator.

Opening a reservation in the Navigator

After you create a new reservation using the Reservation Wizard, the reservation opens automatically in the Navigator. You can also manually open the Navigator by:

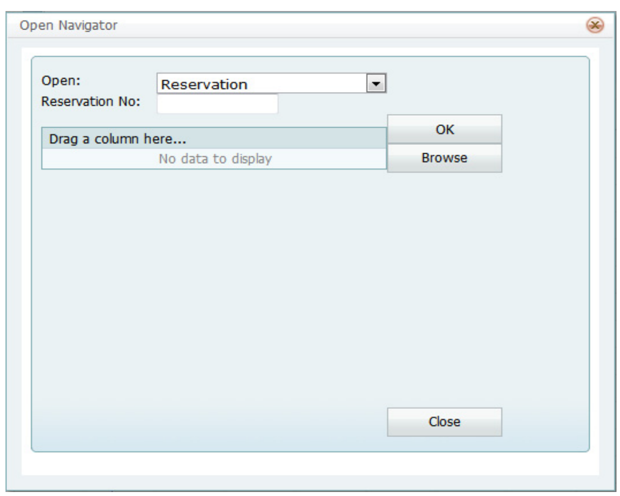
- Selecting a reservation, booking, or service order to open directly in the Navigator. See "Opening a reservation directly in the Navigator" below.
- Opening a reservation through the Reservation Book. See "Opening a reservation through the Reservation Book" on page 68.
- Opening a reservation through a group. See "Opening a reservation through a group" on page 68.
- Opening a reservation through a search. See "Opening a reservation through a search" on page 68.

Opening a reservation directly in the Navigator

1. On the EMS toolbar, click the Navigator icon 

to open the Open Navigator dialog box.

Figure 3-1: Open Navigator dialog box



2. On the Open dropdown list, select the item that you are opening—Reservation, Booking, or Service Order.

3. Do one of the following:
   - In the No. field, enter the number for the reservation, service order, or booking, and then click OK.
   - To enter the last reservation, booking, or service order, that you made during your *current* or *last* EMS session, double-click in the field, and then click OK.

If you do not know the reservation number, you can search for the reservation. On the Navigator, click Browse to open the Browser, and then continue to *"Searching with the Browser or with the Web Reservation Tool" on page 179.*

Opening a reservation through the Reservation Book

On the EMS Web Client toolbar, click the Book icon to open the Reservation Book, and then in the Reservation Book, double-click a booking for the reservation to open the reservation in the Navigator. See "Viewing and Editing Reservations in the Reservation Book" on page 50.

Opening a reservation through a group

You can search for a reservation for a group and open the reservation in the Navigator from the group-specific page. See "Working with Reservations for a Group" below.

Opening a reservation through a search

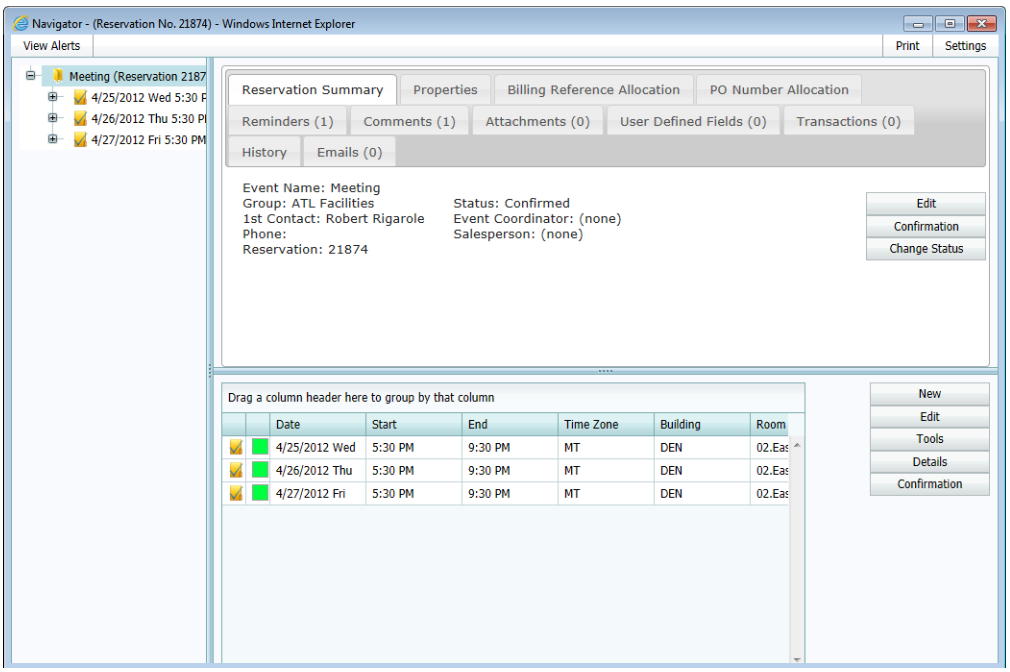
You can search for a reservation using the Browser, the Web Reservation Tool, and/or the Calendar, and then double-clicking the search result entry to open the reservation in the Navigator. See "Search Tools," on page 177.

You can also click Browse on the Open Navigator dialog box to open the Browser search tool.

Folder structure

The Navigator has three panes—a left pane, a top right pane, and a bottom left pane. The left pane displays a selected reservation, all the bookings for the reservation, and the details for each booking in a Windows Explorer-style folder structure. The top-level folder is the to *reservation folder.* The folders that are located beneath a reservation folder are the *booking folders*. The folders that are located beneath a booking folder are the *booking detail folders*. The top right pane of the Navigator displays different tabs and options depending on the folder or item that is selected in the left pane of the Navigator. The bottom right pane of the Navigator displays different information and options depending on the folder or item that is selected in the left pane.

Figure 3-2: Navigator page with a reservation folder selected



Reservation folder

A reservation folder contains the *who* and the *what* information for the reservation. When you select a reservation folder in the left pane of the Navigator, the reservation number is displayed in the title bar of the Navigator, and the following tabs are displayed in the upper right pane of the Navigator:

- Reservation Summary tab—The Reservation Summary displays information about the selected reservation, including the event name, the group for which the reservation was made, the group contact name, the group contact phone number, and the reservation number.
- Properties tab—The Properties tab displays not only the same information as the Reservation Summary tab, but also, information such as the event type, the second group

contact, the date that the reservation was added, the date that the reservation was changed, and so on.

- Billing Reference Allocation tab—By default, the charge for a reservation can be allocated to a single billing reference number. On the Billing Reference Allocation tab, you can allocate the charge for a reservation to multiple billing reference numbers by percentage. See “To allocate charges to multiple billing reference numbers and/or PO numbers” on page 71.

Your EMS administrator must enable the Use Billing Reference Allocation parameter for this tab to be displayed. See EMS System Parameters in the EMS Setup Guide.

- PO Number Allocation tab—By default, the charge for a reservation can be allocated to a single purchase order (PO) number. On the PO Number Allocation tab, you can allocate the charge for a reservation to multiple billing PO numbers by percentage. See “To allocate charges to multiple billing reference numbers and/or PO numbers” on page 71.

Your EMS administrator must enable the Use PO Number Allocation parameter for this tab to be displayed. See EMS System Parameters in the EMS Setup Guide.

- Reminders tab—The Reminders tab displays any reminders that were created for the selected reservation. See “Working with Comments and Reminders in the Navigator” on page 161.
- Comments—The Comments tab displays any text entries that were made for the selected reservation. See “Working with Comments and Reminders in the Navigator” on page 161.
- Attachments tab—The Attachments tab displays any attachments (files) that have been saved with the reservation. See “Working with Attachments in the Navigator” on page 170.
- User Defined Fields—The User Defined Fields tab displays the additional fields that store custom data for a reservation. Your EMS Administrator configures the types of fields that are available as well as the allowed values for these fields. See “Working with User Defined Fields in the Navigator” on page 167.
- Transactions—The Transactions tab displays any invoices that were generated for the selected reservation or any payments that were applied to the selected reservation. See “Billing,” on page 319 for detailed information about invoices and other financial transactions in EMS Web Client.
- History tab—The History tab displays the history for the reservation—the date that a change was made to the reservation, the ID of the user who made the change, the field that was changed, the old field value, and the new field value.
- Emails tab—The Emails tab displays any summarizing information for any emails that were sent to the group for whom the reservation was made.

The bookings for the selected reservation are displayed in the Bookings pane (the lower right pane) of the Navigator. The colored rectangle to the left of a booking indicates the booking's status. If a booking has been canceled, a Canceled icon is displayed on the booking folder in both the Reservation (left) pane and the Bookings pane.

To allocate charges to multiple billing reference numbers and/or PO numbers

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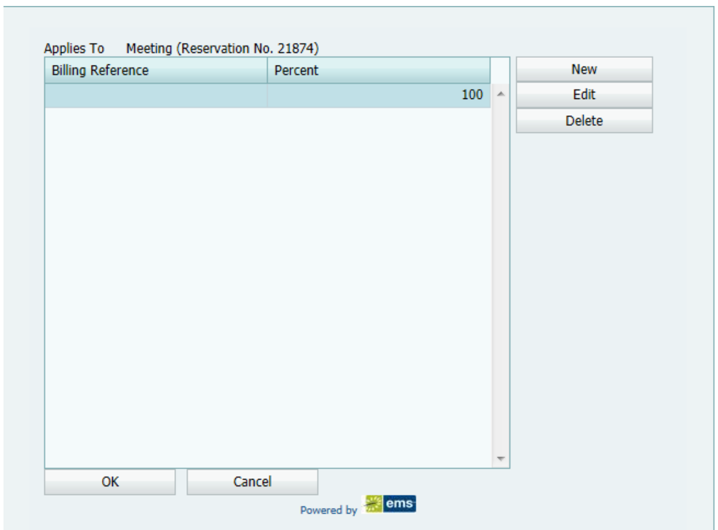
The following procedure details how to allocate a reservation charge to multiple billing reference numbers; however, by analogy, you can follow this procedure to allocate booking charges or booking detail charges to multiple billing reference numbers and/or PO numbers.

1. For a selected reservation, open the Billing Reference Allocation tab, and then click Edit.

   The Billing Reference Allocation dialog box opens. By default, when this dialog box first opens, it displays the charge for the reservation allocated 100% to a single billing reference number placeholder.

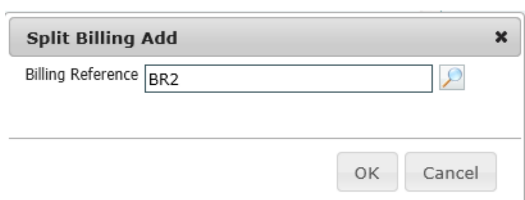
Figure 3-3: Billing Reference Allocation dialog box



2. Select the billing reference number placeholder, and then click Edit.

   The Split Billing Add dialog box opens.

Figure 3-4: Split Billing Add dialog box



3. Do one of the following:

    - Enter the billing reference number to which you are allocating the reservation charges, and then click OK.

      The Billing Reference dialog box closes. You return to the Billing Reference Allocation dialog box with the newly added billing reference number allocated at 100%. Continue to Step 5.

    - Click the Search icon to open a Lookup dialog box, and then do one of the following:

        - To search a list of all pre-configured billing reference numbers, leave the Find field in the Lookup dialog box blank, and then click the Search icon. Click the Add icon next to the appropriate billing reference number to close the Lookup dialog box and return to the Billing Reference dialog box. The Billing Reference dialog box displays the selected billing reference number. Continue to Step 4.

        - To search for a specific billing reference number, enter a search string in the Find field, and then click the Search icon. Click the Add icon next to the appropriate billing reference number to close the Lookup dialog box and return to the Billing Reference dialog box. The Billing Reference dialog box displays the selected billing reference number. Continue to Step 4.

---

*The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, the search string **11** returns **11**7-3C, but not 3C-117.*

4. Click OK.

   The Billing Reference dialog box closes. You return to the Billing Reference Allocation dialog box with the newly added billing reference number allocated at 100%.

5. Do one of the following:

    - To allocate the reservation charges to only this single billing number, click OK.

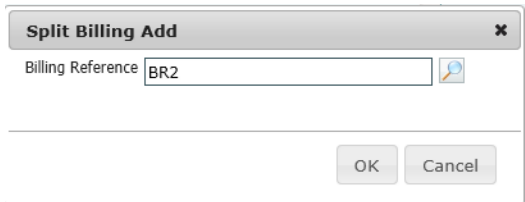
      The Billing Reference Allocation dialog box closes and you return to the Navigator. The newly added billing reference number, allocated at 100%, is displayed on the Billing Reference Allocation tab.

    - To allocate the reservation charges to multiple billing reference numbers, continue to Step 6.

6. Click New.

   The Split Billing Add dialog box opens.

Figure 3-5: Split Billing Add dialog box



7. Do one of the following:
   - In the Billing Reference field, enter a billing reference number.
   - Click the Search icon to open a Lookup dialog box in which you can search for and select a billing reference number from a list of pre-configured numbers.
     - To search a list of all pre-configured billing reference numbers, leave the Find field in the Lookup dialog box blank, and then click the Search icon. Click the Add icon next to the appropriate billing reference number to close the Lookup dialog box and return to the Billing Reference dialog box. The Billing Reference dialog box displays the selected billing reference number.
     - To search for a specific billing reference number, enter a search string in the Find field, and then click the Search icon. Click the Add icon next to the appropriate billing reference number to close the Lookup dialog box and return to the Billing Reference dialog box. The Billing Reference dialog box displays the selected billing reference number.

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*The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, the search string **11** returns **11**7-3C, but not 3C-117.*

8. Click OK.

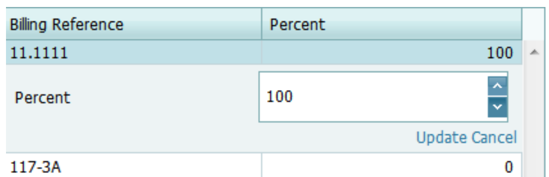
   The Billing Reference dialog box closes. You return to the Billing Reference Allocation tab with the newly added billing reference number displayed with a 0% allocation.

9. Repeat Step 6 through Step 8 until you have added all the needed billing reference numbers.

10. For each new billing reference number, do the following:
    - Double-click to select it.
    - Change the percentage to the appropriate value.
    - Click Update.

The percentages must add up to 100%.

Figure 3-6: Changing the percentage allocation for a billing reference number



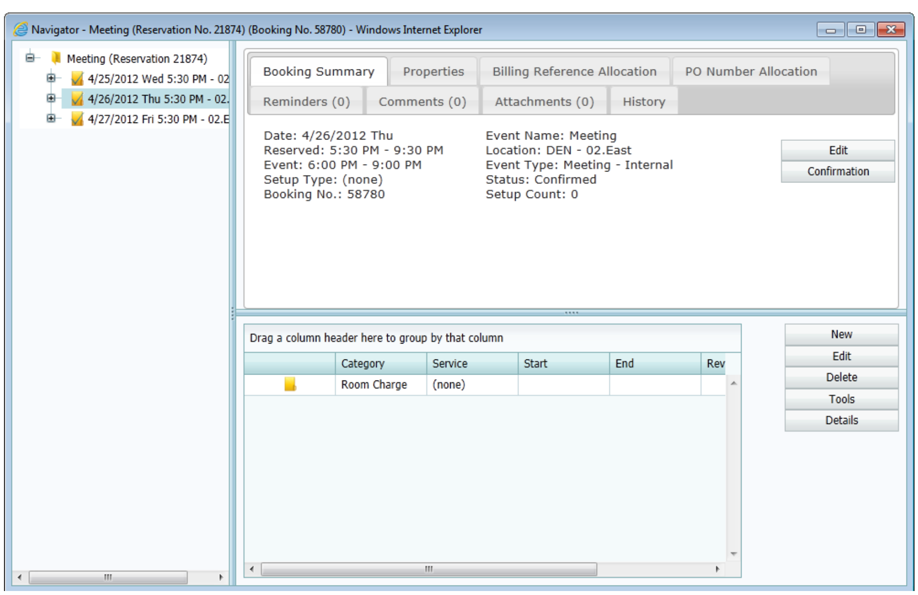
11. Click OK to close the Billing Reference Allocation dialog box and return to the Billing Reference Allocation tab.

    All the billing reference numbers and their percent allocations are displayed on the tab.

Booking folder

Booking folders contain the *where* and *when* information for the reservation. If you can expand a booking folder, this indicates that details have been added to the booking. The booking details for the selected booking are displayed in the Booking Details pane (the lower right pane) of the Navigator. A green background for a booking detail folder indicates that one or more booking detail items have been invoiced for the booking.

Figure 3-7: Navigator page with a booking folder selected



With a booking folder selected in the left pane of the Navigator, the following tabs are displayed in the upper right pane of the Navigator:

- Booking Summary tab—The Booking Summary displays information about the selected booking, including the event date, the reserved time, the event time, and so on.
- Properties tab—The Properties tab displays not only the same information as the Booking Summary tab, but also, information such as the event type, the setup count, the date that the booking was added, the date that the booking was changed, and so on.
- Billing Reference Allocation tab—By default, the charge for a booking can be allocated to a single billing reference number. On the Billing Reference Allocation tab, you can allocate the charge for a booking to multiple billing reference numbers by percentage. See "To allocate charges to multiple billing reference numbers and/or PO numbers" on page 71.

Your EMS administrator must enable the Use Billing Reference Allocation parameter for this tab to be displayed. See EMS System Parameters in the EMS Setup Guide.

- PO Number Allocation tab—By default, the charge for a booking can be allocated to a single purchase order (PO) number. On the PO Number Allocation tab, you can allocate the charge for a reservation to multiple billing PO numbers by percentage. See "To allocate charges to multiple billing reference numbers and/or PO numbers" on page 71.

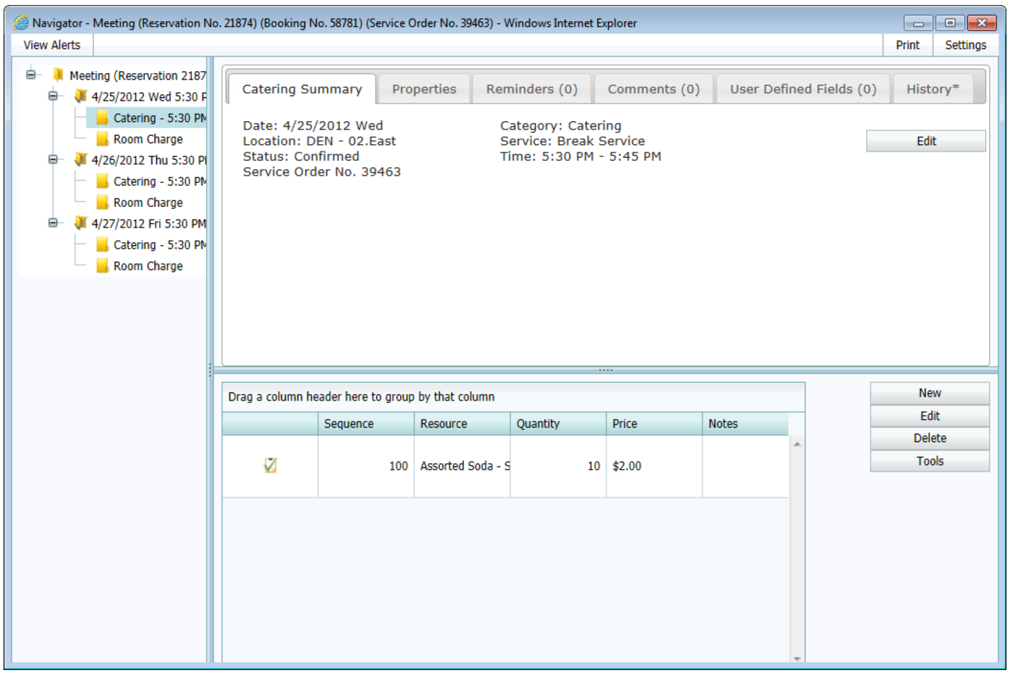
Your EMS administrator must enable the Use PO Number Allocation parameter for this tab to be displayed. See EMS System Parameters in the EMS Setup Guide.

- Reminders tab—The Reminders tab displays any reminders that were created for the selected booking. See "Working with Comments and Reminders in the Navigator" on page 161.
- Comments—The Comments tab displays any comments that were made for the selected booking. See "Working with Comments and Reminders in the Navigator" on page 161.
- Attachments—The Attachments tab displays any attachments that were saved with the booking. See "Working with Attachments in the Navigator" on page 170.
- History—The History tab displays a list of changes made for the selected booking—the date the change was made to the booking, the user who made the change to the booking, and information (field) that was changed for the booking.

Booking Detail folder

If you can expand a booking folder, this indicates that details have been added to the booking. *Booking details*, which are also called *categories*, are the services (catering, A/V equipment, and so on), notes, attendees, activities, and room charges that you can assign to a booking.

Figure 3-8: Navigator page with a booking detail folder selected



Booking Detail folders are discussed in *"Booking Details and Items Overview" on page 120.*

Navigator commands

The Navigator has one constant command in the upper left hand corner—View Alerts and three constant commands in the upper right hand corner—Print and Settings.

Command	Description
View Alerts	Open and view any alerts that have been generated for the selected reservation, booking, or a booking detail that is a service order or catering category.
Print	• Printing an invoice or a confirmation at the reservation level. See "Confirmations," on page 279. • Printing the Setup Worksheet for Reservation report, the Service Orders report, and the Banquet Event Order report, See "Reports," on page 289. • Printing the Transaction report. See "Generating an EMS Billing Report" on page 350. • Printing the history of a reservation, all its bookings, and all its booking detail items.
Refresh	For refreshing the Navigator display based on the settings that you have specified in the Navigator Options dialog box. See "Navigator Options dialog box" on page 78.
Settings	• Options—Opens the Navigator Options dialog box in which you can specify such things as what is to be displayed in the Navigator, mouse actions in the Navigator, and so on. See "Navigator Options dialog box" on page 78. • Confirmation Settings—Opens the Confirmation Settings dialog box which provides a variety of options that you can specify for manual and automatic generation of a confirmation for a reservation or a booking. See "Confirmations," on page 279.

All other navigator commands are available as buttons in the upper right pane and lower right pane of the Navigator.

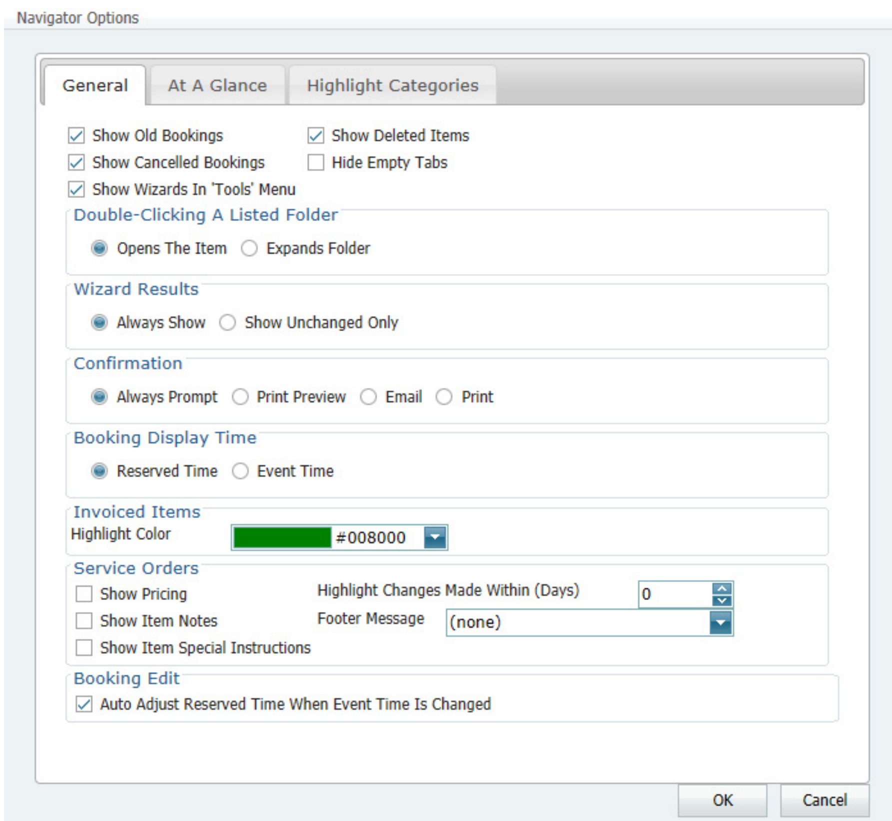
Navigator Options dialog box

The Navigator Options dialog box has three tabs—General, At A Glance, and Highlight Categories.

General tab

General tab—On the General tab, you select the options for such things as which types of bookings to show in the Navigator (old bookings and/or canceled bookings), the result of double-clicking a listed folder (opens the item or expands the folder), the booking time that is displayed (reserved time or event time), and the highlight color for invoiced items.

Figure 3-9: Navigator Options dialog box, General tab



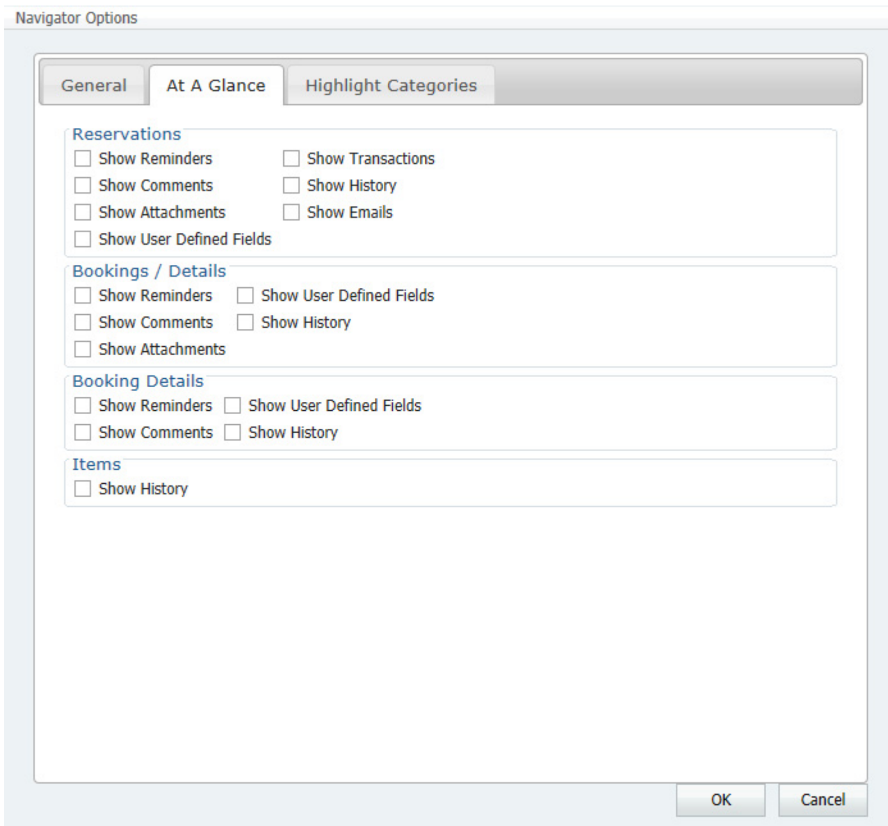
Field	Description
General	
Show Old Bookings	Show bookings in the Navigator that occurred before the current day's date.
Show Cancelled Bookings	Selected, show bookings in the Navigator with a canceled status.
Show Wizards in Tools menu	Show all on the Tools menu in the Bookings pane. If cleared, show only the "Wizards" option, which you must click to open a form from which you can select a tool.

Field	Description
Show Deleted Items	Show all deleted items (bookings, deleted resource items, and so on) for a reservation in the Navigator.
Hide Empty Tabs	Hide the tabs that do not have any data displayed on them for a selected reservation, booking, or booking detail.
Double-Clicking a Listed Folder	
Opens the item	Opens the item for editing.
Expands folder	Opens the next level of folders.
Wizard Results	
Always Show	Show a confirmation of all changes, regardless if they were successful, on a Wizard Results page.
Show Unchanged Only	Show only those changes that were not successful on a Wizard Results page.
Confirmation	
Always prompt	When you click Confirmation, opens a Confirmation filter which you can use to change the default filter options for a confirmation before generating it.
Print Preview	When you click Confirmation, opens an onscreen preview of the confirmation.
Email	When you click Confirmation, opens an email of the confirmation.
Print	When you click Confirmation, prints an immediate confirmation.
Booking Display Time	
Reserved Time	Show the total time for which the space is reserved. This time is the event time plus the setup/teardown times.
Event Time	Show only the event time for which the space is reserved.
Invoiced Items	
Highlight Color	The color with which invoiced items are highlighted in the Navigator page.
Service Orders	
Show Pricing	Show pricing on a service order.
Show Item Notes	Show item notes on a service order.
Show Item Special Instructions	Show special instructions for items on a service order.
Highlight Changes Made Within (days)	Highlight any changes that have been made to a service order within the specified number of days.
Footer Message	Show reconfigured blocks of text that appear in footer of a service order (for example, a Cancellation policy).
Booking Edit	
Auto Adjust Reserved Time When Event Time is Changed	If the reservation includes setup and/or teardown times, then automatically adjust the *total* time for the reservation (the event time plus the setup/teardown time) when the event time is changed.

At A Glance tab

On the At A Glance tab, you specify whether reminders, comments, attachments, and so on are to be displayed in the left pane of the Navigator when a reservation folder, booking folder, booking detail folder, and/or booking detail item is opened.

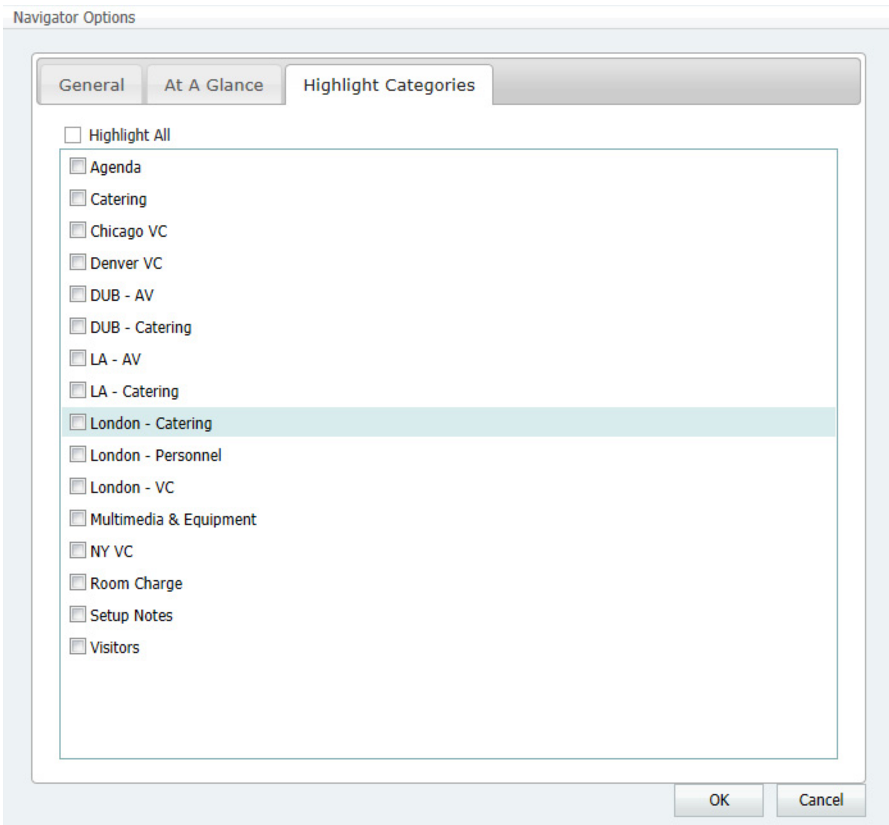
Figure 3-10: Navigator Options dialog box, At A Glance tab



Highlight Categories

On the Highlight Categories tab, you indicate whether a checkmark is to be displayed on all booking detail item folders for the selected booking detail. The default is to Highlight All, which means every booking detail item folder for every booking detail is denoted with a checkmark.

Figure 3-11: Navigator Options dialog box, Highlight Categories tab



Other Navigator commands

All other Navigator commands are available as buttons in the upper right pane and lower right pane of the Navigator. The buttons that are available are dynamically updated based not only on the folder or item that is currently selected in the left pane of the Navigator, but also on the tab that is open in the upper right pane of the Navigator.

Figure 3-12: Buttons available on the Navigator page with a reservation folder selected

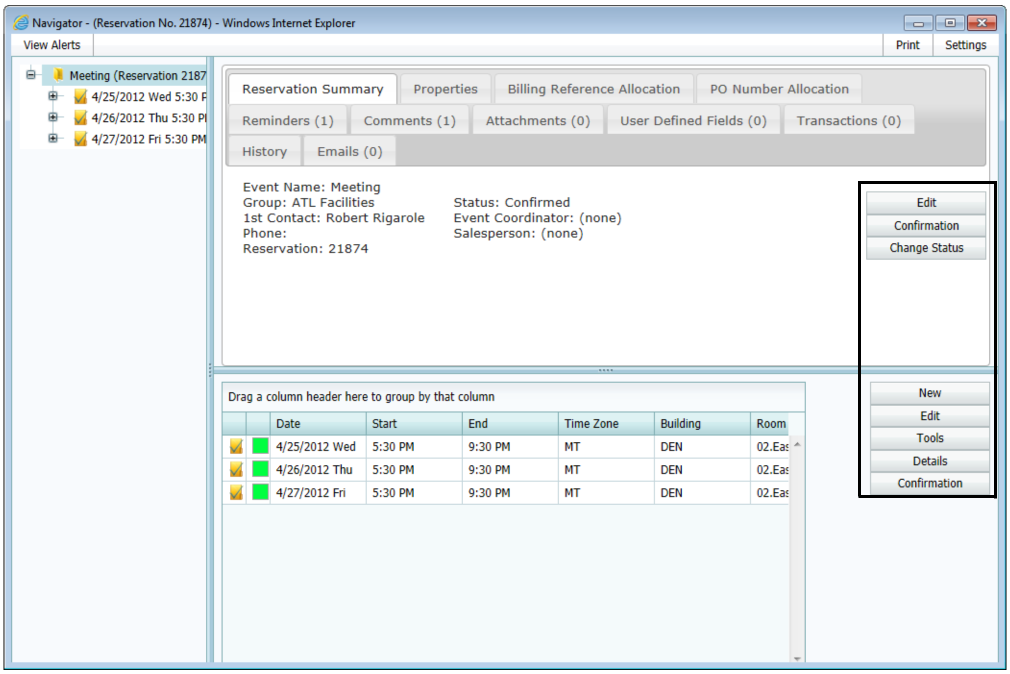


Figure 3-13: Buttons available on the Navigator page with a booking folder selected

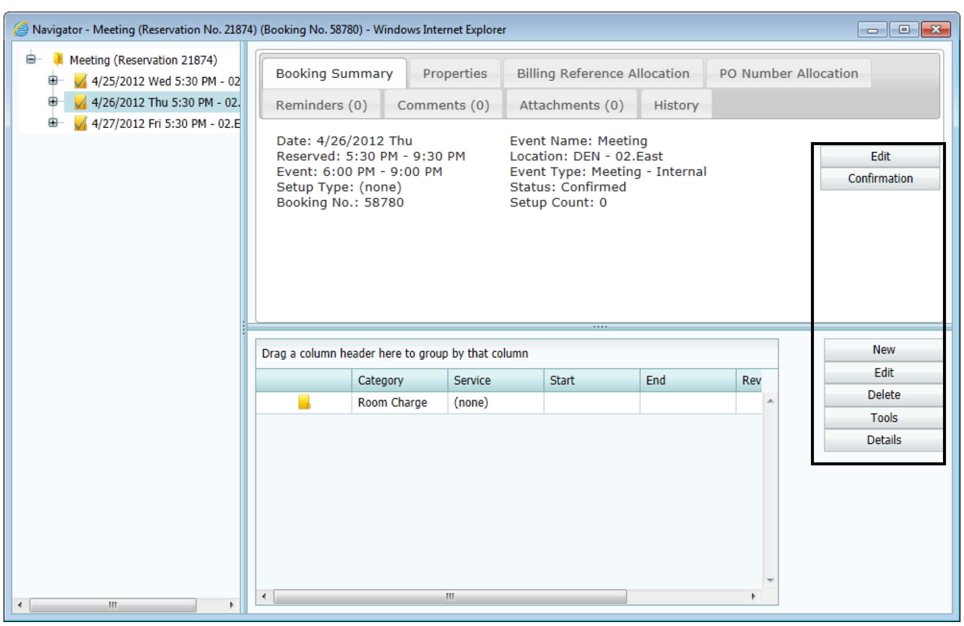
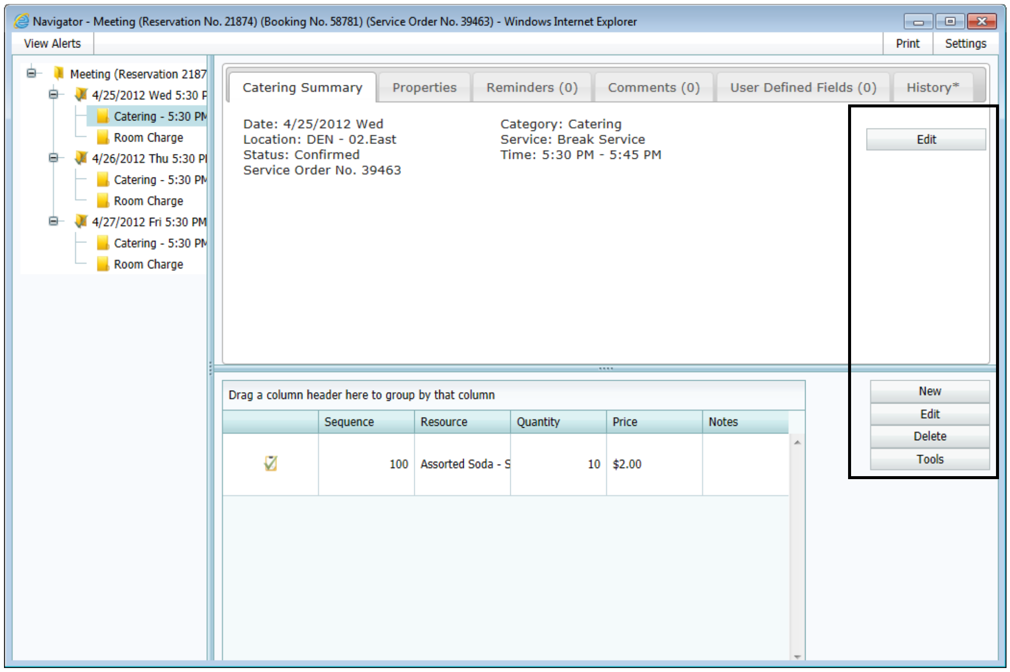


Figure 3-14: Buttons available on the Navigator page with a booking detail folder selected



Many of these same commands are also available on a context menu, which is a menu that opens when you right-click on a folder or item in the Navigator. All the context menus that are available in the Navigator offer a limited set of choices based on not only what is currently selected in the Navigator, but also, in what pane of the Navigator that it is selected. See Figure 3-15 below and Figure 3-16 on page 84.

Figure 3-15: Comparing context menus

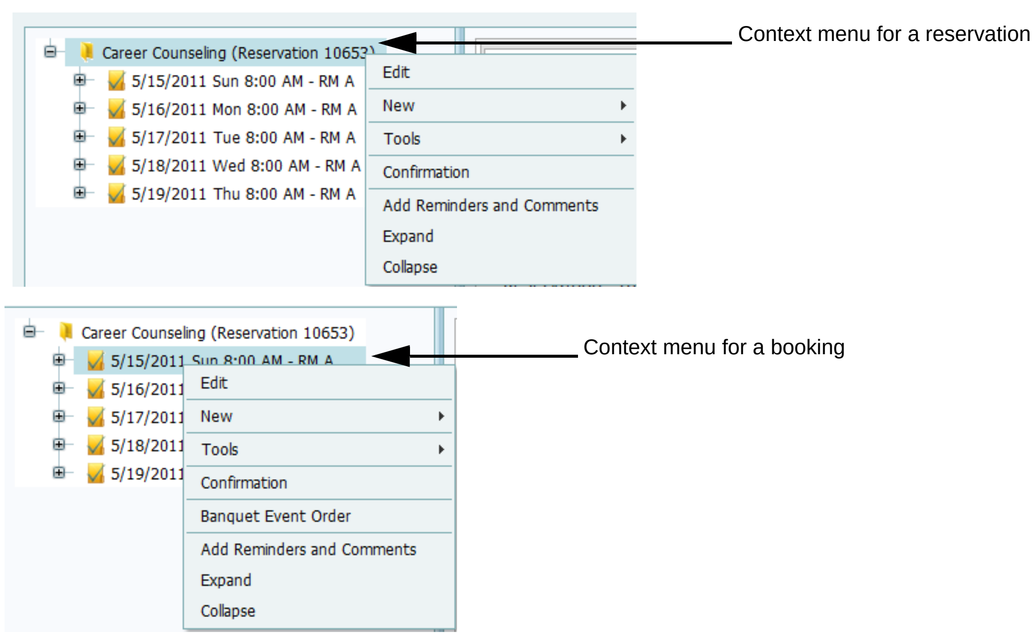
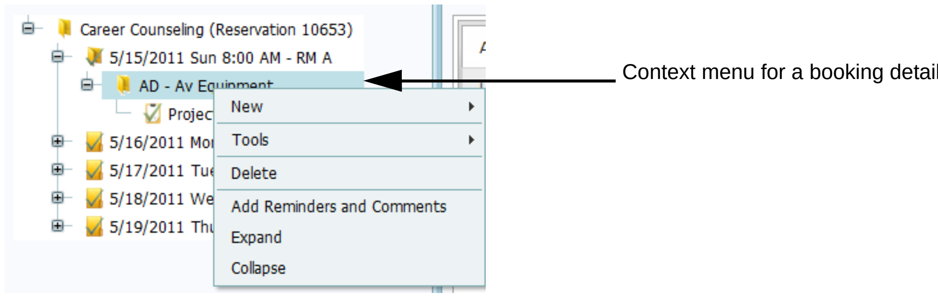
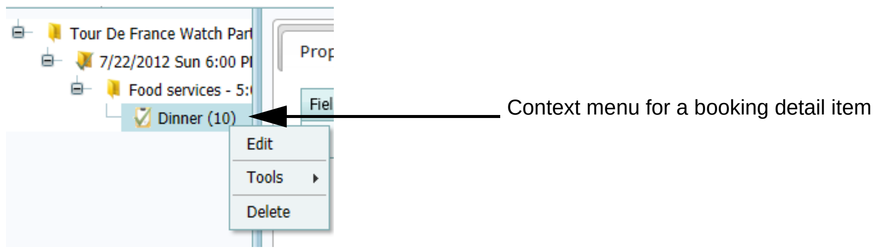


Figure 3-16: Comparing context menus (need context menu for booking detail item)





The majority of the Navigator functions are accessible through the Tools command button in the Bookings pane. For consistency, this chapter references this approach whenever possible; however, you can use whatever approach best suits your working needs.

Adding Bookings to a Reservation in the Navigator

You can use the Navigator to add one or more bookings to an existing reservation.

To add bookings to a reservation

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In the left pane of the Navigator, select the reservation to which you are adding the bookings, and then in the Bookings pane, click New.
   The Reservation Wizard opens. See "Making a Reservation Using the Reservation Wizard" on page 33.

Editing a Reservation in the Navigator

When you edit a reservation in the Navigator, you are working with the *who* and the *what* information for the event—the event name, the group name, and so on. When you edit a reservation, you can edit the *reservation* information (event name, event coordinator, and so on), and you can edit the *billing* information (pricing plan, payment type, and so on).

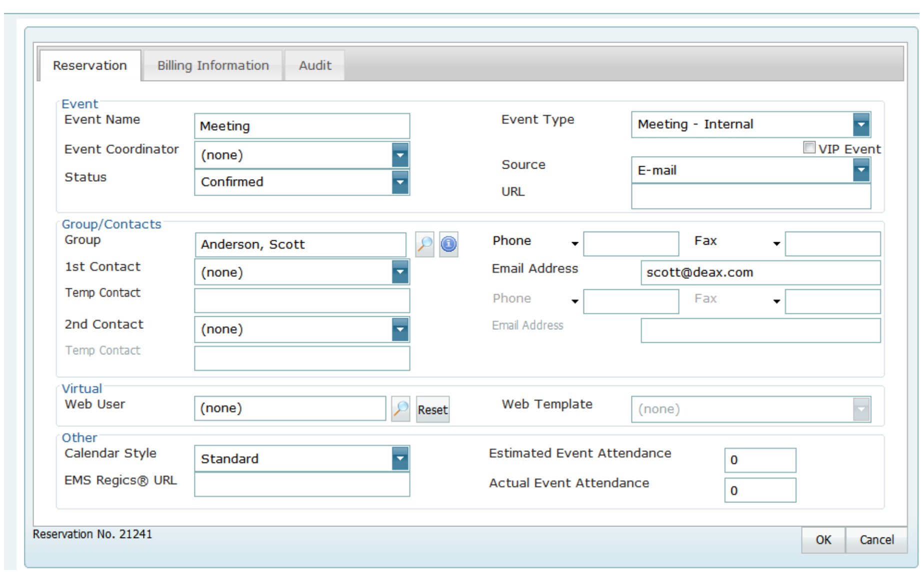
When you edit a reservation, if you select a different pricing plan, then the pricing plan is applied at the reservation level only. Categories and room charges are not automatically repriced. To reprice your categories or room charges based on a new pricing plan, you must use the Update Pricing Plan wizard which is available in the EMS Desktop client.

To edit a reservation in the Navigator

1. Open the reservation in the Navigator. See:
   - “Opening a reservation directly in the Navigator” on page 67.
   - “Opening a reservation through the Reservation Book” on page 68.
   - “Opening a reservation through a group” on page 68.
   - “Search Tools,” on page 177.
2. In left pane the Navigator, select the reservation that you are editing, and then on the Reservation Summary tab or on the Properties tab, click Edit.

   The Reservation page opens. The Reservation tab is the active tab.

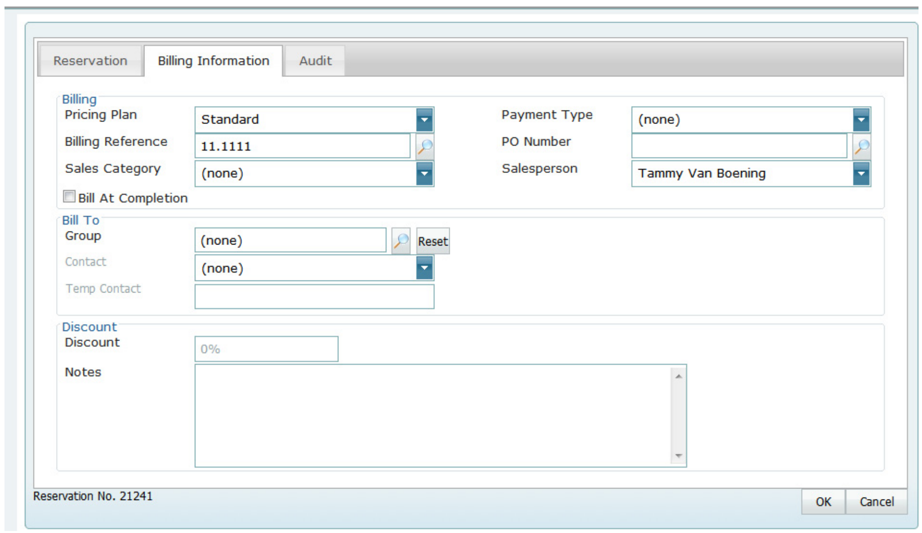
Figure 3-17: Reservation page, Reservation tab



3. Do one or both of the following:
   - On the Reservation tab, edit any and all the reservation information as needed.
   - Open the Billing Information tab, and edit any and all the billing information as needed.

A Search icon next to a field indicates that you can open a Lookup dialog box to search for the indicated item, for example, a group on the Reservation tab, or a billing reference number on the Billing tab. An Information icon next to a field indicates that you can open an Information dialog box that displays read-only information for the item, for example, a group.

Figure 3-18: Reservation page, Billing Information tab



If you select a different pricing plan, then the pricing plan is applied at the reservation level only. Categories and room charges are not automatically repriced. To reprice your categories or room charges based on a new pricing plan, you must use the Update Pricing Plan Wizard. See *"Repricing Categories and Room Charges for a Reservation" on page 88.*

4. Click OK.

   The Reservation page closes and you return to the Navigator, which now shows the updated information for the reservation.

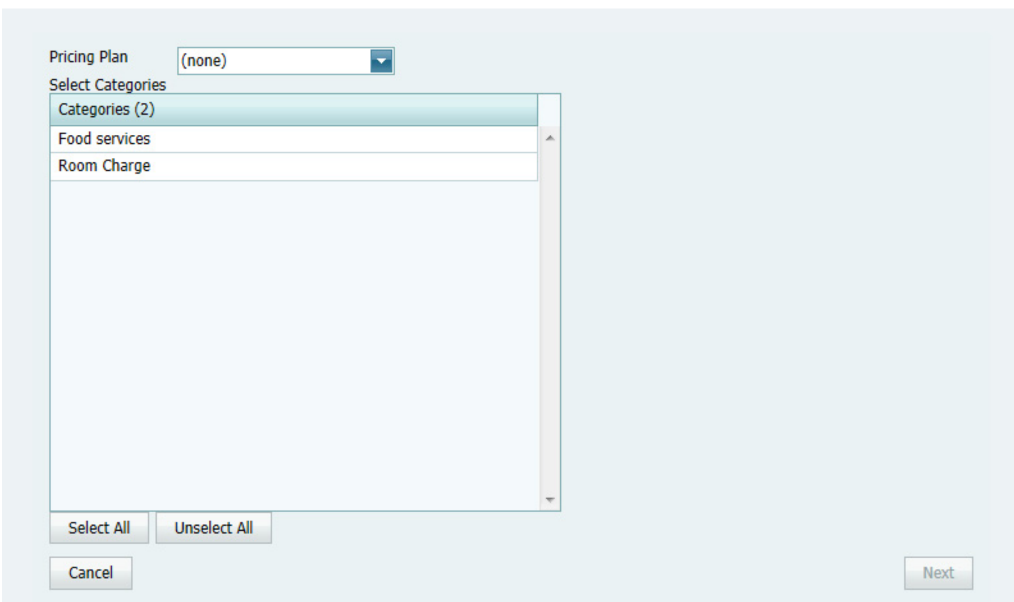
Repricing Categories and Room Charges for a Reservation

When you edit a reservation, if you select a different pricing plan, then the pricing plan is applied at the reservation level only. Categories and room charges are not automatically repriced. To reprice your categories or room charges based on a new pricing plan, then you must use the Update Pricing Plan Wizard.

To reprice categories and room charges for a reservation

1. Open the reservation in the Navigator. See:
    - "Opening a reservation directly in the Navigator" on page 67.
    - "Opening a reservation through the Reservation Book" on page 68.
    - "Opening a reservation through a group" on page 68.
    - "Search Tools," on page 177.
2. In left pane the Navigator, select the reservation that you are repricing, and then on the Reservation Summary tab, click Update Pricing.
   The Update Pricing Plan Wizard opens. The current pricing plan for the reservation is displayed in the Pricing Plan field. The page displays all the categories, including room charges, that can be repriced in one or more of the reservation bookings.

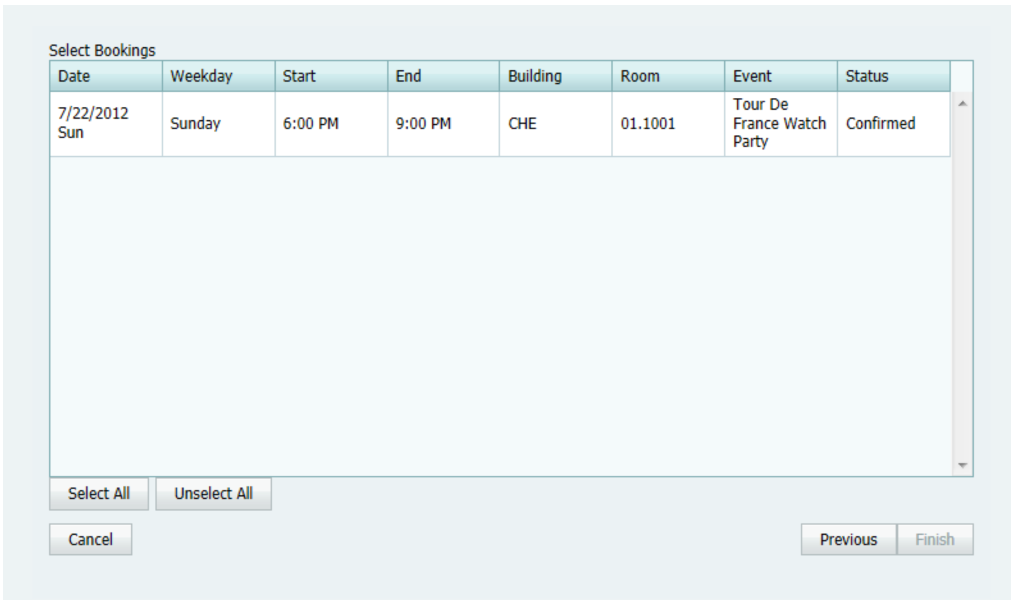
Figure 3-19: Update Pricing Plan Wizard



3. Select the category, or CTRL-click to select the multiple categories that you are repricing for the reservation.
4. Click Next.

   The Select Bookings page opens. This page lists all the bookings with one or more of the selected categories that can be repriced.

Figure 3-20: Update Pricing Plan Wizard, Select Bookings page



You can reprice a room charge for a booking only if the room charge has not been invoiced. To reprice a room charge that has been invoiced, you must first void the invoice. See *"To void an invoice" on page 329.*

5. Select the booking, or CTRL-click to select the multiple bookings for which you are repricing the categories and/or room charges, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.
6. Click OK to close the message and return to the Navigator.

Changing the Status for a Reservation from the Reservation Summary tab

You have two options for changing the booking status for multiple bookings in a reservation—you can use the Change Status function that is available on the Reservation Summary tab in the Navigator or you can use the Change Booking Status Wizard. Even though the Change Booking Status Wizard is available for changing the status of multiple bookings in a reservation, most reservationists who approve reservations that are submitted from VEMS do so by using the Change Status function that is available on the Reservation Summary tab in the Navigator. This is because unlike the Change Booking Status Wizard, when you use the Change Status function in the Navigator to change the status of a reservation, an option is available for automatically generating and sending a confirmation to the group for whom the reservation was made.

Your EMS administrator must grant you the appropriate security access to change the status of a booking, which includes canceling a booking. If you want to change the status of a booking using the Change Booking Status Wizard, see "Editing Multiple Bookings in the Navigator" on page 99.

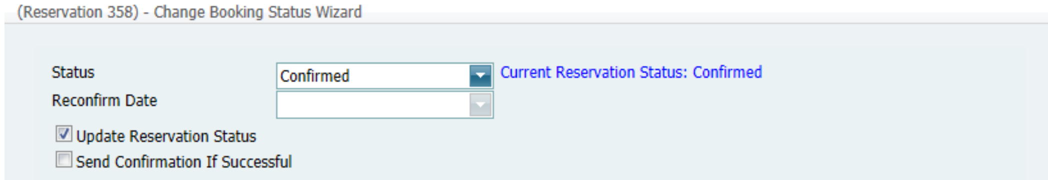
An email can be automatically generated and sent only if Email is selected for the Confirmation setting on the General tab of the Navigator Options dialog box, and if the group for which the reservation was made has an email address in its record. See "Navigator Options dialog box" on page 78 and "Searching for and Configuring Groups" on page 231.

To change the status for a reservation

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In left pane the Navigator, select the reservation that you are editing, and then on the Reservation Summary tab, click Change Status.

   The Change Booking Status page opens. See Figure 3-21 on page 91.

Figure 3-21: Change Booking Status page



3. On the Status dropdown list, select the new status for the bookings.

If you select any type of Canceled status, then three additional fields—Reason, Who Cancelled and Notes—are displayed on the Change Booking Status page. You must enter data in all three of these fields before you can continue in the Wizard.

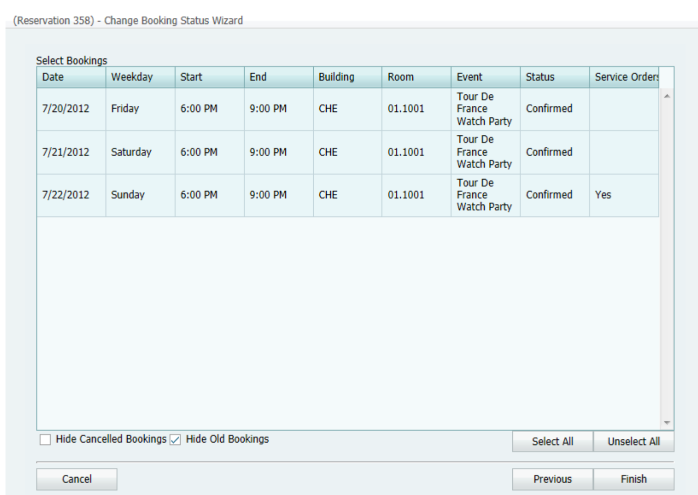
4. Enter a Reconfirm Date if it is required for the new status that you selected.
5. Optionally, do one or both of the following:
   - Leave Update Reservation Status selected to have the reservation-level status changed as well.
   - Select Send Confirmation If Successful to have an email automatically generated and sent to the group for whom the reservation was made.

The confirmation is generated based on the system confirmation settings that you have specified. See *"Specifying your Confirmation Settings" on page 281.*

6. Click Next.

   The Select Booking page opens. This page displays all the bookings for the selected reservation with a date greater than or equal to the current day's date and that do not have invoiced items. By default, all the bookings are selected.

Figure 3-22: Select Bookings page

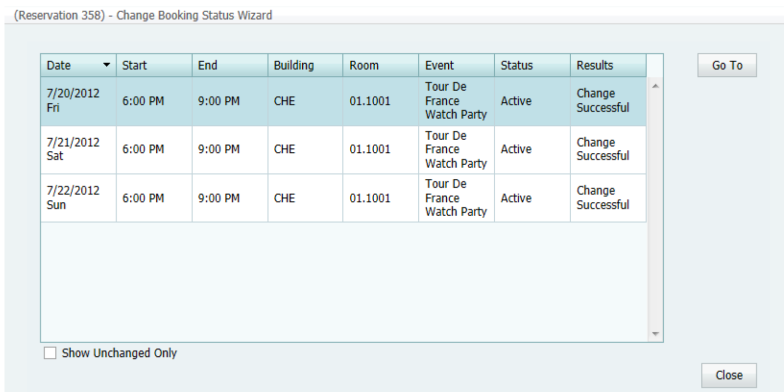


To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

7. Select the booking, or CTRL-click to select the multiple bookings for which you are changing the status, and then click Finish.

   The Change Booking Status Results page opens. This page displays a list of all the selected bookings, whether the status was successfully changed or not.

Figure 3-23: Change Booking Status Results page



Optionally, to view only the bookings for the selected reservation that were NOT successfully changed, select Show Unchanged Only. To view the details for a specific booking that was changed, select the booking, and then click Go To.

8. Click Close to close the Change Status Results page and return to the Navigator.

If you reserve a resource and then edit the date, time, location, or status of a booking, and there is a resource inventory conflict, a Resource Inventory Conflicts message opens onscreen. The message gives you the option to open the report onscreen or to save the report. If you cancel the message, then you can always manually run a Resource Inventory Conflict check. In the Bookings folder of the Navigator, select Tools > Resource Inventory Conflict.

Copying a Reservation in the Navigator

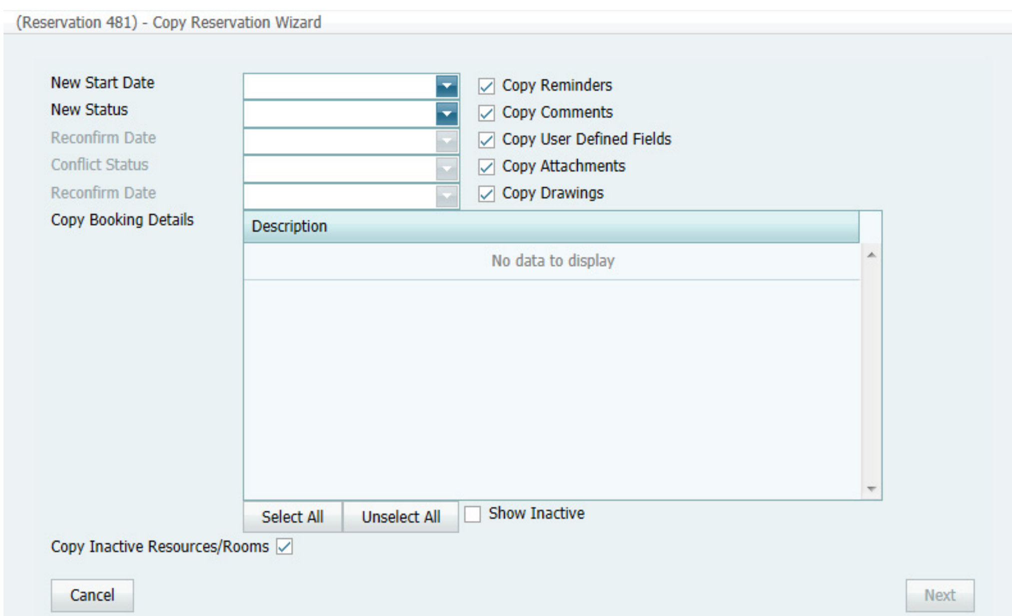
An easy way for you to make a new reservation in the Navigator is to copy an existing reservation and then make any necessary changes to the reservation. When you copy an existing reservation, you must provide a new start date and a new status; however, you can copy the existing reservation reminders, comments, user-defined fields, and drawings as is, and you can copy one or more or all the existing booking details.

To copy a reservation in the Navigator

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In the left pane of the Navigator, select the reservation that you are copying, and then in the Bookings pane, click Tools, and then click Copy Reservation Wizard.

   The Copy Reservation Wizard opens.

Figure 3-24: Copy Reservation Wizard



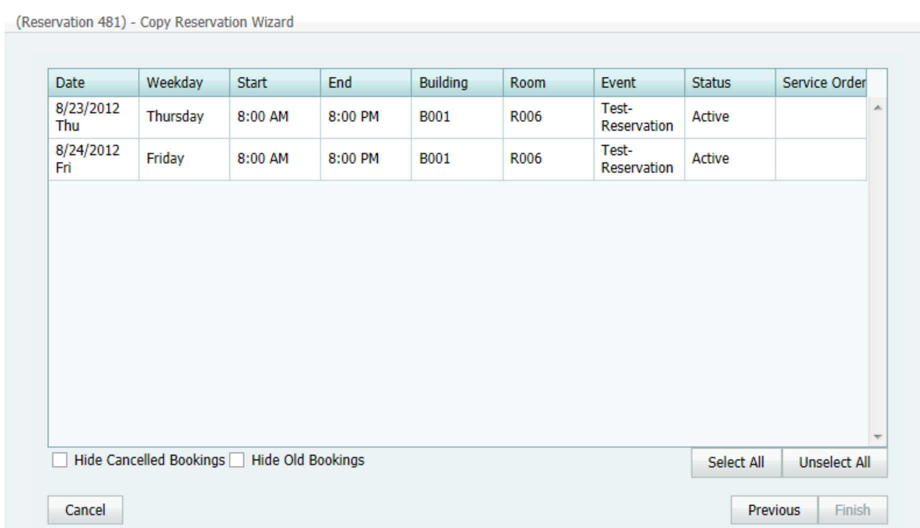
2. Enter the information for the new reservation.

Information	Description/Comments
New Start Date	If you are copying a reservation with multiple bookings, then the start date should be the date of the earliest booking for the existing reservation.
New Status	The status for the *new* reservation.
Reconfirm Date	You must enter a date if it is required for the new status that you selected.
Conflict Status	You must enter a conflict status in the event that the new bookings are in conflict with any existing bookings.
Reconfirm Date	You must enter a date if it is required for the new conflict status that you selected.
• Copy Reminders • Copy Comments • Copy User Defined Fields • Copy Attachments • Copy Drawings	Leave the appropriate options selected to copy the existing items as is, or clear the option for each item that is not to be copied to the new reservation. **Note:** To view and work with any drawings for a reservation, you must open the reservation in the Navigator in the EMS Desktop client.
Copy Booking Details	Select the booking details that are being copied (CTRL-click to select multiple details) or to select all the details for copying, click Select All. **Note:** By default, only active booking details are displayed. To show inactive booking details for copying, click Show Inactive.
Copy Inactive Resources/Rooms	Selected by default. Copies the inactive resource and/or rooms from the existing reservation to the new reservation. Clear this option if you do not want to copy the inactive resources and rooms.

3. Click Next.

   The Select Bookings page opens. This page displays all the bookings for the copied reservation.

Figure 3-25: Copy Reservation Wizard, Select Bookings page



To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

4. CTRL-click to select the multiple bookings that you are recreating in the new reservation, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.

The new reservation is assigned a number based on the next available reservation number in the database. The start date that you specified becomes the date of the first booking for the new reservation. In addition, the copied bookings are scheduled according to the same pattern as the existing reservation. For example, if the existing reservation has three bookings and each booking was scheduled every seven days (12/14, 12/21, and 12/28), and the start date for the new reservation is 12/15, then the new reservation has three bookings with dates of 12/15, 12/22, and 12/29.

When you copy multiple bookings, the bookings are simply copied and pasted as is—the bookings are not moved to different location. If you need to move a booking to a different location, see “To change rooms for a booking” on page 105.

5. Click OK to close the message and return to the Navigator.

   The existing reservation and the new reservation are displayed in separate instances of the Navigator. The new reservation is assigned a number based on the next available reservation number in the database. If any of the new bookings are in conflict with existing bookings, this conflict is indicated in the Navigator.

Editing a Booking in the Navigator

When you edit a booking in the Navigator, you are working with the *when* and *where* information for the event—the event time, the event location, and so on. To edit a booking, you must have the appropriate security access. For example, you cannot move a booking to a room if your EMS administrator has not granted you access to the room. Likewise, you cannot change the status for a booking from tentative to confirmed if your EMS administrator has not granted you access to the confirmed status.

Under certain circumstances, bookings or booking details in EMS can become *locked*. Locked items are displayed in EMS, but you cannot edit or cancel the items. This locking can affect the basic booking information (date, time, room, and so on) or the details for the booking (catering, equipment, and so on). Locks are typically independent of one another. Just because one item is locked does not mean other items in the reservation are locked. Bookings can be locked in the following situations:

- Insufficient security—To edit a booking, you must have access to the room and status and as well as the correct security processes assigned to your user account.

Contact your EMS administrator for assistance.

- Old bookings—A booked event is locked a certain number of days after it has taken place. Your EMS administrator sets the value for this system parameter. Old bookings are locked to prevent you and other users from changing the facts for a past event, which could cause discrepancies between documents printed for the event and the information in EMS. When a booking is locked because it is old, all its details are also locked. You cannot edit or delete existing details, and you cannot add new details.
- Invoiced bookings—When you create an invoice for a booking, you can bill for the entire booking (the room fee plus all the fees for all the booking details) or for only certain items that you choose (for example, the room fee and the equipment fees, but not the catering fees). In either case, if a booking has one or more invoiced items, the booking is locked. This means that you cannot edit or delete the booking, which includes changing the booking status, and editing and deleting invoiced resources. You can, however, still add more details to the bookings. For rooms, this means you cannot edit the room charge. You also cannot move bookings that are invoiced to a new or existing reservation. You can, however, still copy these bookings to a new or existing reservation.

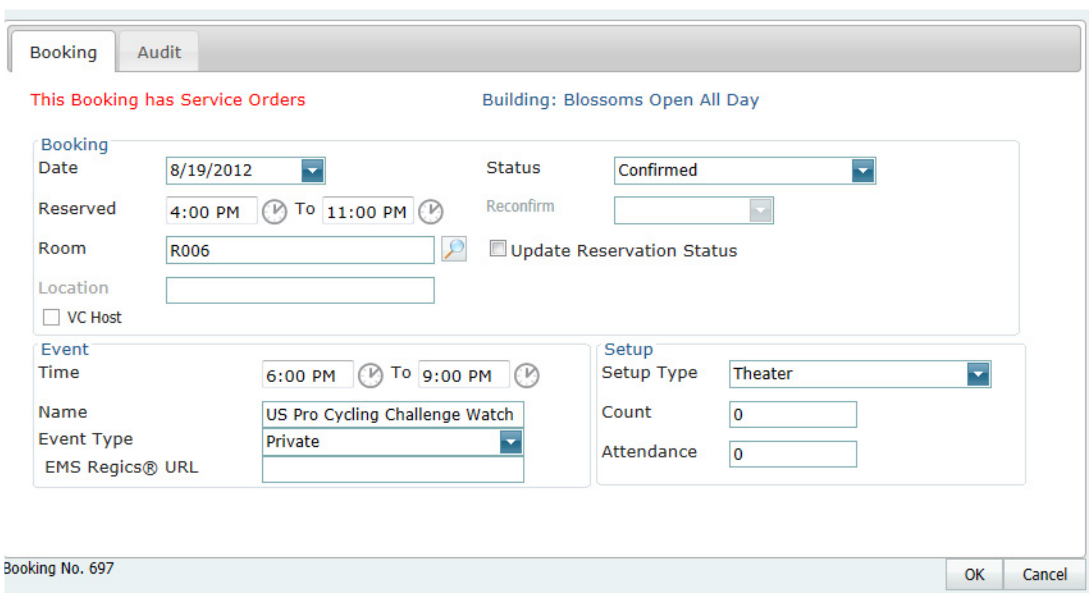
To edit billable information for a booking, see "Editing Booking Detail Item Charges for Multiple Items" on page 147.

Remember, you can also edit certain booking information in the Reservation Book. See "To edit a reservation in the Navigator" on page 86.

To edit a booking in the Navigator

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In left pane of the Navigator, expand the folder structure for the reservation until the appropriate booking folder is visible.
3. Select that booking that you are editing, and then on the Booking Summary tab or on the Properties tab, click Edit.
   The Booking page opens. A message is displayed at the top of the dialog box that indicates the hours for the building that contains the selected room. If the booking has any type of booking detail assigned to it, then "This Booking has Service Orders" is displayed at the top of the page.

Figure 3-26: Booking page



3. On the Booking tab, edit the information for the booking as needed, and then click OK.

If you have been granted the appropriate security access, you change the status of a booking, which includes cancelling a booking.

Two results are possible:

- If you edited anything other than the date, time, or location for a booking, the Booking page closes and you return to the Navigator, which now shows the updated information for the booking.

If you cancel a booking, a Cancel Status dialog box opens in which you must select a reason for canceling the booking, and you must identify the user who canceled the booking. You can also provide notes about the cancellation. If you change the status for a booking, you can select Update Reservation Status to have the reservation-level status changed as well.

- If you edited the date, time, or location for a booking, a dialog box opens, warning you that critical booking information has changed. Click OK to close the message, and then continue to Step 4.

4. Click Yes.

   The Booking page closes and you return to the Navigator, which now shows the updated information for the booking.

If you edit a booking for a video conference event, then any date and time changes that you make to the booking automatically cascade to all related bookings.

If you reserve a resource and then edit the date, time, location, or status of a booking, and there is a resource inventory conflict, a Resource Inventory Conflicts message opens onscreen. The message gives you the option to open the report onscreen or to save the report. If you cancel the message, then you can always manually run a Resource Inventory Conflict check. In the Bookings folder of the Navigator, select Tools > Resource Inventory Conflict.

Editing Multiple Bookings in the Navigator

Four wizards are available for editing the *when* and *where* information for multiple bookings in a reservation:

- The Change Booking Date/Time Wizard
- The Change Booking Status Wizard (which includes canceling multiple bookings in a single step)
- The Change Rooms Wizard
- The Change Miscellaneous Booking information Wizard (which includes type, setup type, and setup count)

To edit billable information for a booking, see "Editing Booking Detail Item Charges for Multiple Items" on page 147.

Remember, you can also edit certain booking information in the Reservation Book. See "To edit an existing reservation" on page 63.

To edit multiple bookings in the Navigator

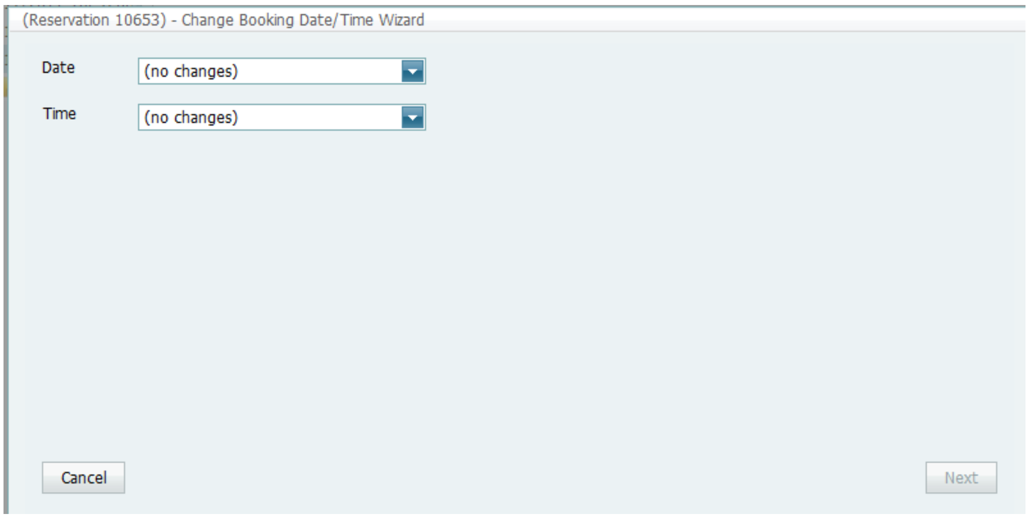
1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In the left pane of the Navigator, select the reservation for which you are editing the bookings.
3. Continue to the following as appropriate:
   - "To edit the booking date and/or time" on page 100.
   - "To edit the booking status" on page 103.
   - "To change rooms for a booking" on page 105.
   - "To edit miscellaneous booking information" on page 112.

To edit the booking date and/or time

1. In the Bookings pane, click Tools > Change Booking Date/Time Wizard.

   The Change Booking Date/Time Wizard opens.

Figure 3-27: Change Booking Date/Time Wizard



2. Change the value for the date, time, or both.

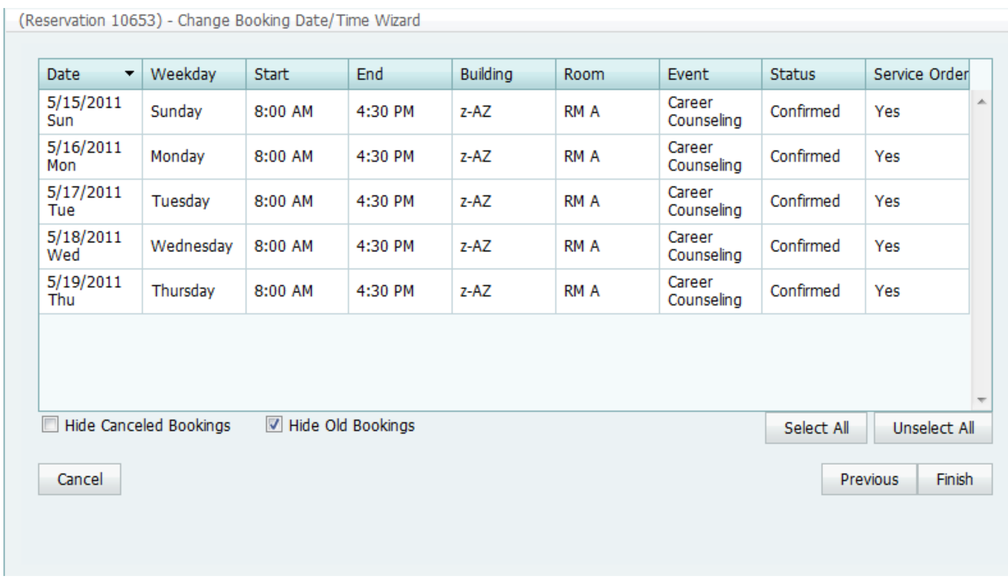
Value	Description
Date	
• No changes	• The default value.
• Reschedule Booking Earlier	• Reschedule the bookings to an earlier date that is based on the number of days that you specify.
• Reschedule Booking Later	• Reschedule the bookings to a later date based on the number of days that you specify.
• Reschedule Booking to Specific Date	• Reschedule the bookings to a new date that you specify.
Time	
• No changes	• The default value.
• End booking earlier	• Resets the event end time and the reserved end time to an earlier time, based on the number of hours that you specify.
• End booking later	• Resets the event end time and the reserved end time to a later time, based on the number of hours that you specify.
• Reschedule Booking Earlier	• Resets both the event start and end times *and* the reserved start and end times to an earlier time, based on the number of hours that specify.
• Reschedule Booking Later	• Resets both the event start and end times *and* the reserved start and end times to a later time, based on the number of hours that specify.

Value	Description
• Reschedule Booking to Specific Time	• Resets the following values based on the specific times that you select: • Reserved Start • Event Start • Event End • Reserved End
• Set Setup/Teardown	• Resets the setup or teardown times based on the hours or minutes that you specify.
• Start Booking Earlier	• Resets the event start time and the reserved start time to an earlier time, based on the number of hours that you specify.
• Start Booking Later	• Resets the event start time and the reserved start time to a later time, based on the number of hours that you specify.

3. Click Next.

   The Select Bookings page opens. By default, this page displays all the bookings for the selected reservation with a date greater than or equal to the current day's date.

Figure 3-28: Change Booking Date/Time Wizard, Select Bookings page



To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

4. Select the booking, or CTRL-click to select the multiple bookings that you are editing, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   The Change Booking Date/Time Results page opens. This page displays a list of all the selected bookings, whether the date/time change was successful or not.

Figure 3-29: Change Booking Date/Time, Results page


(Reservation 10653) - Change Booking Date/Time Wizard

Date	Start	End	Building	Room	Event	Status	Results
5/15/2011 Sun	8:00 AM	5:00 PM	z-AZ	RM A	Career Counseling	Confirmed	Change Successful
5/16/2011 Mon	8:00 AM	5:00 PM	z-AZ	RM A	Career Counseling	Confirmed	Change Successful
5/17/2011 Tue	8:00 AM	5:00 PM	z-AZ	RM A	Career Counseling	Confirmed	Change Successful
5/18/2011 Wed	8:00 AM	5:00 PM	z-AZ	RM A	Career Counseling	Confirmed	Change Successful
5/19/2011 Thu	8:00 AM	5:00 PM	z-AZ	RM A	Career Counseling	Confirmed	Change Successful

Optionally, to view only the bookings for the selected reservation that were NOT successfully changed, select Show Unchanged Only. To view the details for a specific booking that was changed, select the booking, and then click Go To.

5. Click Close to close the Change Booking Date/Time Results page and return to the Navigator.

If you reserve a resource and then edit the date, time, location, or status of a booking, and there is a resource inventory conflict, a Resource Inventory Conflicts message opens onscreen. The message gives you the option to open the report onscreen or to save the report. If you cancel the message, then you can always manually run a Resource Inventory Conflict check. In the Bookings folder of the Navigator, select Tools > Resource Inventory Conflict.

To edit the booking status

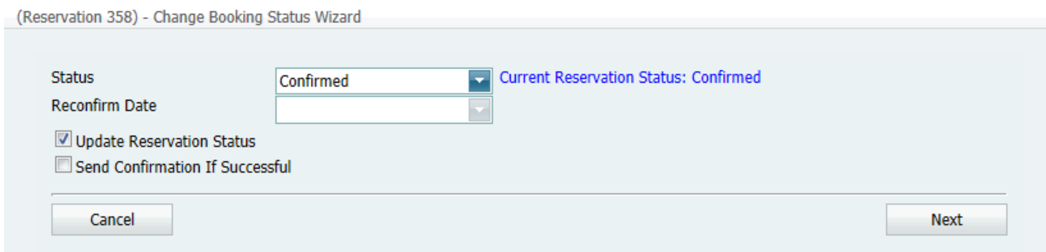
If your EMS administrator has granted you the appropriate security access, you can change the status of a booking, which includes canceling a booking. If you change the status for a booking, you can leave the option of Update Reservation Status selected to have the reservation-level status changed as well.

1. In the Bookings pane, click Tools > Change Booking Status Wizard.

   The Change Booking Status Wizard opens.

This is the same Wizard that opens if you select a reservation in the Navigator, and then on the Reservation Summary tab, click Change Status. See *"Changing the Status for a Reservation from the Reservation Summary tab" on page 90.*

Figure 3-30: Change Booking Status Wizard



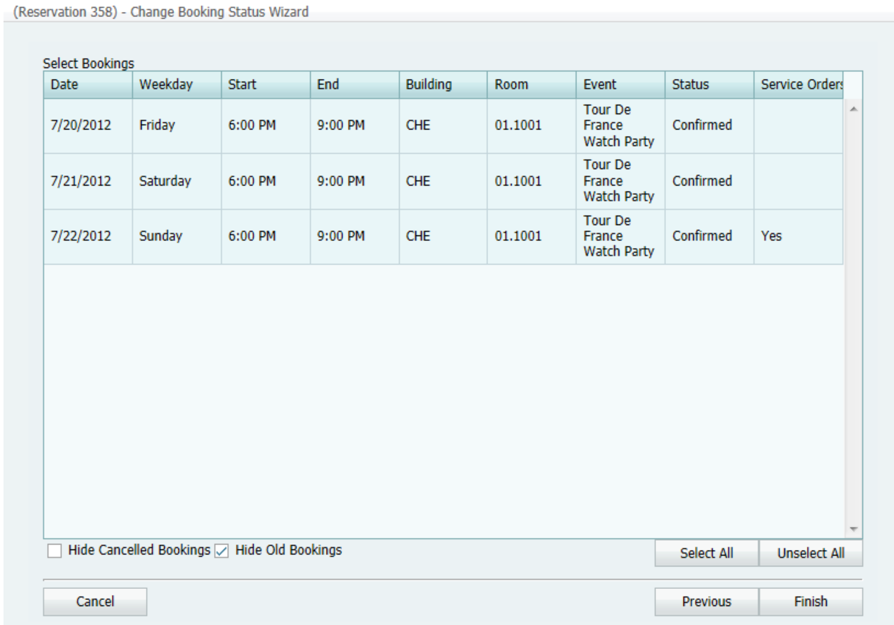
2. On the Status dropdown list, select the new status for the bookings.

If you select any type of Canceled status, then three additional fields—Reason, Who Cancelled and Notes—are displayed on the Change Booking Status page. You must enter data in all three of these fields before you can continue in the Wizard.

3. Enter a Reconfirm Date if it is required for the new status that you selected.
4. Optionally, leave Update Reservation Status selected to have the reservation-level status changed as well.
5. Click Next.

   The Select Bookings page opens. This page displays all the bookings for the selected reservation. See Figure 3-31 on page 104.

Figure 3-31: Change Booking Status Wizard, Select Bookings page

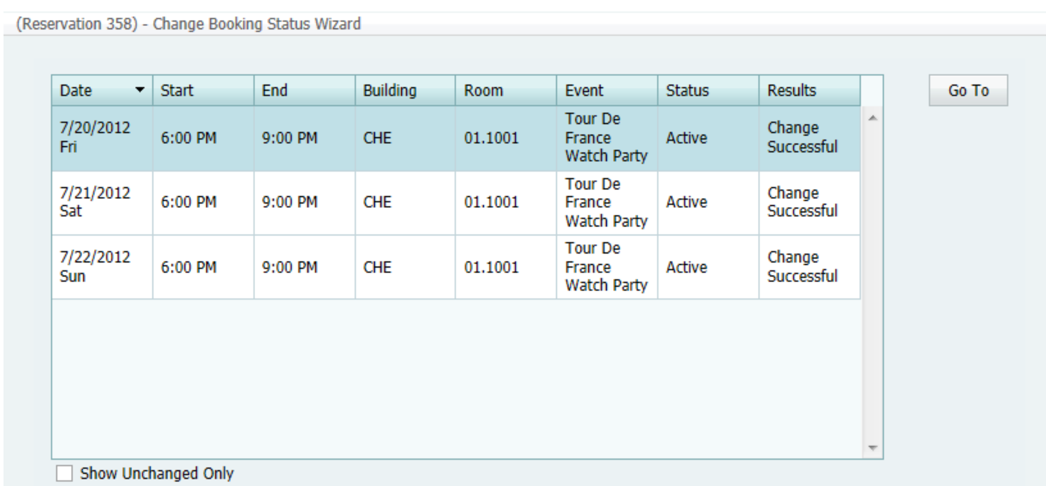


To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

6. Select the booking or CTRL-click to select multiple bookings for which you are changing the status, and then click Finish.

   The Change Booking Status Wizard Results page opens. This page displays a list of all the selected bookings, whether the status change was successful or not.

Figure 3-32: Change Booking Status Wizard, Results page



Optionally, to view only the bookings for the selected reservation that were NOT successfully changed, select Show Unchanged Only. To view the details for a specific booking that was changed, select the booking, and then click Go To.

7. Click Close to close the Change Booking Status Results page and return to the Navigator.

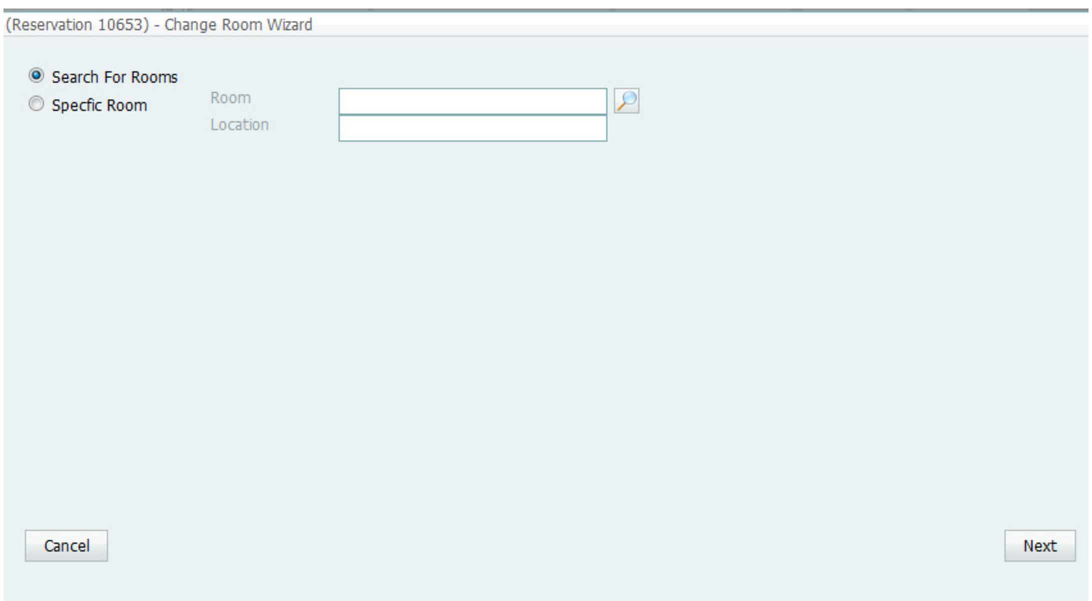
If you reserve a resource and then edit the date, time, location, or status of a booking, and there is a resource inventory conflict, a Resource Inventory Conflicts message opens onscreen. The message gives you the option to open the report onscreen or to save the report. If you cancel the message, then you can always manually run a Resource Inventory Conflict check. In the Bookings folder of the Navigator, select Tools > Resource Inventory Conflict.

To change rooms for a booking

1. In the Bookings pane, click Tools > Change Room Wizard.

   The Change Room Wizard opens. Search for Rooms is selected by default.

Figure 3-33: Change Room Wizard



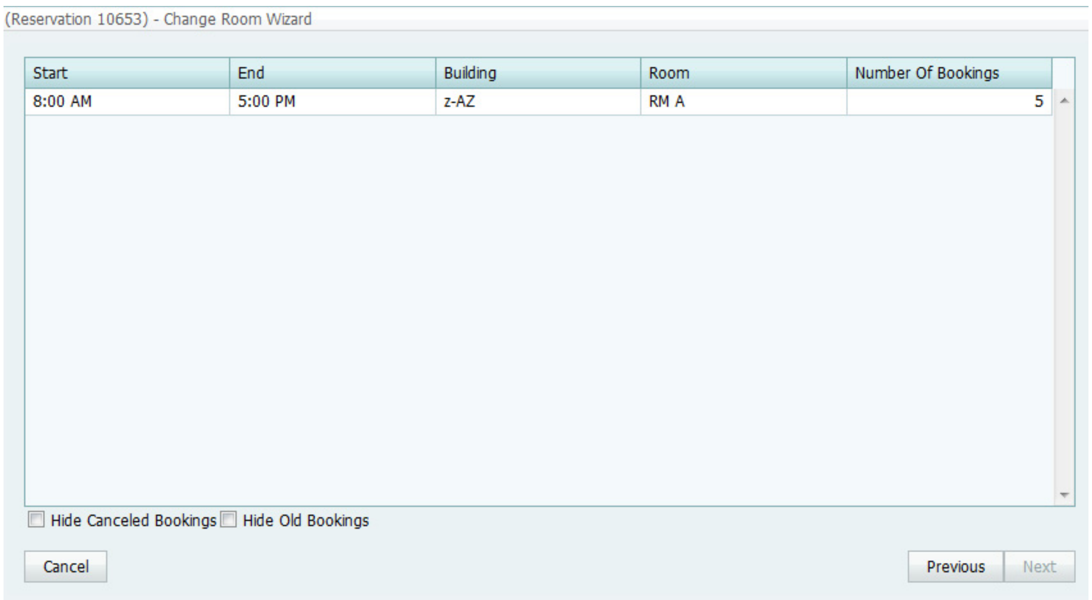
2. Do one of the following:
   - To search for rooms, continue to “To search for rooms” on page 106.
   - To select a specific room, select Specific Room, and then continue to “To select a specific room” on page 110.

To search for rooms

1. Click Next.

   The Change Room Wizard Select Bookings page opens with a list of all the bookings for the selected reservation with a date greater than or equal to the current day's date.

Figure 3-34: Change Room Wizard, Select Bookings page



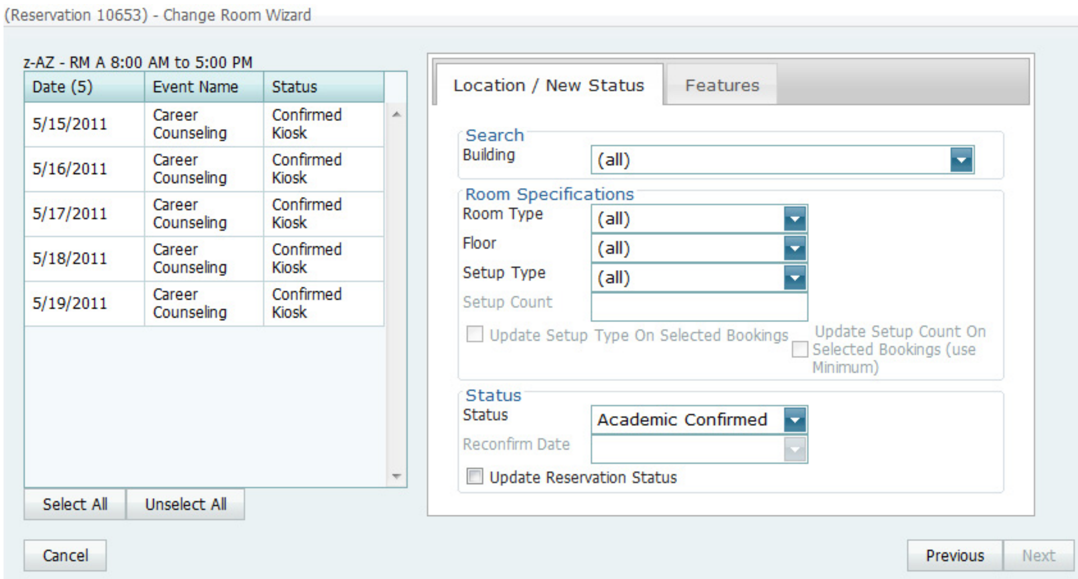
To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

2. Select the time/room combination with which to work, and then click Next. (For example, an 8 a.m. event and a 2 p.m. event in the same room are displayed as two separate items; however, multiple 10 a.m. bookings in the same room on different dates are displayed as a single item.)

   The Change Room Wizard is refreshed with two panes:

   - The left pane displays all the bookings for the selected time/room combinations.
   - The right pane displays options for changing the building, the room specifications, the booking status, or any combination of these. See Figure 3-35 on page 107.

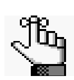
Figure 3-35: Change Room Wizard with location and status options



3. In the left pane of the Change Room Wizard, select the booking, or CTRL-click to select the multiple bookings that you are moving to a new room, or click Select All to select all the displayed bookings in a single step.

4. In the right pane, change the building, the room specifications, the status, the room features, or any combination of these as needed for the selected bookings, and then click Next.

5. If you did not select a specific Setup Type, then go Step 7; otherwise, in the Setup Count field, enter a new setup count.



Make sure that this count is the maximum that you expect the new room to hold.

6. Optionally, select one or both of the following to update the selected bookings with the following information for the new room:
   - Update Setup Type on Selected Bookings.
   - Update Setup Count On Selected Bookings (use Minimum).

7. Optionally, if you change the booking status, select Update Reservation Status to have the reservation-level status changed as well.

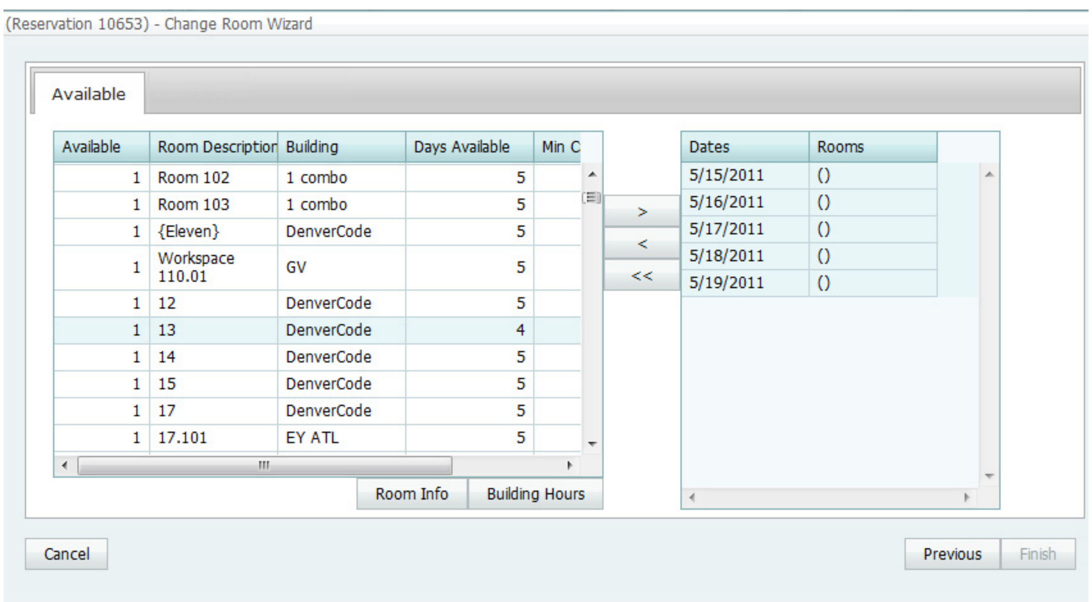
8. Click Next.

   The Change Room Wizard is refreshed with an Available tab, and if applicable, a Conflicts tab. The Available is always the active tab.

   - The Available contains two panes. The left pane lists all the rooms that meet *some or all* of your event criteria. The right pane lists all the event dates that must be fulfilled.
   - The Conflicts tab lists all the rooms that are not available for the requested dates. Optionally, you can open the Conflicts tab to view the list of rooms that were not available for scheduling for the event as well as list of the events that are scheduled for each room.

The Conflicts tab is displayed only if there are any rooms that are not available for the requested dates based on your room search specifications. If no rooms are in conflict, then the tab is not displayed.

Figure 3-36: Change Room Wizard, Available tab



9. Select the room that you are scheduling for the event.
10. Optionally, do one or both of the following; otherwise, go to Step 11.
    - Click Room Info to open the Room Info dialog box and view information about the room properties, setup type, features, and pricing.
    - Click Building Hours to open the Building Hours dialog box which displays the hours that the selected room/building is open on the reserved date.

11. Click the Move button (>) to move the room to the Selected list.

    The selected room is displayed in the Rooms list in the right pane of the Available tab for every event date for which the room is available.

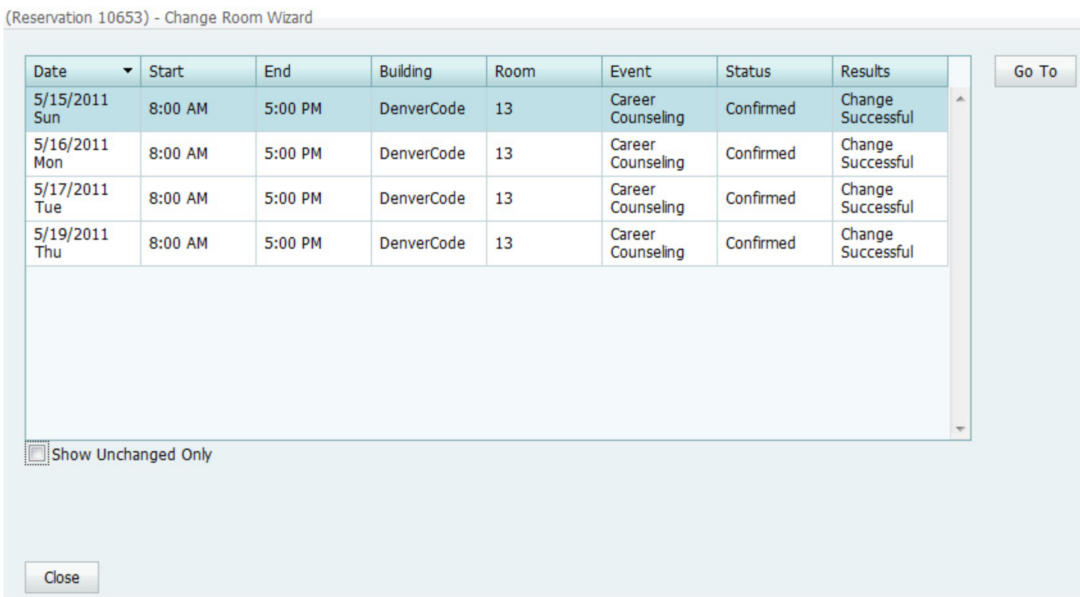
12. If all the event dates are fulfilled, click Finish; otherwise, repeat Step 9 through Step 11 until all the event dates are fulfilled, and then click Finish.

    A message opens, asking if you want to change any more rooms.

13. Click OK to repeat this procedure for any other bookings for the selected reservation; otherwise, click Cancel to close the message.

    The Change Room Wizard Results page opens. This page displays a list of all the selected bookings, whether the room change was successful or not.

Figure 3-37: Change Room Wizard, Results page



Optionally, to view only the bookings for the selected reservation that were NOT successfully changed, select Show Unchanged Only. To view the details for a specific booking that was changed, select the booking, and then click Go To.

14. Click Close to close the Change Room Wizard Results page and return to the Navigator.

If you reserve a resource and then edit the date, time, location, or status of a booking, and there is a resource inventory conflict, a Resource Inventory Conflicts message opens onscreen. The message gives you the option to open the report onscreen or to save the report. If you cancel the message, then you can always manually run a Resource Inventory Conflict check. In the Bookings folder of the Navigator, select Tools > Resource Inventory Conflict.

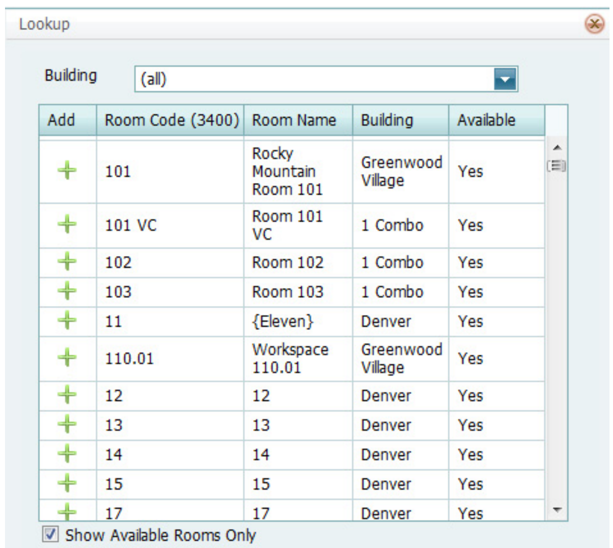
To select a specific room

When you search for a specific room, you can search for a room within your facilities, or you can search for an *override* room, which is a room that is within your facilities but is not typically scheduled for events or it is outside of your facilities. If you specify an override room for an event, you must manually specify the location for the event.

1. Click the Search icon .

   A Lookup dialog box opens. This dialog box lists all the available rooms in all the buildings to which you have been granted access.

Figure 3-38: Lookup dialog box



Optionally, to view all rooms, whether available or unavailable, clear Show Available Rooms Only.

2. Do the following:

   - Open the Building dropdown list and select (all) buildings, or a specific building, area, or view.

   - Click the Add icon next to a room to select the room, and then click OK.

If you are selecting an override room, make sure to select the appropriate room, for example, one named OVR.

   - If you are selecting a standard room or a combo room, go to Step 4; otherwise, if you are selecting an override room, go to Step 3.

3. In the Location field, enter the location of the override room.

4. Click Next.

   The Select Bookings page opens with a list of all the bookings for the selected reservation with a date greater than or equal to the current day's date.

Figure 3-39: Change Room Wizard, Select Bookings page

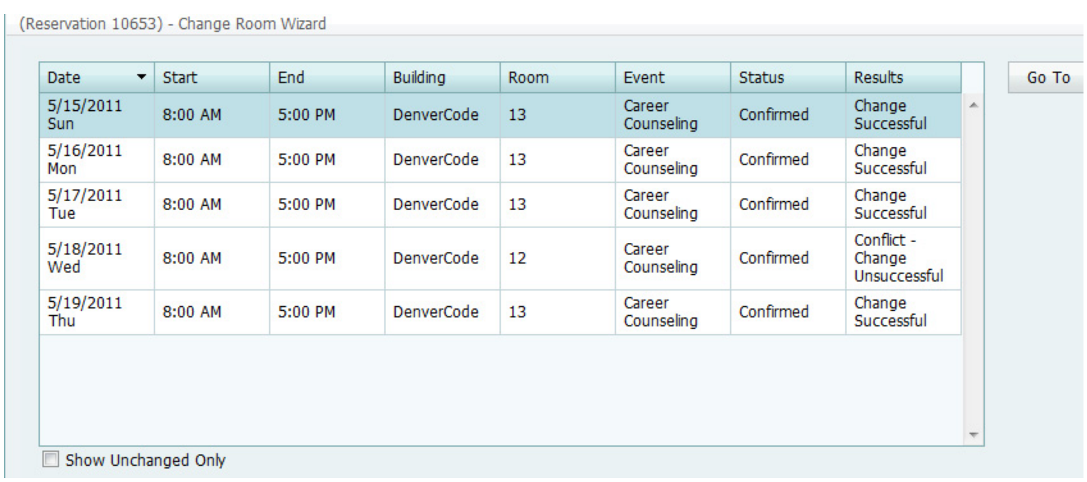
Date	Weekday	Start	End	Building	Room	Event	Status	Service Orders
5/15/2011 Sun	1/7/1900 12:00:00 AM	8:00 AM	5:00 PM	DenverCode	13	Career Counseling	Confirmed	Yes
5/16/2011 Mon	1/8/1900 12:00:00 AM	8:00 AM	5:00 PM	DenverCode	13	Career Counseling	Confirmed	Yes
5/17/2011 Tue	1/9/1900 12:00:00 AM	8:00 AM	5:00 PM	DenverCode	13	Career Counseling	Confirmed	Yes
5/18/2011 Wed	1/10/1900 12:00:00 AM	8:00 AM	5:00 PM	DenverCode	14	Career Counseling	Confirmed	Yes
5/19/2011 Thu	1/11/1900 12:00:00 AM	8:00 AM	5:00 PM	DenverCode	13	Career Counseling	Confirmed	Yes

To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

5. Select the booking, or CTRL-click to select the multiple bookings that you are moving to a new room, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   The Change Room Wizard Results page opens with a list of all the selected bookings, whether the room change was successful or not.

Figure 3-40: Change Room Wizard, Results page



Date	Start	End	Building	Room	Event	Status	Results
5/15/2011 Sun	8:00 AM	5:00 PM	DenverCode	13	Career Counseling	Confirmed	Change Successful
5/16/2011 Mon	8:00 AM	5:00 PM	DenverCode	13	Career Counseling	Confirmed	Change Successful
5/17/2011 Tue	8:00 AM	5:00 PM	DenverCode	13	Career Counseling	Confirmed	Change Successful
5/18/2011 Wed	8:00 AM	5:00 PM	DenverCode	12	Career Counseling	Confirmed	Conflict - Change Unsuccessful
5/19/2011 Thu	8:00 AM	5:00 PM	DenverCode	13	Career Counseling	Confirmed	Change Successful

Optionally, to view only the bookings for the selected reservation that were NOT successfully changed, select Show Unchanged Only. To view the details for a specific booking that was changed, select the booking, and then click Go To.

6. Click Close to close the Change Room Wizard Results page and return to the Navigator.

If you reserve a resource and then edit the date, time, location, or status of a booking, and there is a resource inventory conflict, a Resource Inventory Conflicts message opens onscreen. The message gives you the option to open the report onscreen or to save the report. If you cancel the message, then you can always manually run a Resource Inventory Conflict check. In the Bookings folder of the Navigator, select Tools > Resource Inventory Conflict.

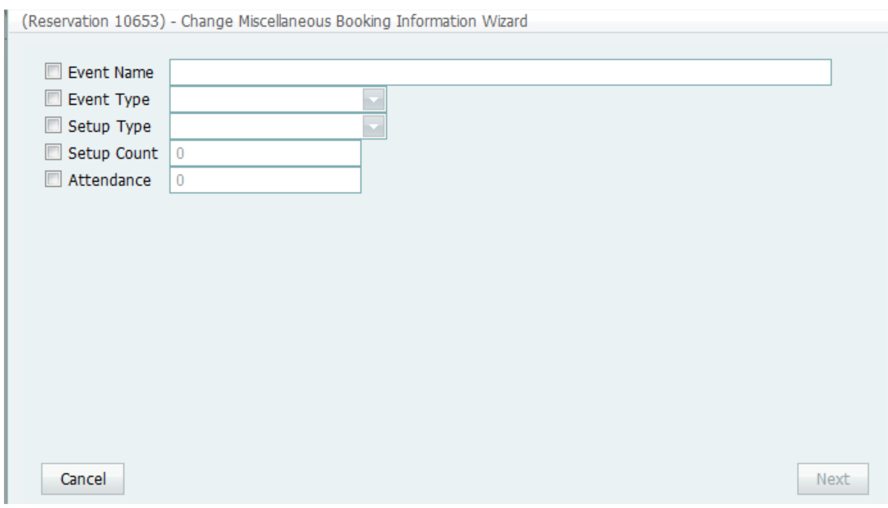
To edit miscellaneous booking information

Miscellaneous information that you can change for multiple bookings includes the event name, the event type, the type, the setup type, the setup count, and the attendance.

1. In the Bookings pane, click Tools > Change Miscellaneous Booking Information Wizard.

   The Change Miscellaneous Booking Information Wizard opens.

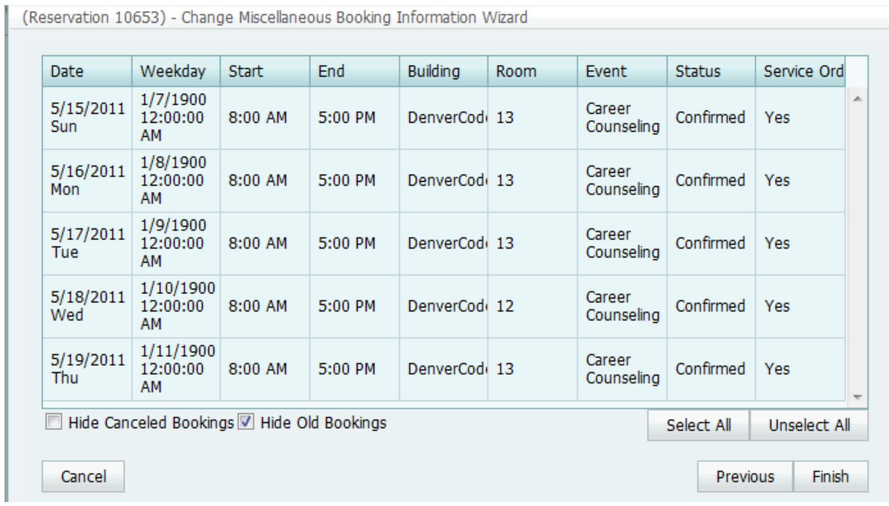
Figure 3-41: Change Miscellaneous Booking Information Wizard



2. Select the information that you are changing, enter the new value for the selected information, and then click Next.

   The Select Bookings page opens. This page displays all the bookings for the selected reservation with a date greater than or equal to the current day's date.

Figure 3-42: Change Miscellaneous Booking Information Wizard, Select Bookings page



To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

3. Select the booking, or CTRL-click to select the multiple bookings for which you are changing the information, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens, indicating that the changes were made successfully.

4. Click OK to close the message and return to the Navigator.

Moving Bookings to a Different Reservation

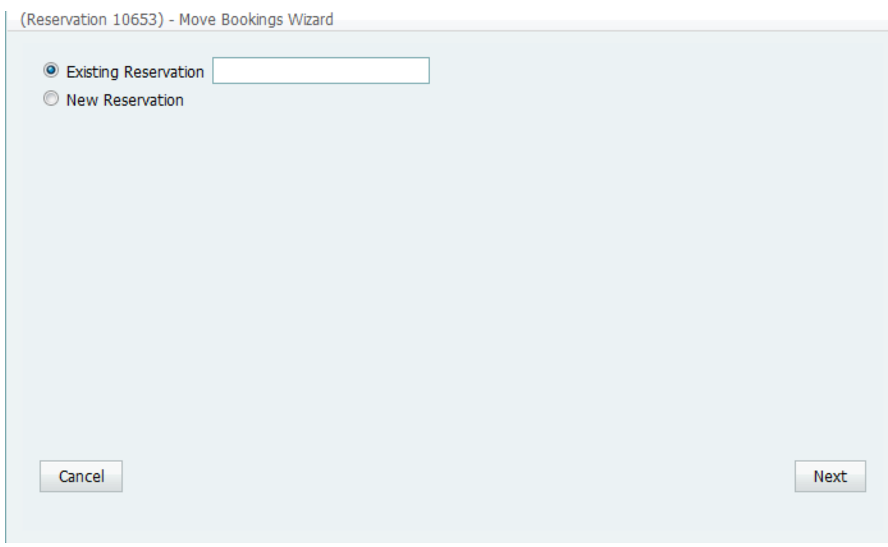
You use the Move Bookings reservation to move one or more bookings that *do not have invoiced items* from a selected reservation to an existing reservation or to an entirely new reservation. When you move a booking from a selected reservation, the booking and all its associated details are *removed entirely* from the selected reservation.

To move bookings to a different reservation

1. Open the reservation in the Navigator. See:
   - “Opening a reservation directly in the Navigator” on page 67.
   - “Opening a reservation through the Reservation Book” on page 68.
   - “Opening a reservation through a group” on page 68.
   - “Search Tools,” on page 177.
2. In the left pane of the Navigator, select the reservation *from* which you are moving the bookings.
3. In the Bookings pane, click Tools, and then click Move Bookings Wizard.

   The Move Bookings Wizard opens. The option to move the bookings to an Existing Reservation is selected by default.

Figure 3-43: Move Bookings Wizard



4. Do one of the following:
   - In the Existing Reservation field, enter the reservation number for the existing reservation to which the bookings are to be moved.
   - Click New Reservation.
5. Click Next.

   The Select Bookings page opens. This page lists all the bookings for the selected reservation that do *not* have invoiced items.

Figure 3-44: Move Bookings Wizard, Select Bookings page

To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

6. Select the booking, or CTRL-click to select the multiple bookings that you are moving to the new or existing reservation, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.
7. Click OK to close the message and return to the Navigator.

   The reservation from which the bookings were moved and the reservation to which the bookings were moved are displayed in separate instances of the Navigator. If you moved the bookings to a *new* reservation, then the new reservation that is created is assigned the next available reservation number in the database. If you moved the bookings to an *existing* reservation and any of the moved bookings are in conflict with bookings in the existing reservation, then this conflict is indicated in the Navigator.

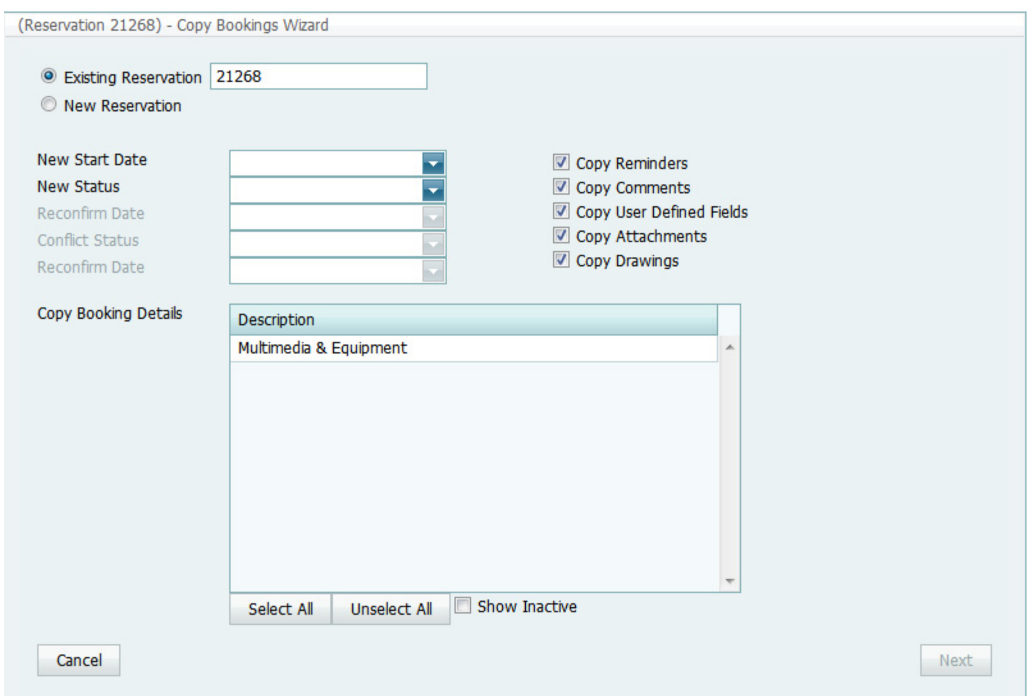
Copying Multiple Bookings in the Navigator

You use the Copy Bookings Wizard to copy one or more bookings to a new date or to a set of dates, either within the same reservation or to a new reservation.

To copy multiple bookings in the Navigator

1. Open the reservation in the Navigator. See:
   - “Opening a reservation directly in the Navigator” on page 67.
   - “Opening a reservation through the Reservation Book” on page 68.
   - “Opening a reservation through a group” on page 68.
   - “Search Tools,” on page 177.
2. In the left pane of the Navigator, select the reservation *from* which you are copying the bookings.
3. In the Bookings pane, click Tools, and then click Copy Bookings Wizard.
   The Copy Bookings Wizard opens. Existing Reservation is selected by default and the number for the reservation from which you are copying the bookings is displayed in the field.

Figure 3-45: Copy Bookings Wizard



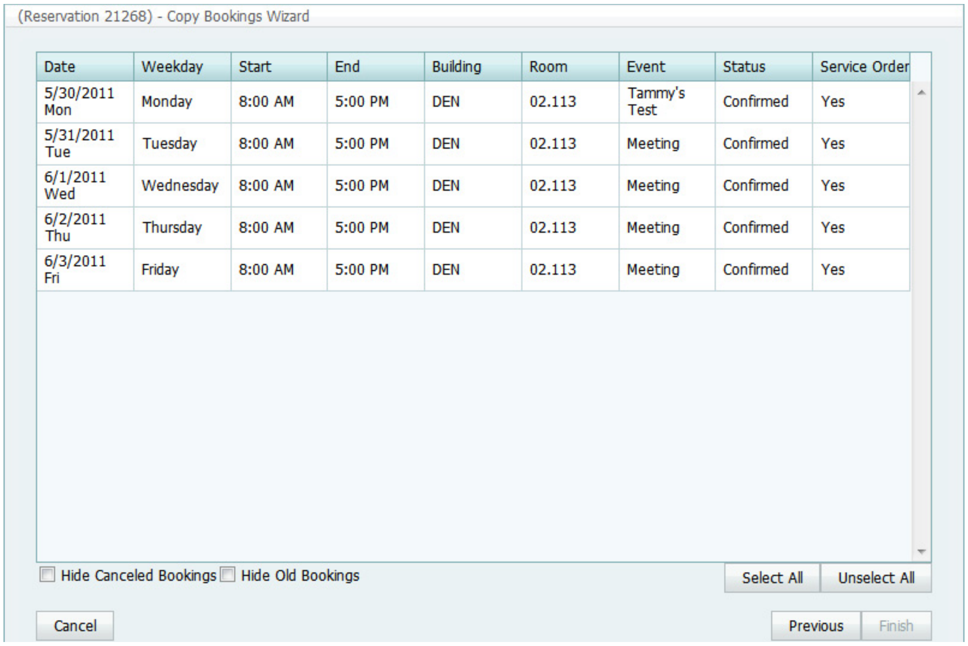
4. Do one of the following:
   - To copy the bookings to an existing reservation, enter the reservation number in the Existing Reservation field.
   - To copy the bookings to a new reservation, click New Reservation.
5. Enter the information for the reservation **to** which you are copying the bookings.

Information	Description/Comments
Start Date	If you are copying a reservation with multiple bookings, then the start date should be the date of the earliest booking for the existing reservation.
New Status	The status for the new reservation.
Reconfirm Date	Enter if required for the new status that you selected.
Conflict Status	You must enter a conflict status in the event that the new bookings are in conflict with the existing bookings.
Reconfirm Date	Enter if required for the new conflict status that you selected.
• Copy Reminders • Copy Comments • Copy User Defined Fields • Copy Attachments • Copy Drawings	Leave the appropriate options selected to copy the existing items as is, or clear the option for each item that is not to be copied to the new reservation. **Note:** To view and work with any drawings for a reservation, you must open the reservation in the Navigator in the EMS Desktop client.
Copy Booking Details	Select the booking details that are being copied (CTRL-click to select multiple details) or to select all the details for copying, click Select All. **Note:** By default, only active booking details are displayed. To show inactive booking details for copying, click Show Inactive.

6. Click Next.

   The Select Bookings page opens. This page displays all the bookings for the copied reservation, regardless of the date or status. See Figure 3-46 on page 118.

Figure 3-46: Copy Bookings Wizard, Select Bookings page



(Reservation 21268) - Copy Bookings Wizard

Date	Weekday	Start	End	Building	Room	Event	Status	Service Order
5/30/2011 Mon	Monday	8:00 AM	5:00 PM	DEN	02.113	Tammy's Test	Confirmed	Yes
5/31/2011 Tue	Tuesday	8:00 AM	5:00 PM	DEN	02.113	Meeting	Confirmed	Yes
6/1/2011 Wed	Wednesday	8:00 AM	5:00 PM	DEN	02.113	Meeting	Confirmed	Yes
6/2/2011 Thu	Thursday	8:00 AM	5:00 PM	DEN	02.113	Meeting	Confirmed	Yes
6/3/2011 Fri	Friday	8:00 AM	5:00 PM	DEN	02.113	Meeting	Confirmed	Yes

Hide Canceled Bookings Hide Old Bookings Select All Unselect All

Cancel Previous Finish

To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

7. Select the booking, or CTRL-click to select the multiple bookings that you are recreating in the existing or new reservation, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.

The start date that you specified becomes the date of the first new booking. In addition, the copied bookings are scheduled according to the same pattern as the existing reservation. For example, if the existing reservation has three bookings and each booking was scheduled every seven days (12/14, 12/21, and 12/28), and the start date for the new reservation is 12/15, then the new reservation has three bookings with dates of 12/15, 12/22, and 12/29.

When you copy multiple bookings, the bookings are simply copied and pasted as is—the bookings are not moved to different location. If you need to move a booking to a different location, see "To change rooms for a booking" on page 105.

8. Click OK to close the message and return to the Navigator.

   The reservation from which you copied the bookings and the reservation to which you copied the bookings are displayed in separate instances of the Navigator. If you copied the bookings to a new reservation, then the new reservation that is created is assigned the next available reservation number in the database. If any of the new bookings are in conflict with bookings in the existing reservation, this conflict is indicated in the Navigator.

Booking Details and Items Overview

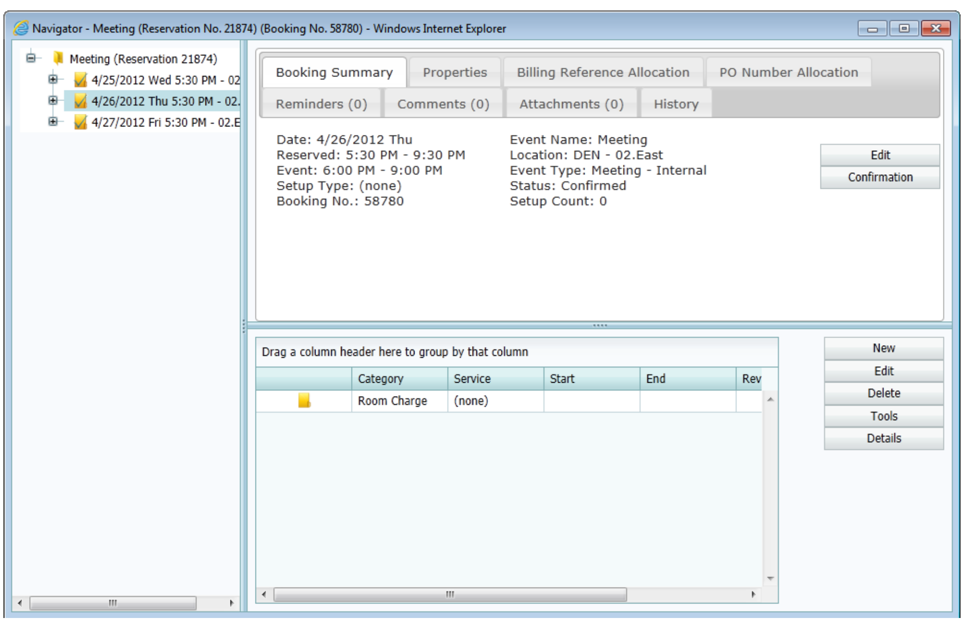
Booking details, which are also called *categories*, are the services (catering, A/V equipment, and so on), notes, attendees, activities, or room charges that you can assign to a booking. *Booking detail items*, also called *resources*, are the individual items (coffee, sandwich, projector, and so on) that you assign to a booking detail. When you add a resource to a booking, for example, coffee, various selections might be available or required, for example, regular, decaf, Italian roast, breakfast blend, and so on. Depending on how your EMS administrator has configured your categories, a resource might require service order times to be specified.

Your EMS Administrator can configure buildings and categories so that a particular category can be used only in a particular building or buildings. This means that when you are adding booking details to a reservation, some booking details (categories) might not be displayed as an option.

The booking details for a selected booking are displayed in the Booking Details pane (the lower right pane) of the Navigator.

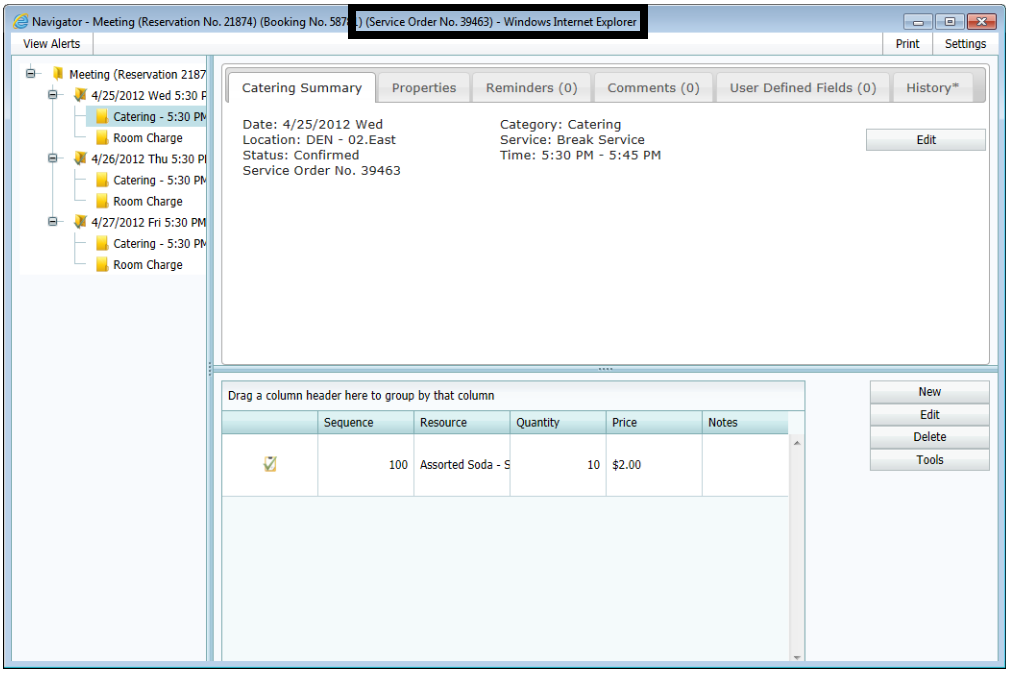
From this point on in the manual, categories that contain resources, but do not require service times are referred to as "resource categories." Categories that contain resources and that require service times are referred to as "service order categories." Categories that are used to manage food service are referred to as "catering categories." Categories that are used to manage miscellaneous notes (setup notes), agenda items, attendees/visitors, or room charges are referred to as "non-resource categories."

Figure 3-47: The Navigator page with a booking folder selected



If you select a booking detail folder that is for a Resource with Service Order category or a Catering category, then the service order number is displayed in the title bar of the Navigator.

Figure 3-48: The Navigator page with a booking detail folder selected



When you select a booking detail folder in the left pane of the Navigator, the tabs that are displayed in the upper right pane of the Navigator depends on the type of booking detail that you selected:

- <Booking Detail> Summary tab—The Summary displays information about the selected booking detail, including the event date, the event location, and the event status.
- Properties tab—The Properties tab also displays information about the booking detail, including the date that it was added to the booking, who added the detail, and, if applicable, the date that the detail was changed and who made the change.

If the booking detail has a price/charge associated with it, for example, a room charge, then the following two tabs are also displayed:

- Billing Reference Allocation tab—By default, the charge for a booking detail can be allocated to a single billing reference number. On the Billing Reference Allocation tab, you can allocate the charge for a reservation to multiple billing reference numbers by percentage. See “To allocate charges to multiple billing reference numbers and/or PO numbers” on page 71.

Your EMS administrator must enable the Use Billing Reference Allocation parameter for this tab to be displayed. See EMS System Parameters in the EMS Setup Guide.

- PO Number Allocation tab—By default, the charge for a booking detail can be allocated to a single purchase order (PO) number. On the PO Number Allocation tab, you can allocate the charge for a reservation to multiple billing PO numbers by percentage. See “To allocate charges to multiple billing reference numbers and/or PO numbers” on page 71.

Your EMS administrator must enable the Use PO Number Allocation parameter for this tab to be displayed. See EMS System Parameters in the EMS Setup Guide.

If the selected booking detail requires a service order or catering category, then the following four tabs are also displayed:

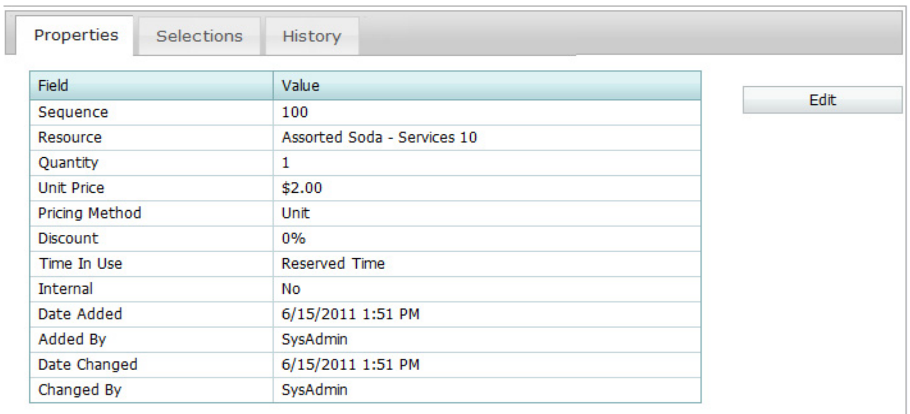
- User Defined Fields—The User Defined Fields tab displays the additional fields that store custom data for the booking detail. Your EMS administrator configures the types of fields that are available as well as the allowed values for these fields. See “Working with User Defined Fields in the Navigator” on page 167.
- Reminders tab—The Reminders tab displays any reminders that were created for the selected booking detail. See “Working with Comments and Reminders in the Navigator” on page 161.
- Comments—The Comments tab displays any comments that were made for the selected booking detail. See “Working with Comments and Reminders in the Navigator” on page 161.
- History—The History tab displays the history for the booking detail—the date that a change was made to the detail, the ID of the user who made the change, the field that was changed, the old field value, and the new field value.

Also, when you select a booking detail folder:

- On most of the tabs in the upper pane of the Navigator page, you can sort data columns in either ascending or descending order. See “Changing the width of data columns on an EMS Browser page” on page 26.
- The booking detail items for the selected booking detail are displayed in the Items pane (the lower right pane) of the Navigator. A green check mark appears in front of each individual item that has been added to a booking. If the item is a package, then a green checkmark is displayed not only in front of the package, but also, in front of each individual item in the package. A red “x” is displayed in front of any booking detail and/or booking detail item that has been deleted from a booking. The Items pane has all the features of an EMS Browser page. See “An EMS Browser Page” on page 25.

If you select a booking detail item in the left pane of the Navigator, then the entire right pane of the Navigator is refreshed with three tabs—a Properties that displays for the selected item, a Selections tab that displays the selections for the booking detail item, if applicable, and a History tab that details the history of the item.

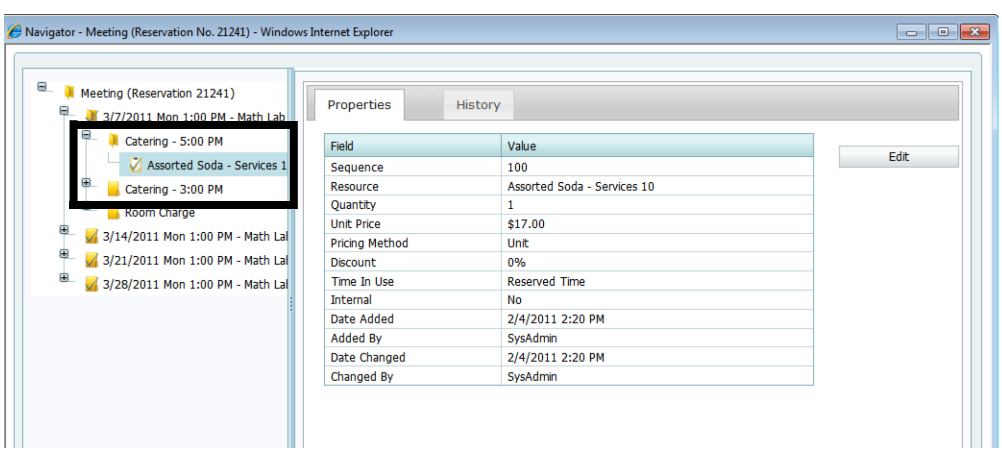
Figure 3-49: The Navigator page with a booking detail item selected



Service order

A booking detail might include a *service order*. A service order is a request to use the resource for a specified time period as opposed to using the resource for the entire event. For example, an event that meets from 10:00 am to 2:00 pm, might have food service from 11:00 am to noon. A service order consists of the service type, start and end times, and a unique, system-generated service order ID. For a catering booking detail, you can also indicate estimated count, guaranteed count, and actual count. You can create multiple service orders in the same booking. For example, you might have a number of catering services (breakfast, lunch, and afternoon refreshments) in the course of a one day training event. In this case, multiple folders are displayed under the booking folder on the left side of the Navigator page, with each folder representing a unique service order.

Figure 3-50: The Navigator page showing multiple service orders in the same booking



If you reserve an item from a category that does not require a service order, your only choices are to reserve the item for the event time or for the entire reserved time.

Your EMS administrator might have configured a default service type for some or all of your system's categories, but you can always select a different value. In addition, your EMS administrator might have configured states to manage your service order process. For detailed information about states, see Configuring Categories in the EMS Setup Guide.

Adding Booking Details and Items to Individual Bookings

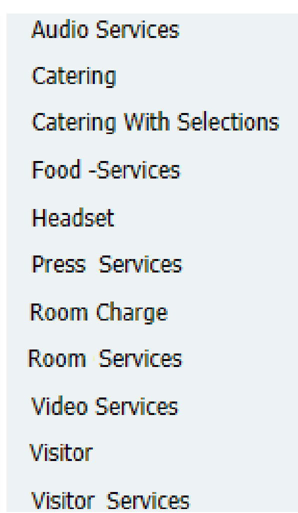
The steps that you follow to add booking details and items to individual bookings depend on the category type. Also, you can add multiple occurrences of a booking detail to a booking only if the detail is a Resource with Service Order category or a Catering category. If the booking detail is *not* from is a Resource with Service Order category or a Catering category, and the detail is already added to a booking, you cannot add the detail again to the booking. You can, however, add more items to the booking detail.

To add booking details and items to individual bookings

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In the left pane of the Navigator, expand the folder structure for the reservation until the appropriate booking folder is visible.
3. Select the booking folder, and then in the Booking Details pane, click New.

   The Booking Details list opens.

Figure 3-51: Example of a Booking Details list



4. Select the booking detail that you are adding to the booking.

   A dialog box opens.

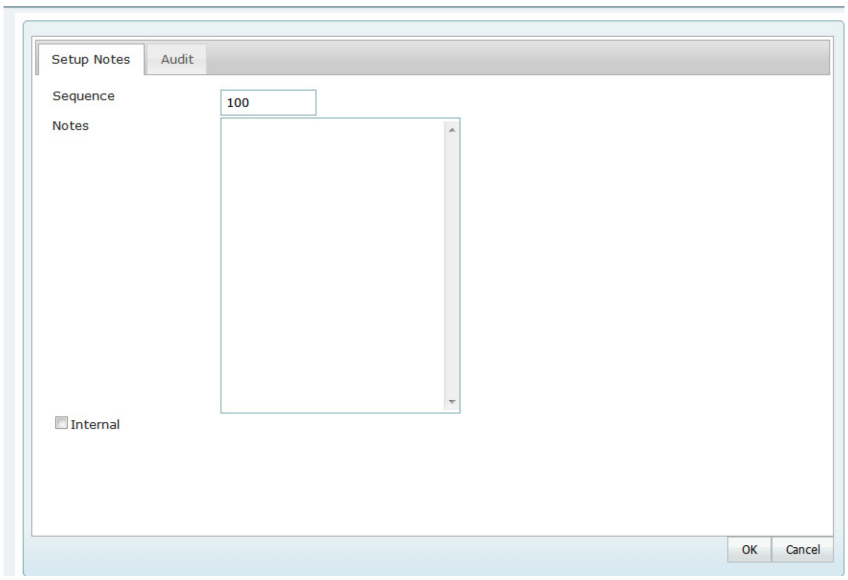
5. Continue to one of the following:
   - "To add a booking detail from a non-resource category" below.
   - "To add a booking detail from a resource, service order, or catering category" on page 130.

To add a booking detail from a non-resource category

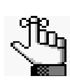
A booking detail that is from a non-resource category can be setup notes, attendees, agenda (activities), or a room charge.

To add setup notes

Figure 3-52: Setup Notes dialog box



1. Enter the sequence number for the setup notes.



The sequence number determines the order in which the notes are displayed in the Items pane in the Navigator when the booking detail (Setup Notes) is selected for a booking.

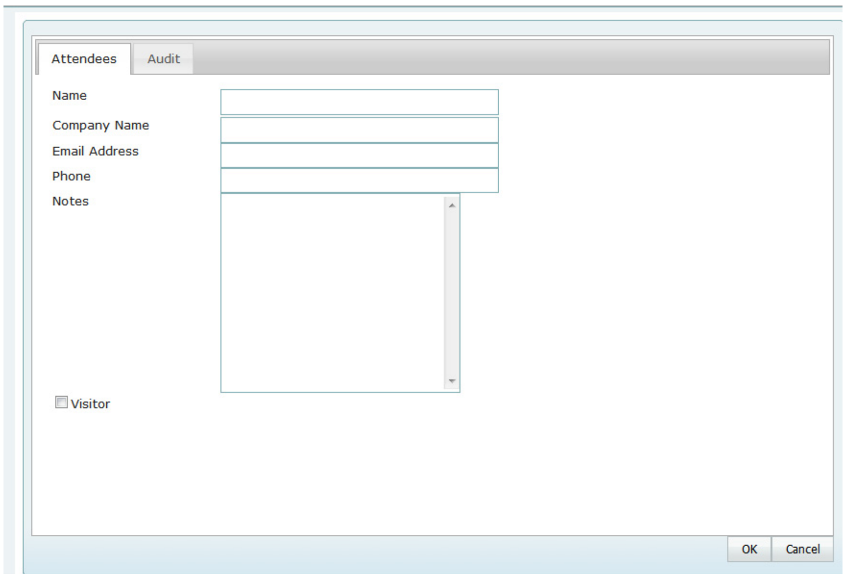
2. Enter the appropriate notes or comments.
3. Optionally, if these notes are to be printed on internal reports only (the notes would be excluded from external reports like a confirmation), then select Internal.
4. Click OK

   The Setup Notes dialog box closes. The booking detail and its items are displayed as folders under the Booking folder in the Navigator page.

After you add setup notes for the first time to a booking, Setup Notes is no longer an available option on the Booking Details dropdown list. To add more setup notes to the booking, select the Setup Notes folder for the booking or click a Setup Note in the Items pane, and then click New.

To add attendees

Figure 3-53: Attendees dialog box



1. Enter the information for the attendee. At a minimum, you must enter the attendee name.
2. If the attendee is a visitor (that is, not registered for the event), then select Visitor.
3. Click OK.

   The Attendee dialog box remains open.

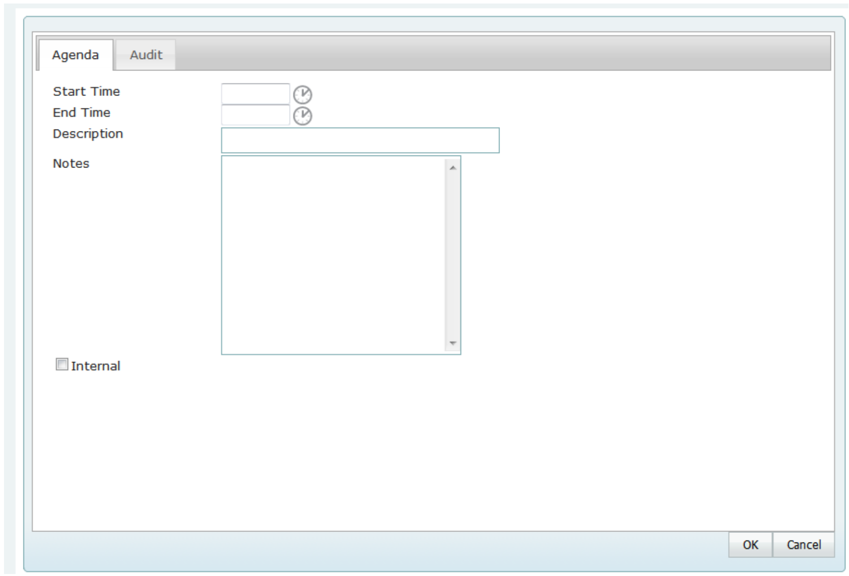
4. Repeat Step 1 through Step 3 until you have added all the needed attendees/visitors to the booking.
5. Click Cancel.

   The Attendees dialog box closes. The booking detail and its items are displayed as folders under the Booking folder in the Navigator page.

If you close the Attendees dialog box before you have added all the needed attendees/visitors to the booking, then Attendees is no longer an available option on the Booking Details dropdown list. To add more attendees/visitors to the booking, select the Attendees folder for the booking or click an attendee/visitor in the Items pane, and then click New.

To add an agenda (activities)

Figure 3-54: Agenda dialog box



1. Enter the start time, the end time, and a description for the agenda.
2. Optionally, in the Description field, enter a description or name for the agenda.

The description or name can be a maximum of 30 characters, including spaces.

3. Optionally, if these notes are to be printed on internal reports only (the notes would be excluded from external reports like a confirmation), then select Internal.
4. Click OK.

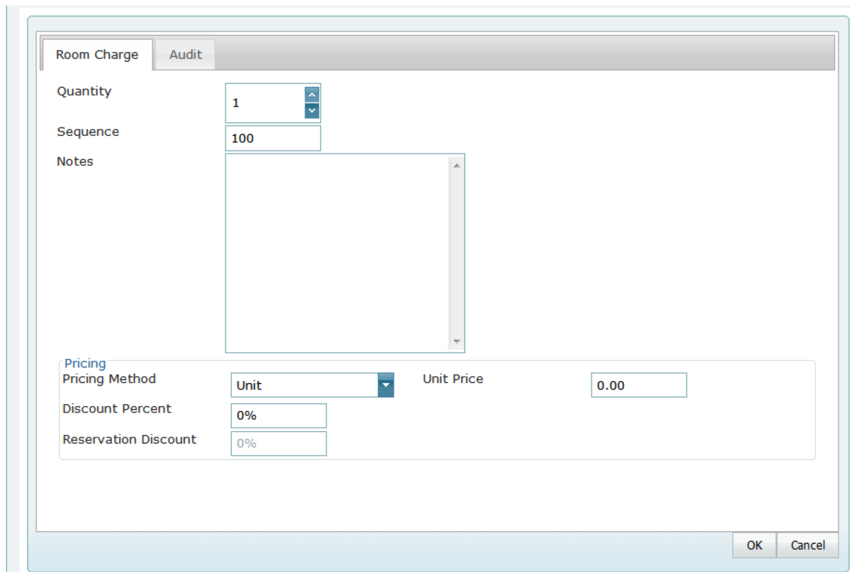
   The Agenda dialog box remains open.
5. Repeat Step 1 through Step 4 unit you have added all the needed agendas.
6. Click Cancel.

   The Agenda dialog box closes. The booking detail and its items are displayed as folders under the Booking folder in the Navigator page.

If you close the Agenda dialog box before you have added all the needed agendas/ activities to the booking, then the Agenda is no longer an available option on the Booking Details dropdown list. To add more agenda/activities to the booking, select the Agenda folder for the booking or click an agenda in the Items pane, and then click New.

To add a room charge

Figure 3-55: Room Charge dialog box



1. Enter the sequence number for the room charge.

The sequence number determines the order in which the charges are displayed in the Items pane in the Navigator when the booking detail (Room Charge) is selected for a booking.

2. Optionally, enter notes or comments about the room charge.
3. If needed, modify the quantity.
4. Select the appropriate pricing method, and then enter any other additional information as needed after you select a pricing method.

Pricing Method	Additional Fields
Half Day/Full Day (Event Time)	• Half Day Price • Full Day Price • Hours
Half Day/Full Day (Reserved Time)	• Half Day Price • Full Day Price • Hours
Hourly (Event Time)	• Hourly Price • Minimum Charge • Maximum Charge • Initial Flat Charge

Pricing Method	Additional Fields
Hourly (Reserved Time)	• Hourly Price • Minimum Charge • Maximum Charge • Initial Flat Charge
Hourly (Specific)	• Hourly Price • Minimum Charge • Maximum Charge • Initial Flat Charge
Unit	• Unit Price

5. Optionally, enter a discount percent and/or a reservation discount.
6. Click OK.

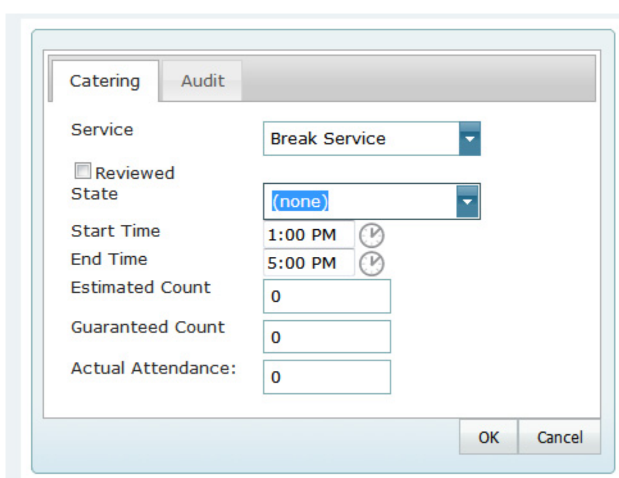
   The Room Charge dialog box closes. The booking detail and its items are displayed as folders under the Booking folder in the Navigator page.

After you add charges for the first time to a booking, Room Charge is no longer an available option on the Booking Details dropdown list. To add more room charges to the booking, select the Room Charge folder for the booking or click a Room Charge in the Items pane, and then click New.

To add a booking detail from a resource, service order, or catering category

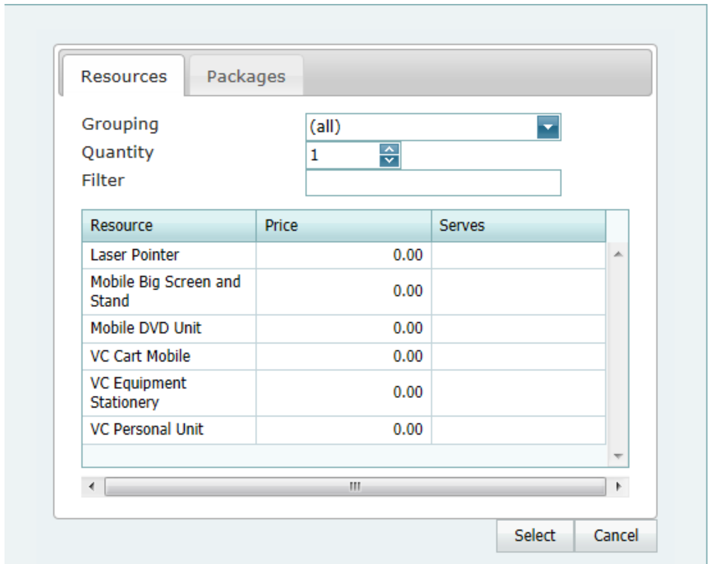
- If you select a service order or catering category, a Service Order dialog box opens with, at a minimum, options for Service, Reviewed, Service Start Time, and End Time. If a catering category is selected, additional fields for Estimated, Guaranteed and Actual Counts are displayed. Go to Step 1.

Figure 3-56: Example of a Service Order dialog box for a catering category



- If you select a resource category, then a Resource Selection dialog box opens. The Resources tab is the active tab. Go to Step 4.

Figure 3-57: Example of a Resource Selection dialog box, Resources tab



1. Select the service type.
2. Enter the start time, and optionally, the end time, estimated count, guaranteed count, and if applicable, select Reviewed and/or a state.

For more information about reviewing service orders and selecting states, see *"Searching with the Service Order Management Browser" on page 203.*

3. Click OK.

   A Resource Selection dialog box opens. The Resources tab is the active tab.

4. Do one of the following
   - To select one or more resources from the pre-configured list of resources, leave the Resources tab open, and then go to Step 5.
   - To add multiple resources to the booking in a single step, open the Packages tab, and then go to Step 7.

5. Do one of the following on the Grouping dropdown list:
    - Leave the default value of (all) as is to search for all items in all groupings.
    - Select a specific grouping to search for only those items in the grouping. For example, if the selected resource category is A/V Equipment, then available groupings could include Computer, Phone, Video, and so on. To search only for the available phones to add to a booking detail, select the Phones grouping.
6. Optionally, in the Filter field, enter a search string by which to filter your search.

Your search is limited to the exact order of the characters in the string, but the search string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of ***co*** *returns* ***co****ffee service,* ***co****nference phone, and mini-****co****pier.*

7. In the Quantity field, leave the default value of 1.00; otherwise, enter a new value.

If you change the quantity for a resource package, then the quantity for each individual resource that makes up the package is also changed.

8. Do one of the following:
    - For the Resources tab—On the Items list, select the resource item, or CTRL-click to select the multiple resource items that you are adding to the booking.

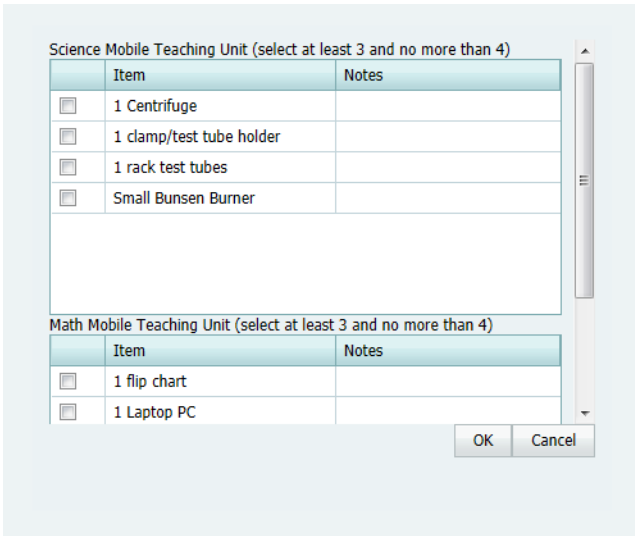
Your EMS administrator might have configured an override resource (also known as an override description) so that you can book a resource that has not been configured in your EMS database. For example, the administrator might have configured an override resource named “Other.” If you select the “Other” resource, then a Description field is displayed on the Resource Selection dialog box. You must enter a description or name for the override resource before you can continue. EMS does not track availability of override resource items; however, EMS reports on override resource items just like any other resource item.

- For the Package tab—Select the package that contains the multiple resources that you are adding to the booking.

9. Click Select.

   - For items on the Resources tab—If your EMS administrator configured selections for the resource, then either you might be required to make selections for the resource, or you have the option to make selections for the resource (see Figure 3-58 below); otherwise, go to Step 10.

Figure 3-58: Example of a Resource Selections dialog box



   - For packages on the Packages tab—The package is added to the booking. An entry for the package as well as entry for each item in the package is displayed in the Booking Detail Items pane of the Navigator.

10. Repeat Step 4 through Step 9 until you have added all the necessary booking detail items for the selected booking.

11. Click Close.

    The Resource Selection dialog box closes. The resource and its items are displayed as folders under the Booking folder in the Navigator.

If you close the Resource Selection dialog box before you have added all the needed resource items to the booking, and the booking detail is not from a catering or service order category, then the booking detail is no longer an available option on the Booking Details dropdown list. To add more resource items to the booking, you can select the Booking Detail folder for the booking or you can click a booking detail item in the Items pane, and then click New.

Adding Booking Details and Items to Multiple Bookings

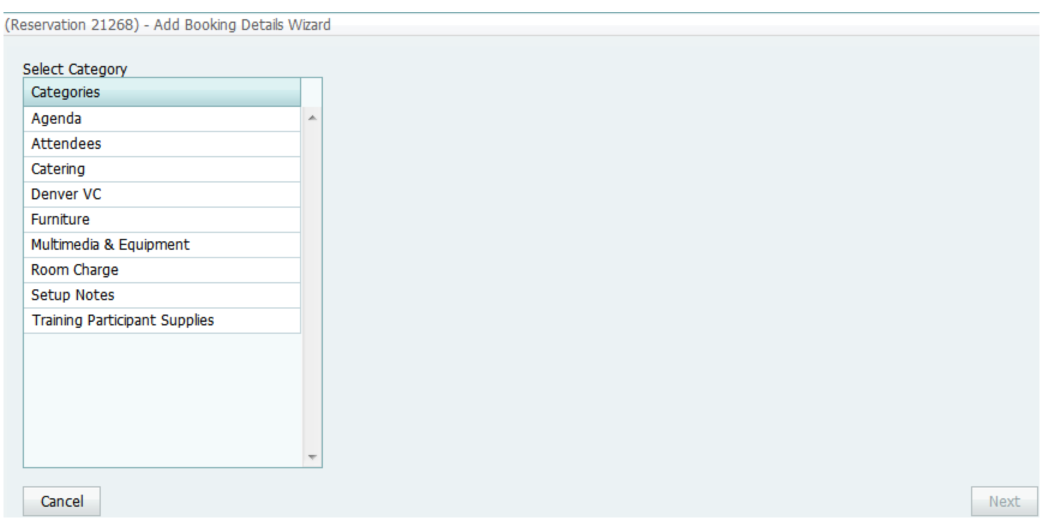
You use the Add Booking Details Wizard to add booking details and items to multiple bookings in a single step. The steps that you follow depend on the category type. Also, you can add multiple occurrences of a booking detail to bookings only for catering and service order categories. If the booking detail is *not* from a catering or service order category, and the detail is already added to the bookings, you cannot add the detail again to the bookings. (You can, however, add more items to the bookings. See "Adding Booking Detail Items to Multiple Bookings" on page 141.)

To add booking details and items to multiple bookings

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In the left pane of the Navigator, select the reservation to which you are adding the booking details and items.
3. In the Bookings pane, click Tools, and then click Add Booking Details Wizard.

   The Add Booking Details Wizard opens.

Figure 3-59: Add Booking Details Wizard



4. Select the booking detail that you are adding to one or more of the bookings for the selected reservation, and then continue to one of the following:
   - "To add a booking detail from a non-resource category."
   - "To add a booking detail from a resource, service order, or catering category" on page 136.

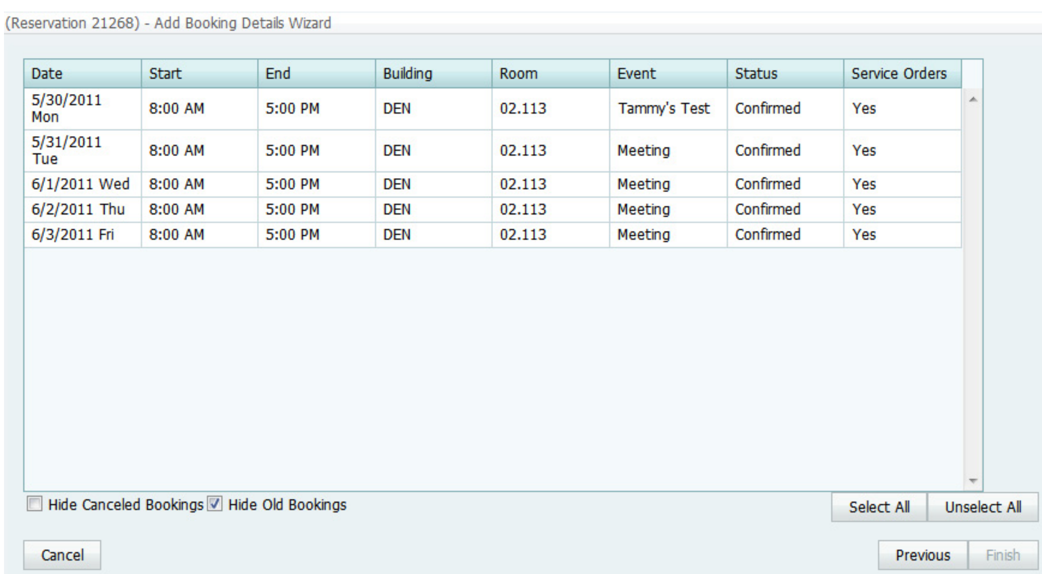
To add a booking detail from a non-resource category

If you select a booking detail of any type other than resource or catering, (for example, attendees or setup notes), then to add the detail to the bookings, you follow the same general steps:

1. Select the booking detail.
2. Click Next, and then enter the information for the booking detail.
   - If you are adding setup notes, see "To add setup notes" on page 126.
   - If you are adding attendees/visitors, see "To add attendees" on page 127.
   - If you are adding an agenda or activities, see "To add an agenda (activities)" on page 128.
   - If you are adding room charges, see "To add a room charge" on page 129.
3. Click Next.

   The Select Bookings page opens. This page displays all the bookings for the selected reservation with a date greater than or equal to the current day's date, *and* that do not already have the selected booking detail added.

Figure 3-60: Add Booking Details Wizard, Select Bookings page



Date	Start	End	Building	Room	Event	Status	Service Orders
5/30/2011 Mon	8:00 AM	5:00 PM	DEN	02.113	Tammy's Test	Confirmed	Yes
5/31/2011 Tue	8:00 AM	5:00 PM	DEN	02.113	Meeting	Confirmed	Yes
6/1/2011 Wed	8:00 AM	5:00 PM	DEN	02.113	Meeting	Confirmed	Yes
6/2/2011 Thu	8:00 AM	5:00 PM	DEN	02.113	Meeting	Confirmed	Yes
6/3/2011 Fri	8:00 AM	5:00 PM	DEN	02.113	Meeting	Confirmed	Yes

To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

4. Select the booking, or CTRL-click to select the multiple bookings to which you are adding the details, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.

5. Click OK to close the message and return to the Navigator.

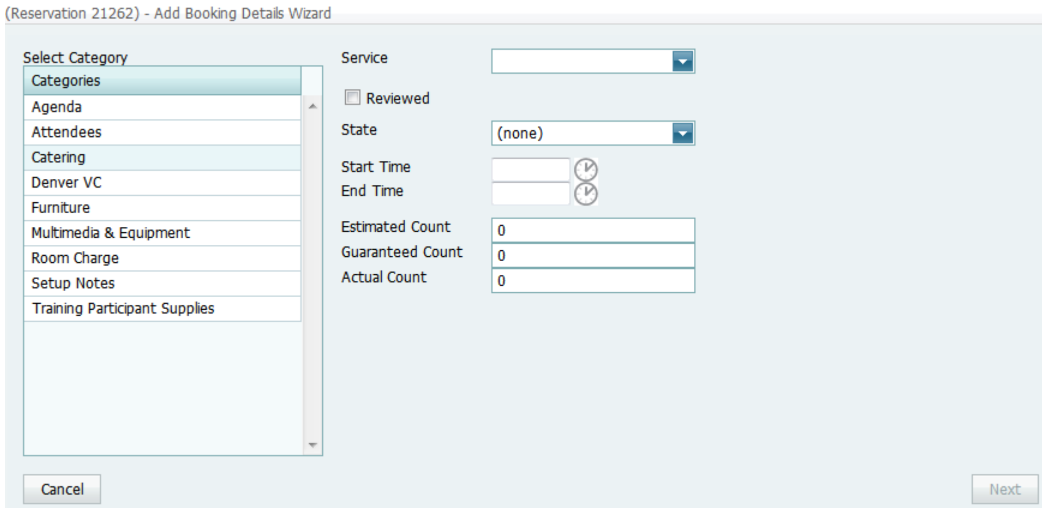
   The booking detail and its items are displayed as folders under the Booking folder in the Navigator page.

6. Repeat this procedure for every non-resource category that you are adding to the bookings.

To add a booking detail from a resource, service order, or catering category

- If you select a catering or service order category, a Service Order dialog box opens with, at a minimum, options for Service, Reviewed, Service Start Time, and End Time. If a catering category is selected, additional fields for Estimated, Guaranteed and Actual Counts are displayed. Go to Step 1.

Figure 3-61: Example of the Add Booking Details Wizard for a resource with a service order



- If you select a resource category, then two results are possible:
  - The Add Booking Details Wizard is updated with options for Reviewed and/or State. If applicable, select Reviewed and/or select a State, click Next to open the Add Booking Details Wizard, and then go to Step 3.

For more information about reviewing service orders and selecting states, see “Searching with the Service Order Management Browser” on page 203.

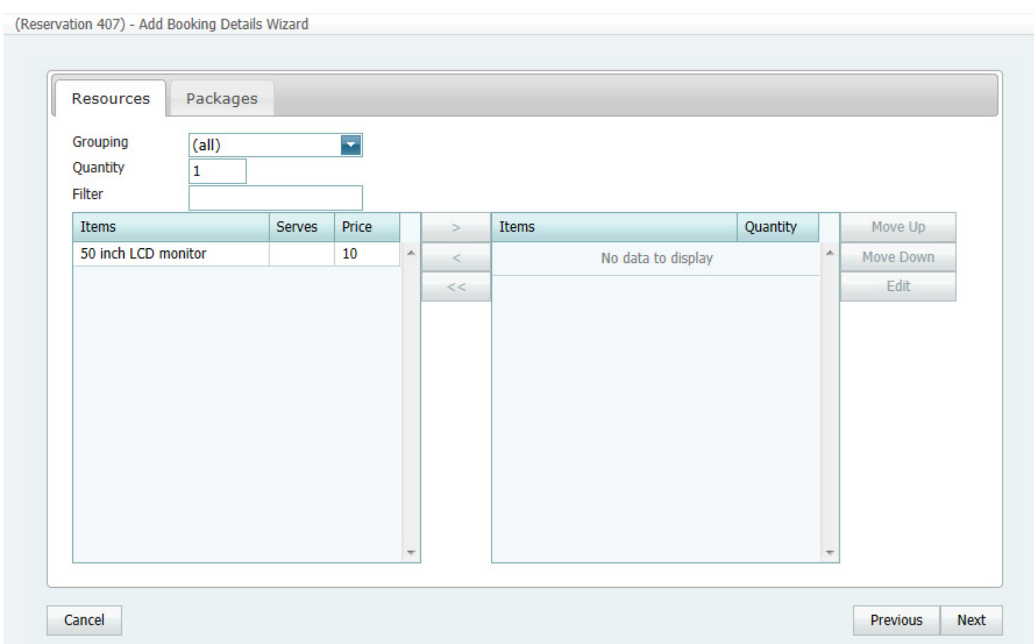
  - The Add Booking Details Wizard opens with two tabs—Resources and Packages. The Resources tab is the active tab. This tab displays a pre-configured list from which you can select one or more resources. Go to Step 3.

1. Select the service type.
2. Enter the start time, and optionally, the end time, estimated count, guaranteed count, and select Reviewed and/or a state.

For more information about reviewing service orders and selecting states, see “Searching with the Service Order Management Browser” on page 203.

3. Do one of the following:
   - To choose one or more resources from the pre-configured list of resources, leave the Resources tab open, and then go to Step 4.
   - To add multiple resources to the booking in a single step, open the Packages tab, and then go to Step 6.

Figure 3-62: Add Booking Details Wizard, Resources tab



4. Do one of the following on the Grouping dropdown list:
    - Leave the default value of (all) as is to search for all items in all groupings.
    - Select a specific grouping to search for only those items in the grouping. (For example, if the selected resource category is A/V Equipment, then available groupings could include Computer, Phone, Video, and so on. To search only for the available phones to add to a booking detail, select the Phones grouping.)
5. Optionally, in the Filter field, enter a search string by which to filter your search.

Your search is limited to the exact order of the characters in the string, but the string can is not case-sensitive and it can appear anywhere in the search results. For example, a search string of ***co*** *returns* ***co****ffee service,* ***co****nference phone, and mini-****co****pier.*

6. In the Quantity field, leave the default value of 1.00; otherwise, enter a new value.

If you change the quantity for a resource package, then the quantity for each individual resource that makes up the package is also changed.

7. Do one of the following:
    - For the Resources tab—On the Items list, select the resource item, or CTRL-click to select the multiple resource items that you are adding to the booking.

Your EMS administrator might have configured an override resource (also known as an override description) so that you can book a resource that has not been configured in your EMS database. For example, the administrator might have configured an override resource named "Other." If you select the "Other" resource, then a Description field is displayed on the Resource Selection dialog box. You must enter a description or name for the override resource before you can continue. EMS does not track availability of override resource items; however, EMS reports on override resource items just like any other resource item.

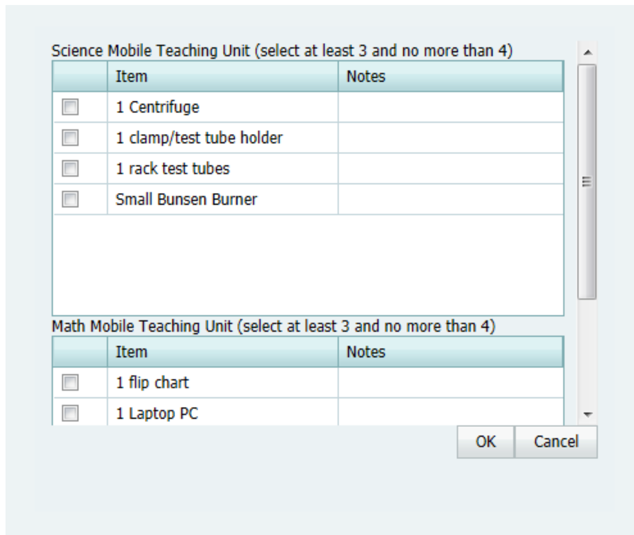
Use the Move Up and Move Down options to order the selected items. To edit a selected item before you add it to multiple bookings, select the item, and then click Edit.

- For the Package tab—Select the package that contains the multiple resources that you are adding to the booking.

8. Click Next.

    - For items on the Resources tab—If your EMS administrator configured selections for the resource, then either you might be required to make selections for the resource, or you have the option to make selections for the resource (see Figure 3-63 below); otherwise, go to Step 9.

Figure 3-63: Example of a Resource Selections dialog box



    - For packages on the Packages tab—The package is added to the booking. An entry for the package as well as entry for each item in the package is displayed in the Booking Detail Items pane of the Navigator.

9. Click Next.

    The Select Bookings page opens. This page displays all the bookings for the selected reservation with a date greater than or equal to the current day's date, *and* that do not already have the selected booking detail added. See Figure 3-64 on page 140.

Figure 3-64: Add Booking Details Wizard, Select Bookings page


(Reservation 407) - Add Booking Details Wizard

Date	Start	End	Building	Room	Event	Status	Service Orders
8/19/2012 Sun	4:00 PM	11:00 PM	Frd_01	RK	US Pro Cycling Challenge Watch Party	Confirmed	Yes
8/20/2012 Mon	4:00 PM	11:00 PM	Frd_01	RK	US Pro Cycling Challenge Watch Party	Confirmed	Yes
8/21/2012 Tue	4:00 PM	11:00 PM	Frd_01	RK	US Pro Cycling Challenge Watch Party	Confirmed	Yes
8/22/2012 Wed	4:00 PM	11:00 PM	Frd_01	RK	US Pro Cycling Challenge Watch Party	Confirmed	Yes
8/23/2012 Thu	4:00 PM	11:00 PM	Frd_01	RK	US Pro Cycling Challenge Watch Party	Confirmed	Yes
8/24/2012 Fri	4:00 PM	11:00 PM	Frd_01	RK	US Pro Cycling Challenge Watch Party	Confirmed	Yes
8/25/2012 Sat	4:00 PM	11:00 PM	Frd_01	RK	US Pro Cycling Challenge	Confirmed	Yes

To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

10. Select the booking, or CTRL-click to select the multiple bookings to which you are adding the details, or click Select All to select all the displayed bookings in a single step, and then click Finish.

    A message opens asking you if you want to add more booking details.

11. Do one of the following:

    - Click Yes to return to the Add Booking Details Wizard.
    - Click No.

      A message opens indicating that the changes were made successfully.

12. Click OK to close the message and return to the Navigator.

    The booking detail and its items are displayed as folders under the Booking folder in the Navigator.

Adding Booking Detail Items to Multiple Bookings

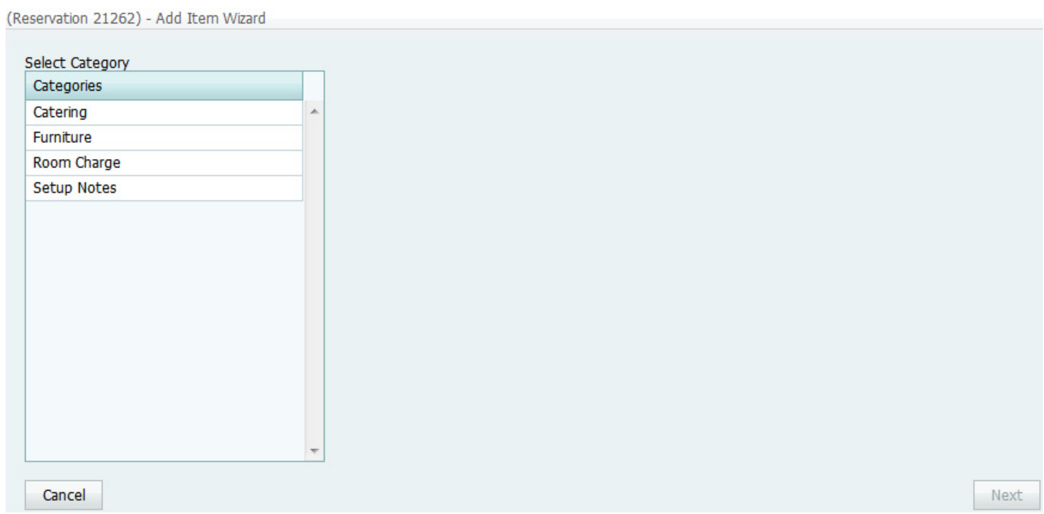
You use the Add Item Wizard to add booking detail items to multiple bookings for categories that *are already added* to the bookings. For example, you can use this Wizard to add food service items only if any of the bookings already has food service added as a booking detail.

To add booking details and items for categories that are not already in use, see *"Adding Booking Details and Items to Multiple Bookings" on page 134.*

To add booking detail items to multiple bookings

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In the left pane of the Navigator, select the reservation to which you are adding the booking detail items.
3. In the Bookings pane, click Tools, and then click Add Item Wizard.
   The Add Item Wizard opens. The first page in this Wizard, the Select Category page, displays only those categories *that are already in use* for any of the bookings in the reservation.

Figure 3-65: Add Item Wizard, Select Category page



4. Select the category to which you want to add items.
5. Click Next.

   The steps that you now must follow depend on the category type. See:

   - “To add a booking detail from a non-resource category” on page 135.
   - “To add a booking detail from a resource, service order, or catering category” on page 136.

Editing Booking Detail Items for Individual Bookings

After you have added booking details and items to bookings for a reservation, you can edit any *non-invoiced* items on an individual basis.

To edit the pricing information for multiple non-invoiced items in a single booking, or for multiple non-invoiced items in multiple bookings, see "Editing Booking Detail Item Charges for Multiple Items" on page 147.

To edit booking detail items for individual bookings

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In the left pane of the Navigator, expand the folder structure for the reservation until the appropriate booking details item folder is visible, and then do the following:
   - Select the booking detail folder that contains the items that you are editing.
   - In the Items pane, select the item that you are editing.

The item cannot be invoiced. If the item is invoiced, the Edit button is not available. To edit an invoiced item, you must first void the invoice. See "To void an invoice" on page 329.

3. Continue to one of the following:
   - "To edit a booking detail item from a non-resource category" on page 144.
   - "To edit a booking detail item from a resource, service order, or catering category" on page 144.

To edit a booking detail item from a non-resource category

1. Click Edit.

   The <Booking Detail> dialog box opens.

2. Edit the item as necessary, and then click OK to close the <Booking Detail> dialog box and return to the Navigator.

   For detailed information about editing a booking detail item from a non-resource category, see:

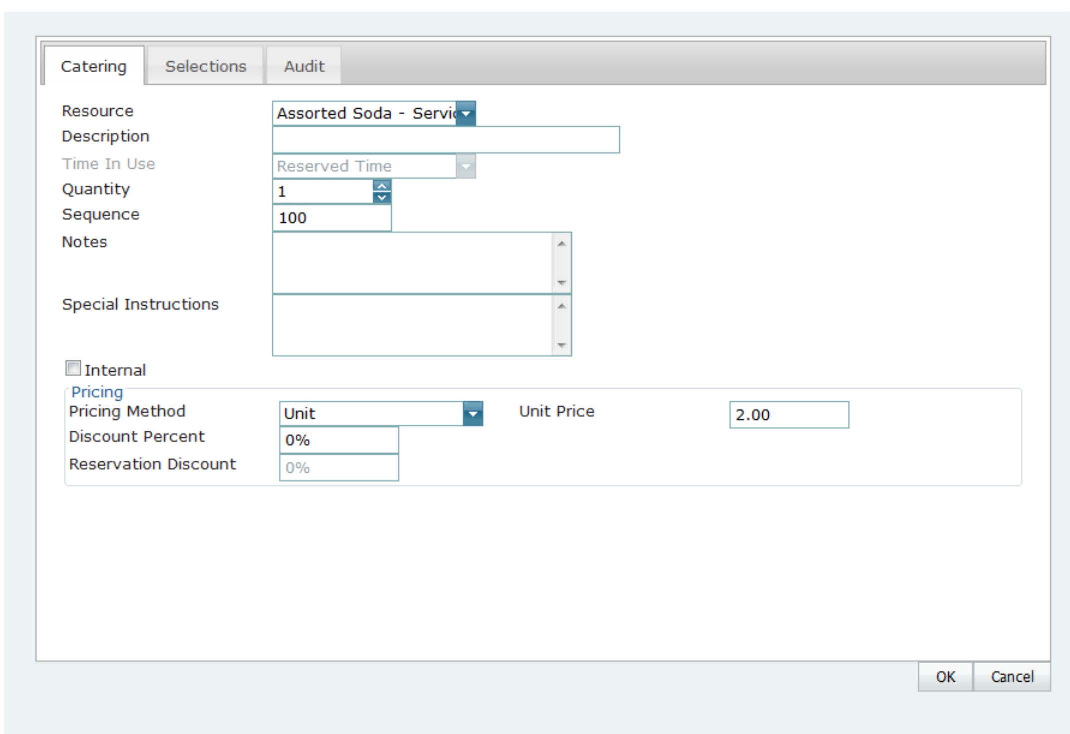
   - “To add setup notes” on page 126.
   - “To add attendees” on page 127.
   - “To add an agenda (activities)” on page 128.
   - “To add a room charge” on page 129.

To edit a booking detail item from a resource, service order, or catering category

1. Click Edit.

   The <Resource> dialog box opens. The Resource tab is the active tab. If selections are available for the resource, then the dialog box also has a Selections tab.

Figure 3-66: <Resource> dialog box, Resource tab



2. On the Resource tab, edit the information as necessary.
   - If applicable, select a completely different item for the resource.
   - The sequence number determines the order in which the items (for example, juice, muffins, and so on) are displayed in the list in the Items pane in the Navigator when the booking detail (for example, Catering) is selected for a booking. If needed, edit the sequence number.
   - The Time in Use indicates the time that the resource is to be available for the booking. If needed, edit the Time in Use.

For a definition of Event Time or Reserved Time, see "Event Timeline" on page 32. You can edit the Time In Use only if the item is not from a resource from a service order or catering category. (The Time in Use is applied at the category level for these types of resources).

   - If the notes are to be printed on internal reports only (the notes would be excluded from external reports like a Confirmation), then select Internal.
   - If you edit the pricing method, then make sure to enter any other additional information as needed.

Pricing Method	Additional Fields
Half Day/Full Day (Event Time)	• Half Day Price • Full Day Price • Hours
Half Day/Full Day (Reserved Time)	• Half Day Price • Full Day Price • Hours
Half Day/Full Day (Service Time) **Note:** Available only for resources with a service order.	• Half Day Price • Full Day Price • Hours
Hourly (Event Time)	• Hourly Price • Minimum Charge • Maximum Charge • Initial Flat Charge
Hourly (Reserved Time)	• Hourly Price • Minimum Charge • Maximum Charge • Initial Flat Charge
Hourly (Service Time) **Note:** Available only for resources with a service order.	• Half Day Price • Full Day Price • Hours

Pricing Method	Additional Fields
Hourly (Specific)	• Hourly Price • Minimum Charge • Maximum Charge • Initial Flat Charge
Unit	• Unit Price

- If applicable, open the Selection tab, and modify the resource selections as needed.

3. Click OK.

   The <Resource> dialog box closes, and you return to the Navigator with the modified item still selected in the Items pane.

If you need to modify counts and/or times for individual items in a resource, service order, or catering category, see *"Editing Count Information for a Booking" on page 149.*

Editing Booking Detail Item Charges for Multiple Items

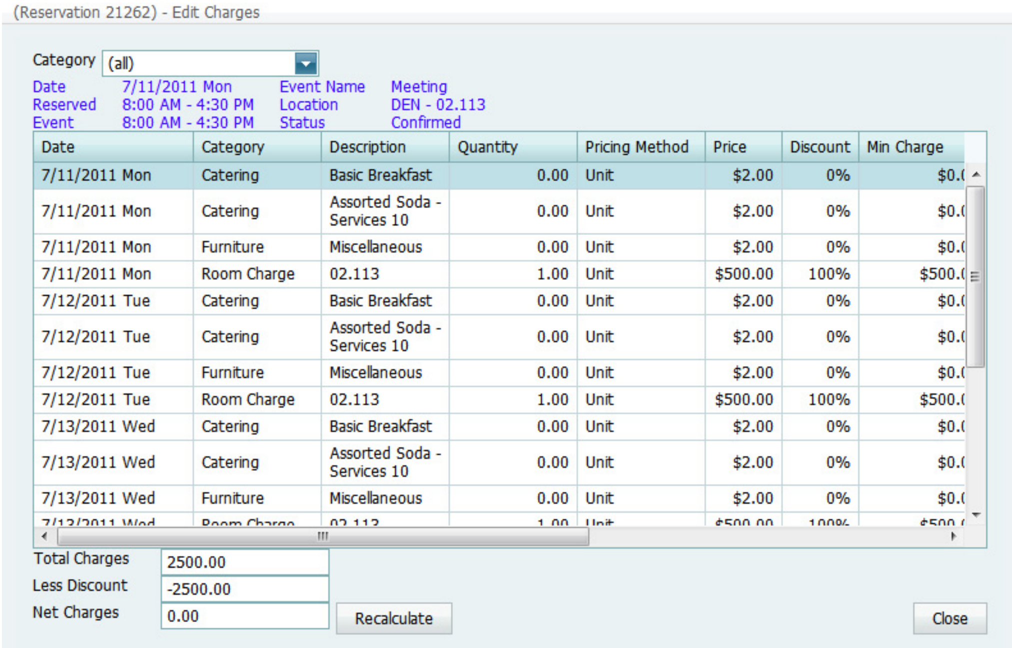
You can edit resource quantities and billing information (price, pricing method, and so on) for individual items (see “Editing Booking Detail Items for Individual Bookings” on page 143) or you can edit this information for multiple *non-invoiced* items using the Edit Charges tool.

To edit the billing information for invoiced items, you must first void the invoice. See “To void an invoice” on page 329.

To edit booking detail item charges for multiple items

1. Open the reservation in the Navigator. See:
   - “Opening a reservation directly in the Navigator” on page 67.
   - “Opening a reservation through the Reservation Book” on page 68.
   - “Opening a reservation through a group” on page 68.
   - “Search Tools,” on page 177.
2. In left pane of the Navigator, do one of the following:
   - To edit all billable items in all the bookings for a reservation, select the reservation.
   - To edit only the billable items in a selected booking, expand the reservation folder, and under the expanded reservation folder, select the booking that contains the items that you are editing.
3. In the Bookings/Booking Details pane, click Tools > Edit Charges.
   The Edit Charges page opens. If you selected a reservation, then all non-invoiced billable items in all the bookings for the selected reservation are displayed on the page; otherwise, only the non-invoiced billable items for the selected booking are displayed. See Figure 3-67 on page 148.

Figure 3-67: Edit Charges page

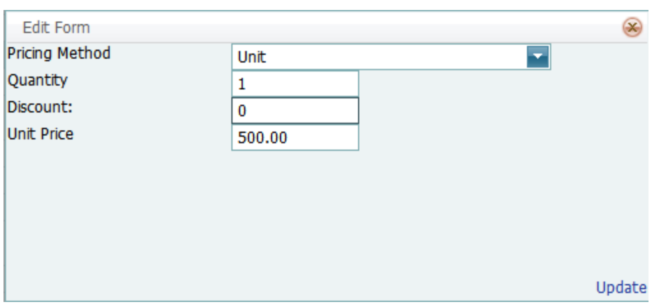


4. Optionally, on the Category dropdown list, select a category to narrow the list of items that are displayed.

5. To edit the quantity, pricing method, price, or discount percentage for an item, double-click in the appropriate field for the item.

   An Edit Form dialog box opens.

Figure 3-68: Edit Form dialog box



6. Make the necessary edits for the selected field, and then click Update.

   The Edit Form dialog box closes and you return to the Edit Charges page. Any resulting recalculations are carried out automatically. The Edit Charges pages closes and you return to the Navigator.

Editing Count Information for a Booking

You use the Edit Counts tool to edit the count information for a booking, including the setup count and attendance count, the estimated count, guaranteed count, and actual count for a booking detail with a category type of catering, as well as the counts for *non-invoiced* booking detail items. You can edit the counts for all bookings in a reservation or for just a selected booking.

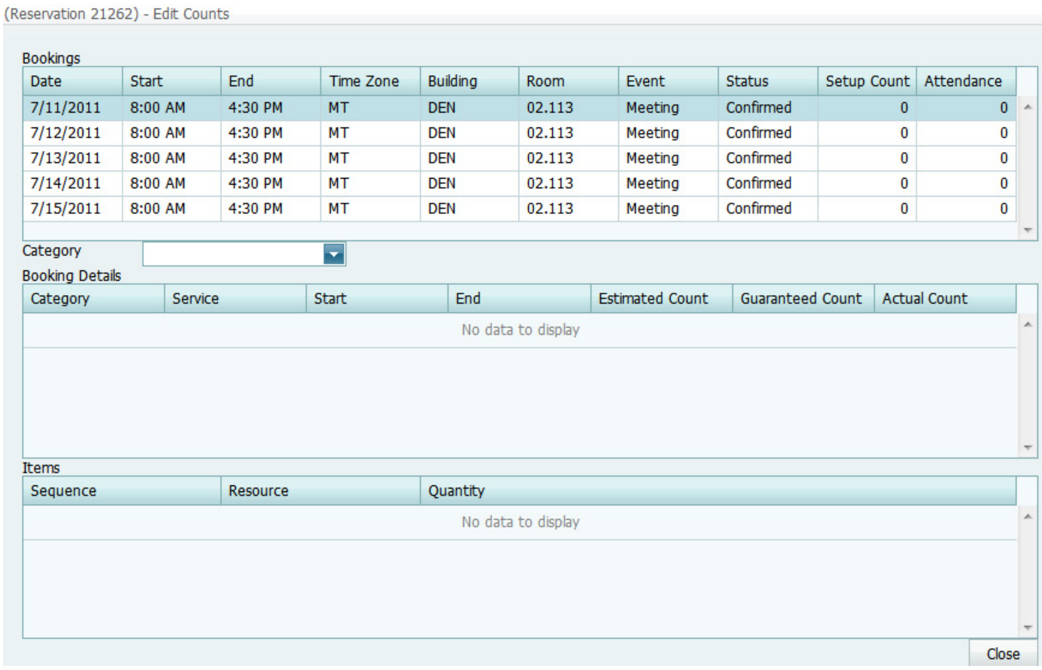
Much of the information that you can edit using the Edit Counts tool is also available for editing in other areas of the application. The purpose of this tool is simply to collate all the count information in a single location for editing.

To edit count information for a booking

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In the left pane of the Navigator, do one of the following:
   - Select the reservation.
   - Expand the reservation folder, and under the reservation folder, select a specific booking.
3. In the Bookings pane, click Tools, and then click Edit Counts.

   The Edit Counts page opens. If you selected the reservation, then the Bookings (top) pane of the page lists all the bookings for the selected reservation; otherwise, the pane lists just the selected booking. See Figure 3-69 on page 150.

Figure 3-69: Edit Counts page



4. Select the booking for which you are editing the count information.
5. On the Category dropdown list, select the booking detail (category) for which you are editing the count information.

   The Booking Details (middle) pane is refreshed with the information for the selected category. If the category is a resource with a service order, then the pane displays the service type and the start and end times for the category. If the category is catering, then the pane also displays the estimated count, guaranteed count, and actual count for the booking detail.
6. In the Booking Details pane, select the booking detail that contains the items for which you are editing the count information.

   The Items (lower) pane is refreshed with a list of all the non-invoiced items for the selected detail.
7. To modify the count information for any booking detail or detail item, click in the appropriate field and make the necessary edits.
8. To edit the count information for multiple bookings, repeat Step 4 through Step 7 as needed for each booking.
9. Click Close.

   The edits are made. You return to the Navigator.

Applying a Reservation Discount

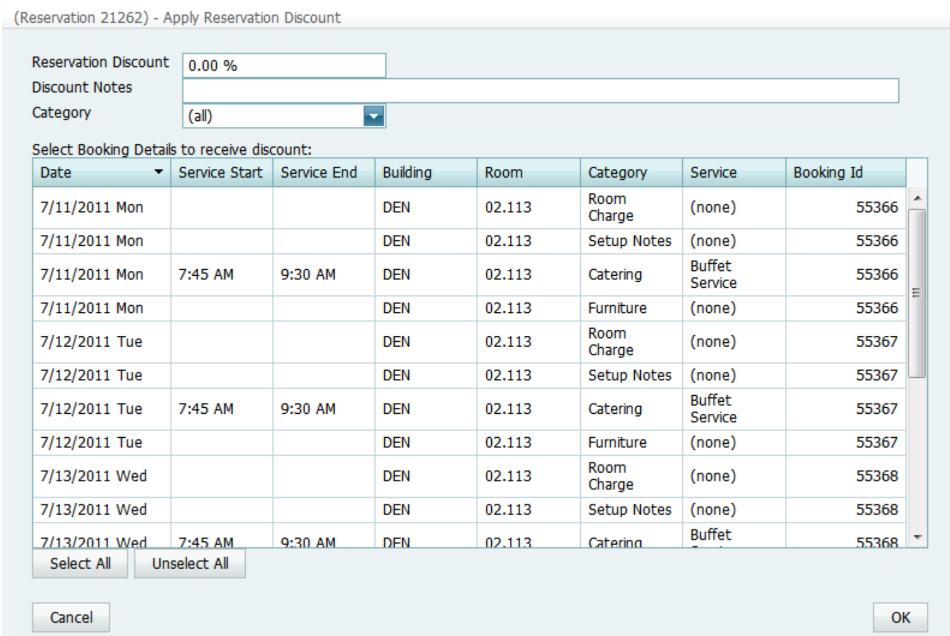
You use Apply Reservation Discount Wizard to apply a reservation discount to *non-invoiced* details in a booking. The discount is applied as a percentage of the total charge for an item and it is added to any existing discounts that have already been applied to the item.

To apply a discount to invoiced items, you must first void the invoice. See *"To void an invoice" on page 329.*

To apply a reservation discount

1. Open the reservation in the Navigator. See:
    - "Opening a reservation directly in the Navigator" on page 67.
    - "Opening a reservation through the Reservation Book" on page 68.
    - "Opening a reservation through a group" on page 68.
    - "Search Tools," on page 177.
2. In the left pane of the Navigator, select the reservation to which you are applying the discount.
3. In the Bookings pane, click Tools, and then click Apply Reservation Discount. The Apply Reservation Discount page opens. All the bookings for the selected reservation with their categories that have not been invoiced are displayed.

Figure 3-70: Apply Reservation Discount page



4. Leave the Category set to the default value of (all), or optionally, to apply a discount to all the items in a specific category, on the Category dropdown list, select a category.

   The Apply Reservation Discount page is updated with the bookings that have the selected category.

5. Enter the discount percentage.

6. Optionally, enter any notes that are relevant about the discount.

7. Select the booking, or CTRL-click to select the multiple bookings to which you are applying the discount, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.

8. Click OK to close the message and return to the Navigator.

After you apply a reservation discount, you can view it and/or edit it when you are editing the reservation on the Billing Information tab of the Reservation page in the Navigator. *See "Editing a Reservation in the Navigator" on page 86.*

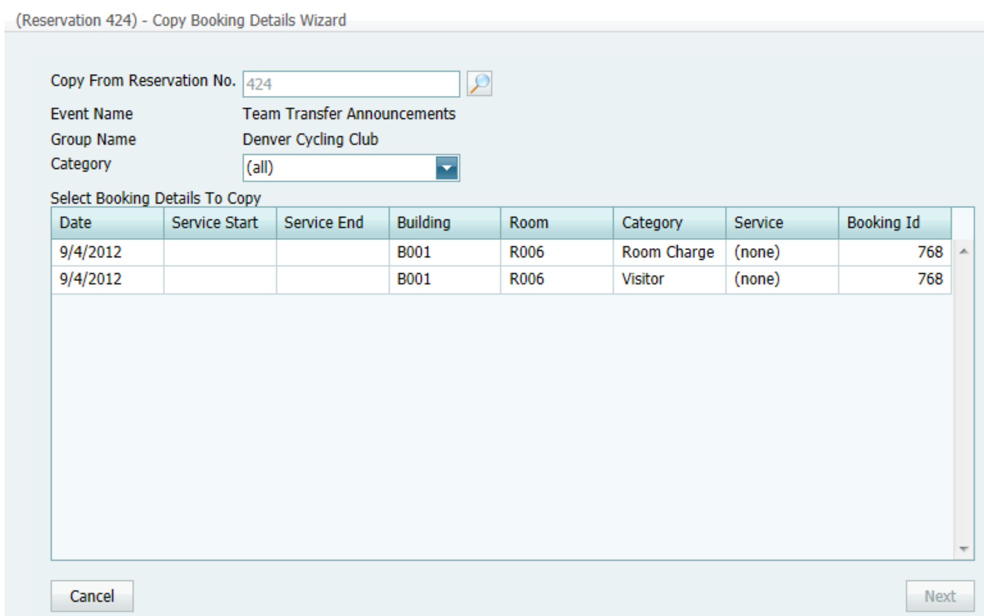
Copying Booking Details between Bookings

You use the Copy Booking Details Wizard to copy the details from one booking in a reservation and paste them into other bookings for the same reservation.

To copy booking details between bookings

1. Open the reservation *to* which the details are to be copied in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In the left pane of the Navigator, select the reservation *from* which you are copying the details.
3. In the Bookings pane, click Tools, and then click Copy Booking Details Wizard. The Copy Booking Details Wizard open. The first page in this Wizard, the Select Booking Details to Copy page, displays all the bookings for the selected reservation, regardless of date. By default, the Copy From Reservation No. field displays the reservation number for the selected reservation.

Figure 3-71: Copy Booking Details Wizard, Select Booking Details to copy page



4. Optionally in the Copy From Reservation No. field, click the Search icon to open the Open Navigator dialog box and search for and select a different reservation from which to copy the booking details.

   The Select Booking Details to Copy page is refreshed with *all* the bookings details for the selected reservation.

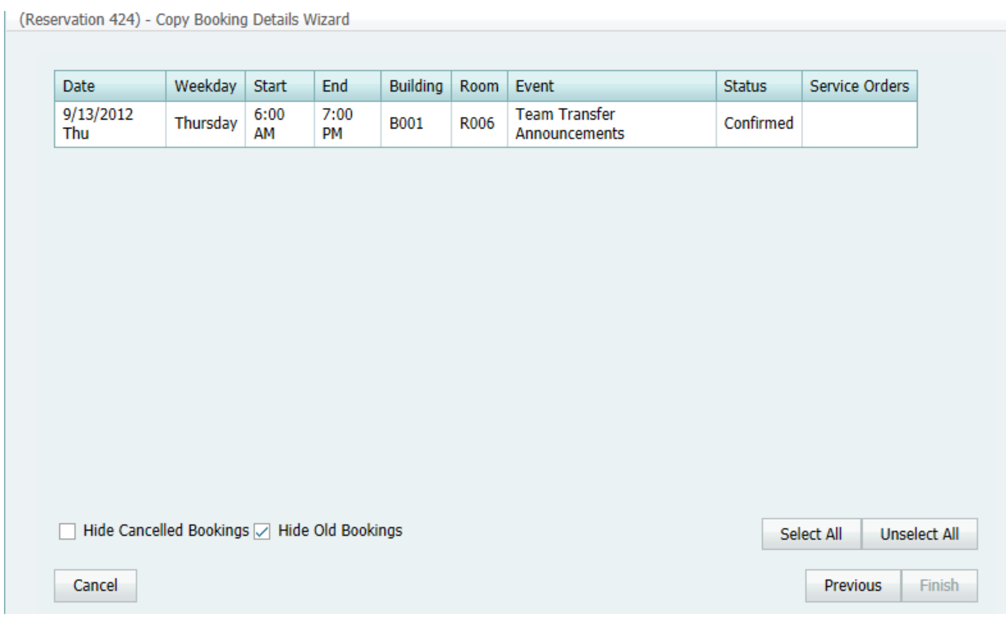
5. Optionally, do one or both of the following:

   - On the Category dropdown list, select a specific category of booking details to display on the Select Booking Details to Copy page.
   - Leave Copy Inactive Resources/Rooms selected to copy this information for the bookings. Clear this option if you do not want to copy this information.

6. Select the booking, or CTRL-click to select the multiple bookings *from* which you are copying the booking details, and then click Next.

   The Select Bookings page opens. This page displays all the bookings with a date greater than or equal to the current day's date *to* which you can copy the booking details.

Figure 3-72: Copy Booking Details Wizard, Select Bookings page



To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

7. Select the booking, or CTRL-click to select the multiple bookings to which you are copying the booking details, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.

8. Click OK to close the message and return to the Navigator.

Deleting Booking Detail Items from Multiple Bookings

If you add booking detail items to bookings for a reservation in error, or a booking item is no longer valid for one or more bookings, and the item has not been invoiced, you can use the Delete Item Wizard to delete the item. You can delete each item on an individual basis, or you can delete all the items for a booking detail in a single step. If you delete an item at the package level, then the deletion cascades down to all the items in the package. You can also delete individual items from a package.

To delete booking detail items from multiple bookings

1. Open the reservation for which you are deleting booking detail items in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In the left pane of the Navigator, select the reservation from which you are deleting the booking detail items.
3. In the Bookings pane, click Tools, and then click Delete Item Wizard.

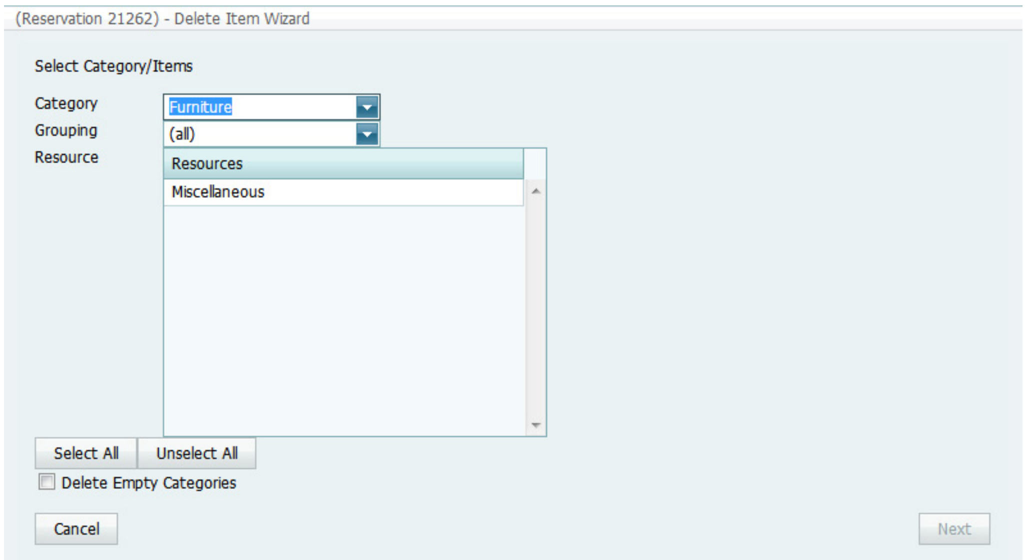
   The Delete Item Wizard opens. The first page that opens is the Select Categories page.

Figure 3-73: Delete Item Wizard, Select Categories page

4. Select the category (booking detail) from which you are deleting the items, and then click Next.

   The Select Categories/Items page opens.

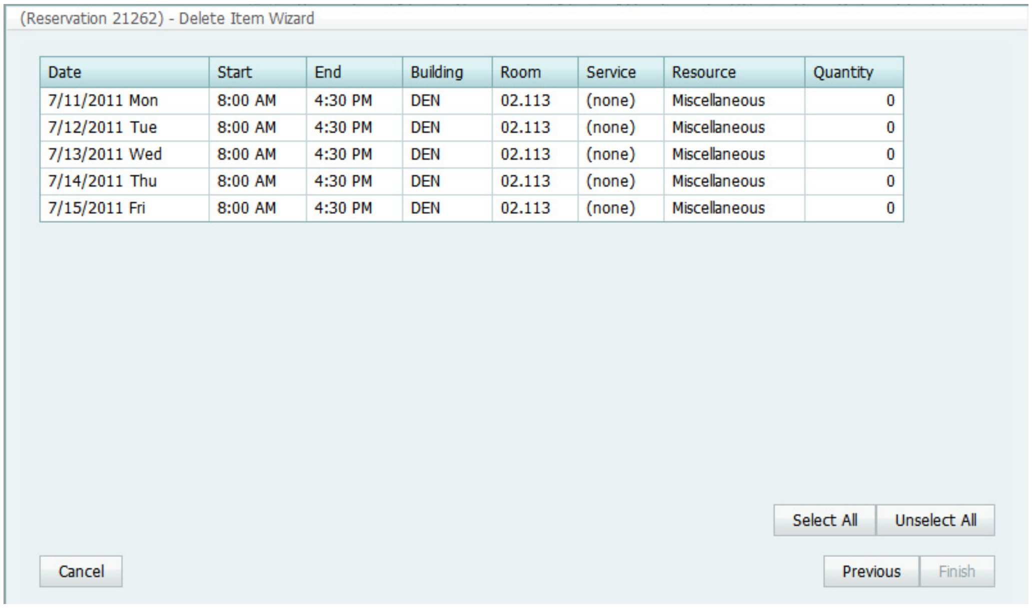
Figure 3-74: Delete Item Wizard, Select Categories/Items page



5. Optionally, do one or both of the following:
   - Select a specific grouping to limit the display to only those items in the grouping.
   - Select Delete Empty Categories to also delete a category after the last item is deleted from the category.
6. On the Resources list, select the resource item, or CTRL-click to select the multiple resource items that you are deleting.
7. Click Next.

   The Select Bookings page opens. This page lists all the bookings for the selected reservation with a date greater than or equal to the current day's date that have the resource items that were selected for deletion. See Figure 3-75 on page 158.

Figure 3-75: Delete Item Wizard, Select Bookings page



Date	Start	End	Building	Room	Service	Resource	Quantity
7/11/2011 Mon	8:00 AM	4:30 PM	DEN	02.113	(none)	Miscellaneous	0
7/12/2011 Tue	8:00 AM	4:30 PM	DEN	02.113	(none)	Miscellaneous	0
7/13/2011 Wed	8:00 AM	4:30 PM	DEN	02.113	(none)	Miscellaneous	0
7/14/2011 Thu	8:00 AM	4:30 PM	DEN	02.113	(none)	Miscellaneous	0
7/15/2011 Fri	8:00 AM	4:30 PM	DEN	02.113	(none)	Miscellaneous	0

8. Select the booking, or CTRL-click to select the multiple bookings from which you are deleting the resource items, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.

9. Click OK to close the message and return to the Navigator.

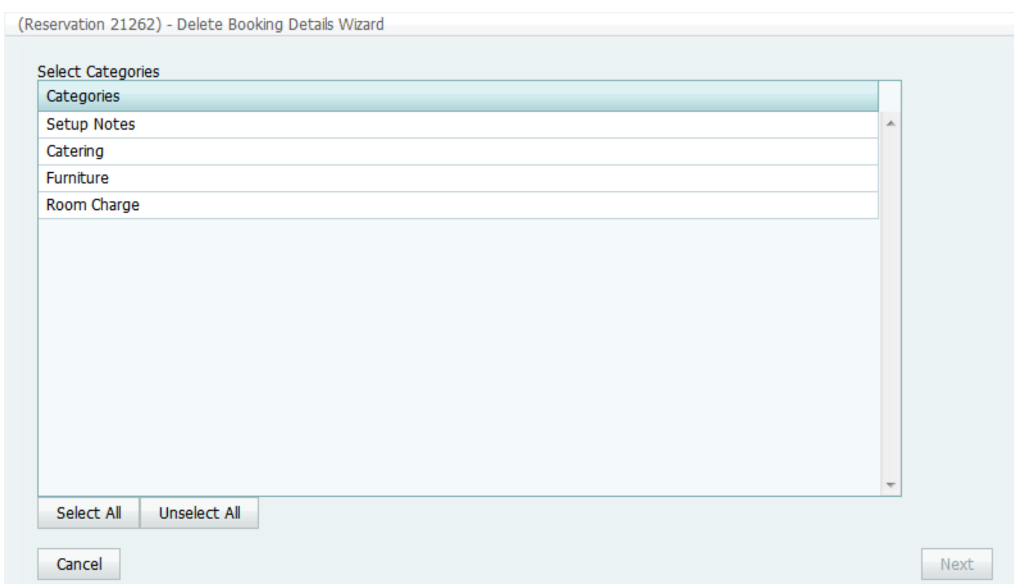
Deleting Booking Details from Multiple Bookings

You use the Delete Booking Details Wizard to delete one or more booking details that do *not* have invoiced items from multiple bookings in a single step. When you delete a booking detail from a booking, any items that have been added for the detail are also deleted.

To delete booking details from multiple bookings

1. Open the reservation from which the booking details are to be deleted in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In the left pane of the Navigator, select the reservation from which you are deleting the booking details.
3. In the Bookings pane, click Tools, and then click Delete Booking Details Wizard. The Delete Booking Details Wizard opens. The first page in this Wizard, the Select Categories page, displays all the categories (booking details) *that are already in use* for any of the bookings in the reservation.

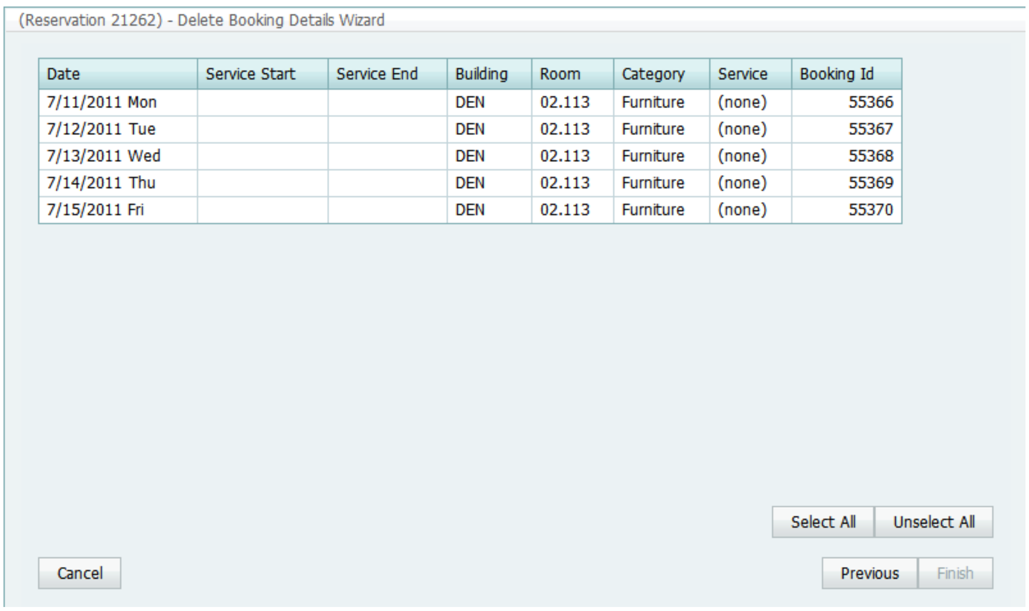
Figure 3-76: Delete Booking Details Wizard, Select Categories page



4. Select the category, or CTRL-click to select the multiple categories that you are deleting from the reservation, or click Select All to select all categories in a single step.
5. Click Next.

   The Select Booking Details page opens. This page lists all the bookings for the selected reservation with a date greater than or equal to the current day's date that have the categories (booking details) that were selected for deletion and that do *not* have any invoiced items.

Figure 3-77: Delete Booking Details Wizard, Select Booking Details page



6. Select the booking, or CTRL-click to select the multiple bookings from which you are deleting the details, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens indicating that the changes were made successfully.
7. Click OK to close the message and return to the Navigator.

Working with Comments and Reminders in the Navigator

A *comment* is a text entry that explains or clarifies a reservation, a booking, a group, or a booking detail that is a service order. A *reminder* is a comment that has a due date associated with it. You can select from a pre-configured list of comment types and reminder types, or you can create a user-specified comment type or reminder type if none of the pre-configured types meets your working needs. You can add comments/reminders directly to a reservation, booking, or service order in the Navigator. You can also edit a comment/reminder, delete a comment/reminder, and view the history for a comment/reminder.

A reminder that you add to a reservation, booking, group, or booking details is called an attached reminder. To work with unattached reminders, see "Reminders Tab" in "Overview of the EMS Dashboard and Dashboard Options" on page 209.

To work with a comment or reminder in the Navigator

The following procedures are written from the perspective of working with a single comment. By analogy, you can follow these procedures to work with a single attached reminder. To add multiple comments and/or reminders to a reservation in a single step, see "Adding Multiple Comments and Reminders to a Reservation" on page 165.

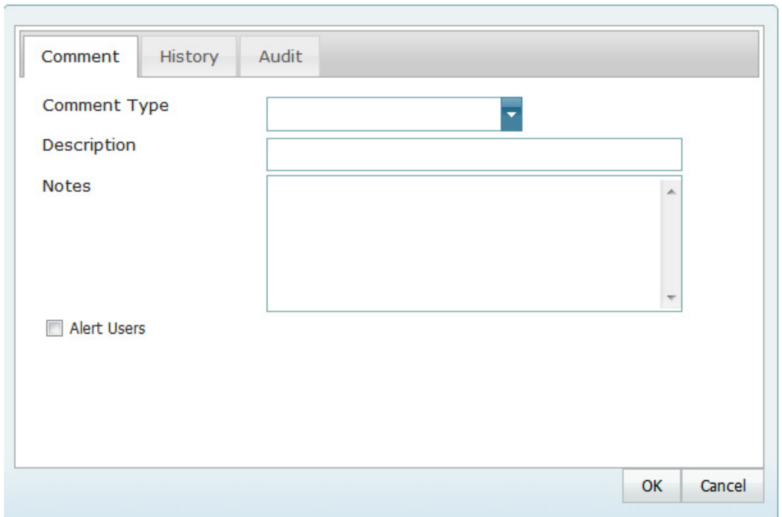
1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In the left pane of the Navigator, select the reservation, booking, or service order, and then in the top right pane of the Navigator, open the Comments tab.
3. Continue to one of the following:
   - "To add a comment" on page 162.
   - "To edit a comment" on page 163.
   - "To delete a comment" on page 163.
   - "To the view history for a comment" on page 163.

To add a comment

1. Click New.

   The Comment dialog box opens.

Figure 3-78: Comment dialog box



2. On the Comment Type dropdown list, select the type of comment that you are adding; otherwise, if none of the pre-configured comment types meets your working needs, select (user-specified comment), and then in the Description field, enter a description for the comment type.
3. In the Notes field, enter the comment.
4. Optionally, to alert any EMS user that opens this reservation, booking, or service order that this comment has been added, select Alert Users.
5. Click OK.

   The Comment dialog box closes. The comment is added to the reservation, booking, or service order. The Comments tab remains open.

To edit a comment

1. Select that comment that you are editing, and then click Edit.

   The Comment dialog box opens. The comment is displayed in the Notes field.

2. Modify the comment as needed, including its type, description, notes, and/or its Alert User status.

3. Click OK.

   The Comment dialog box closes. The modified comment is saved for the reservation, booking, or service order. The Comments tab remains open.

To delete a comment

1. Select the comment that you are deleting, and then click Delete.

   A message opens asking you if it is OK to delete the selected comment.

2. Click OK.

   The selected comment is deleted from the reservation, booking, or service order. The Comments tab remains open.

To the view history for a comment

1. Select the comment for which you viewing the history, and then click Edit.

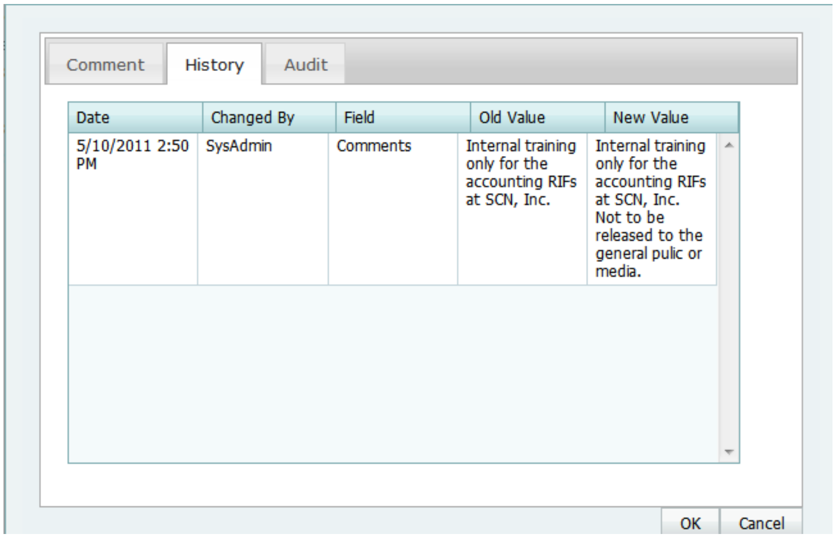
   The Comment dialog box opens. The comment is displayed in the Notes field.

2. Open the History tab.

   The date that the change was made. the name/ID of the user who made the change, the field that was changed, the old value for the changed field, and the new value for the changed field. See Figure 3-79 on page 164.

You can use the scroll feature at the right of the dialog box to scroll through all the history for a selected change.

Figure 3-79: Comment dialog box, History tab



3. Click OK.

   The Comment dialog box closes. The Comments tab remains open.

Adding Multiple Comments and Reminders to a Reservation

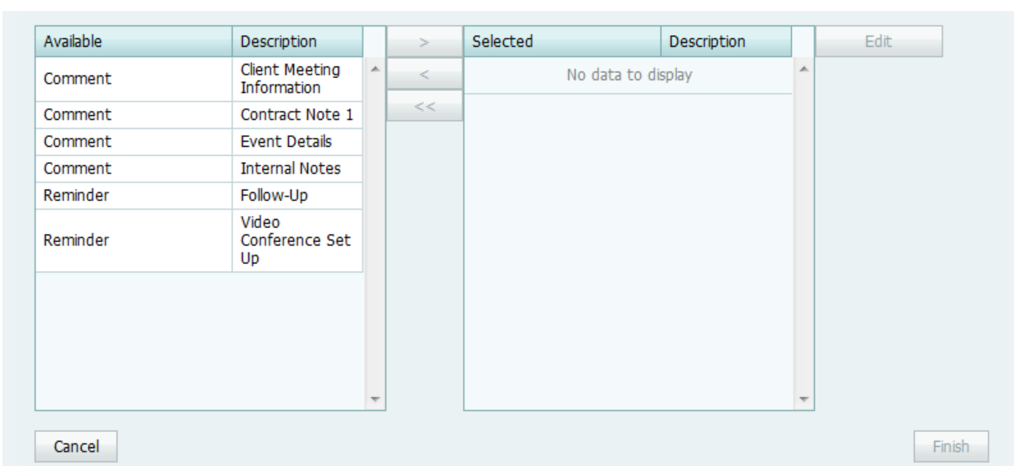
When you add a comment or a reminder to a reservation from the Comments tab or Reminders tab, respectively, then you can add only a single comment or reminder at a time. To add multiple comments or reminders to a reservation in a single step, you must use an option on the context menu for reservations in the Navigator.

When you add multiple reminders and comments to a reservation, your only option is to select from a pre-configured list of comment types and reminder types. To add a user-specified comment type or reminder type, you must add each comment or reminder individually. See *"Working with Comments and Reminders in the Navigator" on page 161.*

To add multiple comments and reminders to a reservation

1. Open the reservation to which you are adding multiple comments and/or reminders in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In the left pane of the Navigator, right-click the reservation, and on the context menu that opens, click Add Reminders and Comments.
   The Add Reminders and Comments page opens. This page lists all the available pre-configured reminder and comment types in the Available list.

Figure 3-80: Add Reminders and Comments page



3. In the Available list, select the comment/reminder type, or CTRL-click to select the multiple comment/reminder types that you are adding to the reservation, and then click the Move (>) button to move the selected comment/reminder types to the Selected list.
4. To enter the text for the selected comment/reminder types, select a comment/reminder type in the Selected list, and then click Edit.

   A Notes dialog box opens in which you can enter the text for the selected comment/reminder type.
5. After you have entered the text for a selected comment/reminder type, click OK to close the Notes dialog box and return to the Add Reminders and Comments page.
6. Repeat Step 4 and Step 5 for each selected comment/reminder type.
7. Click Finish.

   A message opens indicating that the comment/reminder types were added successfully.
8. Click OK to close the message and return to the Navigator.

Working with User Defined Fields in the Navigator

The User Defined Fields tab displays the additional fields that store custom data for a reservation or a booking detail that is a service order. Your EMS administrator configures the types of fields that are available as well as the allowed values for these fields. You can add new fields to a reservation or booking detail, edit the value for a field, and delete fields. You can also view the history for a field.

To work with user-defined fields in the Navigator

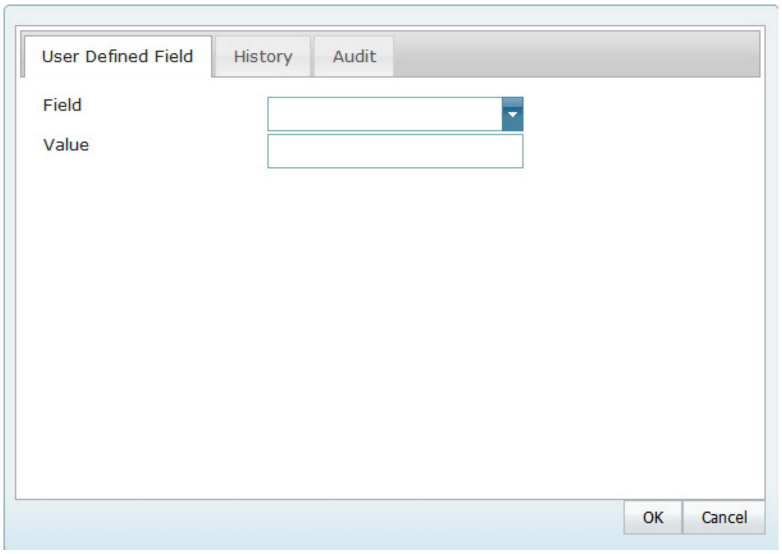
1. Open the reservation in the Navigator. See:
   - “Opening a reservation directly in the Navigator” on page 67.
   - “Opening a reservation through the Reservation Book” on page 68.
   - “Opening a reservation through a group” on page 68.
   - “Search Tools,” on page 177.
2. In the left pane of the Navigator, select the reservation or booking detail (remember, the booking detail must be a service order), and then in the right pane of the Navigator, open the User Defined Fields tab.
3. Continue to one of the following:
   - “To add a user-defined field” on page 168.
   - “To edit a user-defined field” on page 168.
   - “To delete a user-defined field” on page 169.
   - “To the view history for a user-defined field” on page 169.

To add a user-defined field

1. Click New.

   The User Defined Field dialog box opens.

Figure 3-81: User Defined Field dialog box



2. On the Field dropdown list, select the type of field that you are adding.
3. In the Value field, if applicable, leave the default value as-is; otherwise, modify the default value or enter a value for the field.
4. Click OK.

   The User Defined Field dialog box closes. The field is added to the reservation and the User Defined Fields tab remains open.

To edit a user-defined field

1. Select that user defined field that you are editing, and then click Edit.

   The User Defined Field dialog box opens. The field type and field value are displayed in the dialog box.
2. Modify the field type, field value, or both as needed.
3. Click OK.

   The User Defined Field dialog box closes. The modified field is saved for the reservation or booking detail and the User Defined Fields tab remains open.

To delete a user-defined field

1. Select the user-defined field that you are deleting, and then click Delete.

   A message opens asking you if it is OK to delete the selected field.

2. Click OK.

   The selected field is deleted. The User Defined Fields tab remains open.

To the view history for a user-defined field

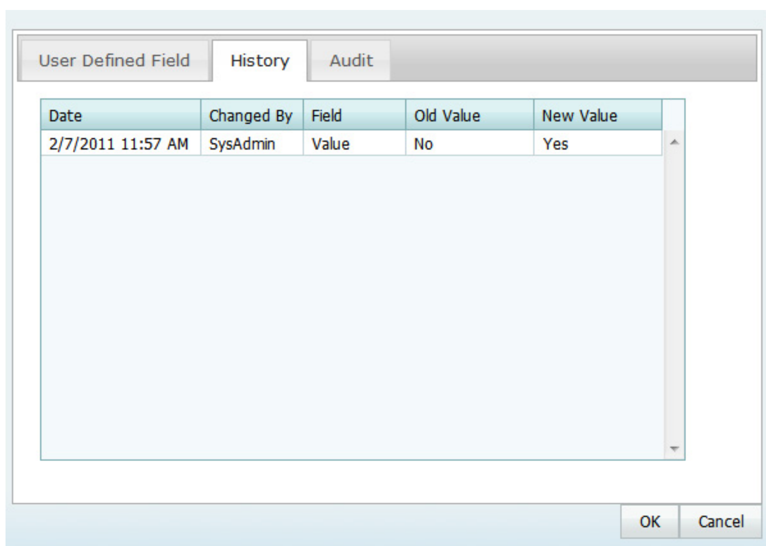
1. Select the user-defined field for which you viewing the history, and then click Edit.

   The User Defined Field dialog box opens. The field type and field value are displayed in the dialog box.

2. Open the History tab.

   The tab displays the following information for each change that was made to the field—the date of the change, the login ID for the user who made the change, and the old and new values for the field.

Figure 3-82: User Defined Field dialog box, History tab



You can use the scroll feature at the bottom on the right side of the dialog box to scroll through all the history for a selected change.

3. Click OK.

   The User Defined Field dialog box closes. The User Defined Fields tab remains open.

Working with Attachments in the Navigator

The term *attachment* is used to describe any file that you can add to or store on a reservation or booking. (Unlike a drawing, which is simply referenced, an attachment is actually stored in the EMS database with the reservation or booking record.) You can also delete an attachment from a booking, and view and edit an attachment.

To work with attachments in the Navigator

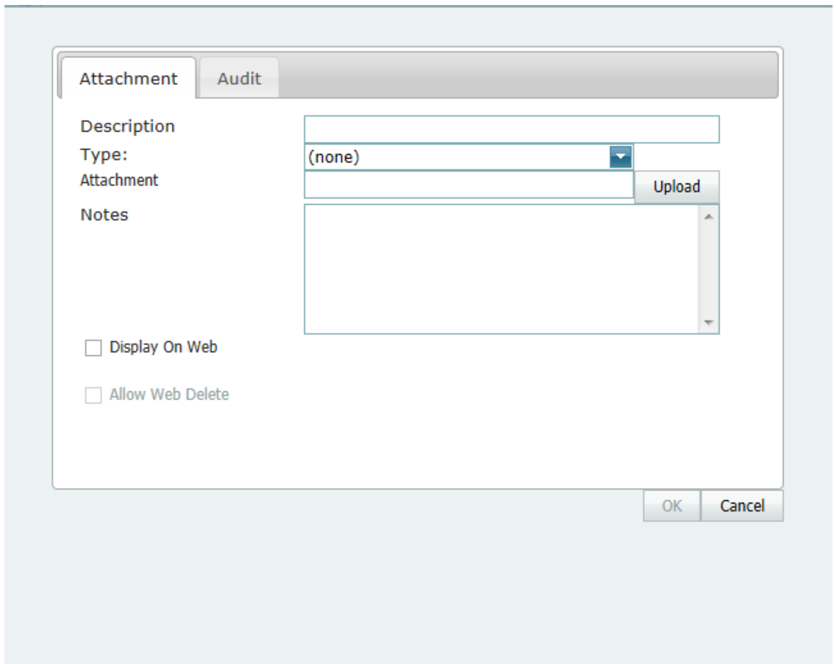
1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In the left pane of the Navigator, select the reservation or expand the folder structure for the reservation until the appropriate booking folder is visible, and then select the booking folder.
3. In the right pane of the Navigator, open the Attachments tab.
4. Continue to one of the following:
   - "To add an attachment to a reservation or booking" on page 171.
   - "To delete an attachment from a reservation or booking" on page 173.
   - "To edit an attachment for a reservation or booking" on page 173.
   - "To view an attachment for a reservation or booking" on page 173.

To add an attachment to a reservation or booking

1. Click New.

   The Attachment dialog box opens.

Figure 3-83: Attachment dialog box



2. Optionally, in the Description field, enter a description for the attachment.

The description can be a maximum of 50 characters, including spaces. If you leave this field blank, then it is automatically populated with the name of the file after you attach it to the reservation or booking.

3. On the Type dropdown list, select the attachment type.
4. Click Upload to open the Attachments dialog box, and then click Attach Files to open the Select File to Upload dialog box and browse to and select the attachment.

   The Select File to Upload dialog box closes.

5. Optionally, do one or more of the following as needed:

   - If the attachment is to be displayed in VEMS when it is attached to a reservation or booking, then select Display on Web.
   - If a VEMS user is to be able to delete this attachment when it is attached to a reservation or booking, then select Allow Web Delete.
   - Enter any pertinent notes for the attachment.

6. Click OK.

   The Attachment dialog box closes. The attachment is added to the booking. The Attachments tab remains open.

To edit an attachment for a reservation or booking

1. Select the attachment that you are editing, and then click Edit.

   The Attachment dialog box opens. The name/description of the attachment is displayed in the Description field. Any notes that have been entered for the attachment are displayed in the Notes field.

2. Do any of the following as needed:

   - Edit the description as needed.

The description can be a maximum of 50 characters, including spaces. If you leave this field blank, then it is automatically populated with the name of the file after you attach it to the reservation or booking.

   - Click Upload to open the Attachments dialog box, and then click Attach Files to open the Select File to Upload dialog box and browse to and select a different attachment.
   - Edit the notes and/or web options.

3. Click OK.

   The Attachment dialog box closes. The Attachments tab remains open.

To delete an attachment from a reservation or booking

1. Select the attachment or CTRL-click to select the multiple attachments that you are deleting from the reservation or booking.
2. Click Delete.

   A message opens asking you if it is OK to delete the selected attachments.

3. Click OK.

   The selected attachments are deleted from the reservation or booking. The Attachments tab remains open.

To view an attachment for a reservation or booking

Your computer must have the appropriate application installed to view attachments of a specific type. For example, to open a .docx that is attached to a booking, Microsoft Word must be installed on your computer.

1. Select the attachment that you want to view.

2. Click View.

   A File Download dialog box opens asking you if you want to open the file or save the file.

3. Do one of the following:

   - To open the file immediately, click Open.
   - To save the file, and then open it at a later date, click Save, and the in the Save As dialog box that opens, specify the file name and the location in which to save the file.

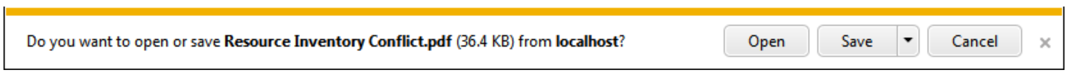
4. Optionally, if the application in which you open the attachment allows it, edit the attachment as needed, and then save the attachment.

   The next time you open the attachment in the Navigator, you can see the changes that you made.

Running the Resource Utility Conflicts Tool

Resource conflicts can occur if bookings for the same date and time require the same resource, and insufficient quantities of the resource to accommodate all the bookings. When you reserve any resource for which the inventory is maintained (for example, equipment, personnel, and so on), EMS checks the available quantity and *automatically* notifies you in an Inventory Conflict message if there is insufficient quantities of the selected resource to accommodate your event.

Figure 3-84: Inventory Conflict message



You have the option of dismissing this message and over-committing the resource; however, although you are aware that the resource has been over-committed, other users will not necessarily be aware of this fact. If you need to confirm that an over-commitment of resources does not exist *for a single reservation*, then you can manually run the Resource Inventory Conflicts tool from the Navigator to generate a report that lists the resources that are in conflict by booking for the reservation.

To confirm that an over-commitment of resources does not exist across multiple reservations, run any of the various resource usage reports that are available. See "Statistics reports" in "Generating an EMS Report" on page 291.

To run the Resource Utility Conflicts tool

1. Open the reservation in the Navigator. See "Opening a reservation directly in the Navigator" on page 67.
2. In the Bookings pane, click Tools, and then click Resource Inventory Conflicts.

   A message opens, asking you if you want to open or save the Resource Inventory Conflict.pdf file.
3. Select the option that best fit your working needs.
   - If you click Open, the Resource Inventory Conflict report opens onscreen. You can always indicate a file name and save the file after you view it.
   - If you click Save, you must select the directory in which to save the file.
4. Optionally, edit the booking details for the involved bookings to resolve the conflict.

Search Tools

EMS Web Client has a variety of options available to you for searching for reservations, bookings, service orders, resources, and queries. These options include the Browser, the Web Reservation tool, the Calendar, the Navigator, a Group, the Web Request tool, the Resource Calendar, and the Service Order Management browser.

This chapter covers the following topics:

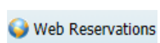
- "Searching with the Browser or with the Web Reservation Tool" on page 179.
- "Searching with the Calendar" on page 187.
- "Searching with the Resource Calendar" on page 196.
- "Searching with the Service Order Management Browser" on page 203.

Remember, a fast way to view and edit bookings is through the Reservation Book. See "Viewing and Editing Reservations in the Reservation Book" on page 50.

For information about searching with the Navigator, see , "The Navigator," on page 65. For information about searching for reservations by group, see "Working with Reservations for a Group" on page 271.For information about searching with the Web Request tool, see , "EMS Dashboard," on page 207.

Searching with the Browser or with the Web Reservation Tool

You can use the Browser to search for reservations, bookings, service orders, resources, web and reservations. The results are displayed in a list view. When you carry out a search in the Browser, you can carry out a *basic search* or an *advanced search*. A *basic search* is based on the basic information that you specify for a reservation when you first create it, such as the starting date, the end date, the group for which the event was scheduled, the group contact name, and so on. An *advanced search* is a field level search that is carried out at the reservation level, the booking level, the booking detail level, the booking detail item level, the service order level, or any combination of these. For example, in an advanced search, you can specify criteria as granular as who added a specific booking detail item.

A web reservation is any reservation that a user has submitted through VEMS. The Web Reservation searching tool is identical to the Browser searching tool with one exception—when the Browser opens for the first time, the Browse for function is set to Reservations whereas the Web Reservation tool is set to Web Reservations. As a result, although this section is written from the perspective of using the Browser, all the information can be applied when using the Web Reservation searching tool. To open the Web Reservation searching took, click the Web Reservations icon 

on the EMS Web Client toolbar.

To carry out a search in the Browser

1. On the EMS toolbar, click the Browser icon 

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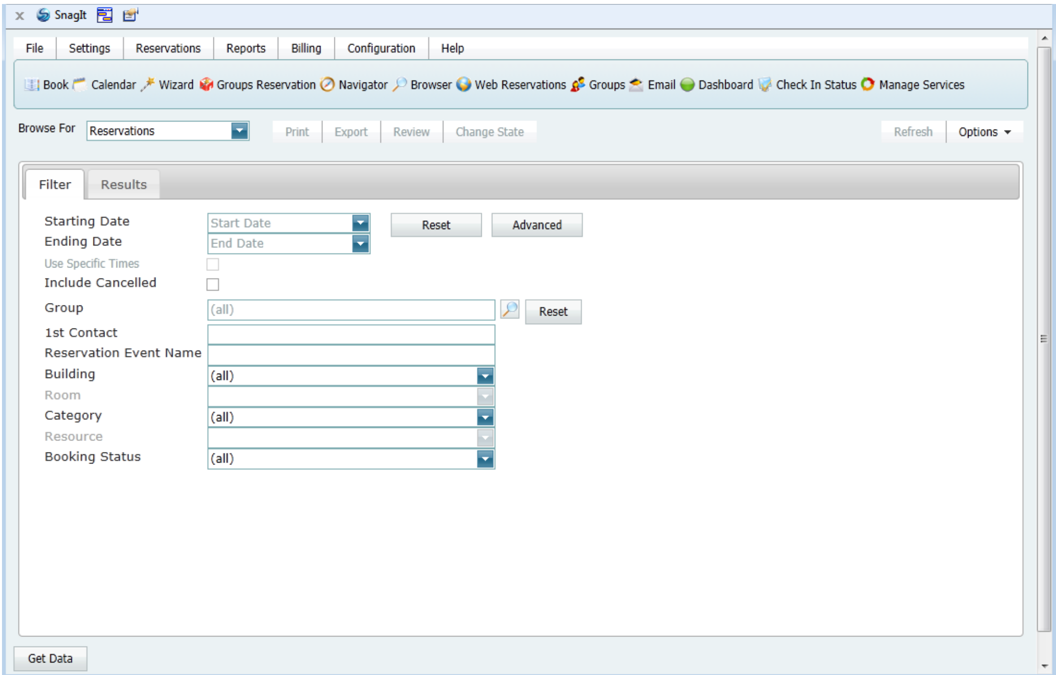
   By default, the *first* time that the Browser page opens, the Filter tab is set to a Basic search; otherwise, the Filter tab is set to the search type (Basic or Advanced) that you last carried out. See Figure 4-1 on page 180.

Figure 4-1: Browser page, Basic search options



2. Click the Basic/Advanced toggle to select the type of search that is to be carried out, and then continue to one of the following:
   - "To carry out a basic search in the Browser" below.
   - "To carry out an advanced search in the Browser" on page 183.

To carry out a basic search in the Browser

1. On the Browse For dropdown list, select the item for which to search.
2. Enter the search criteria.

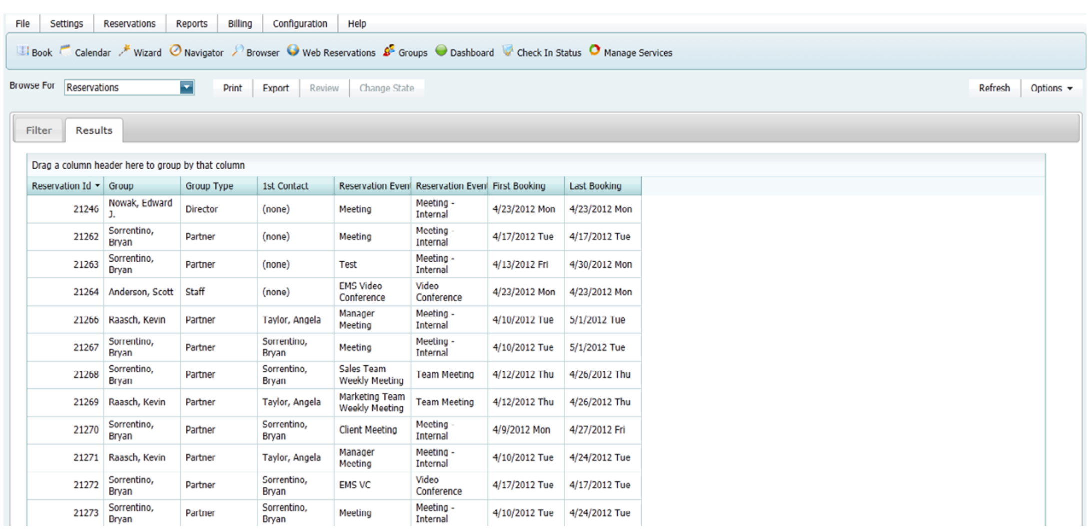
Field	Description
• Starting Time • Ending Time	Both are optional.
Use Specific Times	Available only if the Starting Date is the same as the Ending Date.
Include Cancelled	By default, search results are not set to show canceled reservations. Select this option to search for canceled reservations as well.
Group	If the pre-defined list of groups is too extensive to scroll, then click the Search icon to open the Groups page and search for a specific group. See "To search for a group and/or contact" on page 231.

Field	Description
• 1st Contact • Event Name	Enter a search string by which to filter your search. The string is not case-sensitive, but your search is limited to the exact order of characters in the string and it must begin with the information for which you are searching. For example, a search string of **ed** returns **Ed**, **Ed**ward, **Ed**die, and so on, but not Ted or Fred.
Building	The default value is set to (all). You can leave this value as is, or you can select a specific building, area, or view.
Building/Room	• If you select a specific building, then (all) rooms in the building are selected by default. You can select a specific room in the building. • If you select an area, then you can select a specific building that is contained in the area. • If you select a view, then Room is left blank; however, you can select a specific room to search.
Category	The default value is set to (all). You can leave this value as is, or you can select a specific category (booking detail).
Resource	Available only if you select a category that is a resource or service order. The default value is set to (all). You can leave this value as is, or you can select a specific resource item.
Booking Status	The default value is set to (all). You can leave this value as is, or you can select a specific booking status.

3. Optionally, click Options and edit the default values for one or more additional search options—Date/Time Filter, Number of Records to Return, When Filtering By Specific Room, and Show Service Order Items.
4. Click Get Data or Refresh.

   The search results are displayed on the Results tab.

Figure 4-2: Browser page, Results tab



5. Optionally, do one or more of the following:

   - The Results tab is an EMS Browser page. See “An EMS Browser Page” on page 25 for all the features that are available for this tab.
   - Double-click an event entry on the Results tab to open the event in the Navigator.
   - Click Print to open a message that asks you if you want to open or save the .pdf file, for example, Reservations.pdf for the Reservation view. Select the option that best fit your working needs.
     - If you click Open, the file opens onscreen. You can always specify a different file name and save the file after you view it.
     - If you click Save, you must select a directory in which to save the file.
   - Click Export to export the search results to a Microsoft Excel spreadsheet.

     A message opens, asking you if you want to print or save the .xls file, for example, the Reservations.xls file for the Reservation view. Select the option that best fit your working needs.
     - If you click Open, the file opens onscreen. You can always specify a different file name and save the file after you view it.
     - If you click Save, you must select the directory in which to save the file.
   - In the Service Orders view, to mark a service order as Reviewed, select the service order, or CTRL-click to select multiple service orders, and then click Review > Mark as Reviewed. Conversely, to mark a service order as Unreviewed, click Review > Mark as Unreviewed.
   - In the Service Orders view, to change the state of a service order in a booking, select the appropriate booking in the Results list, or CTRL-click to select multiple service orders *of the same category,* and then click Change State. A Change State dialog box opens. The dialog box lists all the available states for the service order. Select the new state for the service order on the State dropdown list.

If the selected category does not use States, then a message opens indicating this. For more information about reviewing service orders and selecting states, see “Searching with the Service Order Management Browser” on page 203.

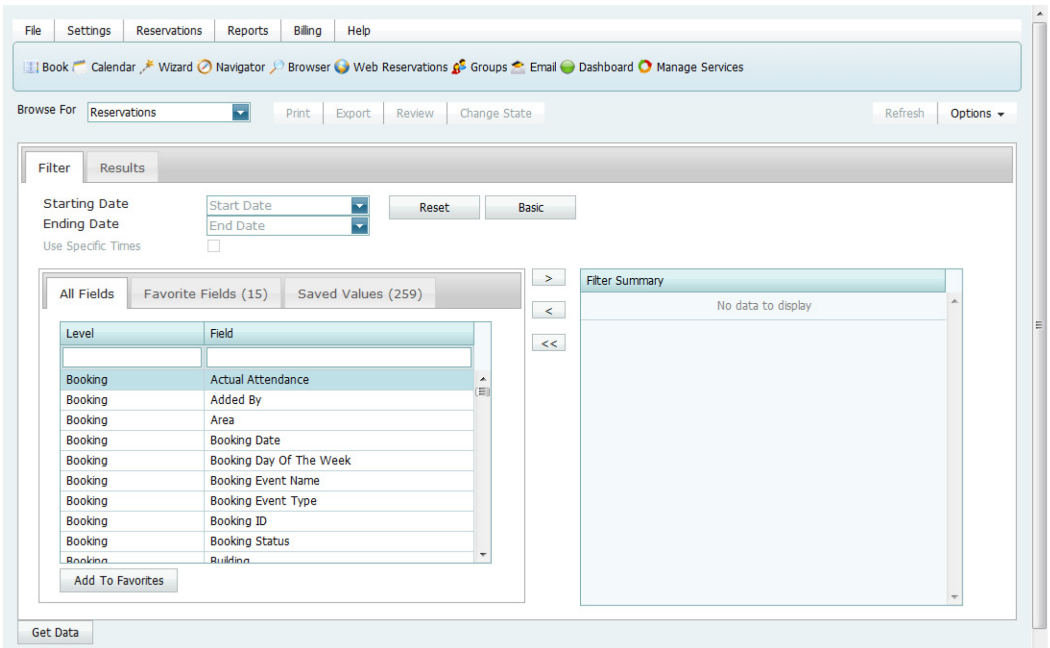
   - In the Browse For field, select a different item to search for. The Results tab is refreshed with the search results based on the item that you selected *and* the search criteria on the Filter tab.
   - Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
   - Click Refresh to requery the database based on the current search criteria.

6. Click Close.

   Any changes that you made to the search results columns (position, sort order, and so on) are reset to their default values after you click Refresh or carry out a new search.

To carry out an advanced search in the Browser

Figure 4-3: Browser page, Advanced search options



1. On the Browse For dropdown list, select the item for which to search.
2. Optionally, enter a Starting Date, an Ending Date, or both.
3. Optionally, if the Starting Date and the Ending Date are the same, select Use Specific Times and enter specific time periods to search.

Use Specific Times is available only if the Starting Date is the same as the Ending Date.

4. For *each* field level option by which to carry out the search:
   - Select the field level option, and then click the Move button (>).

To filter the list of available fields, in the Level Search field and/or the Field Search field, enter a search string. Your search is limited to the exact order of the characters in the string, but the search string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of ***add*** *returns* ***Add****ed by, Date* ***Add****ed, and Group* ***Add****ress Line 1. The list of fields that meet all your search criteria is dynamically updated as you enter the criteria.*

   - When prompted, enter a value or define the limits for the option, and then click OK.

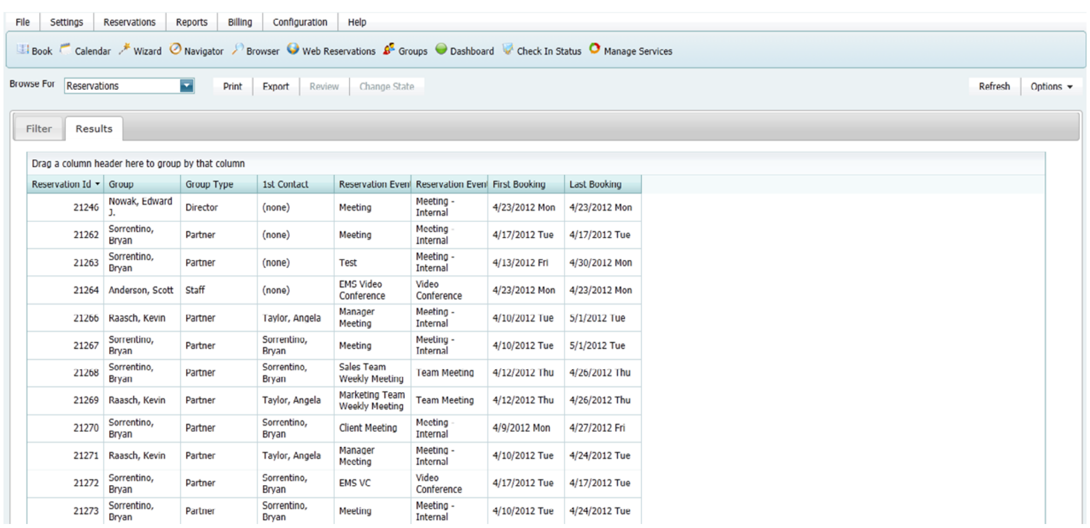
   The option is moved to the Filter Summary list.

If you have specific fields and/or values by which you always want to carry out a search, then you can set up these fields to be your Favorite fields. See *"To set up favorite fields for a Browser search" on page 186.*

5. Optionally, click Options and edit the default values for one or more additional search options—Date/Time Filter, Number of Records to Return, When Filtering By Specific Room, and Show Service Order Items.
6. Click Get Data or Refresh.

   The search results are displayed on the Results tab.

Figure 4-4: Browser page, Results tab



7. Optionally, do one or more of the following:

    - The Results tab is an EMS browser page. See “An EMS Browser Page” on page 25 for all the features that are available for this tab.
    - Double-click an event entry on the Results tab to open the event in the Navigator.
    - Click Print to open a message that asks you if you want to open or save the .pdf file, for example, Reservations.pdf for the Reservation view. Select the option that best fit your working needs.
        - If you click Open, the file opens onscreen. You can always specify a different file name and save the file after you view it.
        - If you click Save, you must select a directory in which to save the file.
    - Click Export to export the search results to a Microsoft Excel spreadsheet.

      A message opens, asking you if you want to print or save the .xls file, for example, the Reservations.xls file for the Reservation view. Select the option that best fit your working needs.
        - If you click Open, the file opens onscreen. You can always specify a different file name and save the file after you view it.
        - If you click Save, you must select the directory in which to save the file.
    - In the Service Orders view, to mark a service order as Reviewed, select the service order, or CTRL-click to select multiple service orders, and then click Review > Mark as Reviewed. Conversely, to mark a service order as Unreviewed, click Review > Mark as Unreviewed.
    - In the Service Orders view, to change the state of a service order in a booking, select the appropriate booking in the Results list, or CTRL-click to select multiple service orders *of the same category*, and then click Change State. A Change State dialog box opens. The dialog box lists all the available states for the service order. Select the new state for the service order on the State dropdown list.

If the selected category does not use States, then a message opens indicating this. For more information about reviewing service orders and selecting states, see “Searching with the Service Order Management Browser” on page 203.

    - In the Browse For field, select a different item to search for. The Results tab is refreshed with the search results based on the item that you selected *and* the search criteria on the Filter tab.
    - Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
    - Click Refresh to requery the database based on the current search criteria.

8. Click Close.

   Any changes that you made to the search results columns (position, sort order, and so on) are reset to their default values after you click Refresh or carry out a new search.

To set up favorite fields for a Browser search

If you have specific fields and/or values by which you always want to carry out a Browser search, you do not have to filter the list of fields on the All Fields tab for every search. Instead, you can set up each of these fields to be a favorite field with a specific value or limit if needed.

1. Open the Browser, and make sure that the Advanced search features are displayed.
2. For each field that you are setting up as favorite field, select the field on the All Fields tab, and then click Add to Favorites.

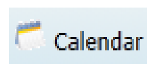
   The field is added to the Favorite Fields tab.
3. Optionally, after you define a value or define the limits for a field, click Save Value on the Filter dialog box.

   The next time that you carry out a search, you can simply open the Favorite Fields tab or the Saved Values tab to carry out a search based on your customized list of search fields.

Searching with the Calendar

You use the Calendar to search for reservations, bookings, and service orders in your EMS Web Client database. The results are displayed in a calendar view. When you carry out a search in the Calendar, you can carry out a *basic search* or an *advanced search*. A *basic search* is based on the basic information that you specify for a reservation when you first create it, such as the starting time, the end time, the group for which the event was scheduled, the group contact name, and so on. An *advanced search* is a field level search that is carried out at the reservation level, the booking level, the booking detail level, the booking detail item level, or any combination of these. For example, in an advanced search, you can specify criteria as granular as who added a specific booking detail item.

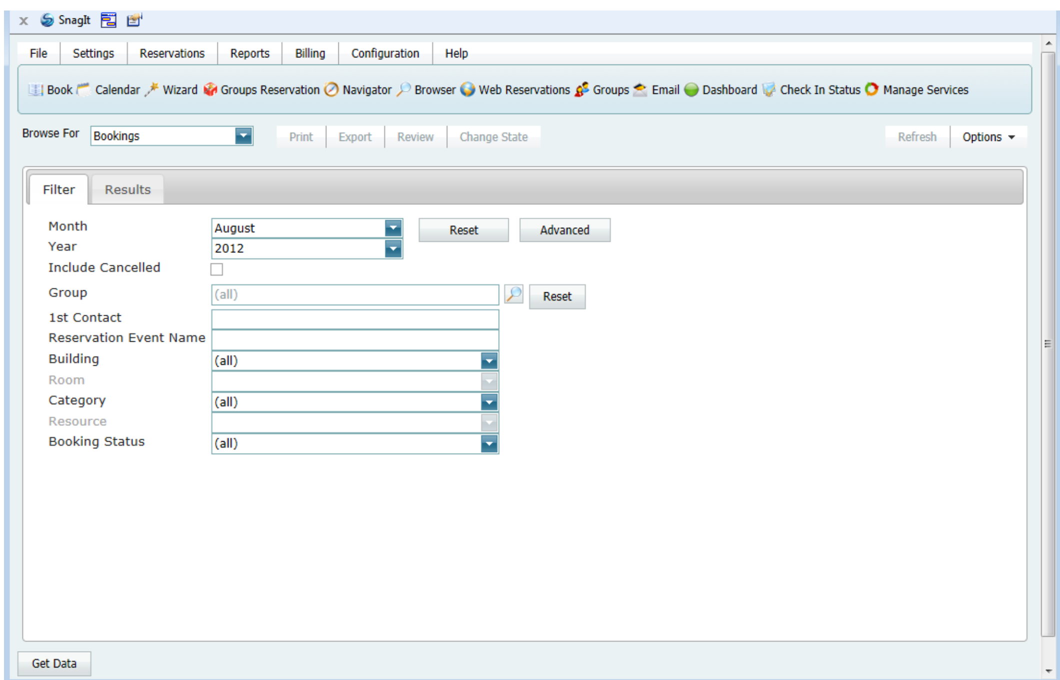
To carry out a search in the Calendar

1. On the EMS toolbar, click the Calendar icon 

.

   The Calendar page opens. By default, the *first* time that the Calendar page opens, the Filter tab is set to a Basic search and the Month and Year fields are set to the current month and year; otherwise, the Filter tab is set to the search type (Basic or Advanced) that you last carried out.

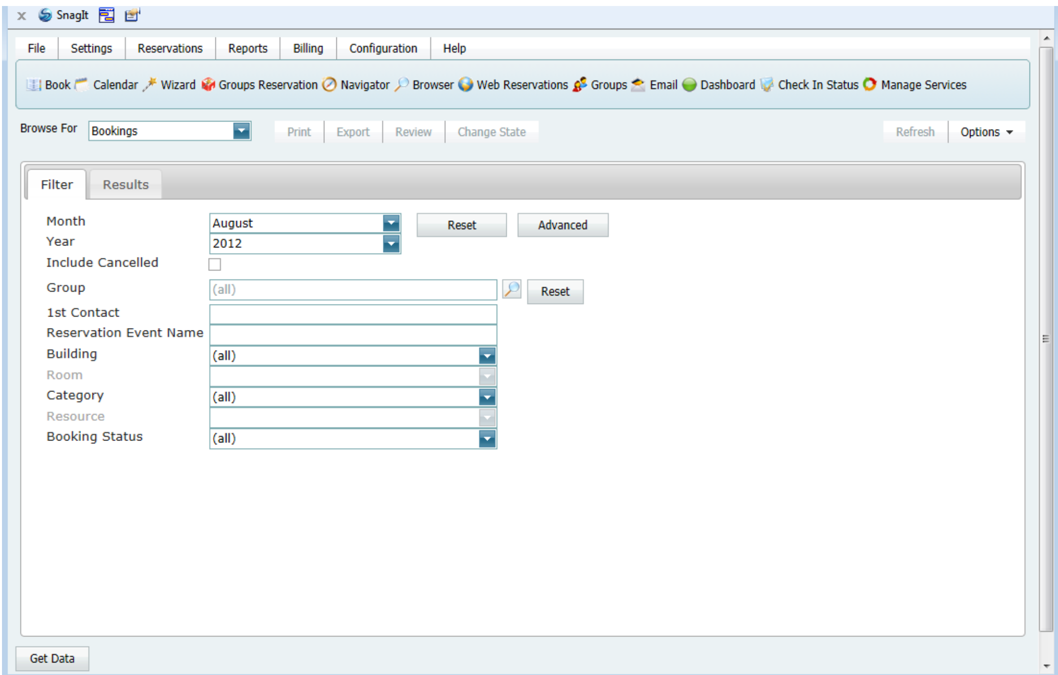
Figure 4-5: Calendar page, Filter tab



2. Click the Basic/Advanced toggle to select the type of search that you want to carry out and then continue to one of the following:
   - "To carry out a basic search in the Calendar."
   - "To carry out an advanced search in the Calendar" on page 192.

To carry out a basic search in the Calendar

Figure 4-6: Calendar page, Filter tab with Basic search options



1. On the Browse For dropdown list, select the item for which to search.
2. Enter the search criteria.

Field	Description
Month Year	The default value is the current month and year, but you can change one or both of these values if needed.
Include Cancelled	By default, search results are not set to show canceled bookings. Select this option if you want to search for canceled bookings as well.
Group	If the pre-defined list of groups is too extensive to scroll, then click the Search icon to open the Groups page and search for a specific group. See "To search for a group and/or contact" on page 231.
• 1st Contact • Event Name	Enter a search string by which to filter your search. The search is not case-sensitive, but your search is limited to the exact order of characters in the string and it must begin with the information for which you are searching. For example, a search string of **ed** returns include **Ed**, **Ed**ward, **Ed**die, and so on, but not Ted or Fred.

Field	Description
Building	The default value is set to (all). You can leave this value as is, or you can select a specific building, area, or view.
Building/Room	• If you select a specific building, then (all) rooms in the building are selected by default. You can select a specific room in the building. • If you select an area, then you can select a specific building that is contained in the area. • If you select a view, then Room is left blank; however, you can select a specific room to search.
Category	The default value is set to (all). You can leave this value as is, or you can select a specific category (booking detail).
Resource	Available only if you select a category that is a resource or service order. The default value is set to (all). You can leave this value as is, or you can select a specific resource item.
Booking Status	The default value is set to (all). You can leave this value as is, or you can select a specific booking status.

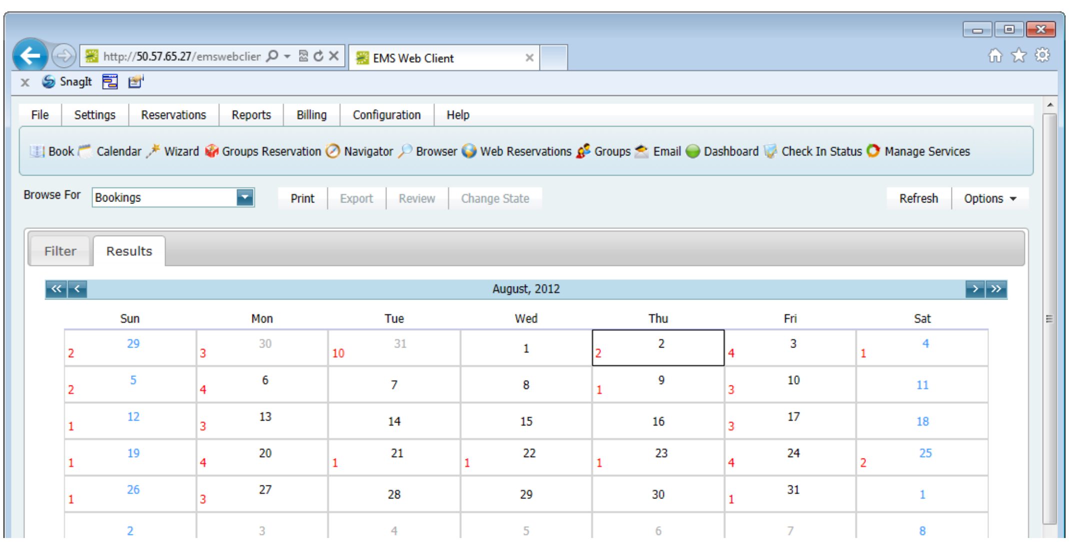
3. Optionally, click Options and edit the default values for one or more additional search options—Date/Time Filter, Number of Records to Return, Get Data When Calendar Opens, When Filtering By Specific Room, and Change Calendar Day Count Color.

4. Click Get Data or Refresh.

   The search results are displayed on the Results tab in a calendar view. The number of bookings that meet the search criteria is indicated on the dates on which the events occur. The current day's date is outlined in black.

By default, the number of bookings is indicated in red unless you selected a different color for the Change Calendar Day Count Color. Any color that you pick here is carried over to the same option for the Resource Calendar.

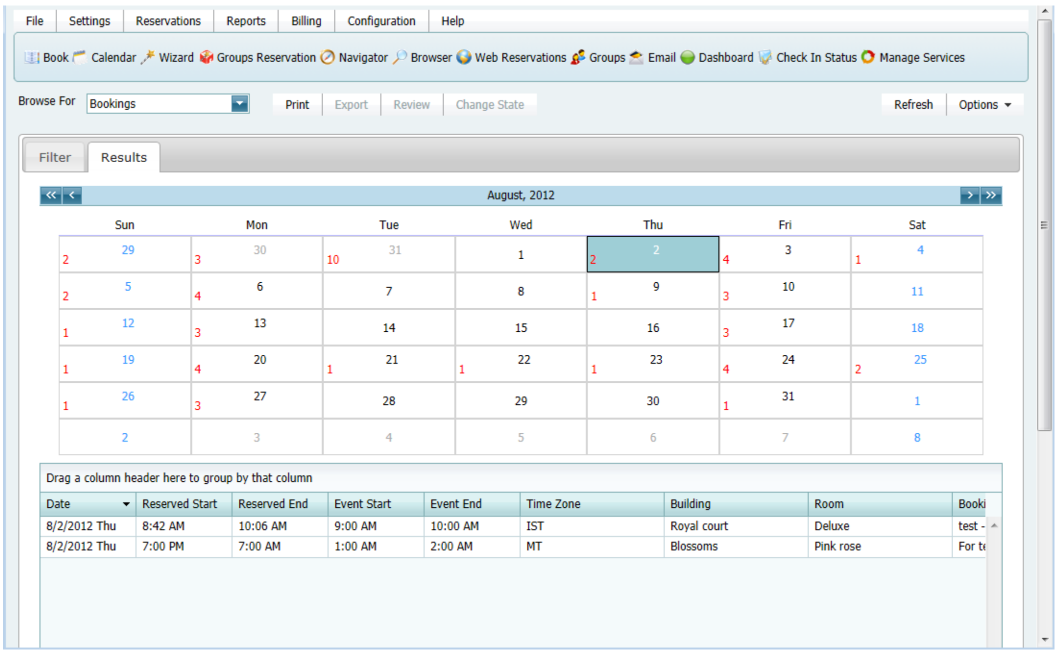
Figure 4-7: Calendar page, Results tab



5. Optionally, do one or more of the following:

   - Click on a date in the upper pane of the Results tab to view a list of bookings for the date in the lower pane of the tab.

Figure 4-8: Calendar page, Results tab with list of events for selected dates



   - The lower pane on the Results tab is an EMS Browser page. See "An EMS Browser Page" on page 25 for all the features that are available for this tab.
   - Double-click the event entry on the Results tab to open an event in the Navigator.
   - Click Print to open a message that asks you if you want to open or save the .pdf file, for example, Reservations.pdf for the Reservation view. Select the option that best fit your working needs.
     - If you click Open, the file opens onscreen. You can always specify a different file name and save the file after you view it.
     - If you click Save, you must select a directory in which to save the file.
   - Click Export to export the search results to a Microsoft Excel spreadsheet.

     A message opens, asking you if you want to print or save the .xls file, for example, the Reservations.xls file for the Reservation view. Select the option that best fit your working needs.

     - If you click Open, the file opens onscreen. You can always specify a different file name and save the file after you view it.
     - If you click Save, you must select the directory in which to save the file.

- In the Service Orders view, to mark a service order as Reviewed, select the service order, or CTRL-click to select multiple service orders, and then click Review > Mark as Reviewed. Conversely, to mark a service order as Unreviewed, click Review > Mark as Unreviewed.
- In the Service Orders view, to change the state of a service order in a booking, select the appropriate booking in the Results list, or CTRL-click to select multiple service orders *of the same category*, and then click Change State. A Change State dialog box opens. The dialog box lists all the available states for the service order. Select the new state for the service order on the State dropdown list.

If the selected category does not use States, then a message opens indicating this. For more information about reviewing service orders and selecting states, see *"Searching with the Service Order Management Browser" on page 203.*

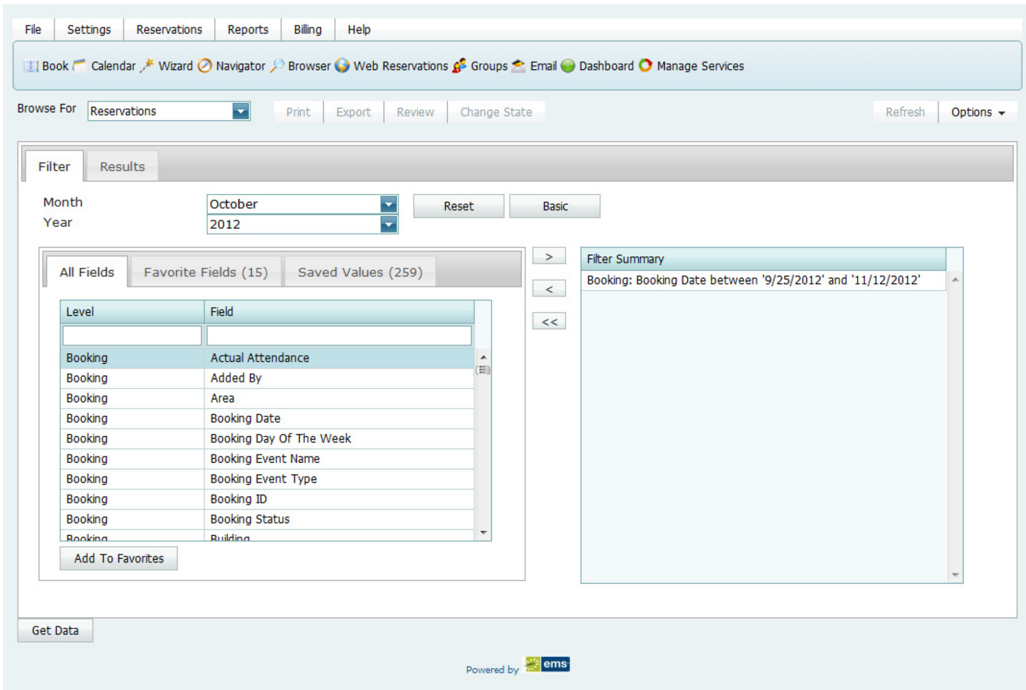
- In the Browse For field, select a different item to search for. The Results tab is refreshed with the search results based on the item that you selected *and* the search criteria on the Filter tab.
- Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
- Click Refresh to requery the database based on the current search criteria.

6. Click Close.

   Any changes that you made to the search results columns (position, sort order, and so on) are reset to their default values after you click Refresh or carry out a new search.

To carry out an advanced search in the Calendar

Figure 4-9: Calendar page, Advanced search options



1. On the Browse For dropdown list, select the item for which to search.
2. Leave the Month and Year set to the default values (current month and year), or optionally, enter different values as needed.
3. Optionally, click Options and edit the default values for one or more additional search options—Date/Time Filter, Number of Records to Return, Get Data When Calendar Opens, When Filtering By Specific Room, and Change Calendar Day Count Color.
4. For *each* field level option by which to carry out the search:
   - Select the field level option, and then click the Move button (>).

To filter the list of available fields, in the Level Search field and/or the Field Search field, enter a search string. Your search is limited to the exact order of the characters in the string, but the search string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of ***add*** *returns* ***Add****ed by, Date* ***Add****ed, and Group* ***Add****ress Line 1. The list of fields that meet all your search criteria is dynamically updated as you enter the criteria.*

   - When prompted, enter a value or define the limits for the option, and then click OK.

   The option is moved to the Filter Summary list.

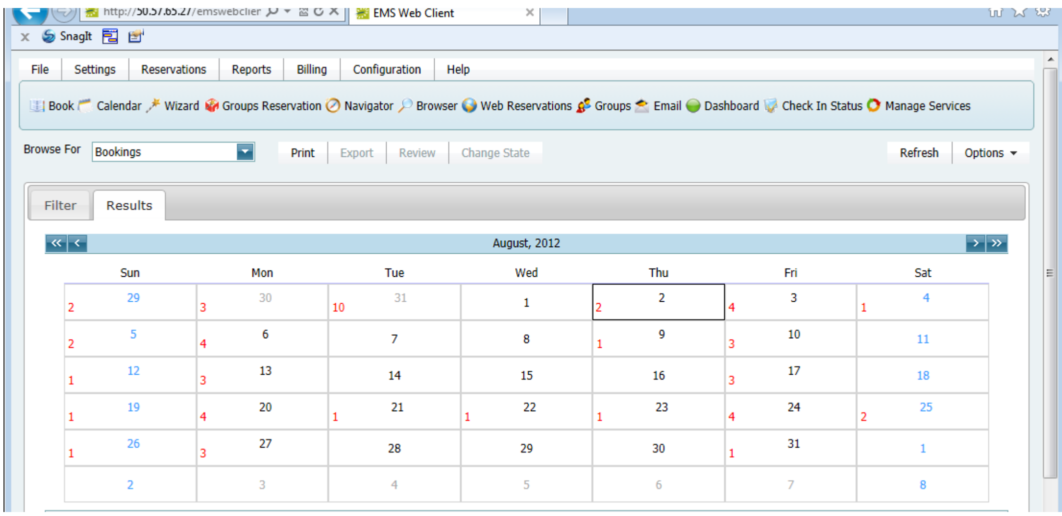
If you have specific fields and/or values by which you always want to carry out a search, then you can set up these fields to be your Favorite fields. See *"To set up favorite fields for a Calendar search" on page 195.*

5. Click Get Data or Refresh.

   The search results are displayed on the Results tab in a calendar view. The number of bookings that meet the search criteria is indicated on the dates on which the events occur. The current day's date is outlined in black.

By default, the number of bookings is indicated in red unless you selected a different color for the Change Calendar Day Count Color.

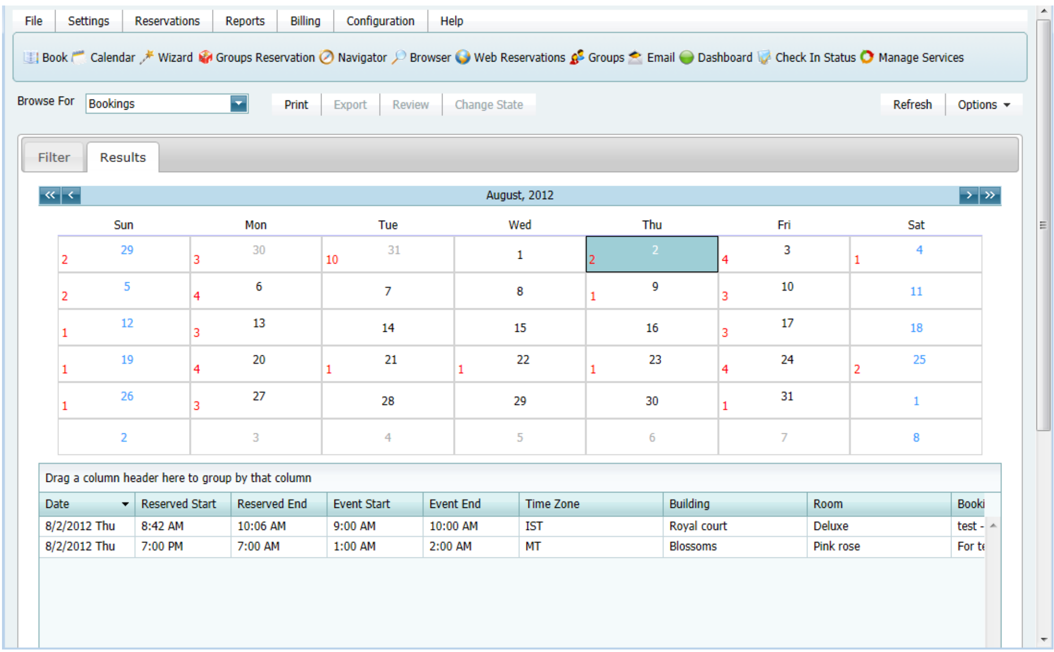
Figure 4-10: Calendar page, Results tab



6. Optionally, do one or more of the following:

   - Click on a date in the upper pane of the Results tab to view a list of bookings for the date in the lower pane of the tab.

Figure 4-11: Calendar page, Results tab with list of events for selected dates



   - The lower pane on the Results tab is an EMS Browser page. See "An EMS Browser Page" on page 25 for all the features that are available for this tab.

   - To open an event in the Navigator, double-click the event entry on the Results tab.

   - Click Print to open a message that asks you if you want to open or save the .pdf file, for example, Reservations.pdf for the Reservation view. Select the option that best fit your working needs.

     - If you click Open, the file opens onscreen. You can always specify a different file name and save the file after you view it.

     - If you click Save, you must select a directory in which to save the file.

   - Click Export to export the search results to a Microsoft Excel spreadsheet.

     A message opens, asking you if you want to print or save the .xls file, for example, the Reservations.xls file for the Reservation view. Select the option that best fit your working needs.

     - If you click Open, the file opens onscreen. You can always specify a different file name and save the file after you view it.

     - If you click Save, you must select the directory in which to save the file.

- In the Service Orders view, to mark a service order as Reviewed, select the service order, or CTRL-click to select multiple service orders, and then click Review > Mark as Reviewed. Conversely, to mark a service order as Unreviewed, click Review > Mark as Unreviewed.
- In the Service Orders view, to change the state of a service order in a booking, select the appropriate booking in the Results list, or CTRL-click to select multiple service orders *of the same category*, and then click Change State. A Change State dialog box opens. The dialog box lists all the available states for the service order. Select the new state for the service order on the State dropdown list.

If the selected category does not use States, then a message opens indicating this. For more information about reviewing service orders and selecting states, see *“Searching with the Service Order Management Browser” on page 203.*

- In the Browse For field, select a different item to search for. The Results tab is refreshed with the search results based on the item that you selected *and* the search criteria on the Filter tab.
- Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
- Click Refresh to requery the database based on the current search criteria.

7. Click Close.

   Any changes that you made to the search results columns (position, sort order, and so on) are reset to their default values after you click Refresh or carry out a new search.

To set up favorite fields for a Calendar search

If you have specific fields and/or values by which you always want to carry out a Calendar search, you do not have to filter the list of fields on the All Fields tab for every search. Instead, you can set up each of these fields to be a favorite field with a specific value or limit if needed.

1. Open the Calendar, and make sure that the Advanced search features are displayed.
2. For each field that you are setting up as favorite field, select the field on the All Fields tab, and then click Add to Favorites.

   The field is added to the Favorite Fields tab.
3. Optionally, after you define a value or define the limits for a field, click Save Value on the Filter dialog box.

   The next time that you carry out a search, you can simply open the Favorite Fields tab or the Saved Values tab to carry out a search based on your customized list of search fields.

Searching with the Resource Calendar

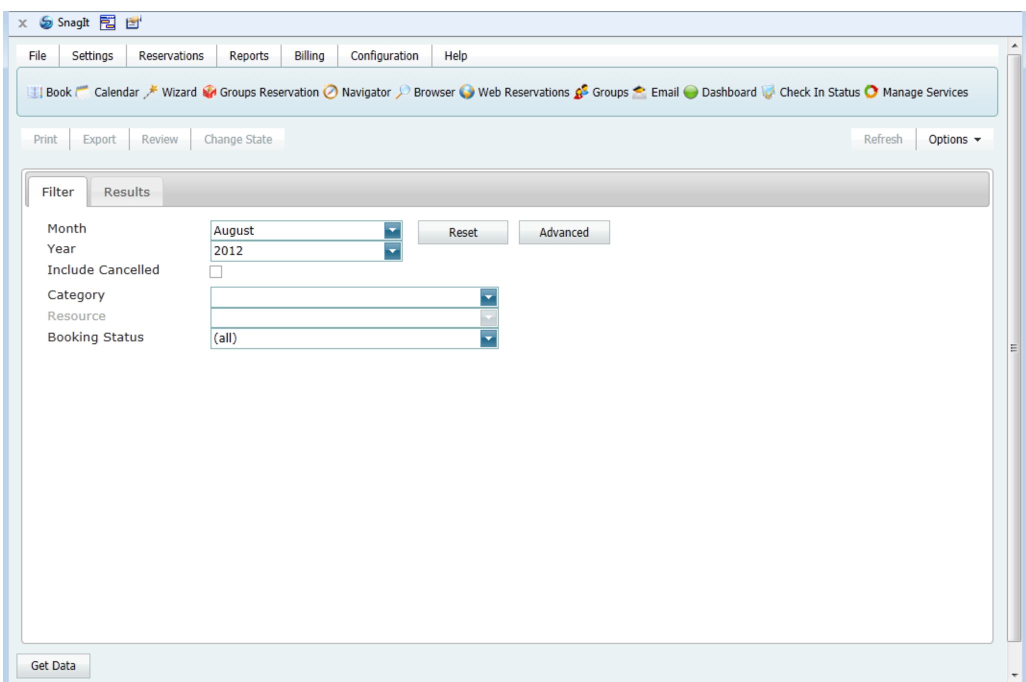
You use the Resource Calendar to search for a particular resource and determine how much of the resource (that is, how many individual items) is needed for a specific day or month in a specific year. For example, how many slices of key lime pie are needed in November, 2012? You can use the results of the search to assist you in managing the counts of the resources that your organization must ensure are available for scheduled events. When you carry out a search in the Resource Calendar, you can carry out a *basic search* or an *advanced search*. A *basic search* is based on the basic information that you specify for a resource item when you first create it, such as its category and status. An *advanced search* is a field level search that is carried out the booking level, the booking detail level, the booking detail item level, the reservation level, the service order level, or any combination of these. For example, in an advanced search, you can specify criteria as granular the date that the service order reminder was added. You can open a resource item that has been returned in the search results in the Navigator, and edit the item if needed.

To carry out a search in the Resource Calendar

1. On the EMS main menu, click Reservations > Reservations > Resource Calendar.

   The *first* time that the Resource Calendar opens, the Filter tab is set by default to a Basic search; otherwise, the Filter tab is set to the search type (Basic or Advanced) that you last carried out.

Figure 4-12: Resource Calendar, Basic search



2. Click the Basic/Advanced toggle to select the type of search that is to be carried out, and then continue to one of the following:

   - "To carry out a basic search in the Resource Calendar" below.
   - "To carry out an advanced search in the Resource Calendar" on page 199.

To carry out a basic search in the Resource Calendar

1. Leave the Month and Year set to the default values (current month and year), or optionally, enter different values as needed.

2. Enter the search criteria.

Field	Description
Include Cancelled	By default, search results are not set to show resource items for canceled reservations. Select this option to search for resource items in canceled reservations as well.
Category	Select a specific category (booking detail).
Resource	Available only if you select a category that is a resource or service order. Select a specific resource item.
Status	The default value is set to (all). You can leave this value as is, or you can select a specific booking status.

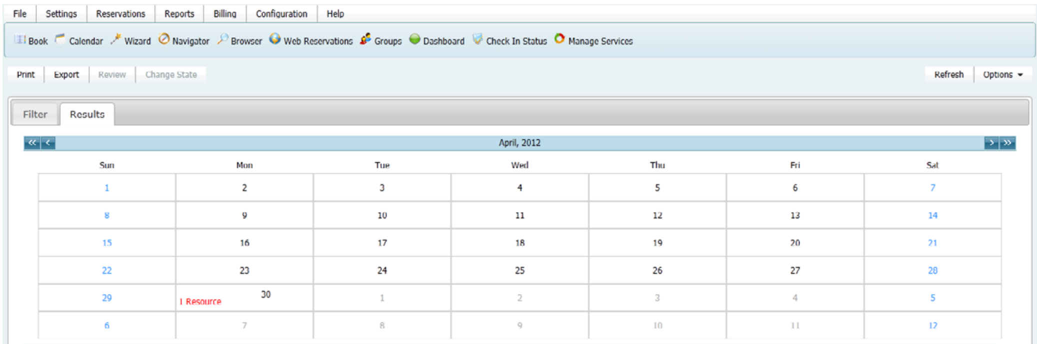
3. Optionally, click Options and edit the default values for one or more additional search options—Date/Time Filter, Number of Records to Return, When Filtering By Specific Room, and Change Calendar Day Count Color.

4. Click Get Data or Refresh.

   The search results are displayed on the Results tab in a calendar view. The *total* number of resources in *all* bookings that meet the search criteria is indicated on the dates on which the events occur. The current day's date is outlined in black. See Figure 4-13 on page 198.

By default, the number of resources is indicated in red unless you selected a different color for the Change Calendar Day Count Color. Any color that you pick here is carried over to the same option for the Calendar.

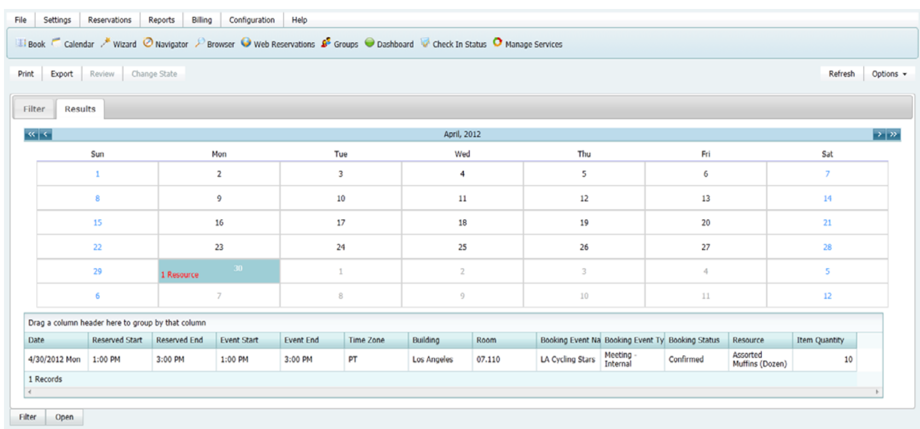
Figure 4-13: Resource Calendar page, Results tab



5. Optionally, do one or more of the following:

   - Click on a date in the upper pane of the Results tab to view a list of bookings for the date in the lower pane of the tab.

Figure 4-14: Resource Calendar page, Results tab with list of events for selected dates



   - The lower pane on the Results tab is an EMS Browser page. See "An EMS Browser Page" on page 25 for all the features that are available for this tab.
   - Double-click an event entry on the Results tab to open the event in the Navigator.
   - Click Print to open a message that asks you if you want to open or save the Resources.pdf file. Select the option that best fit your working needs.
     - If you click Open, the file opens onscreen. You can always specify a different file name and save the file after you view it.
     - If you click Save, you must select a directory in which to save the file.

- Click Export to export the search results to a Microsoft Excel spreadsheet.

  A message opens, asking you if you want to print or save the Resources.xls file. Select the option that best fit your working needs.

  - If you click Open, the file opens onscreen. You can always specify a different file name and save the file after you view it.
  - If you click Save, you must select the directory in which to save the file.

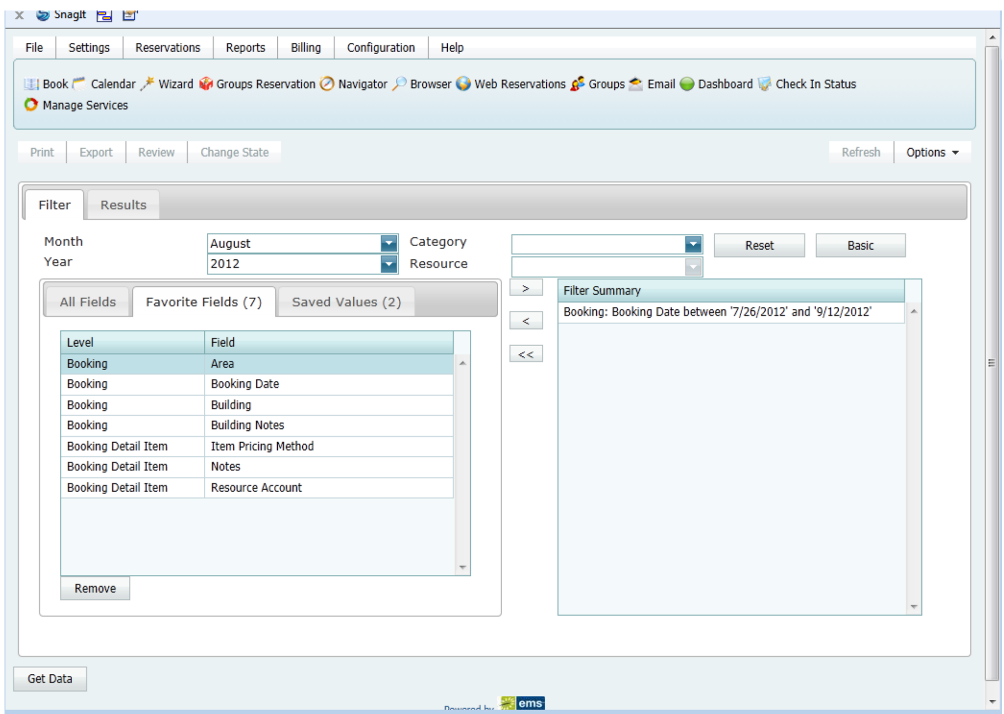
- Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
- Click Refresh to requery the database based on the current search criteria.

6. Click Close.

   Any changes that you made to the search results columns (position, sort order, and so on) are reset to their default values after you click Refresh or carry out a new search.

To carry out an advanced search in the Resource Calendar

Figure 4-15: Resource Calendar, Advanced search



1. Optionally, do one or both of the following:
   - The default values for the month and year are the current month and year. You can enter different values as needed.
   - Click Options and edit the default values for one or more additional search options—Date/Time Filter, Number of Records to Return, When Filtering By Specific Room, and Change Calendar Day Count Color.
2. For *each* field level option by which to carry out the search:
   - Select the field level option, and then click the Move button (>).

To filter the list of available fields, in the Field Search field, enter a search string. Your search is limited to the exact order of the characters in the string, but the search string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of ***add*** *returns* ***Add****ed by, Date* ***Add****ed, and Group* ***Add****ress Line 1. The list of fields that meet your search criteria is dynamically updated as you enter your search criteria.*

   - When prompted, enter a value or define the limits for the option, and then click OK.

   The option is moved to the Filter Summary list.

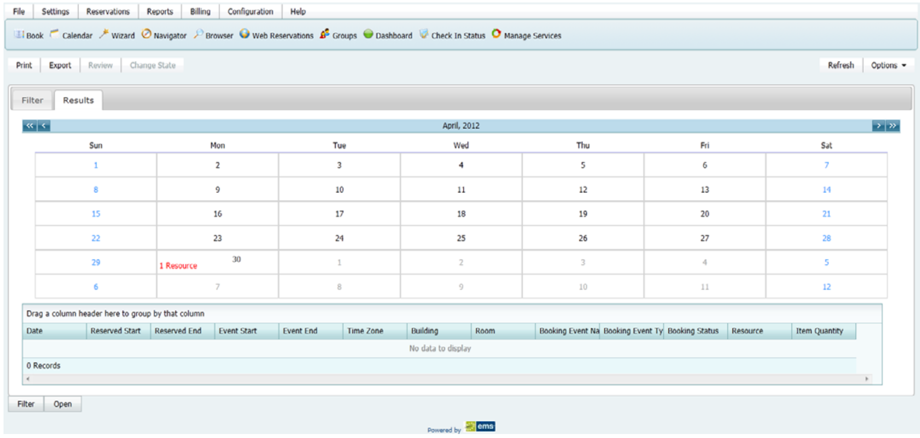
If you have specific fields and/or values by which you always want to carry out a search, then you can set up these fields to be your Favorite fields. See "To set up favorite fields for a Resource Calendar search" on page 202.

3. Click Get Data or Refresh.

   The search results are displayed on the Results tab in a calendar view. The *total* number of resources in *all* bookings that meet the search criteria is indicated on the dates on which the events occur. The current day's date is outlined in black. See Figure 4-16 on page 201.

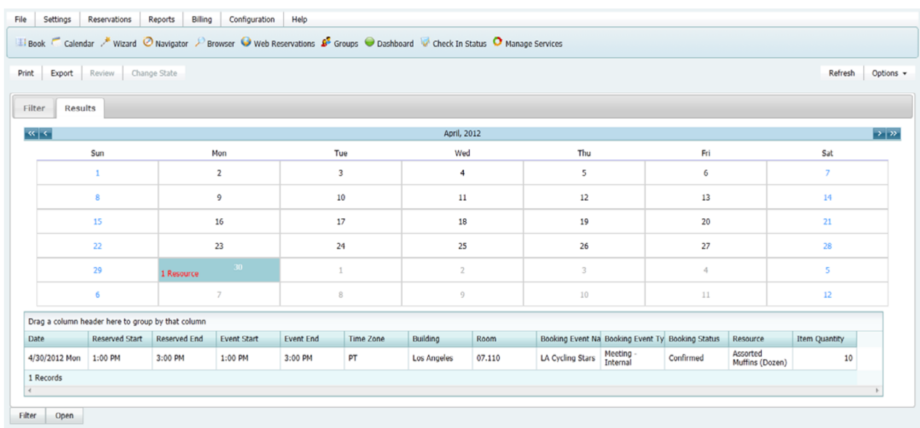
By default, the number of resources is indicated in red unless you selected a different color for the Change Calendar Day Count Color.

Figure 4-16: Resource Calendar, Results tab



4. Optionally, do one or more of the following:
   - Click on a date in the upper pane of the Results tab to view a list of bookings for the date in the lower pane of the tab.

Figure 4-17: Resource Calendar page, Results tab with list of events for selected dates



   - The lower pane on the Results tab is an EMS Browser page. See “An EMS Browser Page” on page 25 for all the features that are available for this tab.
   - Double-click an event entry on the Results tab to open the event in the Navigator.
   - Click Print to open a message that asks you if you want to open or save the Resources.pdf file. Select the option that best fit your working needs.
     - If you click Open, the file opens onscreen. You can always specify a different file name and save the file after you view it.
     - If you click Save, you must select a directory in which to save the file.

- Click Export to export the search results to a Microsoft Excel spreadsheet.

  A message opens, asking you if you want to print or save the Resources.xls file. Select the option that best fit your working needs.

  - If you click Open, the file opens onscreen. You can always specify a different file name and save the file after you view it.
  - If you click Save, you must select the directory in which to save the file.
- Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
- Click Refresh to requery the database based on the current search criteria.

5. Click Close.

   Any changes that you made to the search results columns (position, sort order, and so on) are reset to their default values after you click Refresh or carry out a new search.

To set up favorite fields for a Resource Calendar search

If you have specific fields and/or values by which you always want to carry out a Resource Calendar search, you do not have to filter the list of fields on the All Fields tab for every search. Instead, you can set up each of these fields to be a favorite field with a specific value or limit if needed.

1. Open the Resource Calendar, and make sure that the Advanced search features are displayed.
2. For each field that you are setting up as favorite field, select the field on the All Fields tab, and then click Add to Favorites.

   The field is added to the Favorite Fields tab.
3. Optionally, after you define a value or define the limits for a field, click Save Value on the Filter dialog box.

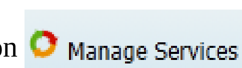
   The next time that you carry out a search, you can simply open the Favorite Fields tab or the Saved Values tab to carry out a search based on your customized list of search fields.

Searching with the Service Order Management Browser

You use the Service Order Management browser to search for and view the resources with and without service orders for all bookings on a particular day as well as the current state of the resources and their Reviewed status. After viewing a resource, if applicable, you can change the state for a resource. You can review a resource, or you can mark a resource as unreviewed. You can also open a resource in the Navigator, and edit it if necessary.

A category state is a process phase, or state, that describes the movement of a resource in the category through your organization's processes, for example, "Unassigned," "Assigned," "Out for Delivery," "In Prep," and so on. Your EMS administrator configures the states that are specific to your organization. Contact your EMS administrator for assistance with states.

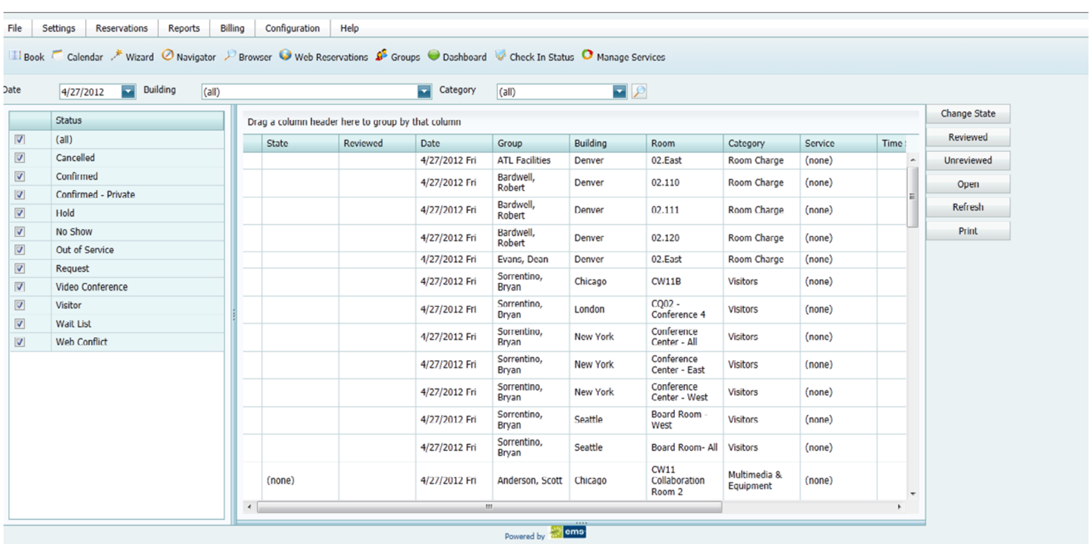
To search with the Service Order Management browser

1. On the EMS toolbar, click the Manage Services icon 

.

   The Service Order Management page opens. When this page first opens, the display is static and you must manually refresh it. To set options for automatically refreshing the page's display, go to Step 2; otherwise, go to Step 4.

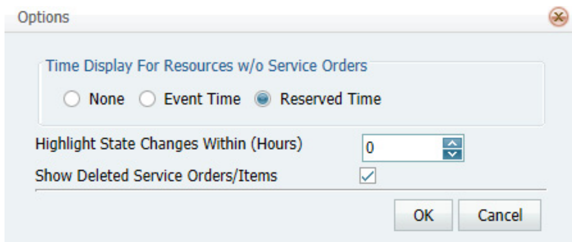
Figure 4-18: Service Order Management page



2. Click Options.

   The Options dialog box opens.

Figure 4-19: Options dialog box



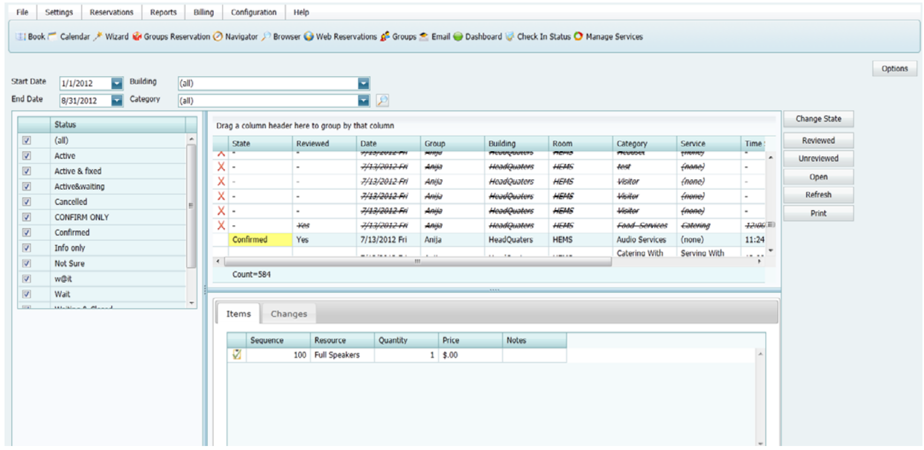
3. Edit the display options as needed for the Manage Services page, and then click OK to apply these changes.
4. To filter the search results, do one or more of the following:
   - Leave the Date set to the default value (the current day's date), or select a different date.
   - On the Building dropdown list, leave the value set to the default value (all buildings), or select a specific building, area, or view.
   - On the Category dropdown list, select the category by which to search.
   - In the Status pane, select one or more specific booking statuses, or select (all) statuses.
5. Click Refresh.

   A list of all bookings that meet your search criteria is displayed in the upper pane of the page.

   - If states are assigned to any of the resources in a booking, then the name of the state and if applicable, its color, is displayed in the State column for the booking. If a resource for a booking is of the type to which states can be assigned, but none has been assigned, then (none) is displayed in the State column for the booking.
   - If a resource has been reviewed for a booking, then "Yes" is displayed in the Reviewed column for the booking.
   - If your Options are set to show deleted service orders/items, then an "x" appears next to the booking for which the orders/items were deleted and a single line through the booking is displayed.

   See Figure 4-20 on page 205.

Figure 4-20: Service Order Management page with results

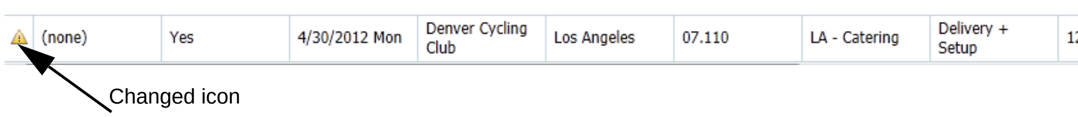


6. Optionally, do one or more of the following:

   - The upper pane on the Service Order Management page is an EMS Browser page. See "An EMS Browser Page" on page 25 for all the features that are available for this pane.
   - To view the resources (individual items) for a booking, select the booking. The resources are displayed on the Items tab in the lower pane of the page. See Figure 4-20 above.
   - To open an event in the Navigator and edit the resource item as needed, double-click the event entry on the Results tab. See , "The Navigator," on page 65.

If you edit any information for a resource (quantity, notes, and so on) or the service order (service order time, estimated count, or so on) for a booking, then a Changed icon is displayed next to the booking.

Figure 4-21: Booking with Changed icon



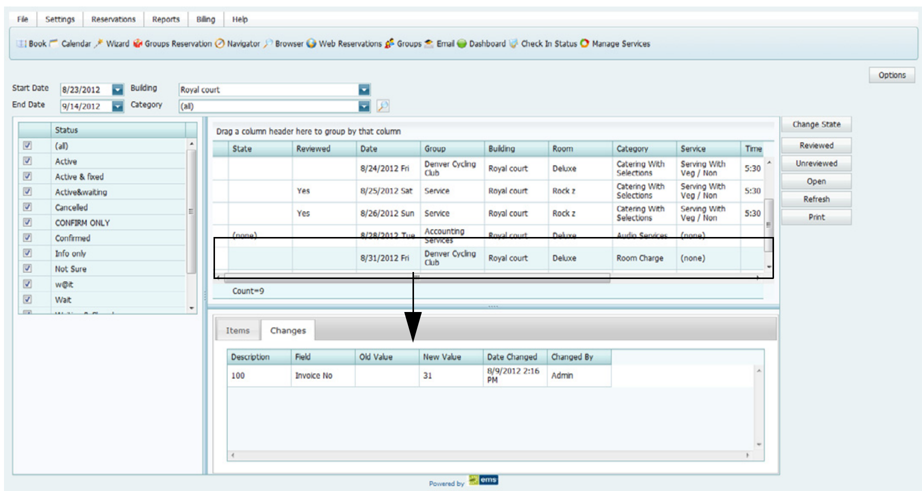
   - To mark a resource for a booking as reviewed, select the booking, or CTRL-click to select multiple bookings, and then click Reviewed. A message opens asking you if you are sure that you want to mark the resource as reviewed. Click Yes to close the message. "Yes" is displayed in the Reviewed column for the booking.
   - To reverse the Reviewed status for a resource in a booking, select the appropriate booking, or CTRL-click to select multiple bookings, and then click Unreviewed. A message opens asking you if you are sure that you want to mark the selected resource as unreviewed. Click Yes to close the message. "Yes" is cleared from the Reviewed column for the booking.

- To change the state of the resources for a booking, select the booking, or CTRL-click to select multiple service orders *of the same category*, and then click Change State. A Change State dialog box opens. The dialog box lists all the available states for the resource. Select the new state for the resource on the State dropdown list.

If the selected category does not use States, then a message opens indicating this.

- To view the changes made to the resources for a booking, select the booking, and then open the Changes tab in the lower pane of the page.

Figure 4-22: Viewing changes to a resource in the Service Order Management page



- Click Print to open a message that asks you if you want to open or save the Service Order Management.pdf file. Select the option that best fit your working needs.
  - If you click Open, the file opens onscreen. You can always specify a different file name and save the file after you view it.
  - If you click Save, you must select a directory in which to save the file.
- The Items tab and the Changes tab in the lower pane of the Service Order Management page have some of the same basic features as an EMS Browser page. You can rearrange the column order by dragging a column to a new location using the column heading, you can change the width of the data columns, and you can sort the data columns on a tab in either ascending or descending sort order. See "An EMS Browser Page" on page 25.
- Make any necessary changes to the search criteria, and then click Refresh to repeat the search based on the new search criteria.

EMS Dashboard

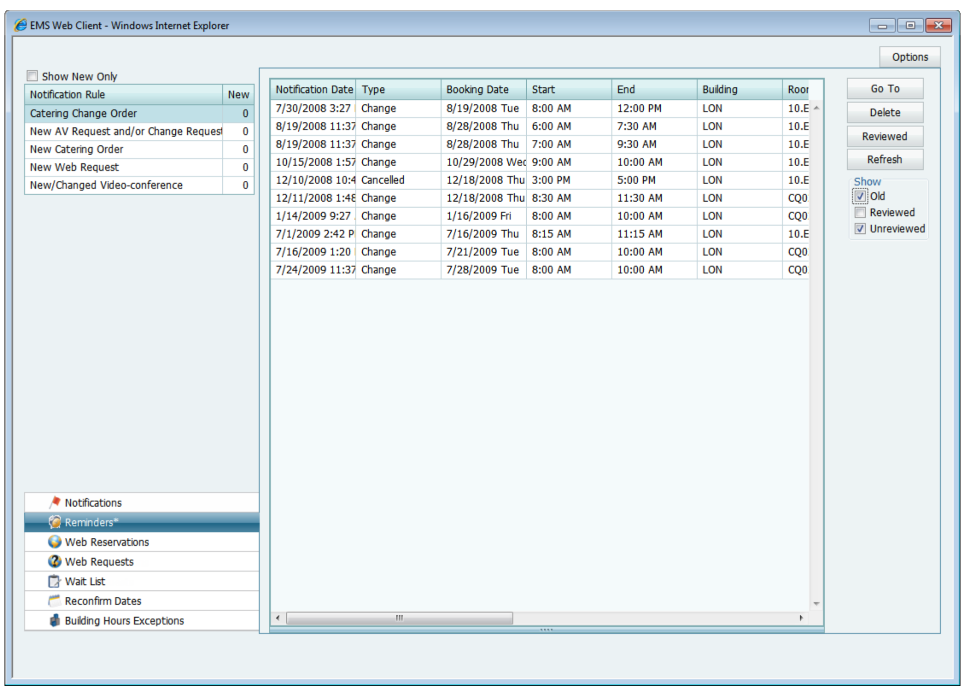
The Dashboard is a page that centralizes critical information about reservations in a single location. The information that is displayed on this page, including notifications, reminders, web reservations and so on, provides you with the necessary input to manage your work in the EMS Web Client.

This chapter covers the following topics:

Overview of the EMS Dashboard and Dashboard Options

The Dashboard is a page that centralizes critical information about reservations in a single location. The information that is displayed on this page provides you with the necessary input to manage your work in the EMS Web Client. By default, when the page first opens, seven tabs are available—Notifications, Reminders, Web Reservations, Web Requests, Wait List, Reconfirm Dates, and Building Hours Exceptions. If any tab on the page has at least one record displayed on it, then, by default, when you log into the EMS Web Client, the Dashboard page opens and the Dashboard icon on the main toolbar flashes briefly. An asterisk (*) is displayed to the right of the tab name. All the tabs in the upper pane of the page have some of the basic features of an EMS Web Client Browser page. You can rearrange the column order by dragging a column to a new location using the column heading, you can sort the data columns on a tab in either ascending or descending sort order, and you can change the width of the data columns.

Figure 5-1: Dashboard page



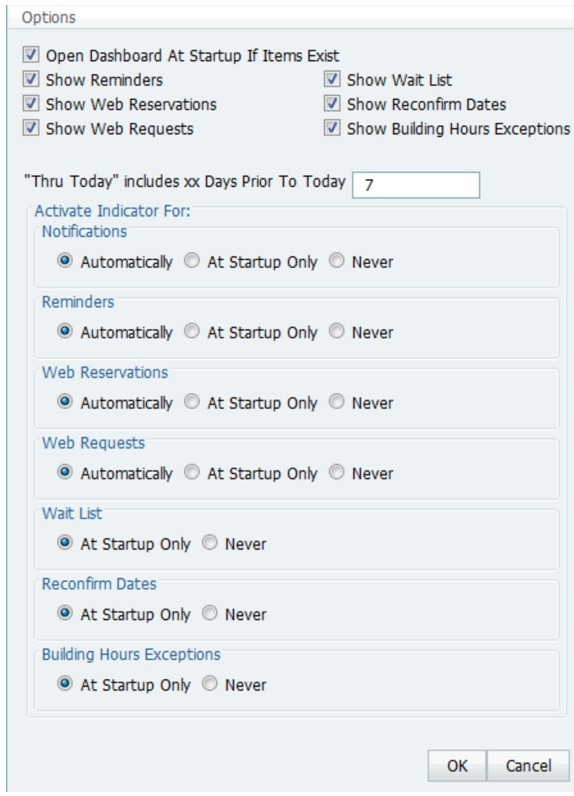
For information about working with data columns on a Dashboard tab, see "An EMS Browser Page" on page 25.

You can change the default behavior of the Dashboard in the Dashboard Options dialog box. See "Dashboard options" on page 210. You can also click the Dashboard icon Dashboard *at any time to open the Dashboard page.*

Dashboard options

The appearance and functioning of your Dashboard page are determined by the values that you set for the Dashboard options. To view and if needed, modify these values, in the upper right corner of the Dashboard page, click Options to open the Dashboard Options dialog box.

Figure 5-2: Dashboard options dialog box



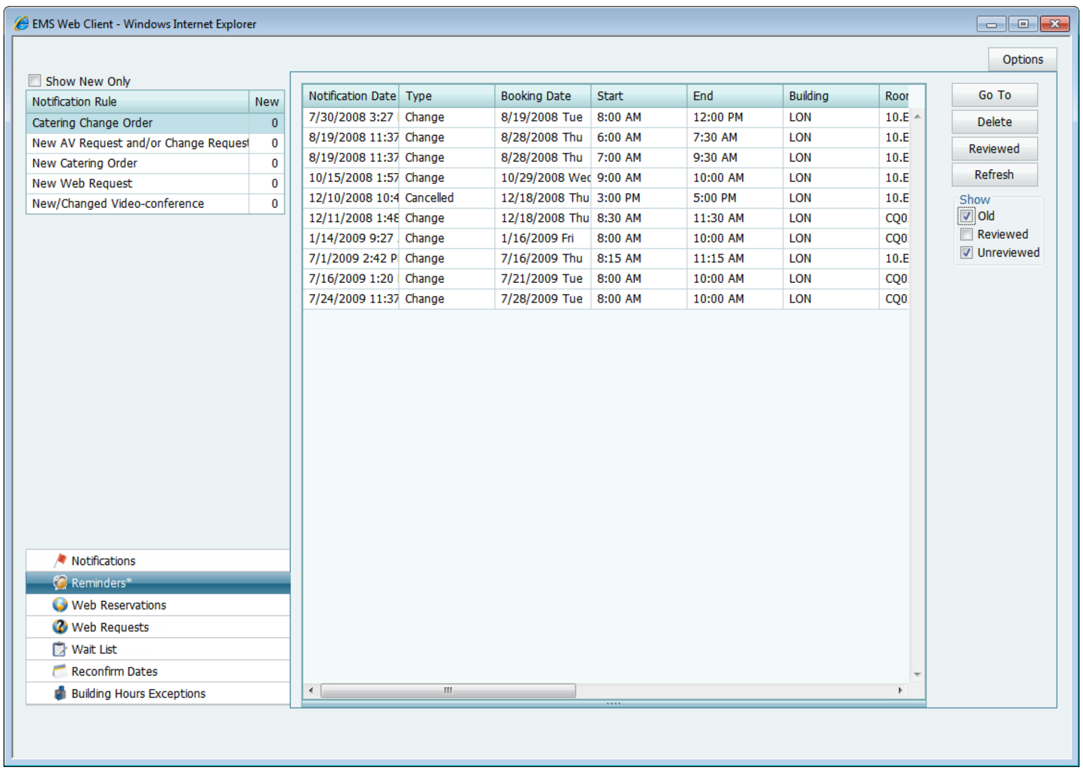
Option	Description
Open Dashboard At Startup If Items Exist	Selected by default. The Dashboard page opens automatically after you log into EMS if any tab displays at least one item.
• Show Reminders • Show Web Reservations • Show Web Requests • Show Wait List • Show Reconfirm Dates • Show Building Hours Exceptions	Selected by default. Indicates the tabs that are to be displayed on the Dashboard page.
"Thru Today" includes xx Days Prior to Today	Indicates how far into the past that reminders are to be displayed in the "Thru Today" view. The default value is seven.

Option	Description
Activate Indicator For: • Notifications • Reminders • Web Reservations • Web Requests	Set on a per tab basis. Indicates when the Dashboard icon on the toolbar is to flash if at least one item is displayed on any tab. Values are: • Automatically—Immediately when there is at least one record that is displayed on the indicated tab, even when you are working in EMS. • At Startup Only • Never
Activate Flashing Indicator For: • Wait List • Reconfirm Date Reminders • Building Hours Exceptions	Set on a per tab basis. Indicates when the Dashboard icon on the toolbar is to flash if tasks on the tab require your attention. Values are: • At Startup Only • Never

Notifications Tab

Your EMS administrator can configure notification rules to alert you or groups of which you are a member when additions or modifications have been carried out in the EMS database such as the creation or modification of a booking, the creation or modification of a service order, the creation of a new web account, and so on.

Figure 5-3: Dashboard page, Notifications tab



When the Notifications tab first opens, all the notification rules that include you are listed in the Notification Rule pane (upper left pane) of the tab. Next to each rule, the number of *new* notifications (notifications with the current day's date) is displayed. The tab is interactive. You can:

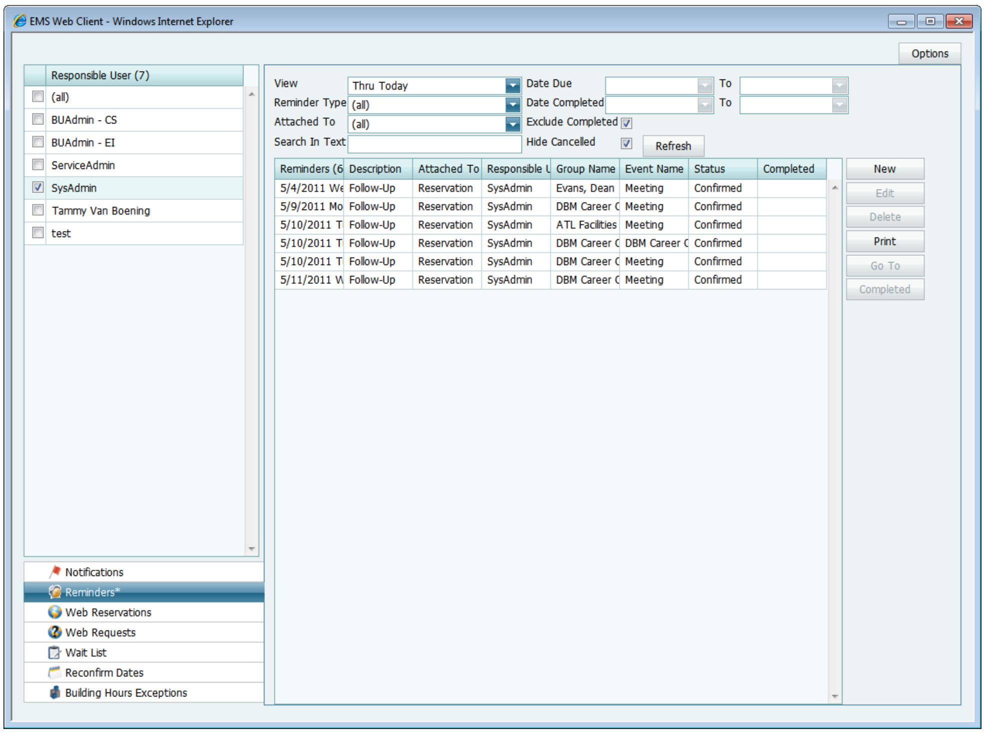
- Select a rule to view all unreviewed notifications for future bookings (the default view).
- Select a rule, and under Show, select Reviewed to view all reviewed notifications for future bookings.
- Select a rule, and under Show, select Old to view all notifications for past bookings.
- Select a notification to view detailed information about the notification (such as new bookings, the changes made to a booking, and the users who were notified of the changes) in a pane at the bottom of the page.

- Select Show New Only to show only new notifications (notifications with the current day’s date) for the notification rules.
- Select a notification, and then click Reviewed to mark a notification as “Reviewed.”
- Select a notification and then click Go To to open the item to which the notification refers.
    - If the notification is attached to a reservation, booking, or booking detail, then the reservation opens in the Navigator, and the appropriate folder (Reservation, Booking, or Booking Detail) is automatically selected.
    - If the notification is attached to a group, then the Group page opens, with the group information displayed in the page.
- Click Refresh to check for notifications that have been issued since you opened the Dashboard.
- Select a notification, or CTRL-click to select multiple notifications, and then click Delete to delete the notifications from the Notifications tab.

Reminders Tab

A *comment* is a text entry that explains or clarifies a reservation, booking, group, or service order. A *reminder* is a comment that has a due date associated with it. The Reminders tab displays all the reminders for which you are the responsible user and that, by default, have a due date through the current day's date.

Figure 5-4: Dashboard page, Reminders tab



The tab is interactive. You can:

- View a list of reminders for other responsible users and/or set the criteria for which reminders that you want to view. See "To change the Reminders tab view" on page 215.
- Create an unattached reminder. "To create an unattached reminder" on page 216.
- Edit a reminder. "To edit a reminder" on page 217.
- Delete a reminder. "To delete a reminder" on page 217.
- Print a reminder. "To print a reminder" on page 218.
- Go to the item to which a reminder is attached. See "To go to the item to which a reminder is attached" on page 218.
- Complete a reminder. See "To complete a reminder" on page 218.
- Reassign multiple reminders from one EMS user to another. See "To reassign multiple reminders from one EMS user to another" on page 219.

To change the Reminders tab view

By default, when the Dashboard page first opens, the Reminders tab displays all the reminders for which you are the responsible user and that, by default, have a due date through the current day's date. You can do one or more of the following to change this view:

- To view the reminders for which other user's are responsible, simply select the user or users in the Responsible User pane.
- To view only a specific group of reminders for which you or others are the responsible users, change the viewing criteria.

Option	Description
View	View reminders that have the indicated due date. The default value is Thru Today. If a value from the pre-configured list does not meet your needs, then select (user specified) and in the Date Due fields, enter at least a Starting due date. The Ending due date is optional.
Reminder Type	The default value is (all).
Attached To	The default value is (all). To view reminders that are not attached to any item (reservation, booking, group, or service order), select (none). See "To create an unattached reminder" on page 216.
Search in Text	Enter the string by which to search for specific reminders. (The search is carried out on the Notes field for the reminder.) The search is not-case sensitive and the search string can be found anywhere in the Notes. For example, "cat" returns reminders that have "**cat**ering" or "Mary's **cat**ering" in the Notes field.
Date Completed	Available only if Exclude Complete is not checked.
Exclude Completed	Selected by default. Clear this option to display completed reminders in the Reminders list. To display completed reminders that meet the other viewing criteria, regardless of their completion dates, leave the Date Completed fields blank; otherwise, to view completed reminders that were completed by a specific date, you can enter a Starting date or a date range in the Date Completed fields.
Hide Cancelled	Not selected by default. Select this option to display canceled reminders in the Reminders list.

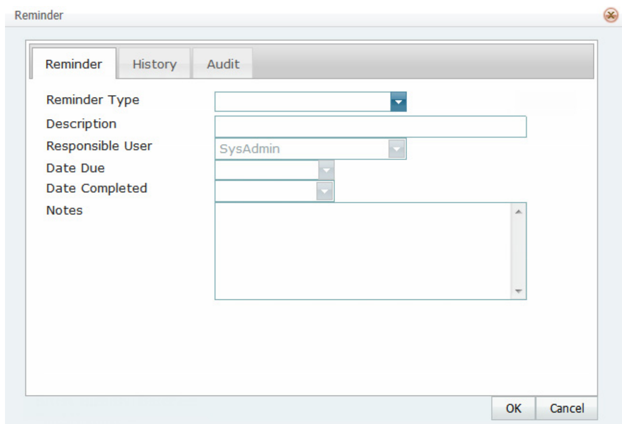
To create an unattached reminder

When you create reminder on the Navigator, the reminder is attached to a specific reservation, booking, or booking detail. Similarly, when you create a reminder on the Groups page, the reminder is attached to a specific group. If needed, however, you can create a reminder that addresses just your general business needs and is not attached to any specific item. For example, you can create a reminder about “preparing for your organization’s yearly safety inspection.” Any reminder that you create from the Reminders tab on the Dashboard page is an *unattached* reminder.

1. Click New.

   The Reminder dialog box opens.

Figure 5-5: Reminder dialog box



2. Do one of the following:
   - Select a Reminder Type.
   - If none of the pre-configured Reminder Types meets your working needs, then select (user-specified), and in the Description field, enter a description for the reminder type.

   The Responsible User field is populated with your User ID and the Date Due field is populated with the current day’s date.

3. Optionally, change the value for the Responsible User, the Date Due, or both.
4. If you are completing the reminder today, select a Date Completed; otherwise, leave this field blank. (This field is populated automatically when you or another user completes the reminder. See “To complete a reminder” on page 218.)
5. Optionally, in the Notes field, enter any further explanation or information about the reminder.

6. Click OK.

   The Reminder dialog box closes. The newly created reminder is not attached to an item. It might or might not be displayed in the Reminders list depending on the values that you have set for filtering the display.

To edit a reminder

1. On the Reminders list, select the reminder that you are editing, and then click Edit.

   The Reminder dialog box opens. The dialog box is populated with the current information the reminder.

2. Edit the reminder as needed.
3. Click OK.

   The Reminder dialog box closes. If the reminder is attached to an item such as a reservation, then the reminder remains attached; otherwise, it is saved as an unattached reminder.

To delete a reminder

You can delete any reminder (attached or unattached) regardless of its due date and regardless if it is completed.

1. On the Reminders list, select the reminder that you are deleting, and then click Delete.

   A message opens asking you if it is OK to delete the reminder.

2. Click Yes.

   The message closes and the reminder is deleted.

To print a reminder

1. On the Reminders list, select the reminder that you are printing, and then click Print.

   A message opens, asking you if you want to open the Reminders.pdf file or save the file?

Figure 5-6: Reminders file message

2. Select the option that best fit your working needs.
   - If you click Open, the reminder opens onscreen. You can always indicate a file name and save the file after you view it.
   - If you click Save, you must select the directory in which to save the file.

To go to the item to which a reminder is attached

On the Reminders list, select a reminder, and then click Go To.

The Attached To column for the reminder must state anything other than "Unattached."

- If the reminder is attached to a reservation, booking, or booking detail, then the reservation opens in the Navigator, and the appropriate folder (Reservation, Booking, or Booking Detail) is automatically selected.
- If the reminder is attached to a group, then the Group page opens, with the group information displayed in the page.

To complete a reminder

1. On the Reminders list, select the reminder, or CTRL-click to select the multiple reminders that you are completing.
2. Click Completed.

   A message opens asking you if it is OK to set the selected reminders as completed.
3. Click Yes.

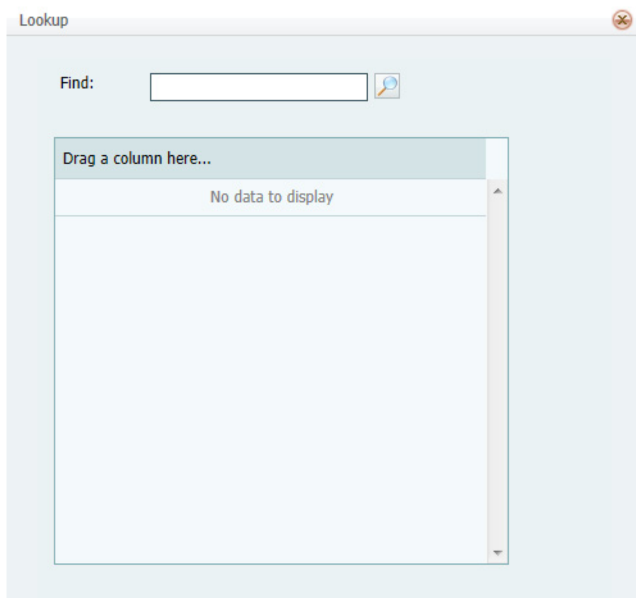
   The message closes. The reminders are completed with a date equal to the current day's date. The reminders might or might not be displayed in the Reminders list depending on the values that you have set for filtering the display.

To reassign multiple reminders from one EMS user to another

1. On the Reminders list, select the reminder, or CTRL-click to select the multiple reminders that you are reassigning.
2. Click Reassign.

   A Find Users dialog box opens. You use the options on this dialog box to search for the users to whom you are reassigning the reminders.

Figure 5-7: Find Users dialog box



3. Do one of the following;

   - To lists all the users for your EMS implementation, click the Search icon .
   - To search for a specific user, enter a search string in the Find field, and then click the Search icon .

     The list of users that meet your search criteria is displayed in the dialog box.

The search string is limited to the exact order of the characters in the string, but the search string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of ***Admin*** *returns both* ***Admin*** *users and Sys**Admin**.*

4. Click the Add icon next to the appropriate user.

   A message opens, asking you if you are sure that you want to reassign the selected reminders to the user.

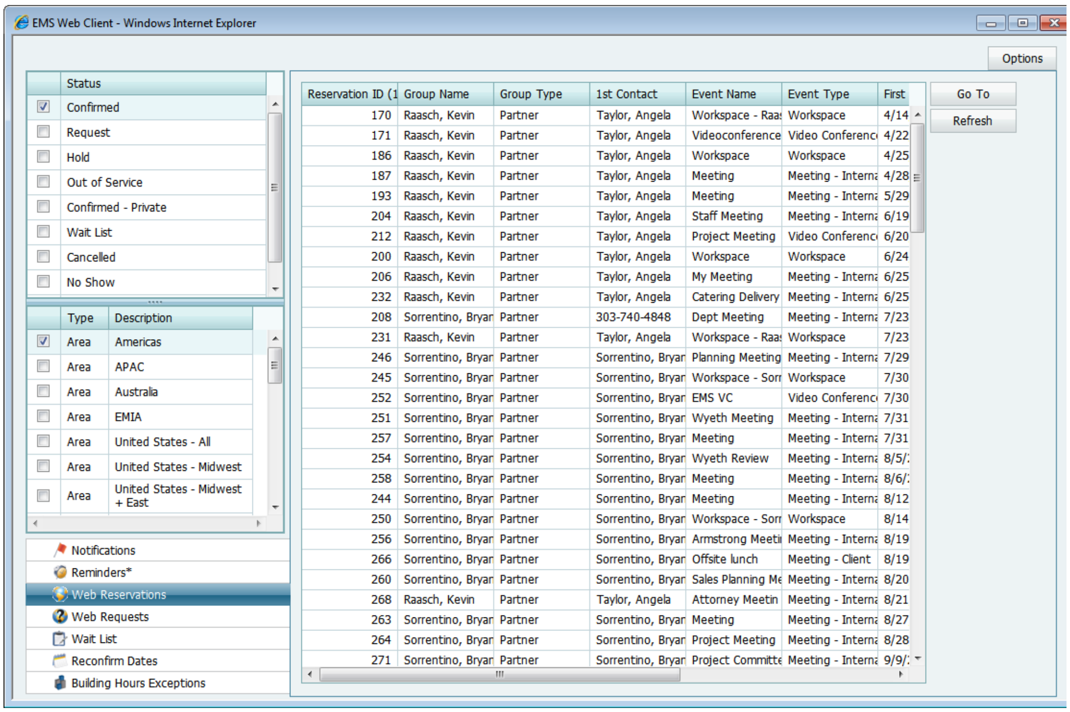
5. Click OK.

   The Find User dialog box and message close and the reminder is reassigned.

Web Reservations Tab

The Web Reservation tab displays any reservation that was submitted through VEMS for web process templates that are set to Self Serve mode.

Figure 5-8: Web Reservations tab



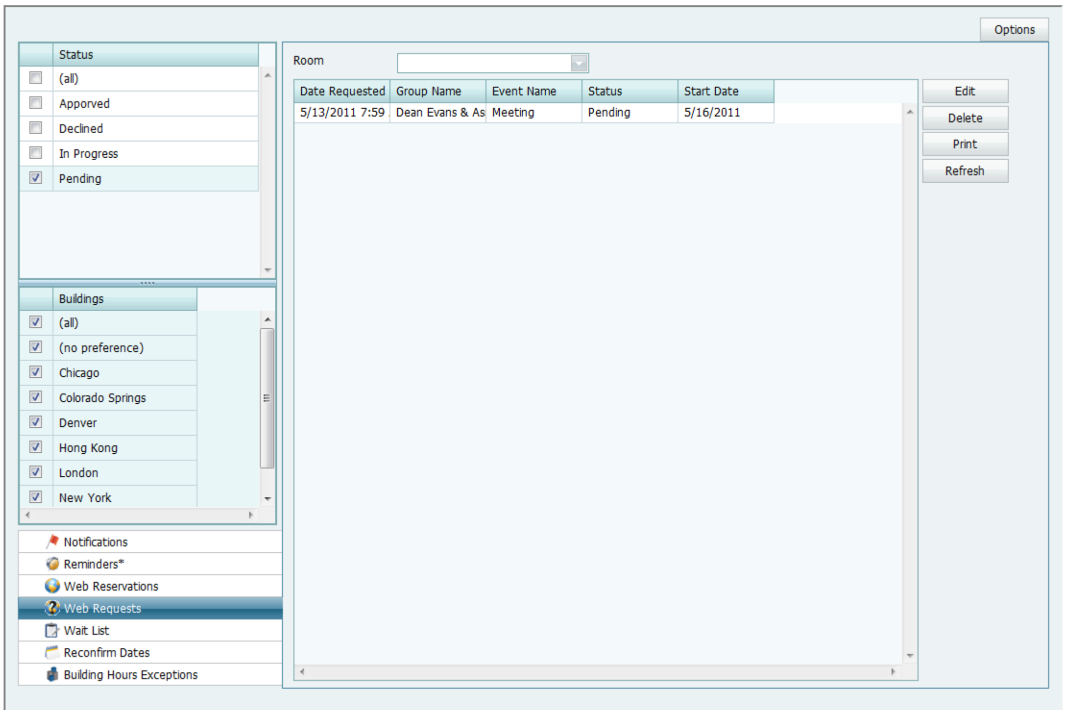
The tab is interactive. You can:

- Select options to filter the reservations that are displayed on the tab. After you select or edit the filtering options, click Refresh.
  - Status and Building/Area/View options are displayed on the left pane of the tab. You can select one or more statuses, or you can select all statuses in a single step. You can select a specific building, area, and/or view, or you can select all buildings, areas, and views in a single step.
  - Date options are displayed on the View list at the top of the right pane of the tab. You can view reservations for the indicated due date. The default value is Thru Today. If a value from the pre-configured list does not meet your needs, then select (user specified) and in the Date Due fields, enter at least a Starting due date. The Ending due date is optional.
- Select the reservation in the Reservations list, and then click Go To to open the reservation in the Navigator.

Web Requests Tab

The Web Requests tab displays any reservation that was submitted through VEMS for web process templates that are set to Request mode. A request that has not yet been processed has a status of Pending.

Figure 5-9: Dashboard page, Web Requests tab



The tab is interactive. You can:

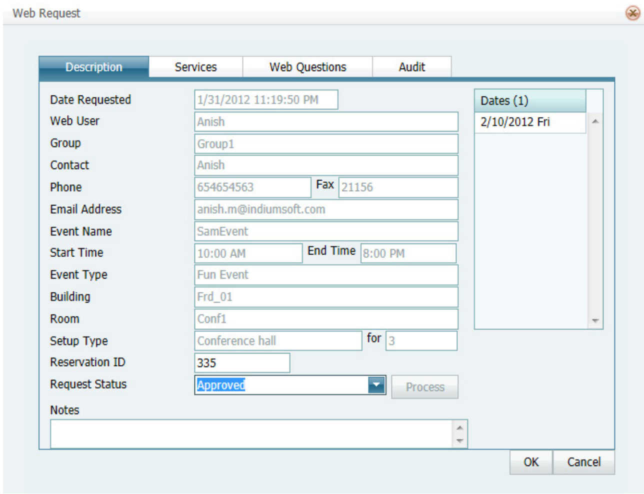
- Select options to filter the reservations that are displayed on the tab. After you select or edit the filtering options, click Refresh.
    - Status and Building/Area/View options are displayed on the left pane of the tab. You can select one or more statuses, or you can select all statuses in a single step. You can select a specific building, area, and/or view, or you can select all buildings, areas, and views in a single step.
    - Room options are displayed on the Room list at the top of the right pane of the tab. To enable the Room list, you must select a *specific* building.
- Edit a web request, including processing it. See “To edit a web request” on page 223.
- Delete a web request. See “To delete a web request” on page 224.
- Print a web request. See “To print a web request” on page 225.

To edit a web request

1. Select the web request that is you are editing, and then click Edit.

   The Web Request dialog box opens. All of the information that was submitted for the request through VEMS is displayed in the dialog box. The dialog box always has a Description tab, a Web Questions tab, and an Audit tab. If the request included resources or setup notes, it also has a Services tab.

Figure 5-10: Web Request dialog box



2. Do one of the following:

   - Edit the request as necessary without processing it, and then click OK. When editing the request without processing it, optionally, you can do one or more of the following:

     - If you have questions about the request or want to confirm some information (for example, “Will alcohol be served at the event?”) before you process the request, you can enter these questions or comments in the Notes field on the Description tab. A web user can see these notes when viewing the request in VEMS and you can wait for a response before deciding whether to process the request.

     - In addition, to indicate that you are reviewing the request before you process it, you can set the status of the request to In Progress on the Description tab. A web user can see this status when viewing the request in VEMS.

     - If the request required questions to be answered on the web, open the Web Questions tab to see the questions and the user’s answers.

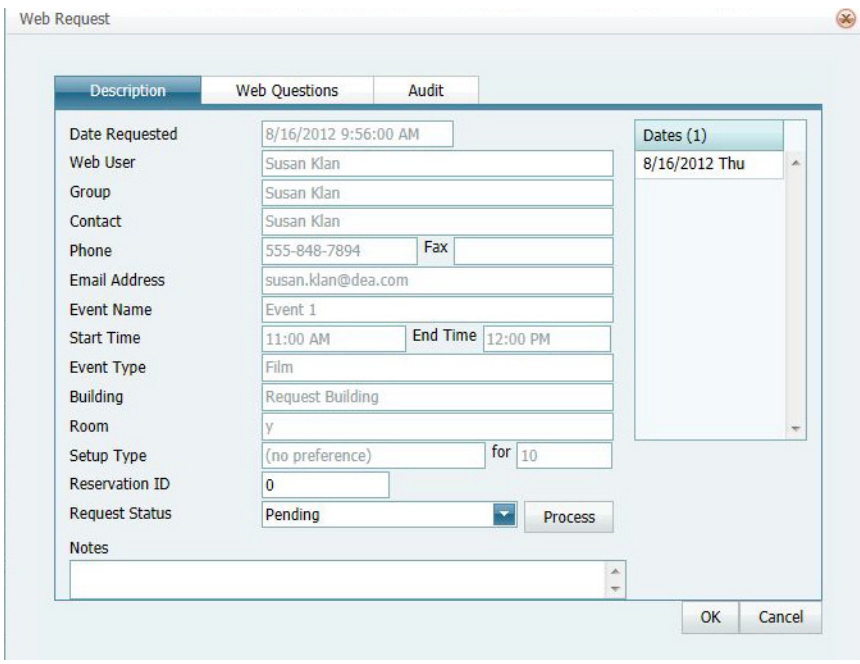
     - If the request includes resources, open the Services tab to see what the request includes. To view the details for each category, double-click a category to display its associated details in the right pane.

- To process the request and create a true reservation for the request in your EMS database, on the Description tab, click Process.

  The reservation opens in the Reservation Wizard. Continue to "Making a Reservation Using the Reservation Wizard" on page 33.

After you create a true reservation using the wizard and the reservation includes a request for services, the Process Web Request Details page opens. (See Figure 5-11 below.) You can process the services immediately using the options on this page, or to process the services at a later date, click Cancel to close the page. You can then open the reservation on the Web Requests tab, and on the Services tab, click Process.

Figure 5-11: Process Web Request Details page



To delete a web request

1. Select the web request, or CTRL-click to select the multiple web requests that you are deleting, and then click Delete.

   A message opens asking you if it is OK to delete the selected web requests.

2. Click Yes.

   The message closes. The selected web requests are deleted.

To print a web request

1. Select the web request, or CTRL-click to select the multiple web requests that you are printing, and then click Print.

   A Web Requests message opens, asking you if you want to open the Web Requests.pdf file or save the file?

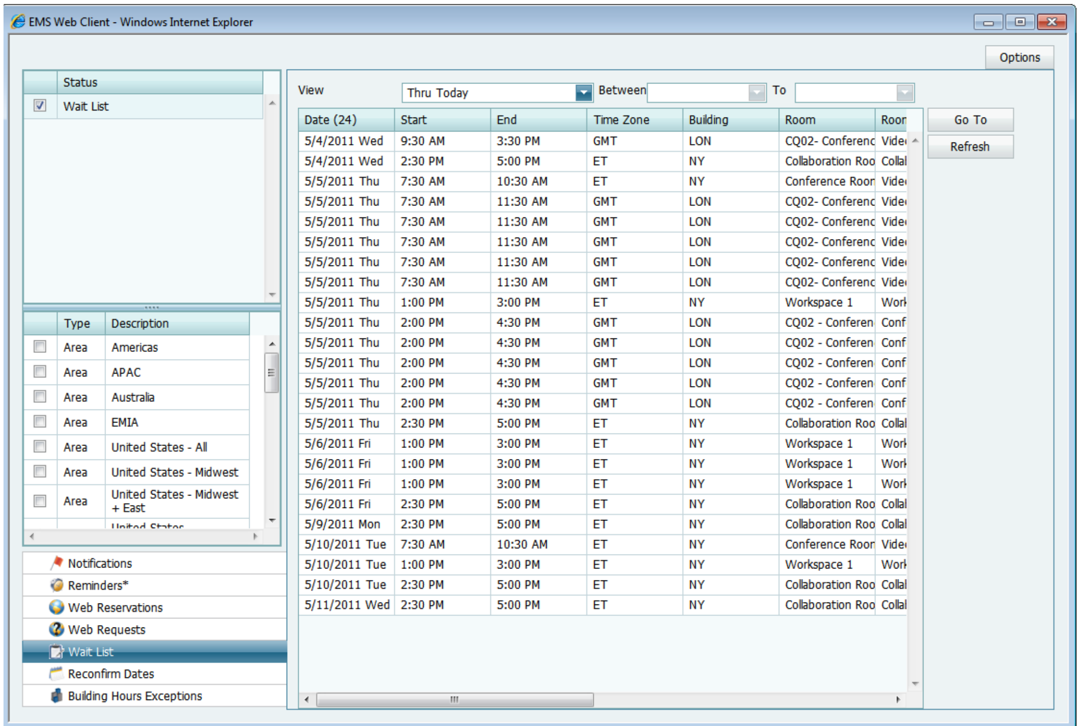
2. Select the option that best fit your working needs.

   - If you click Open, the reminder opens onscreen. You can always indicate a file name and save the file after you view it.
   - If you click Save, you must select the directory in which to save the file.

Wait List Tab

The Wait List tab provides you a way of monitoring wait-listed reservations. It also provides an indicator when the requested room becomes available.

Figure 5-12: Wait List tab



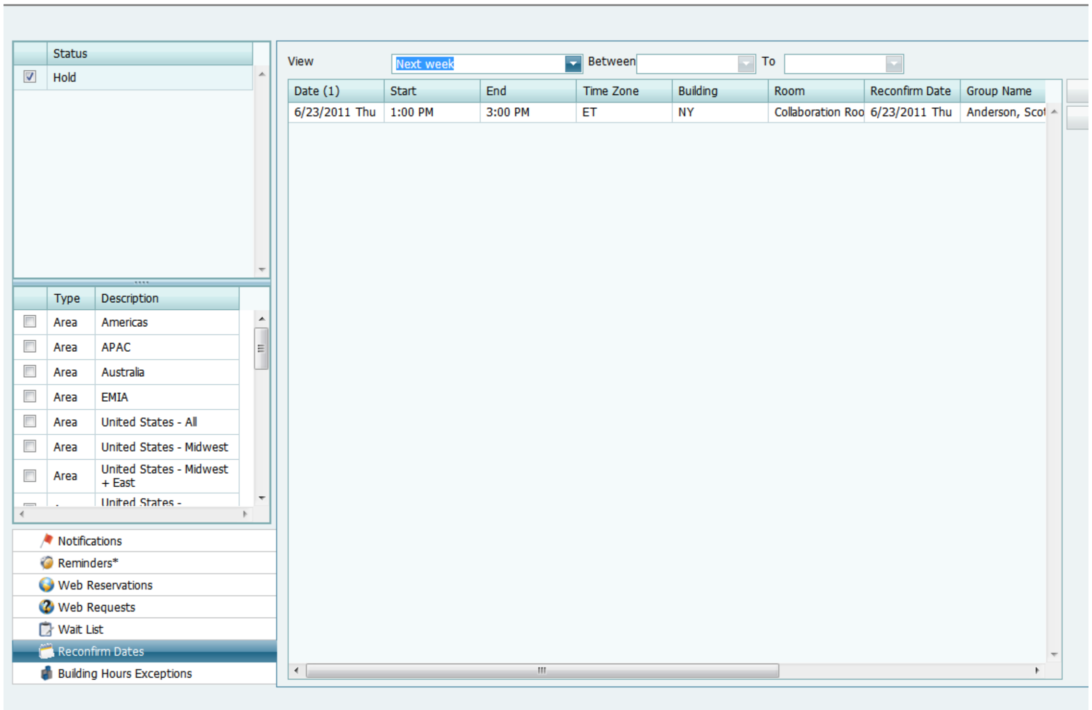
The tab is interactive. You can:

- Select options to filter the reservations that are displayed on the tab. After you select or edit the filtering options, click Refresh.
    - Status and Building/Area/View options are displayed on the left pane of the tab. You can select one or more statuses, or you can select all statuses in a single step. You can select a specific building, area, and/or view, or you can select all buildings, areas, and views in a single step.
    - Date options are displayed on the View list at the top of the right pane of the tab. You can view reservations for the indicated due date. The default value is Thru Today. If a value from the pre-configured list does not meet your needs, then select (user specified) and in the Date Due fields, enter at least a Starting due date. The Ending due date is optional.
- Select the reservation in the Reservations list, and then click Go To open the reservation in the Navigator.

Reconfirm Dates Tab

The Reconfirm Dates tab displays reservations that have been booked in a status that requires the Reconfirm Date option (for example, a Tentative or Hold status). You use this tab as a reminder to reconfirm such reservations.

Figure 5-13: Reconfirm Dates tab



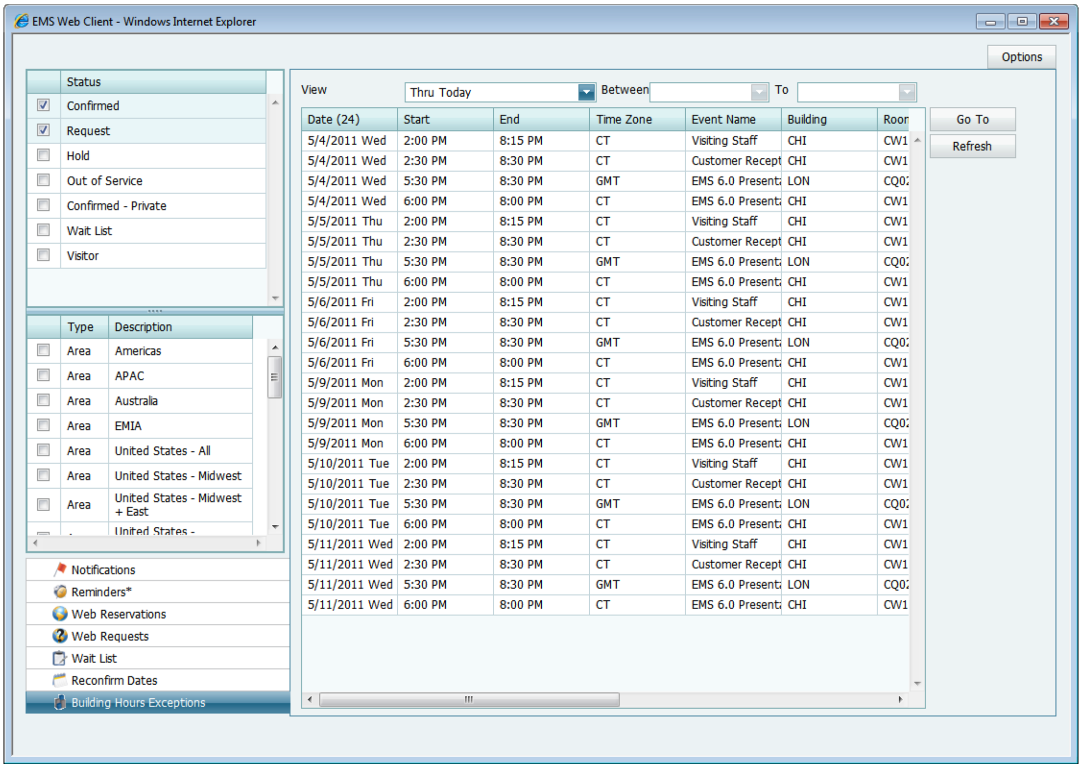
The tab is interactive. You can:

- Select options to filter the reservations that are displayed on the tab. After you select or edit the filtering options, click Refresh.
  - Status and Building/Area/View options are displayed on the left pane of the tab. You can select one or more statuses, or you can select all statuses in a single step. You can select a specific building, area, and/or view, or you can select all buildings, areas, and views in a single step.
  - Date options are displayed on the View list at the top of the right pane of the tab. You can view reservations for the indicated due date. The default value is Thru Today. If a value from the pre-configured list does not meet your needs, then select (user specified) and in the Date Due fields, enter at least a Starting due date. The Ending due date is optional.
- Select the reservation in the Reservations list, and then click Go To open the reservation in the Navigator.

Building Hours Exceptions Tab

The Building Hours Exceptions tab displays reservations that occur outside configured building hours.

Figure 5-14: Building Hours Exceptions tab



The tab is interactive. You can:

- Select options to filter the reservations that are displayed on the tab. After you select or edit the filtering options, click Refresh.
  - Status and Building/Area/View options are displayed on the left pane of the tab. You can select one or more statuses, or you can select all statuses in a single step. You can select a specific building, area, and/or view, or you can select all buildings, areas, and views in a single step.
  - Date options are displayed on the View list at the top of the right pane of the tab. You can view reservations for the indicated due date. The default value is Thru Today. If a value from the pre-configured list does not meet your needs, then select (user specified) and in the Date Due fields, enter at least a Starting due date. The Ending due date is optional.
- Select the reservation in the Reservations list, and then click Go To open the reservation in the Navigator.

Groups and Contacts

A *group* is an entity for which reservations are made at your facilities. A group is one of the four core data items that your EMS administrator must configure so that you can make reservations. A group can be an internal or external entity and it can be an organization or an individual. A *contact* is a person who serves as the coordinator or focal point for a group.

This chapter covers the following topics:

Searching for and Configuring Groups

A *group* is an entity for which reservations are made at your facilities. A group can be an internal or external entity and it can be an organization or an individual. A group must be configured before you can make reservations for it in EMS. Optionally, if you want to first confirm that a group has not already been configured, then you can search for the group.

Typically, your EMS administrator carries out basic configuration of the groups for which you need to make reservations. You always have the option of modifying any group that your EMS administrator has configured and you always have the option of configuring new groups when needed.

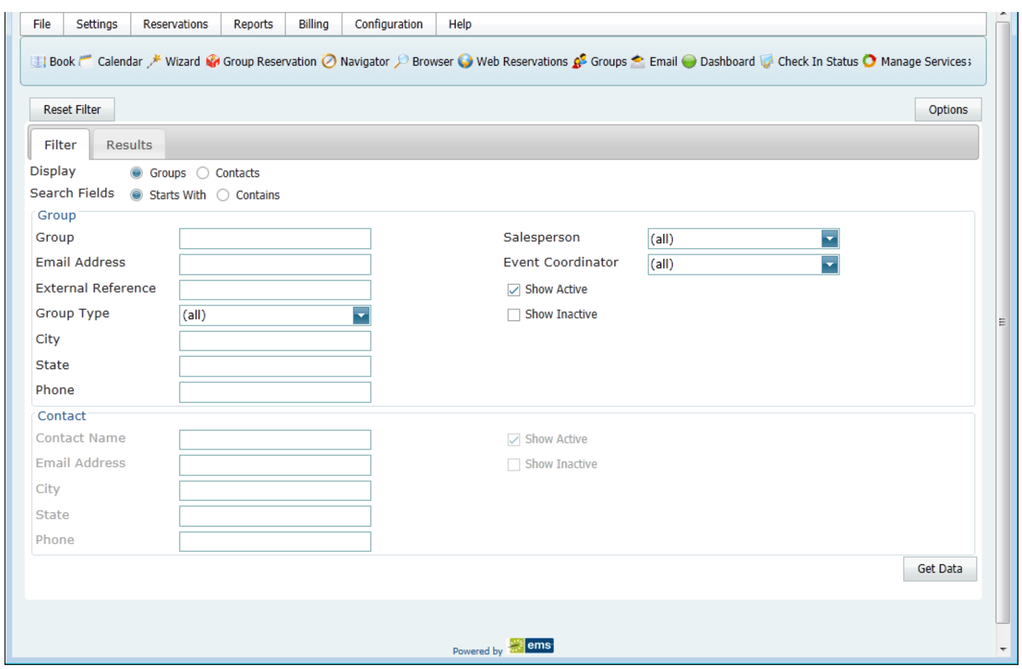
Your organization might use a different term (such as client, customer, and so on) to identify the entities for which reservations are made at your facilities. Contact your EMS administrator if you need assistance in clarifying this term.

To search for a group and/or contact

1. On theEMS toolbar, click the Groups icon Groups.

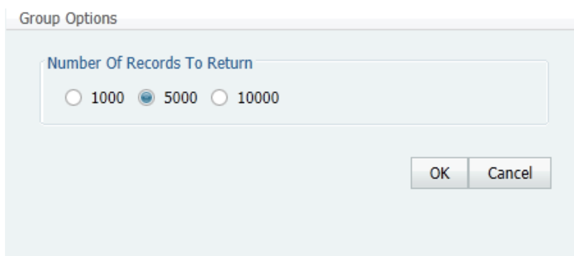
   The Groups page opens. The Filter tab is the active tab.

Figure 6-1: Groups page, Filter tab



2. By default, when the Results tab opens after you carry out your first search, it lists the first 1000 groups that are currently configured in your EMS database and that have a status of Active. Optionally, to change the number of records that are displayed in the Groups page before you carry out your first search, click Options, and then on the Group Options dialog box, select a different number of records to return.

Figure 6-2: Group Options dialog box



3. Enter your search criteria.

Option	Description
Display	• Groups—Display all groups that meet your search criteria on the Results tab. • Contacts—Display all contacts that meet your search criteria on the Results tab. **Note:** When a list of contacts is displayed, the contact's group is also displayed.
Search Fields	• Starts with—The string is not case-sensitive, but your search is limited to the exact order of the characters in the string, and the string must begin with the information for which you are searching. For example, **Assoc** returns **Assoc**iation of Broadcasters but not Biomedical Student Association. • Contains—Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive, and the string can be found anywhere in your search results. For example, **Assoc** returns both **Assoc**iation of Broadcasters and Biomedical Student **Assoc**iation.
Group	Fields are available if you select Groups for Display. Enter values as needed in any or all fields.
Contact	Fields are available only if you select Contacts for Display. Leave all fields set to their default search values to search for all active contacts that are currently configured in your EMS database, or enter values as needed in any or all fields. **Note:** If you select Contact, then both the Group fields and the Contact fields are available for searching. If you enter data in both sets of fields when you are searching for a contact, then your search criteria must be met for both the contact *and* the contact's group to be displayed on the Results tab.
Note: To reset the Filter at any time to its default settings, click Reset Filter.	

4. Click Get Data.

   The Results tab opens with a list of search results that meet all your search criteria.

5. To further filter the display on the Results tab, in the Search field, enter a search string, and then click anywhere on the Groups page

   The list of groups that meet your search criteria is displayed on the Results tab.

---

*Your search is limited to the exact order of the characters in the string, but the search string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **Assoc** returns both **Ass**ociation of Broadcasters and Biomedical Student **Assoc**iation.*

To configure groups

Typically, your EMS administrator carries out basic configuration of the groups for which you need to make reservations. You always have the option of modifying any group that your EMS administrator has configured and you always have the option of configuring new groups when needed.

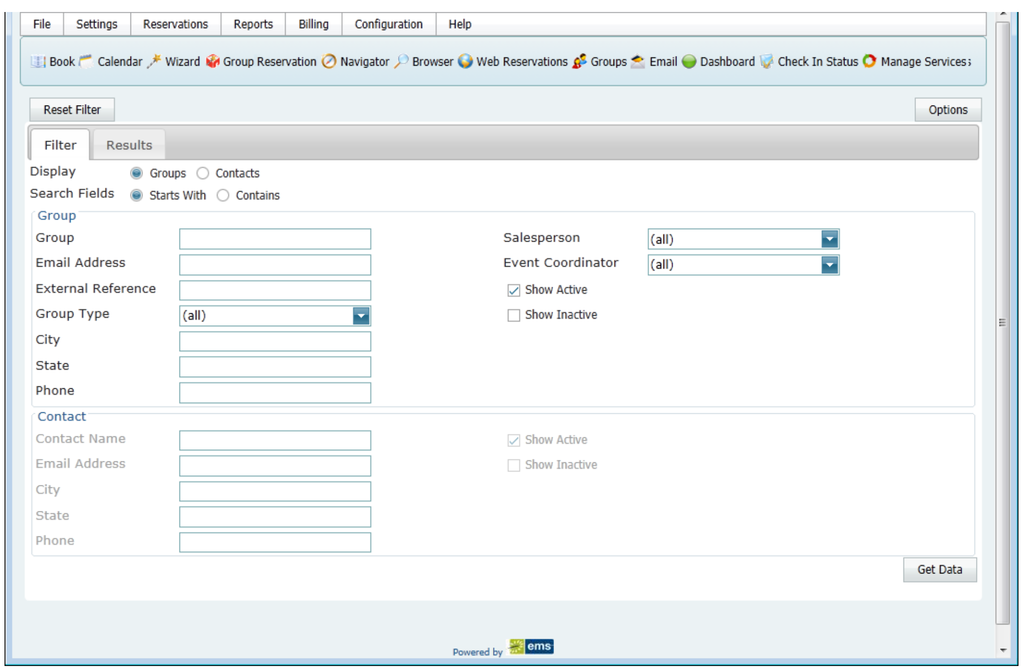
Remember that before you configure a group, you might want to search for the group to verify that it has not already been configured. See "To search for a group and/or contact" on page 231.

1. On the EMS toolbar, click the Groups icon 

.

   The Groups page opens. The Filter tab is the active tab.

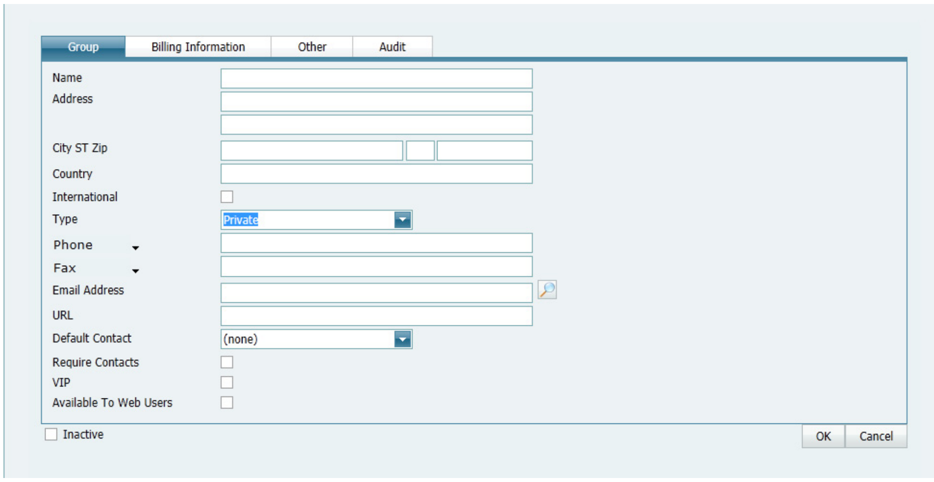
Figure 6-3: Groups page, Filter tab



2. Open the Results tab, and then click New.

   The Group dialog box opens. The Group tab is the active tab.

Figure 6-4: Group dialog box, Group tab



3. Enter the summary information for the new group.

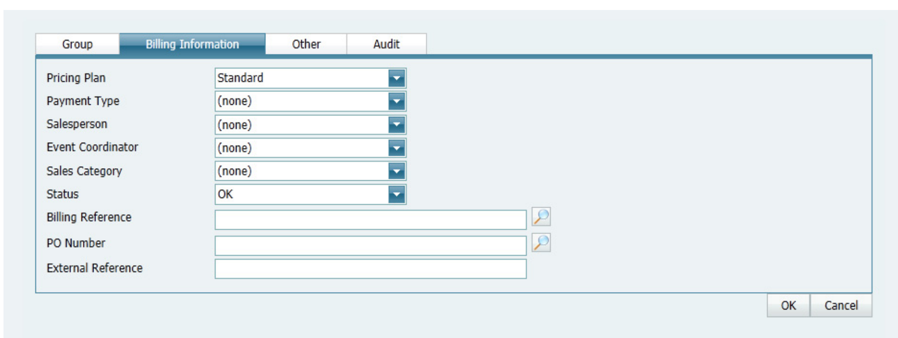
The only required information is the group name. All other information on all tabs is optional and can be added at a later date when needed.

Field	Description
Name	Required field. The name of the group. **Note:** The name can be a maximum of 50 characters, including spaces.
Address City ST Country Zip	The street or mailing address for the group.
International	Select this option to drop the State and Zip fields for an international group.
Group Type	Pick a group type. **Note:** If calculations have been assigned to a group type, then these calculations are applied only to *new* groups of this type.
Phone Fax	The phone number and fax number for the group. **Note:** The Phone and Fax fields have a dropdown list available on which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.

Field	Description
Email Address	The email address for the group. **Note:** If your computer is connected to a network, click the Search icon to open a Global Address Lookup dialog box and search for the email address.
URL	The URL for the group's website. **Note:** Web users can link to this group's web site on VEMS.
Default Contact	Populated with the name of the default contact for the group *after* you have defined default contacts for the group.
Require Contacts	Select this option if the group is to *always require* a contact when a reservation is being made for the group.
VIP	Select this option if the group is to be designated as a VIP group.
Display on Web	Select this option if users are to be able to select the group on the Group Lookup page in VEMS.
Inactive	Leave this option blank to add the group as an active group. Select this option to inactivate the group.

4. Optionally, do one or both of the following; otherwise, go to Step 5.
   - Open the Billing Information tab and add the default billing information for the group.

Figure 6-5: Group dialog box, Billing Information tab



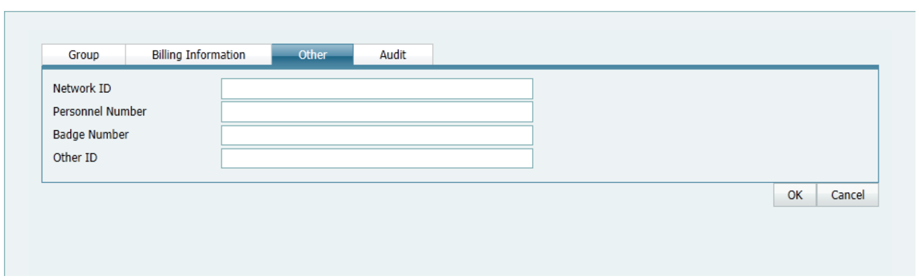
The values that you specify here are the default values that are applied when a new reservation is made for the group. Any EMS user can change these values if needed.

Option	Description
Pricing Plan	Pick a pricing plan.
Payment Type	Pick a payment type.
Salesperson	Pick a salesperson.
Event Coordinator	Pick an event coordinator.
Sales Category	Pick a sales category.

Option	Description
Status	The status is a way to indicate the standing or ranking of the group. The default values are the following: • OK—A reservation can be made for the group. (In your organization, this status could indicate that the group is current in payments due.) • Warning—If a group status is set to Warning, then a Warning message opens when you make a reservation for the group. It does not, however, prevent a reservation from being made for the group. • Bad—If a group status is set to Bad, then reservations cannot be made for the group.
Billing Reference Number	You can manually enter data into the field, or you can click the Search icon to open a master list of billing reference numbers and select a reference. **Note:** To define a list of eligible billing references that are specific to the group, see “Configuring Additional Information for a Group” on page 238.
PO Number	You can manually enter data into the field, or you can click the Search icon to open a master list of PO Numbers and select a PO number. **Note:** To define a list of eligible PO numbers that are specific to the group, see “Configuring Additional Information for a Group” on page 238.
External Reference	Links the group to a web user record and/or HR Toolkit.
Account	Pick an account.

- Open the Other tab and add any other identifying information for the group as needed.

Figure 6-6: Group dialog box, Other tab



Option	Description
Network ID	The Windows login for the group.
Personnel Number	Organization number for the group.
Badge Number	Badge number for the group.
Other ID	Any secondary ID for the group.

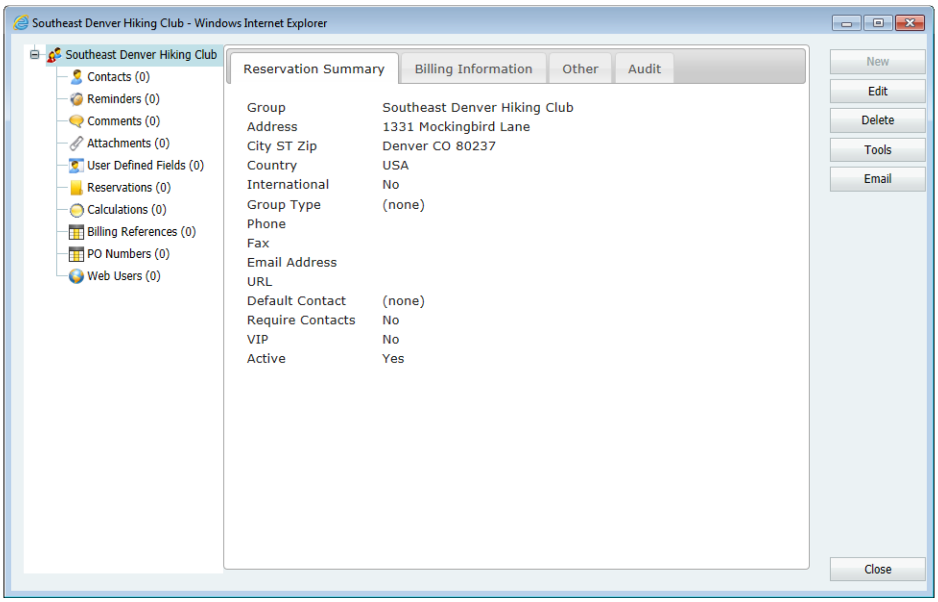
5. Click OK.

   The Group dialog box closes and you return to the Groups page with the newly configured group automatically selected in the page.

6. Optionally, double-click this group to open a group-specific page.

   You can use the options on this page to configure additional information for the group. See "Configuring Additional Information for a Group" on page 238.

Figure 6-7: Example of a group-specific page



Configuring Additional Information for a Group

After you have configured a new group in your EMS database with the basic group information (group identifying information, billing information and/or other information), you have the option of configuring additional information for the group. You can:

- Create a web user from the group. See "To create a web user from a group" on page 238.
- Assign the group to a web user. See "To assign the group to a web user" on page 241.
- Add reminders to the group. See "To add a reminder to a group" on page 243.
- Add comments to the group. See "To add a comment to a group" on page 244.
- Add attachments to the group. See "To add attachments to a group" on page 246.
- Add user defined fields to the group. See "To add user defined fields to a group" on page 248.
- Assign calculations to the group. See "To assign calculations to a group" on page 249.
- Configure a master list of group-specific billing reference numbers. See "To configure a list of billing reference numbers" on page 251.
- Configure a master list of group-specific PO numbers. See "To configure a list of PO numbers" on page 252.

When you select a configuration item (contacts, reminders, and so on) in the left pane in a group-specific page, the right pane for the page is an EMS Web Client Browser page. See "An EMS Browser Page" on page 25.

For information about adding a contact to a group, see "Configuring Contacts for a Group" on page 254. For information about editing a contact for a group, see "Editing Group Information" on page 262. For information about emailing a group, see "Sending Email from EMS" on page 367.

To create a web user from a group

A *web user* is a registered user who can submit requests for reservations or schedule reservations in VEMS. When you add a new group in your EMS database, you decide the "level" of the group that you are adding. For a group that is added at the individual (personnel/employee) level, you might also need to create a web user from the group. This user can then create and view reservations on behalf of a group or groups in VEMS. You can create only one web user *from* a group. When you create a web user, you can also specify one or more delegates for the web user. A *delegate* is a web user who can create and view reservations on behalf of another web user.

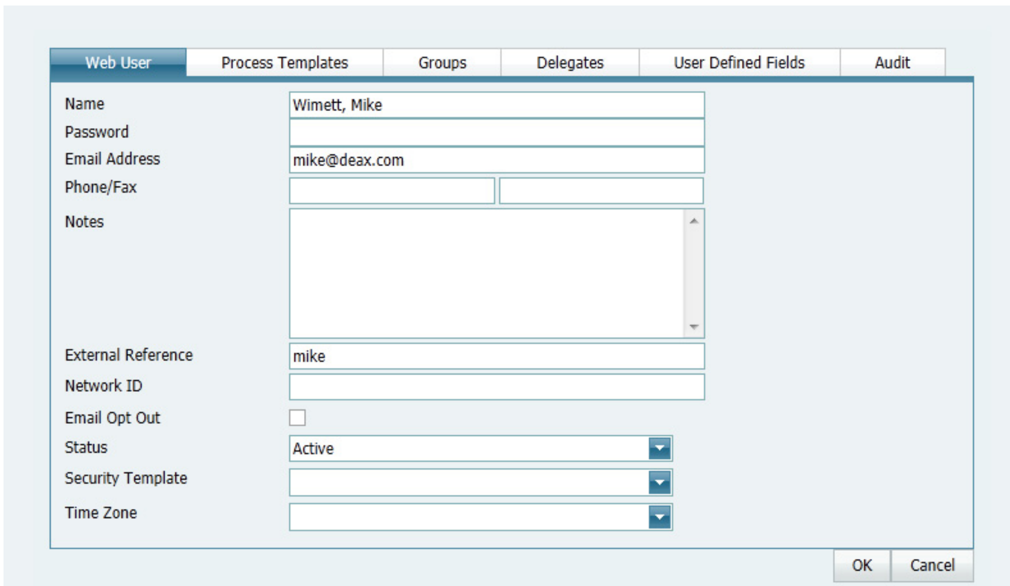
1. Open the Groups page and search for the group for which you are creating the web user. See "To search for a group and/or contact" on page 231.

2. On the Groups page, select the group, and then click Tools > Create Web User.

   A group-specific page opens. The Web User tab is the active tab. See Figure 6-8 on page 239.

The User Defined Fields tab displays the questions that a web user was required to answer when the user requested to create an account through VEMS and it is not relevant to the procedure that is described below.

Figure 6-8: Group-specific page, Web User tab



3. Enter the information for the web user.

Ideally, you should enter all the necessary information for your web user before you save the web user; however, at any time if you need to access your web user, on the EMS main menu, click Configuration > Web > Web Users.

Field	Description
Name	Automatically populated after you select the group from the Groups page.
Password	The password that a web user must enter to log in to VEMS.
Email address	If this information has been entered in the Groups page for the group, then this field is automatically populated after you select the group from the Groups page. If the field is blank, you must enter the full email address for the user. (The user must enter this address to log in to VEMS.)
Phone/Fax	Optional fields. If this information has been entered for the group, then these fields are automatically populated after you select the group from the Groups page. If the fields are blank, you can enter values if needed.

Field	Description
Notes	Optional field.
External Reference	Optional field. Links the web user to a group and/or HR Toolkit.
Network ID	Optional field. The web user’s network ID.
Email Opt Out	Select this option if the web user is not to receive automatic emails (such as reservation summary emails) from VEMS. The user will still receive manually sent emails.
Status	Required field. Select the status for the web user: • Active—The web user can log in to VEMS. • Inactive—The user cannot log in to VEMS and is instructed to contact the EMS administrator. • Pending—The web user cannot log in to VEMS and is informed that he/she must check back at a later time.
Security Template	Required field. This determines the web user's access to the system—the menu items that the user can see and the information that the user can view in a tooltip when 'rolling-over' an event in VEMS.
Time Zone	Required field. Select the time zone for the user.

4. Open the Process Templates tab and on the Available list, select the web process template, or CTRL-click to select the multiple templates to which you are assigning this user, and then click the Move button (>) to move the selected templates to the Selected list.

A web process template defines the functions that are available to each type of web user in VEMS when the user is submitting a request for a reservation.

5. Open the Groups tab and do one of the following to specify the groups on whose behalf the web user can view and make reservations in VEMS.

   - The group (web user) is selected by default. You can leave this group in the Selected list, or you can select the group and click the Remove button (<).
   - Specify any combination of search criteria for the Find field and Group Type, and then click Display to produce a list of all groups that meet the criteria. In the Available list, select a group, or CTRL-click to select multiple groups, and then click the Move button (>) to move the selected groups to the Selected list.

If you leave the Find field blank, then a list of all currently active groups for the selected group type is displayed. If you enter a search string in the Find field, the string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, ***And*** *returns* ***And****erson, Scott, but not Cooper, Anderson.*

6. Open the Delegates tab, and on the Search by dropdown list, do one of the following to specify the delegates for the web user:
   - Leave the Find field blank, and then click Display to open a list of *all* currently available web users. Select a user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.
   - On the Search By dropdown list, select the option by which to search (Email Address or User Name), and in the Find field, enter the string by which to filter your search, and then click Display. Select a web user, or CTRL-click to select web multiple users, and then click the Move button (>) to move the selected users to the Selected list.

The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of ***bob*** *returns* ***bob****.worth@emssoftware.com but not dbobbett@emssoftware.com.*

7. Click OK.

   The dialog box for creating a web user closes and a message opens indicating that the web user was created successfully.

8. Click OK to close the message and return to the Groups page.

To assign the group to a web user

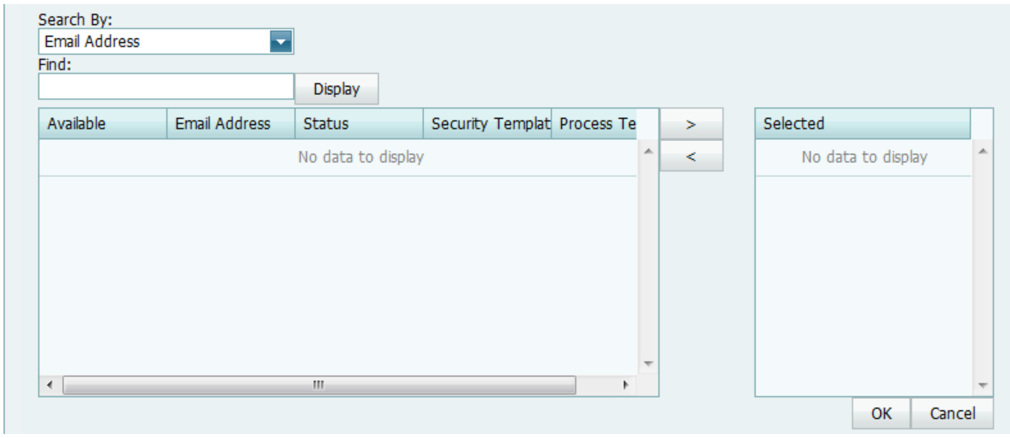
When you add a new group in your EMS database, you should also assign the group to a web user. This web user can then create and view reservations on behalf of the group in VEMS. You can assign a group to one or more web users.

1. Open the Groups page and search for the group to which you are assigning the web user. See “To search for a group and/or contact” on page 231.

2. On the Groups page, select the group, and then click Tools > Assign to Web Users.

   The Assign Group dialog box opens. See Figure 6-9 on page 242.

Figure 6-9: Assign Group dialog box



3. Do one of the following to select the web users that are being assigned to the group:
   - Leave the Find field blank, and then click Display to open a list of *all* currently active web users. Select the web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.
   - In the Search By dropdown list, select the option by which to search (Email Address or User Name) and then in the Find field, enter the string by which to filter your search, and then click Display. Select the web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected users to the Selected list.

The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of ***bob*** *returns* ***bob****.worth@emssoftware.com but not dbobbett@emssoftware.com.*

4. Click Finish.

   A message opens indicating that the group was assigned successfully.

5. Click OK to close the message and return to the Groups page.

To add a reminder to a group

A *comment* is a text entry that explains or clarifies a reservation, a booking, a group, or a booking detail that is a service order. A *reminder* is a comment that has a due date associated with it.

1. Open the Groups page and search for the group to which you are adding the reminder. See "To search for a group and/or contact" on page 231.

2. On the Groups page, select the group, and then click Open.

   A group-specific page opens. The group is automatically selected in the page.

For an example of a group-specific page, see *Figure 6-7 on page 237.*

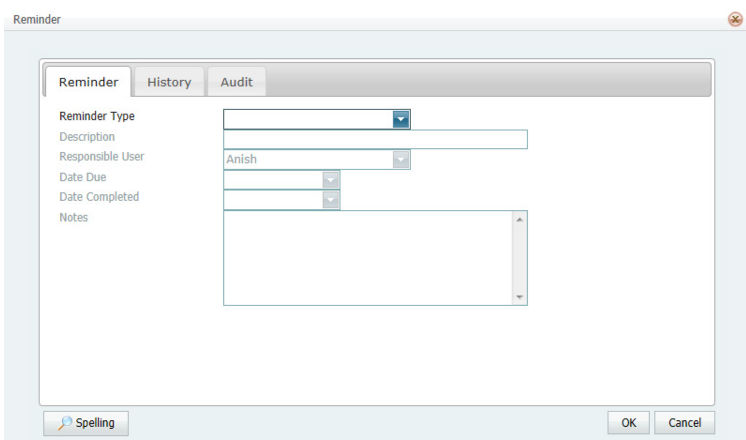
3. In the left pane of the group-specific page, select Reminders.

   A list of all reminders that are currently configured for the group is displayed in the right pane of the page.

4. Click New.

   The Reminder dialog box opens. The Responsible User field is populated with the your User ID.

Figure 6-10: Reminder dialog box



5. On the Reminder Type dropdown list, select the type of reminder that you are adding; otherwise, if none of the pre-configured reminder types meets your working needs, select (user specified comment), and then in the Description field, enter a description for the reminder type.

   The Date Due field is populated with the current day's date.

The description can be a maximum of 30 characters, including spaces.

6. Optionally, change the value for the Responsible User, the Date Due, or both.
7. If you are completing the reminder today, select a Date Completed; otherwise, leave this field blank.

If you leave this field blank, then it is automatically populated when you or another user completes the reminder on the Reminders tab of the Dashboard page. *See “To complete a reminder” on page 218.*

8. Optionally, in the Notes field, enter any further explanation or information about the reminder.
9. Click OK.

   The Reminder dialog box closes. The newly added reminder is automatically selected in the group-specific page.

To add a comment to a group

A *comment* is a text entry that explains or clarifies a reservation, a booking, a group, or a booking detail that is a service order.

1. Open the Groups page and search for the group to which you are adding the comment. See “To search for a group and/or contact” on page 231.
2. On the Groups page, select the group, and then click Open.

   A group-specific page opens. The group is automatically selected in the page.

For an example of a group-specific page, see *Figure 6-7 on page 237.*

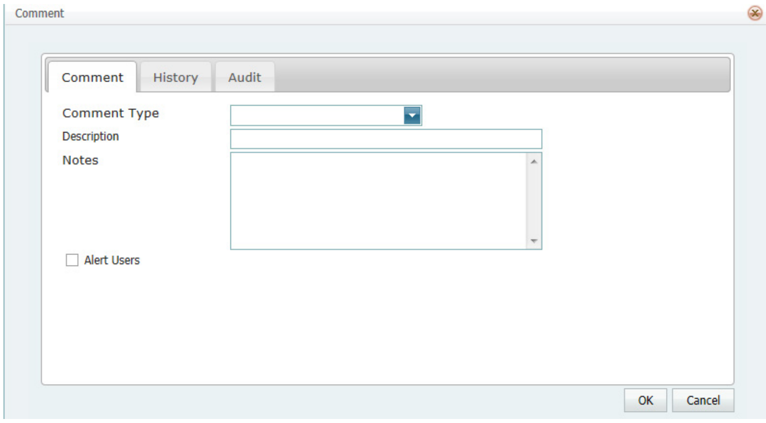
3. In the left pane of the group-specific page, select Comments.

   A list of all comments that are currently configured for the group is displayed in the right pane of the page.

4. Click New.

   The Comment dialog box opens.

Figure 6-11: Comment dialog box



5. On the Comment Type dropdown list, select the type of comment that you are adding; otherwise, if none of the pre-configured comment types meets your working needs, select (user specified comment), and then in the Description field, enter a description for the comment type.

The description can be a maximum of 30 characters, including spaces.

6. In the Notes field, enter the comment.
7. Optionally, to alert any EMS user who opens this group or a reservation that is assigned to this group that this comment has been added to the group, select Alert Users.
8. Click OK.

   The Comment dialog box closes. The newly added comment is automatically selected in the group-specific page.

To add attachments to a group

An *attachment* is used to describe any file that you can add to or store on a reservation, a booking, or a group.

1. Open the Groups page and search for the group to which you are adding the attachment. See "To search for a group and/or contact" on page 231.

2. On the Groups page, select the group, and then click Open.

   A group-specific page opens. The group is automatically selected in the page.

For an example of a group-specific page, see *Figure 6-7 on page 237.*

3. In the left pane of the group-specific page, select Attachments.

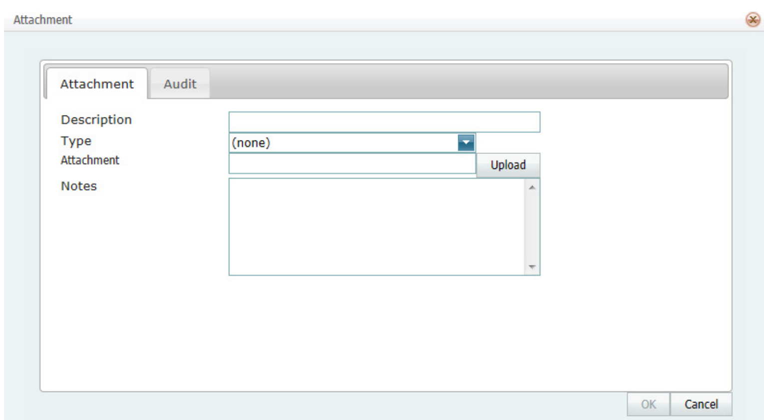
   A list of all attachments that have already been added to the group is displayed in the right pane of the page.

To view any attachment in this list, select it, and then click View.

4. Click New.

   The Attachment dialog box opens.

Figure 6-12: Attachment dialog box



5. In the Description field, enter a name or description for the attachment.

The description can be a maximum of 50 characters, including spaces. If you leave this field blank, then it is automatically populated with the name of the file after you attach it to the Group.

6. On the Type dropdown list, select the attachment type.

7. Click Upload to open the Attachments dialog box, and then click Attach Files to open the Select File to Upload dialog box and browse to and select the attachment.

   The Select File to Upload dialog box closes.

8. Optionally, in the Notes field, enter any pertinent notes for the attachment.

9. Click OK.

   The Attachment dialog box closes. The newly added attachment is automatically selected in the group-specific page.

To add user defined fields to a group

A *user defined field* (UDF) is a custom field that stores additional data for a group. Typically, your EMS administrator configures the types of fields that are available as well as the allowed values (text, numeric, and so on) for the fields. When you add a user defined field to a group, you must specify a value for the field.

1. Open the Groups page and search for the group to which you are adding the UDF. See "To search for a group and/or contact" on page 231.

2. On the Groups page, select the group, and then click Open.

   A group-specific page opens. The group is automatically selected in the page.

For an example of a group-specific page, see Figure 6-7 on page 237.

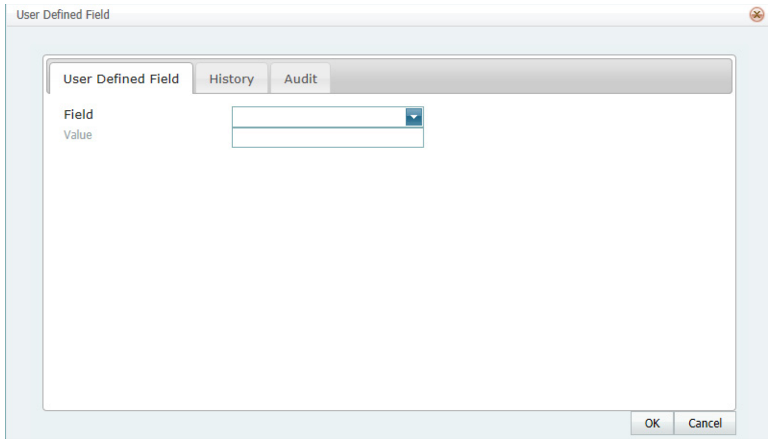
3. In the left pane of the group-specific page, select User Defined Fields.

   A list of all UDFs that have already been added to the group is displayed in the right pane of the page.

4. Click New.

   The User Defined Field dialog box opens. See Figure 6-13 on page 249.

Figure 6-13: User Defined Field dialog box



5. On the Field dropdown list, select the UDF that you are adding to the group.
6. In the Value field, enter a value for the UDF.
7. Click OK.

   The User Defined Field dialog box closes. The newly added UDF is automatically selected in the group-specific page.

To assign calculations to a group

Calculations are additional charges that can be applied to billable items (a category, a group, a group type, a resource, or a room) such as gratuity or sales tax. When you configure a group, you can assign the calculations that are to always apply to the group.

1. Open the Groups page and search for the group to which you are assigning the calculations. See "To search for a group and/or contact" on page 231.
2. On the Groups page, select the group, and then click Open.

   A group-specific page opens. The group is automatically selected in the page.

For an example of a group-specific page, see Figure 6-7 on page 237.

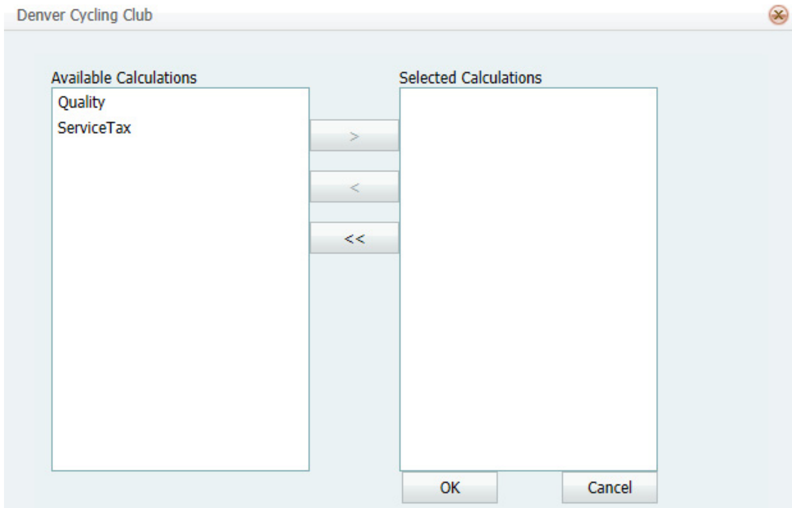
3. In the left pane of the group-specific page, select Calculations.

   The right pane of the group-specific page displays any calculations that have already been assigned to the group.

4. Click Edit.

   The Calculations dialog box opens. The group name is displayed at the top of the dialog box.

Figure 6-14: Calculations dialog box



5. On the Available list, select the calculation, or CTRL-click to select the multiple calculations that are to always apply to this group, and then click the Move button (>) to move the selected calculations to the Selected list.

Your EMS administrator can also assign calculations to a group type. If your EMS administrator has already assigned calculations for this group's type, then these calculations are automatically applied to the group. The calculations are displayed in the Selected list after you click OK and save the group; however, you can always edit these calculations.

6. Continue with any other optional configuration for the group as needed; otherwise, click OK to close the Calculations dialog box and return to the group-specific page.

To configure a list of billing reference numbers

You can configure a list of billing reference numbers that are specific to the group.

1. Open the Groups page and search for the group for which you are configuring the master billing reference numbers list. See "To search for a group and/or contact" on page 231.
2. On the Groups page, select the group, and then click Open.

   A group-specific page open. The group is automatically selected in the page.

For an example of a group-specific page, see Figure 6-7 on page 237.

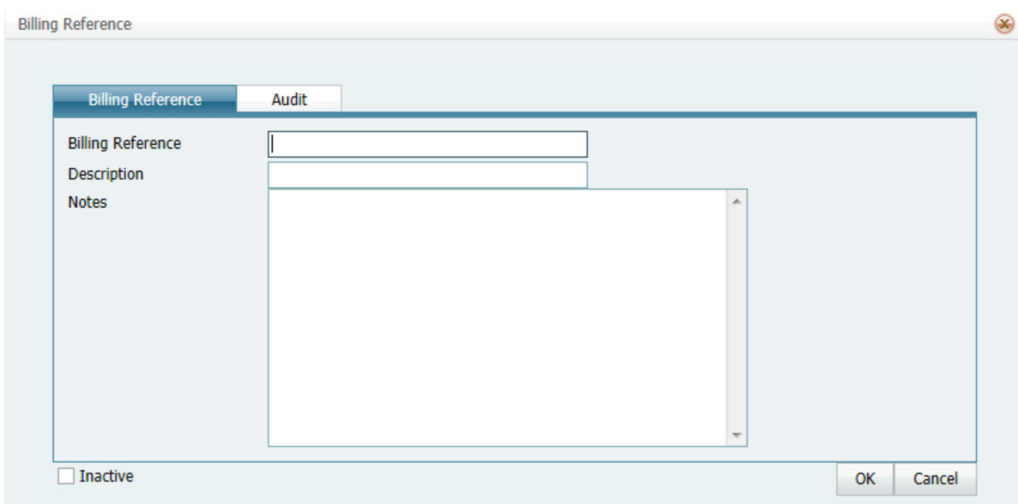
3. In the left pane of the group-specific page, select Billing Reference.

   A list of all currently active billing reference numbers for the group is displayed in the right pane of the group-specific page.
4. Optionally, to display all billing reference numbers regardless of status, click Show Inactive.

   Any inactive billing reference numbers are displayed in red italics in the right pane.
5. Click New.

   The Billing Reference dialog box opens.

Figure 6-15: Billing Reference dialog box



6. Enter the information for the new billing reference number.

Option	Description
Billing Reference Number	The billing reference number that is associated with the group. **Note:** The reference can be alphanumeric and it has a maximum of 100 characters, including spaces.
Description	A description of the billing reference number.
Notes	Any other comments or statements that are applicable for the billing reference number.
Inactive	Leave this option blank to add the reference as an active reference (the billing reference number is to be available when a reservation is made for the group). Select this option to inactivate the billing reference number.

7. Continue with any other optional configuration for the group as needed; otherwise, click OK to close the Billing Reference Number dialog box and return to the group-specific page.

To configure a list of PO numbers

You can configure a list of PO numbers that are specific to the group.

1. Open the Groups page and search for the group for which you are configuring the master PO numbers list. See "To search for a group and/or contact" on page 231.
2. On the Groups page, select the group, and then click Open.

   A group-specific page open. The group is automatically selected in the page.

For an example of a group-specific page, see Figure 6-7 on page 237.

3. In the left pane of the group-specific page, select PO Numbers.

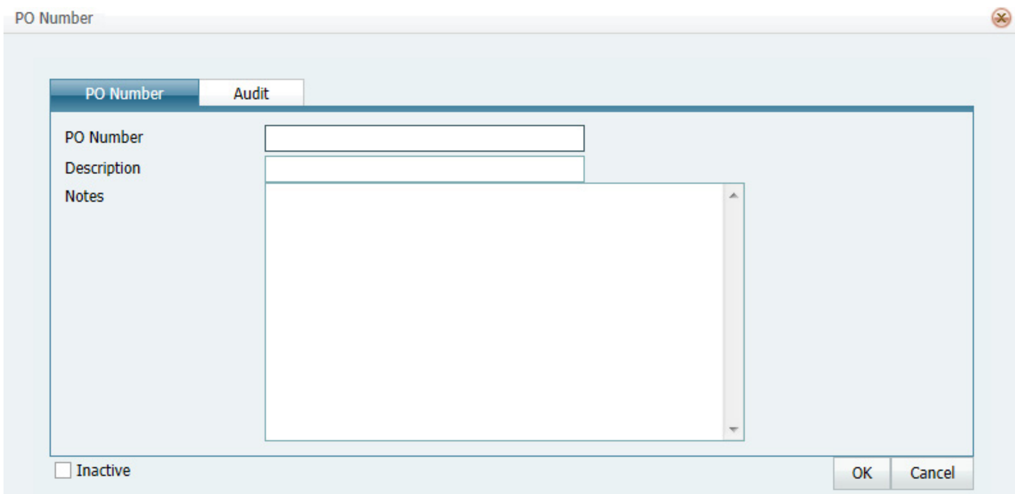
   A list of all currently active PO numbers for the group is displayed in the right pane of the group-specific page.
4. Optionally, to display all PO numbers regardless of status, click Show Inactive.

   Any inactive PO numbers are displayed in red italics in the right pane.

5. Click New.

   The PO Number dialog box opens.

Figure 6-16: PO Number dialog box



6. Enter the information for the new PO number.

Option	Description
PO Number	The PO number that is associated with the group. **Note:** The reference can be alphanumeric and it has a maximum of 100 characters, including spaces.
Description	A description of the PO number.
Notes	Any other comments or statements that are applicable for the PO number.
Inactive	Leave this option blank to add the PO number as an active number (the PO number is to be available when a reservation is made for the group). Select this option to inactivate the PO number.

7. Continue with any other optional configuration for the group as needed; otherwise, click OK to close the PO Number dialog box and return to the group-specific page.

Configuring Contacts for a Group

A *contact* is a person who serves as the coordinator or focal point for a group. You have two options for configuring a contact for a group. You can configure a" free form" contact, which requires you to manually enter the contact information, or you can configure a contact from another group, which means that you do not have to manually enter the contact information. Instead, the group information is automatically used for the contact.

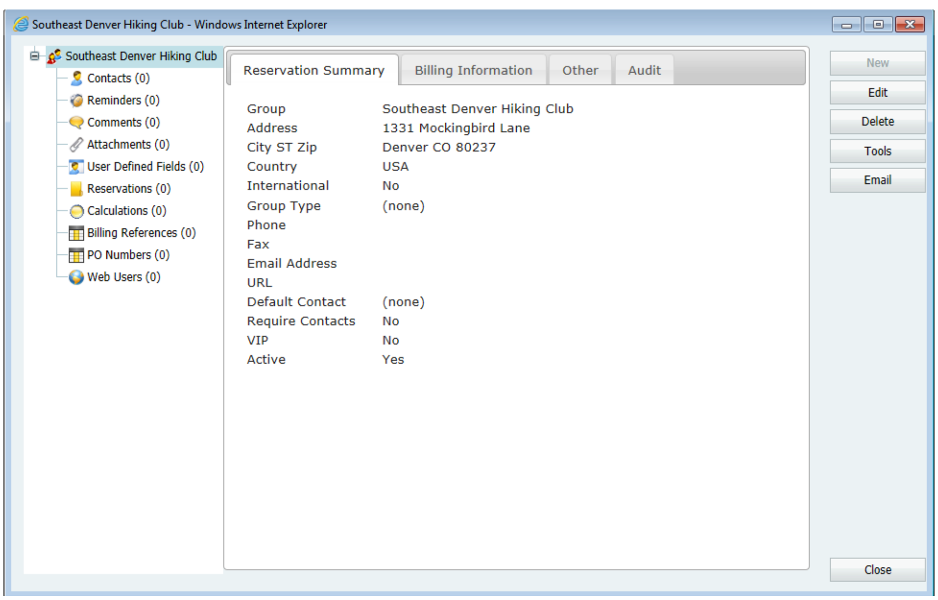
You can also configure and edit a contact "on the fly" during the reservation process. See "Making a Reservation Using the Reservation Wizard" on page 33 for details.

To configure contacts

1. Open the Groups page and search for the group for which you are configuring the contact. See "To search for a group and/or contact" on page 231.
2. Select the group, and then click Open.

   A group-specific page opens. The group is automatically selected in the page.

Figure 6-17: Group-specific page



3. In the left pane of the group-specific page, select Contacts.

   A list of all currently active contacts for the group is displayed in the right pane of the group-specific page.

Optionally, to display all group contacts regardless of status, click Show Inactive. Any inactive contacts are displayed in red italics in the right pane.

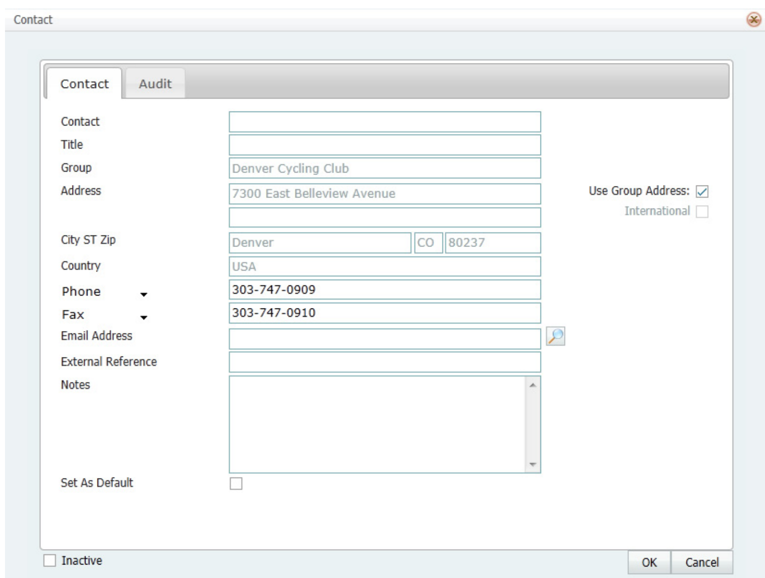
4. Continue to one of the following:
   - "To configure a contact manually" below.
   - "To configure a contact from a group" on page 257.

To configure a contact manually

1. Click New.

   The Contact dialog box opens.

Figure 6-18: Contact dialog box



2. Enter the information for the new contact.

Field	Description
Contact	The name of the contact. **Note:** The name can be a maximum of 50 characters, including spaces.
Title	The title (Mr., Ms., Dr., and so on) of the contact.
Group	Populated with the name of the group that you selected. You cannot change this value.
Address	Populated with the address of the group that you selected. If the contact address is not the same as the group address, then clear Use Group Address and enter the appropriate values in the Address fields.
International	Select this option to drop the State and Zip fields for an international group.

Field	Description
Phone Fax	The phone number and fax number for the contact. By default, they are set to the phone number and fax number for the group, but you can always edit these values. **Note:** The Phone and Fax fields have a dropdown list available on which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.
Email Address	The email address for the contact. **Note:** If your computer is connected to a network, click the Search icon to open a Global Address Lookup dialog box and search for the email address.
External Reference	Links the contact to an outside program, for example, HR Toolkit, if needed.
Notes	Any other information that is pertinent for the contact.
Set as Default	Select this option if the contact is to be the default contact for the selected group. **Note:** If a default contact has been defined for a group, then when you specify the group information for a reservation, the Contact field is automatically populated with the name of the default contact. **Note:** You can always specify a contact as the default contact for a selected group at a later date. To do so, select the contact in the right pane of the group-specific page, click Set Default, and then click Yes at the prompt to set the selected user as the default contact.
Inactive	Leave this option blank to add the contact as an active contact. Select this option to inactivate the contact.

3. Optionally, make sure that the newly created contact is selected so that you can create a web user from the contact. See "To create a web user from a contact" on page 259.

4. Click OK.

   The Contact dialog box closes. The contact is added to the group. The group-specific page remains open.

To configure a contact from a group

1. Click Tools > Click Create Contact from Another Group.

   A Lookup dialog box opens.

2. Do one of the following to search for the group that is to be the source of the contact:

   - Leave the Find field blank, and then click the Search icon to open a list of *all* currently active groups in your EMS database.

   - In the Find field enter a search string, and then click the Search icon to return a list of groups that meet your search criteria.

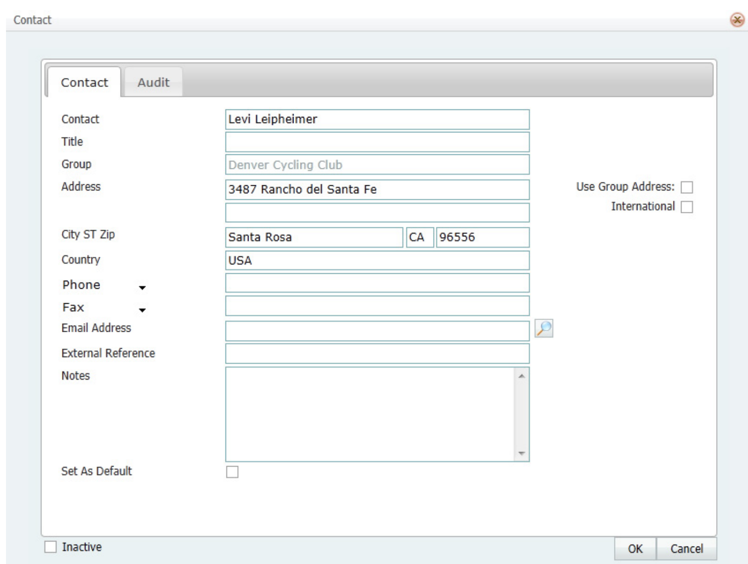
     - Starts with—The string is not case-sensitive, but your search is limited to the exact order of the characters in the string, and the string must begin with the information for which you are searching. For example, **Assoc** returns **Association** of Broadcasters but not Biomedical Student Association.

     - Contains—Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive, and the string can be found anywhere in your search results. For example, **Assoc** returns both **Association** of Broadcasters and Biomedical Student **Association**.

3. Click the Add icon next to the appropriate group to select it.

   The Lookup dialog box closes and the Contact dialog box opens. The name of the group (contact source) is displayed in the Group field and you cannot edit this value. The remainder of the fields (Contact Name, Address, Phone, and so on) display the information for the group that you selected in Step 2 of "To configure contacts" on page 254.

Figure 6-19: Contact dialog box



4. If needed, edit the information for the contact.

Field	Description
Contact	The name of the contact. **Note:** The name can be a maximum of 50 characters, including spaces.
Title	The title (Mr., Ms., Dr., and so on) of the contact.
Group	Populated with the name of the group that you selected first (the group for which you are configuring the contact). You cannot change this value.
Address	Populated with the address of the contact. If the contact address is the same as the group address, then select Use Group Address to populated the address fields with the group address; otherwise, you can edit these values.
International	Not applicable if Use Group Address is selected. Select this option to drop the State and Zip fields from the address for an international contact.
Phone Fax	The phone number and fax number for the group. **Note:** The Phone and Fax fields have a dropdown list available on which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.
Email Address	The email address for the contact. **Note:** If your computer is connected to a network, click the Search icon  to open a Global Address Lookup dialog box and search for the email address.
External Reference	Links the contact to an outside program, for example, HR Toolkit, if needed.
Notes	Any other information that is pertinent for the contact.
Set as Default	Select this option if the contact is to be the default contact for the selected group. **Note:** If a default contact has been defined for a group, then when you specify the group information for a reservation, the Contact field is automatically populated with the name of the default contact. **Note:** You can always specify a contact as the default contact for a selected group at a later date. See “To edit the contacts for a group” on page 263.
Inactive	Leave this option blank to add the contact as an active contact. Select this option to inactivate the contact.

5. Optionally, make sure that the newly created contact is selected so that you can create a web user from the contact. See “To create a web user from a contact” on page 259.

6. Click OK.

   The Contact dialog box closes. The contact is added to the group. The group-specific page remains open.

To create a web user from a contact

A *web user* is a registered user who can submit requests for reservations or schedule reservations in VEMS. When you add a contact to a group in your EMS database, you might also need to create a web user from the contact. This web user can then create and view reservations on behalf of the contact's group in VEMS. You can create only one web user *from* a contact. When you create a web user, you can also specify one or more delegates for the web user. A *delegate* is a web user who can create and view reservations on behalf of another web user.

1. If needed, open the group that contains the contact from which you are creating the web user in the group-specific page. See “To configure contacts” on page 254.
2. In the left pane of the group-specific page, make sure that Contacts is selected.
3. In the right pane of the page, select the contact from which you are creating the web user.
4. Click Tools > Create Web User from Contact.

   A contact-specific dialog box opens. The Web User tab is the active tab.

The User Defined Fields tab displays the questions that a web user was required to answer when the user requested to create an account through VEMS and it is not relevant to the procedure that is described below.

5. Enter the information for the web user.

Field	Description
Name	Automatically populated after you select the contact. You can edit this information.
Password	The password that a web user must enter to log in to VEMS.
Email address	If this information has been entered for the contact, then this field is automatically populated after you select the contact. If the field is blank, you must enter the full email address for the user. (The user must enter this address to log in to VEMS.)
Phone/Fax	Optional fields. If this information has been entered for the contact, then these fields are automatically populated after you select the contact. If the fields are blank, you can enter values if needed.
Notes	Optional field.
External Reference	Optional field. Links the web user to an outside program if needed.
Network ID	Optional field. The web user's network ID.
Email Opt Out	Select this option if the web user is not to receive automatic emails (such as reservation summary emails) from VEMS. The user will still receive manually sent emails.

Field	Description
Status	Required field. Select the status for the web user: • Active—The web user can log in to VEMS. • Inactive—The user cannot log in to VEMS and is instructed to contact the EMS administrator. • Pending—The web user cannot log in to VEMS and is informed that he/she must check back at a later time.
Security Template	Required field. This determines the web user's access to the system—the menu items that the user can see and the information that the user can view in a tooltip when 'rolling-over' an event in VEMS.
Time Zone	Required field. Select the time zone for the user.

6. Open the Process Templates tab and on the Available list, select the web process template or CTRL-click to select the multiple templates to which this user is to be assigned, and then click the Move button (>) to move the selected templates to the Selected list.

A web process template defines the functions that are available to each type of web user in VEMS when the user is submitting a request for a reservation.

7. Open the Groups tab and do one of the following to specify the groups on whose behalf the web user can view and make reservations in VEMS.
   - The contact's group is selected by default. You can leave this group in the Selected list, or you can select the group and click the Remove button (<).
   - Specify any combination of search criteria for the Find field and Group Type, and then click Display to produce a list of all groups that meets the criteria. In the Available list, select a group, or CTRL-click to select multiple groups, and then click the Move button (>) to move the selected groups to the Selected list.

If you leave the Find field blank, then a list of all currently active groups for the selected group type is displayed. If you enter a search string in the Find field, the string is not case-sensitive, but your search is limited to the exact order of the characters in the string and the string must begin with the information for which you are searching. For example, ***AAA*** *returns* ***AAA*** *Colorado, but not Colorado AAA.*

8. Open the Delegates tab, and on the Search by dropdown list, do one of the following to specify the delegates for the web user:

    - Leave the Find field blank, and then click Display to open a list of *all* currently available web users. Select a web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.
    - On the Search By dropdown list, select the option by which to search (Email Address or User Name), and in the Find field, enter the string by which to filter your search, and then click Display. Select a web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.

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*The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and the string must begin with the information for which you are searching. For example, if searching by Email Address, a search string of **bob** returns **bob**.worth@emssoftware.com but not dbobbett@emssoftware.com.*

9. Optionally, click Spelling to spell check any information that you manually entered for the user.
10. Click OK.

    The dialog box for creating a web user closes and a message opens indicating that the web user was created successfully.
11. Click OK to close the message and return to the group-specific page.

Editing Group Information

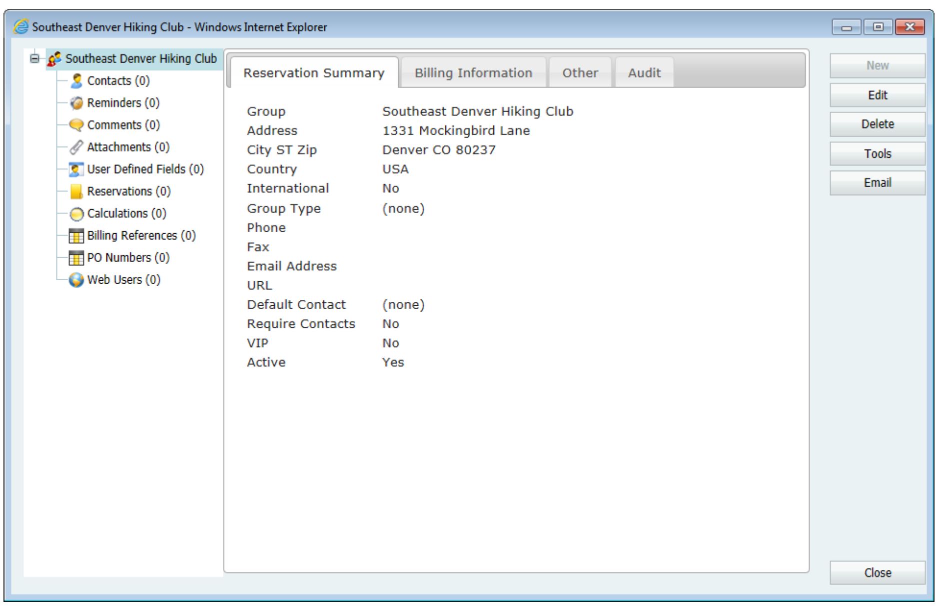
You can edit any and all information for a group. The way that you edit the information depends on the information itself. You can edit the Summary information, the Billing information, and the Other information through the Edit function on the group-specific page. You must edit the group's contacts, reminders, comments, attachments, UDFs, calculations, billing reference numbers, PO numbers, and web users on the group-specific page.

To edit group information

1. Open the Groups page and search for the group for which you are editing the information. See “To search for a group and/or contact” on page 231.
2. Select the group, and then click Open to open the group in the group-specific page.

   The group is selected by default. The Summary tab is the active tab.

Figure 6-20: Group-specific page



3. Continue to one of the following:
   - “To edit summary, billing, and/or other group information” on page 263.
   - “To edit the contacts for a group” on page 263.
   - “To edit the reminders for a group” on page 264.
   - “To edit the comments for a group” on page 264.
   - “To edit the attachments for a group” on page 265.
   - “To the edit user defined fields (UDFs) for a group” on page 266.

- "To edit the calculations for a group" on page 266.
- "To edit the billing reference numbers for a group" on page 267.
- "To edit the PO numbers for a group" on page 267.
- "To edit the web users for a group" on page 268.

To edit summary, billing, and/or other group information

1. To edit the summary information, billing information, and/or other information for the group, click Edit.

   The group-specific page opens.

2. Open the appropriate tab, and then edit the information as needed.

   See Step 3 and Step 4 of "To configure groups" on page 233.

3. After you edit the information, click OK.

   The group-specific page closes. You return to the group-specific page with the group still selected.

To edit the contacts for a group

1. In the left pane of the group-specific page, select Contacts.

   A list of all contacts that are currently configured for the group is displayed in the right pane of the page.

2. In the right pane of the page, select the contact that you are editing, and then do one of the following:

   - To set the selected contact as the default contact for the group, click Set Default, and then click OK at the prompt.
   - To edit the information for the contact, click Edit.

     The Contact dialog box opens. The dialog box displays the information for the selected contact.

3. Edit the information for the contact as needed. See "To configure a contact manually" on page 255.

4. Click OK.

   The Contact dialog box closes. You return to the group-specific page with Contacts still selected.

To edit the reminders for a group

1. In the left pane of the group-specific page, select Reminders.

   A list of all reminders that are currently configured for the group is displayed in the right pane of the page.

2. In the right pane of the groups-specific page, select the reminder that you are editing, and then click Edit.

   The Reminder dialog box opens. The Reminder tab is the active tab.

3. Do any or all of the following to edit the reminder as needed:

   - On the Reminder Type dropdown list, select a different reminder type.
   - Optionally, change the value for the Responsible User, the Date Due, or both.
   - If you are completing the reminder today, select a Date Completed; otherwise, leave this field blank.

If you leave this field blank, then it is automatically populated when you or another user completes the reminder on the Reminders tab of the Dashboard page. *See “To complete a reminder” on page 218.)*

   - In the Notes field, enter any further explanation or information about the reminder.

4. Optionally, click Spelling to spell check the edited reminder before you save it.

5. Click OK.

   The Reminder dialog box closes. The newly edited reminder is automatically selected in the group-specific page.

To edit the comments for a group

1. In the left pane of the group-specific page, select Comments.

   A list of all comments that are currently configured for the group is displayed in the right pane of the page.

2. In the right pane of the group-specific page, select the comment that you are editing, and then click Edit.

   The Comment dialog box opens. The Comment tab is the active tab.

3. Do any or all of the following to edit the comment as needed:
   - On the Comment Type dropdown list, select a different comment type.

If none of the pre-configured comment types meets your working needs, select (user specified comment), and then in the Description field, enter a description for the comment type.The description can be a maximum of 30 characters, including spaces.

   - In the Notes field, enter or modify the comment.
   - To alert any EMS user that opens this group that this comment has been added to the group, select Alert Users.
4. Optionally, click Spelling to spell check the edited comment before you save it.
5. Click OK.

   The Comment dialog box closes. The newly edited comment is automatically selected in the group-specific page.

To edit the attachments for a group

1. In the left pane of the group-specific page, select Attachments.

   A list of all attachments that have been added for the group is displayed in the right pane of the page.
2. In the right pane of the group-specific page, select the attachment that you are editing, and then click Edit.

   The Attachment dialog box opens.
3. Do any or all of the following to edit the attachment as needed:
   - Edit the description for the attachment.

The description can be a maximum of 50 characters, including spaces. If you leave this field blank, then it is automatically populated with the name of the file after you attach it to the Group.

   - On the Type dropdown list, select a different attachment type.
   - Click Upload to open the Attachments dialog box, and then click Attach Files to open the Select File to Upload dialog box and browse to and select a different attachment.
4. Click OK.

   The Attachment dialog box closes. The newly edited attachment is automatically selected in the group-specific page.

To the edit user defined fields (UDFs) for a group

1. In the left pane of the group-specific page, select User Defined Fields.

   All user defined fields that are currently configured for the group are displayed in the right pane of the group-specific page.

2. In the right pane of the group-specific page, select the UDF that you are editing, and then click Edit.

   The User Defined Field dialog box opens. The User Defined Field tab is the active tab.

3. Do one or both of the following to edit the UDF:

   - On the Field dropdown list, select a different UDF.
   - In the value field, edit the value for the UDF.

4. Click OK.

   The User Defined Field dialog box closes. The newly edited UDF is automatically selected in the group-specific page.

To edit the calculations for a group

1. In the left pane of the group-specific page, select Calculations, and then click Edit.

   The Calculations dialog box opens.

2. Do one or both of the following:

   - On the Available list, select the calculation, or CTRL-click to select the multiple calculations that are to always apply to this group, and then click the Move button (>) to move the selected calculations to the Selected list.
   - On the Selected list, select the calculation, or CTRL-click to select the multiple calculations that are *not* to apply to this group, and then click the Remove button (<) to move the selected calculations to the Available list.

3. Click OK.

   The Calculations dialog box closes. You return to the group-specific page with Calculations still selected.

To edit the billing reference numbers for a group

1. In the left pane of the group-specific page, select Billing References.
2. In the right pane of the page, select the billing reference number that you are editing, and then click Edit.

   The Billing Reference dialog box opens. The dialog box displays the information for the selected billing reference number.
3. Edit the information for the billing reference number as needed.

Option	Description
Billing Reference	The billing reference number that is associated with the group. **Note:** The reference can be alphanumeric and it has a maximum of 100 characters, including spaces.
Description	A description of the billing reference number.
Notes	Any other comments or statements that are applicable for the billing reference number.
Inactive	Leave this option blank to add the reference as an active reference (the billing reference number is to be available when a reservation is made for the group). Select this option to inactivate the billing reference number.

4. Click OK.

   The Billing Reference dialog box closes. You return to the group-specific page with Billing References still selected.

To edit the PO numbers for a group

1. In the left pane of the group-specific page, select PO Numbers.
2. In the right pane of the page, select the PO number that you are editing, and then click Edit.

   The PO Number dialog box opens. The dialog box displays the information for the selected PO number.
3. Edit the information for the PO number as needed.

Option	Description
PO Number	The PO number that is associated with the group. **Note:** The reference can be alphanumeric and it has a maximum of 100 characters, including spaces.
Description	A description of the PO number.
Notes	Any other comments or statements that are applicable for the PO number.

Option	Description
Inactive	Leave this option blank to add the PO number as an active number (the PO number is to be available when a reservation is made for the group). Select this option to inactivate the PO number.

4. Click OK.

   The PO Number dialog box closes. You return to the group-specific page with PO Numbers still selected.

To edit the web users for a group

When you edit the web users for a group, you can select additional web users for the group, or you can remove web users for the group. You cannot edit the web user itself, nor can you edit the delegates for a web user.

1. In the left pane of the group-specific page, select Web Users.
2. In the right pane of the group-specific page, select the web user whom you are editing, and then click Edit.

   The Web Users dialog box opens.
3. Do one or both of the following:
   - To add a new web user for the group:
     - Leave the Find field blank, and then click Display to open a list of *all* currently active web users. Select the web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.
     - In the Search By dropdown list, select the option by which to search (Email Address or User Name) and then in the Find field, enter the string by which to filter your search, and then click Display. Select the web user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected users to the Selected list.

The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and the string must begin with the information for which you are searching. For example, if searching by Email Address, a search string of ***bob*** *returns* ***bob****.worth@emssoftware.com but not dbobbett@emssoftware.com.*

   - To remove a web user from a group, in the Selected field, select the user, or CTRL-click to select the multiple web users that you are removing from the group, and then click the Remove button (<) to move the selected web users to the Available list.

4. After you edit the information, click OK.

   The Web Users dialog box closes. You return to the group-specific page with Web Users still selected.

Importing Groups

You can import groups into your EMS database from a tab-delimited text file. (See *Import File Specifications* in the *EMS Setup Guide* for the file specifications.)

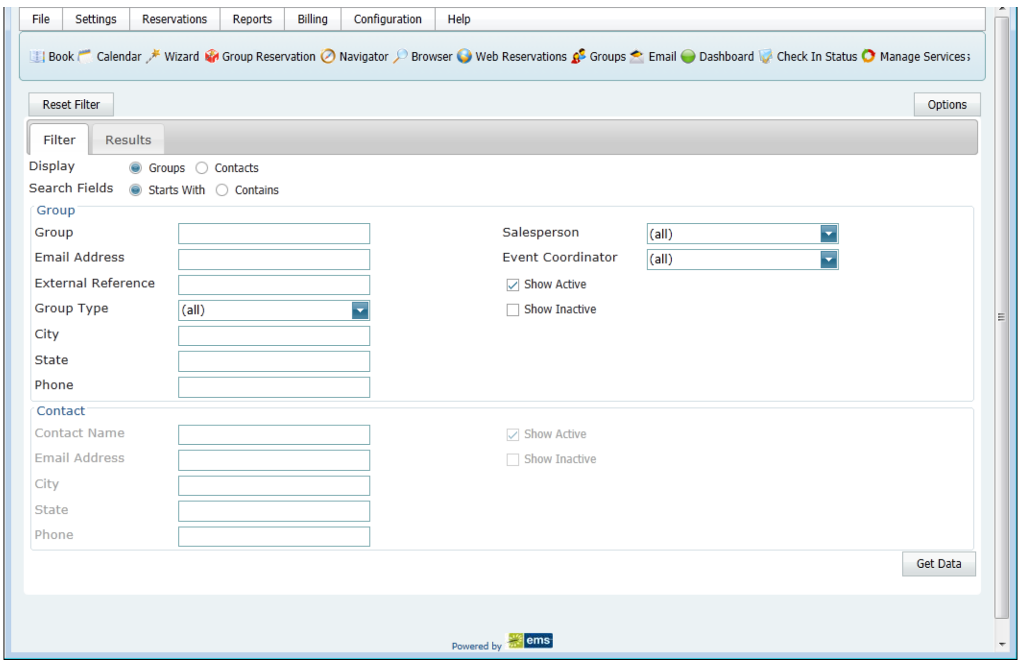
To import groups

1. On the EMS toolbar, click the Groups icon 

.

   The Groups page opens. The Filter tab is the active tab.

Figure 6-21: Groups page, Filter tab



2. Click Import.

   The Open File dialog box opens.

3. Browse to and select the text file that lists the groups that you are importing.

   A dialog box opens, indicating the number of groups that you are about to import, and asking you if you want to continue.

4. Click Yes.

   A message opens indicating that the import was successful.

5. Click OK to close the message and return to the Groups page.

Working with Reservations for a Group

You have a variety of options for working with the reservations for a group. You can:

- Search for and make a reservation for a group from the Groups page.
- Search for and make a reservation for a group from the group-specific page.
- Search for reservations by group, and then open and view any existing reservations in the Navigator for a group from the group-specific page.
- Reassign the reservations for a group or contact from the group-specific page.

In EMS Workplace, you can also make a group reservation from the Group Reservation page.

To work with reservations for a group

1. Open the Groups page and search for the appropriate group. See "To search for a group and/or contact" on page 231.
2. On the Groups page, select the group, and then do one of the following:
    - Click New Reservation at the top of the page to open the Reservation Wizard, and then continue to "Making a Reservation Using the Reservation Wizard" on page 33.
    - Click Open to open the group-specific page (the group is automatically selected in the page), and then continue to one of the following:
        - "To search for and view reservations by group from the group-specific page" below.
        - "To search for and make a reservation for a group from the group-specific page" on page 272.
        - "To reassign a reservation for a group from the group-specific page" on page 272.

To search for and view reservations by group from the group-specific page

1. In the left pane of the group-specific page, select Reservations.

    All reservations that have been made for the group in your EMS database and that have a date greater than or equal to the current day's date are displayed in the right pane of the group-specific page.

Optionally, to show all reservations that have been made for the group, click Show Old Reservations.

2. In the right pane of the group-specific page, select the appropriate reservation, and then click Open.

   The reservation opens in the Navigator.

3. Continue to , “The Navigator,” on page 65.

To search for and make a reservation for a group from the group-specific page

1. In the left pane of the group-specific page, select Reservations.

   All reservations that have been made for the group in your EMS database and that have a date greater than or equal to the current day’s date are displayed in the right pane of the group-specific page.

Optionally, to show all reservations that have been made for the group, click Show Old Reservations.

2. Click New.

   The Reservation Wizard opens.

3. Continue to “Making a Reservation Using the Reservation Wizard” on page 33.

To reassign a reservation for a group from the group-specific page

1. In the left pane of the group-specific page, select Reservations.

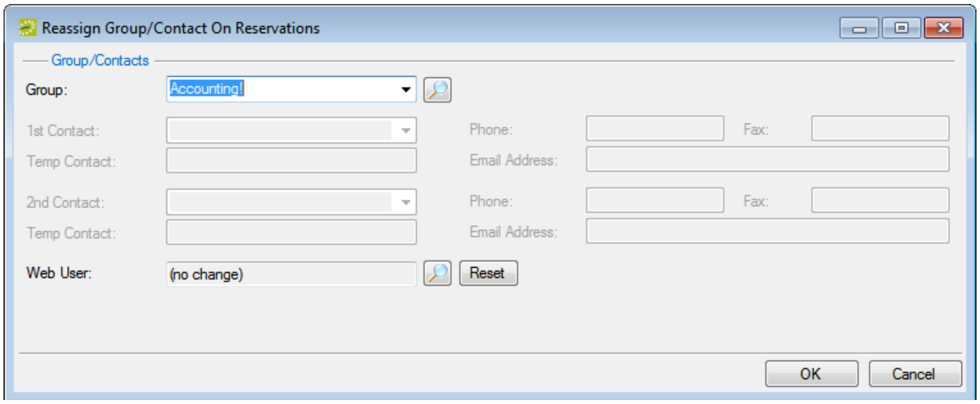
   All reservations that have been made for the group in your EMS database and that have a date greater than or equal to the current day’s date are displayed in the right pane of the group-specific page.

Optionally, to show all reservations that have been made for the group, click Show Old Reservations.

2. In the right-pane of the group-specific page, select the appropriate reservation, or CTRL-click to select multiple reservations, and then click Reassign.

   The Reassign Group/Contact on Reservations dialog box opens. See Figure 6-22 on page 273.

Figure 6-22: Reassign Group/Contact on Reservations dialog box



3. On the Group dropdown list, select the group to which you are reassigning the reservation, or click the Search icon to open a Lookup dialog box and do one of the following to search for a group:

   - Leave the Find field blank, and then click the Search icon to open a list of *all* currently active groups in your EMS database, and then click the Add icon next to the appropriate group to select it.
   - In the Find field enter a search string, click the Search icon to return a list of groups that meet your search criteria, and then click the Add icon next to the appropriate group to select it.
     - Starts with—The string is not case-sensitive, but your search is limited to the exact order of the characters in the string, and the string must begin with the information for which you are searching. For example, **Assoc** returns **Association** of Broadcasters but not Biomedical Student Association.
     - Contains—Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive, and the string can be found anywhere in your search results. For example, **Assoc** returns both **Association** of Broadcasters and Biomedical Student **Association**.

4. Optionally, edit any and/or all of the group information as needed.

Option	Description
1st Contact 2nd Contact	The contact for the group to which you are reassigning the reservation. **Note:** If none of the pre-configured contacts is appropriate, then select (temporary contact) and in the Temp Contact field, enter the name of the temporary contact.
Phone Fax Email Address	The phone, fax, and email address for the contacts for the group to which the reservation is being reassigned. If you selected from the list of the pre-configured contacts, then some or all of this information might be automatically populated, but you can still edit the values. If you selected a (temporary contact), then you must enter this information for the contact.
Web User	The web user for the group. Initially, this field is set to (no change) which means that the web user for the group to which you are reassigning the reservation is to remain as is; however, if needed, you can click the Search icon to open the < > dialog box and select a different web user. • You can search by User Name or Email Address. • To search a list of all available web users, leave the Search field in the < > s dialog box blank, and then click Display. • To search for a specific web user, enter a search string in the Search field, and then click Display. **Note:** The string is not case-sensitive, but your search is limited to the exact order of characters in the string and the string must begin with the information for which you are searching. For example, if searching by Email Address, a search string of **bob** returns **bob**worth@emssoftware.com but not dbobbett@demssoftware.com. **Note:** To return this field to the (no change) value at any time, click Reset.

5. Click OK.

   A Reassign Reservations message opens, asking you if it is OK to reassign the selected reservations to the group.

6. Click Yes.

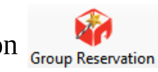
   The Reassign Reservations message closes and a second Reassign Reservations message opens, indicating the reservations were successfully reassigned.

7. Click OK.

   The message closes, and the reassigned reservations are no longer displayed in the group-specific page.

You might have to click Reservations in the left-pane of the group-specific page to refresh the display.

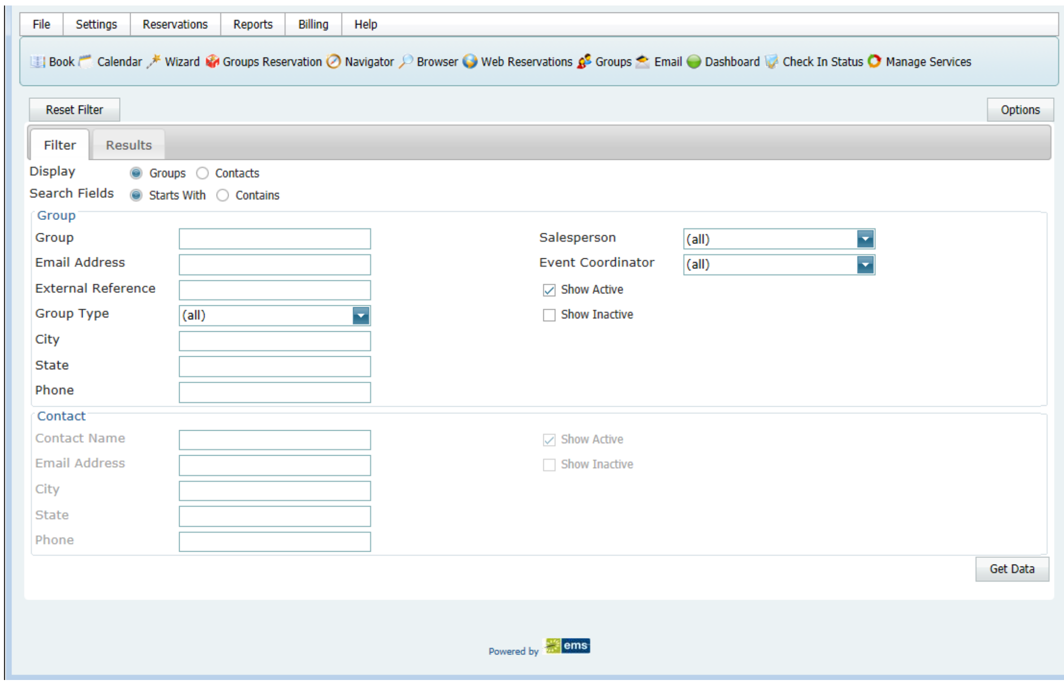
To make a group reservation from the Group Reservation page (EMS Workplace only)

1. On the EMS Workplace toolbar, click the Group Reservation icon 

.

   The Group Reservation page opens. The Filter tab is the active tab.

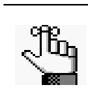
Figure 6-23: Group Reservation page, Filter tab



2. Search for the group for which you are making a reservation. See “To search for a group and/or contact” on page 231.
3. Select the group for which you are making the reservation, and then click Reservation.

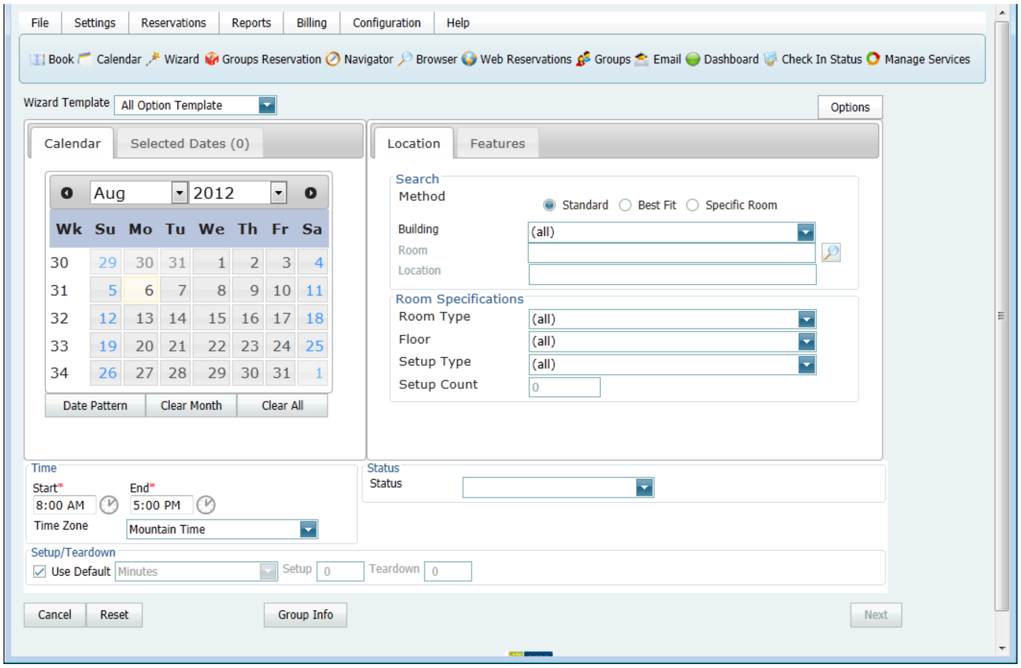
   A dropdown list of the available Reservation Wizard templates opens.
4. Select the appropriate template.

   The Reservation Wizard opens. The name of the group for which you are making the reservation is displayed in the title bar of the Reservation Wizard. The Reservation Wizard template that you selected is displayed on the Wizard Template dropdown list at the top of the Reservation Wizard. (You can always select a different template if needed.) See Figure 6-24 on page 276.



Depending on how your EMS administrator has configured the template that you selected, you might be prompted to select a reservation start date before the Reservation Wizard opens.

Figure 6-24: Reservation Wizard with Wizard Template option



5. Continue making the reservation as you normally would. See "Making a Reservation Using the Reservation Wizard" on page 33.

Printing and Exporting Group Information

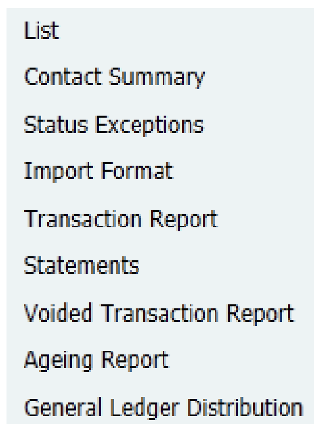
You can print a variety of information for selected groups such as contact summary information, status exceptions, group import format information, and billing information, and you can also export a list of selected groups and the summary information for each group (type, name, address, and so on) to an Excel spreadsheet.

To print group information

1. Search for the groups for which you are printing the information. See "To search for a group and/or contact" on page 231.
2. On the Groups page, click Print.

   A list with a variety of options for printing information for the groups *that are currently displayed* in the Groups page opens.

Figure 6-25: Group print options



3. Select the information that you want to print for the displayed groups.

Option	Description
List	A message opens asking you if you want to print or save the Groups.pdf file. This file lists all the groups (group name, address, phone number, email address, pricing plan, and status) that are currently displayed in the Groups page. The groups are sorted by group type.
Contact Summary	A message opens asking you if you want to print or save the Groups (Contact Summary).pdf file. This file lists all the contacts (group name, group phone number, contact name, and contact phone number) that have been configured for all the groups that are currently displayed in the Groups page.
Status Exceptions	A message opens asking you if you want to print or save the Group. Status Exceptions.pdf file.groups. This file is derived from all the groups that are currently displayed in the Groups page that have any status other than OK. The groups are sorted by group type.

Option	Description
For any of the above three files, select the option that best fit your working needs. • If you click Open, the file opens onscreen. You can always specify a different file name and save the file after you view it. • If you click Save, you must select the directory in which to save the file.	
Import Format	Opens an onscreen preview of the required format for the tab-delimited file that is to be used when importing groups.
Transaction Report	See “Generating an EMS Billing Report” on page 350.
Statements	See “Generating an EMS Billing Report” on page 350.
Voided Transaction Report	See “Generating an EMS Billing Report” on page 350.
Ageing Report	See “Generating an EMS Billing Report” on page 350.
General Ledger Distribution	See “Generating an EMS Billing Report” on page 350.

To export a list of groups to an Excel spreadsheet

1. Search for the groups that are you exporting to an Excel spreadsheet. See “To search for a group and/or contact” on page 231.
2. On the Groups page, click Export.

   A message opens asking you if want to open the Groups.xls file or save it.
3. Select the option that best fit your working needs.
   - If you click Open, the file opens onscreen. You can always specify a different file name and save the file after you view it.
   - If you click Save, you must select the directory in which to save the file.

To preview the file, Microsoft Excel must be installed on your EMS client.

Confirmations

In EMS, a *confirmation* is a document that details the critical information for a reservation—the date, the time, the location, the scheduled resources, and so on. You send a confirmation to the group who is sponsoring or hosting the event as verification that the reservation has been correctly set up—the time and location are correct, all the necessary resources have been scheduled, and so on. You can also use the confirmation to inform the group of any outstanding issues related to the reservation (such as a balance due) and to provide other information that is not necessarily reservation-specific such as your organization's cancellation policies, your organization's alcohol policies, and so on. You can generate a confirmation for all the bookings in a reservation, or just for a selected booking in a reservation.

This chapter covers the following topics:

- "Specifying your Confirmation Settings" on page 281.
- "Generating a Single Confirmation at a Time" on page 284.

Remember, a fast way to view reservations is through the Reservation Book. See *"Viewing and Editing Reservations in the Reservation Book" on page 50.*

This chapter details the generation of a single confirmation at a time. To generate confirmations for multiple reservations in a single step, see *"Generating Multiple Confirmations" on page 375.*

Specifying your Confirmation Settings

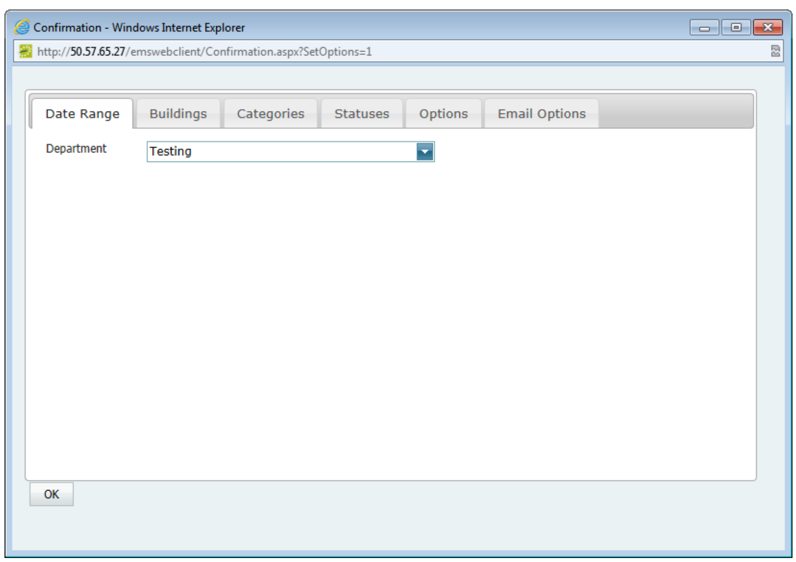
The Confirmation Settings dialog box provides a variety of options that you can specify for manual and automatic generation of a confirmation for a reservation or a booking. You can specify your confirmation settings one time and use these settings for all confirmations that you generate, or you can change the settings on as-needed basis and tailor them for each confirmation that you generate.

To specify your confirmation settings

1. Open a reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In the upper right hand corner of the Navigator, click Settings > Confirmation Settings.

   The Confirmation Settings dialog box opens.

Figure 7-1: Confirmation Settings dialog box



3. Specify the settings for your system's confirmations.

Field	Description
Date Range tab—The department name that appears at the top of a printed confirmation.	
Buildings tab—Select the specific buildings that are to be included in the confirmation.	

Field	Description
Categories tab—Select the specific booking details that are to be included in the confirmation.	
Statuses tab—Select the specific statuses that are to be included in the confirmation.	
Options tab—Format settings for a printed confirmation.	
Confirmation Title	Appears bold and centered at the top of the printed confirmation.
Header Message Footer Message	Pre-configured blocks of text that appear in the header and footer of the printed confirmation.
Paper Size	The size of the paper on which the confirmation is printed. Values are Letter, Legal, and A4.
Print Comments	Include the comments for the reservation in the printed confirmation.
Print Reminders	Include the reminders for the reservation in the printed confirmation.
Print Cancel Reasons	Include the reasons for cancellation in the printed confirmation.
Print User Defined Fields	Include user-defined fields and their values in the printed confirmation.
Print Room Phone	Include the phone number for the room in which the event is being held in the printed confirmation.
Print Room Notes	Include any notes for the room in which the event is being held in the printed confirmation.
Print Building Notes	Include any notes about the building in the printed confirmation.
Print Billing Reference Allocation	Include the billing reference numbers for the event as well as the percentage of charges that is allocated to each number in the printed confirmation.
Print PO Allocation	Include the PO numbers for the event as well as the percentage of charges that is allocated to each number in the printed confirmation.
Print Category Subtotals	Include the subtotal charges by category in the printed confirmation.
Print Room Type	Include the room type for the event in the printed confirmation.
Print Item Selection Notes	Include the notes for each resource selection item for the event in the printed confirmation.
Suppress Reserved Time	Do not show the reserved time for the event in the printed confirmation.
Suppress Location	Do not show the location for the reservation in the printed confirmation.
Suppress Pricing	Do not show the reservation’s room charges or resource charges in the printed confirmation.
Suppress Logo	Do no show your organization’s logo in the printed confirmation.
Suppress Item Notes	Do not show notes for any booking items in the printed confirmation.
Suppress Item Special Instructions	Do not show special instructions for any booking items in the printed confirmation.
Suppress Item Selections	Do not show any resource item selections in the printed confirmation.
Always Display Time Zone	Always show the time zone for the event in the printed confirmation.

Field	Description
Display Messages as HTML	If you have defined any HTML messages, then select this option to display the HTML version of these messages in the printed confirmation; otherwise, the message is displayed in plain text.
Limit Bookings to Those With Details in Selected Categories	Show only those bookings in the printed confirmation that contain details for the categories that are selected on the Categories tab.
Email Options tab—Format settings for the body of an emailed confirmation.	
Header Message Footer Message	Pre-configured blocks of text that appear in the body of the emailed confirmation. **Note:** Your EMS administrator configures these values. Contact your administrator if you need assistance with adding or editing a value.
Email Format	• None—Opens a blank email form. • Detail—The confirmation appears in its entirety in the email body. • Mobile Friendly—The confirmation appears in a condensed version that is viewable on a mobile device. • Summary—Only the booking information appears in the email body.
Attached Detailed Confirmation	The entire confirmation is provided as an attachment to the email.
Attach .ics file	An .ics file is a file that a recipient can save to create an entry in his/her personal calendar. Select this option to attach an .ics file to the email.
Prompt for Res. Attachments	Select from a list of reservation-level attachments that you are including in the email.
Email To Email CC	Select the users associated with the reservation who should receive the email confirmation.

4. You can now generate a confirmation (manually or automatically) based on the settings that you have specified. See "Generating a Single Confirmation at a Time" on page 284.

Generating a Single Confirmation at a Time

You can generate a confirmation for all the bookings in a reservation, or just for a selected booking in a reservation. In the default implementation of EMS, when you request to generate a confirmation for a reservation or a booking, the Confirmation dialog box opens. The Confirmation dialog box has the same tabs as the Confirmation Settings dialog box. (Remember, the values that you specified on the Confirmation Settings dialog box determine the information that is included in a confirmation. See "Specifying your Confirmation Settings" on page 281.) It also contains options for generating a print preview of the confirmation and for manually printing or emailing the confirmation. If you want to automatically generate a printed or emailed confirmation according to your confirmation settings, then you must edit the Confirmation setting on the General tab of the Navigator Options dialog box.

To manually generate a single confirmation at a time

1. Open the reservation in the Navigator. See:
   - "Opening a reservation directly in the Navigator" on page 67.
   - "Opening a reservation through the Reservation Book" on page 68.
   - "Opening a reservation through a group" on page 68.
   - "Search Tools," on page 177.
2. In the left pane of the Navigator, do one of the following:
   - Select the reservation for which you are generating the confirmation.
   - Select the reservation for which you are generating the confirmation, and then in the Bookings (lower right) pane, select the booking for which you are generating the confirmation.
3. Do one of the following:
   - If you are generating a confirmation for a reservation, then open the Reservation Summary tab or Properties tab in the upper right pane of the Navigator, and then click Confirmation.
   - If you are generating a confirmation for a selected booking, then open the Booking Summary tab in the upper right pane of the Navigator, and then click Confirmation.

   The Confirmation dialog box opens. The Date Range tab is the active tab. The dialog box has the same tabs as the Confirmation Settings dialog box with one exception, the Date Range tab. (Additional options are available on the Date Range tab that you can use to limit the confirmation to specific bookings and/or specific booking times.) It also has options for saving, or *memorizing*, the displayed confirmation settings so that you do not have to adjust the settings every time you generate the confirmation. When the dialog box first opens, the Setup is set to (user-specified).

4. Do one of the following:

   - Review the selections on this dialog box, and optionally, make any needed modifications.

If you use specific times, then you must also click Options and indicate how the confirmation is to be limited—to bookings that start within the range or to bookings that occur within the time range.

If needed, you can always save, or memorize, these settings. See *"Working with Memorized Reports" on page 293.*

   - On the Setup dropdown list, select a saved, or *memorized*, confirmation.

If you select a memorized confirmation, then the only changes that you can make are to the dates and/or times on the Date Range tab.

5. Do one of the following:

   - To manually generate a confirmation that you can print, select the output format for the confirmation, and then click Generate Report.

     If you selected the default format of HTML, then the confirmation is displayed onscreen in its own page. You can use your browser options to view the confirmation prior to printing, set your printing options, print the confirmation, and so on. For all other confirmation formats, you must indicate whether to open the confirmation, or to save the confirmation. To open a confirmation in any format other than HTML, you must have the correct application installed on your client:

Output Format	Required Application
PDF	Adobe Reader or Adobe Acrobat
RTF	Microsoft Word
XLS	Microsoft Excel
HTML	Web Browser
TEXT	Notepad or Textpad
TIFF	Any graphics application including Microsoft Paint and Microsoft Office Picture Manager.

     Unless you change the filter settings, all subsequent confirmations are generated and printed according to the parameters and options that you have specified and in the format that you specified.

   - To manually generate an emailed confirmation, click Email to open an onscreen preview of the email, and then complete and send the email as you normally would. See "Sending Email from EMS" on page 367.

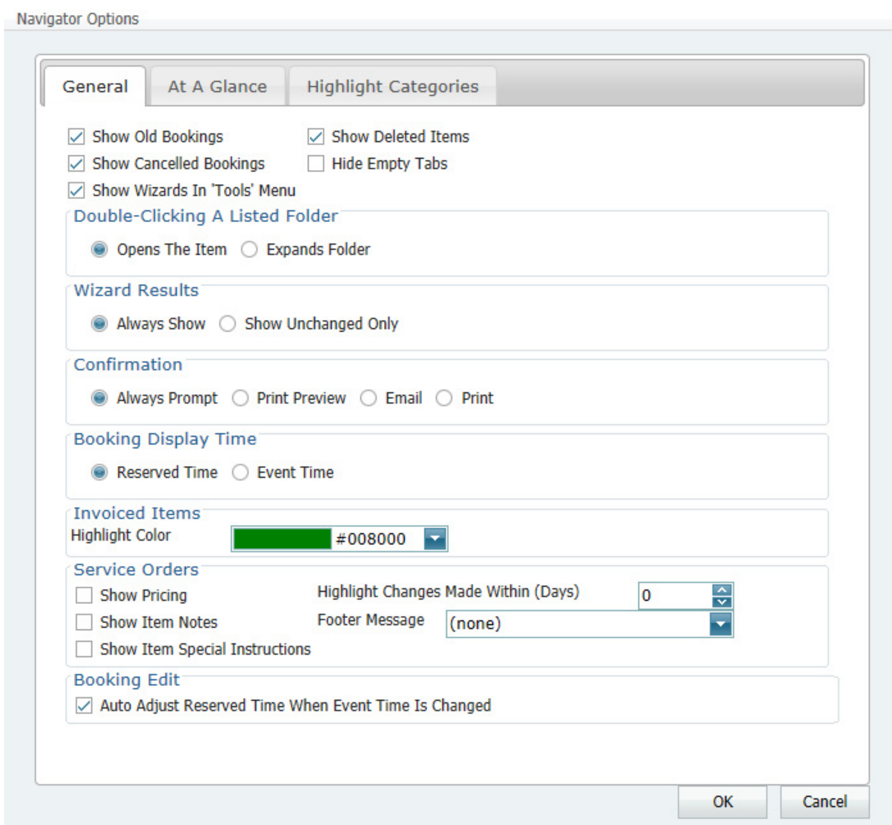
To automatically generate a confirmation

If you want to always automatically generate a printed or emailed confirmation based on your confirmation settings, then you must edit the Confirmation setting on the General tab of the Navigator Options dialog box.

1. Open the reservation in the Navigator. See:
   - “Opening a reservation directly in the Navigator” on page 67.
   - “Opening a reservation through the Reservation Book” on page 68.
   - “Opening a reservation through a group” on page 68.
   - “Search Tools,” on page 177.
2. In the upper corner of the Navigator page, click Settings > Options.

   The Navigator Options dialog box opens. The General tab is the active tab.

Figure 7-2: Navigator Options dialog box, General tab



3. Under Confirmation, select one of the following:
   - Email—To always automatically generate a confirmation that you can email based on your confirmation settings.
   - Print—To always automatically generate a confirmation that you can print based on your confirmation settings.
4. Click OK to close the dialog box and return to the Navigator.

   The next time you select any reservation or booking in the Navigator and click Confirmation, the following happens:
   - If your Navigator Options are set to Email, then see “Sending Email from EMS” on page 367.
   - If your Navigator Options are set to Print, then an onscreen preview of the confirmation opens. The onscreen preview contains options for printing a hard copy of the email, and so on.

If the emailed confirmation includes an attachment, then the Confirmation name is also used for the Confirmation Attachment name.

Reports

EMS contains six different categories of general reports to assist you in monitoring and maintaining your organization's reservation records and associated transactions.

This chapter covers the following topics:

- "Generating an EMS Report" on page 291.
- "Working with Memorized Reports" on page 293.
- "Report Descriptions and Options" on page 298.

Reports that are specific for the Billing function in EMS are detailed in "Billing," on page 319.

Generating an EMS Report

All EMS reports are available under the Reports option on the main menu. For any EMS report, you can specify the parameters, options, and format for the report, or you can generate the report according to memorized settings. Not all reports require the same parameters, nor do they all have the same options available.

If you run the EMS Web Client in Internet Explorer 8, to generate reports, you must enable the following setting: Tools -> Internet Options -> Security -> Custom Level -> Downloads -> Automatic prompting for file downloads.

To generate a report

1. On the EMS main menu, click Reports to open the Reports menu, and then click the option for the report that you are generating. For example, to generate the Event Schedule report, click Reports > Daily > Event Schedule.
2. On the Setup dropdown list, do one of the following:
   - To generate the report according to the filter settings that you specify (parameters, options, and so on), leave (user specified) selected on the Report Setup list, and then go to Step 3.
   - To run the report with filter settings that have been saved, or memorized, select the memorized report on the Report Setup list, and then go to Step 5.

For detailed information about memorized reports, see "Working with Memorized Reports" on page 293.

3. On the Options list, select the Date/Time filter by which to generate the report.
4. Specify the report parameters, options, and format. See:
   - "Daily reports" on page 299.
   - "Sales reports" on page 304.
   - "Statistics reports" on page 307.
   - "Other reports" on page 310.
   - "Exceptions reports" on page 312.
   - "Hoteling reports (EMS Workplace only)" on page 315.

Report parameters and options are discussed in "Report Descriptions and Options" on page 298. Billing reports are discussed in ,"Billing," on page 319. Contact your EMS administrator if you need assistance in generating any of these reports.

5. In the Report Comment field, enter a comment that is to be printed on the report.

The comment can be a maximum of 255 characters, including spaces.

6. Select the output format for the report, and then click Generate Report.

   If you selected the default format of HTML, then the report is displayed onscreen in its own page. You can use your browser options to view the report prior to printing, set your printing options, print the report, and so on. For all other report formats, you must indicate whether to open the report, or to save the report. To open a report in any format other than HTML, you must have the correct application installed on your client:

Report Format	Required Application
PDF	Adobe Reader or Adobe Acrobat
RTF	Microsoft Word
XLS	Microsoft Excel
HTML	Web Browser
TEXT	Notepad or Textpad
TIFF	Any graphics application including Microsoft Paint and Microsoft Office Picture Manager.

7. Click Close.

   Unless you change the filter settings, all subsequent reports are generated and printed according to the parameters and options that you have specified and in the format that you specified. If you want to save certain settings so that you do not have to adjust the filter settings every time you run the report, you can memorize the report. See "Working with Memorized Reports" on page 293.

Working with Memorized Reports

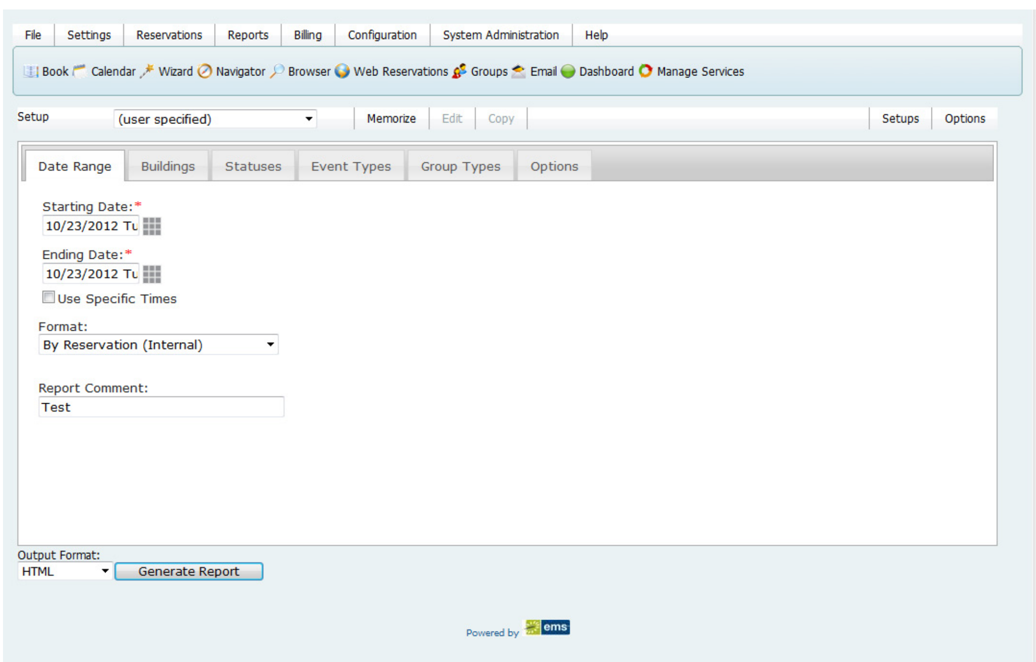
A *memorized* report is a report for which the filter settings have been saved, or memorized, so that you do not have to adjust the filter settings every time you run the report. You can create a new memorized report, or you can copy an existing memorized report, and edit the filter settings as needed to create a new memorized report. If you are the owner of a memorized report, you can also edit the name of an existing memorized report and you can delete a memorized report.

Although this topic is written from the perspective of reports, it is also applicable for working with memorized confirmations and invoices.

To create a new memorized report

1. On the EMS main menu, click Reports to open the Reports menu, and then click the option for the report that you are memorizing. For example, to memorize the Event Schedule report, click Reports > Daily > Event Schedule to open the Event Schedule dialog box.

Figure 8-1: Event Schedule report dialog box



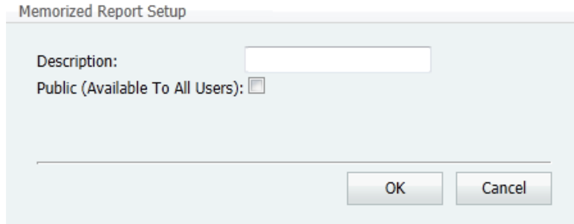
2. On the <Report> dialog box, click Options, and then select the Date/Time filter by which to generate the report.

3. Specify the report parameters, options, and format.

4. On the <Report> dialog box, click Memorize.

   The Memorize Report Setup dialog box opens.

Figure 8-2: Memorize Report Setup dialog box



5. In the Description field, enter a name or description for the report.

The description can be a maximum of 50 characters, including spaces.

6. If you are an administrative user, and the report is to be available to all users, then select Public (Available to All Users); otherwise, if the report is to be available only to you (the owner), then leave this option blank.

If you are not an administrative user, then only your EMS administrator can make your memorized reports available to all users. Contact your EMS administrator for assistance.

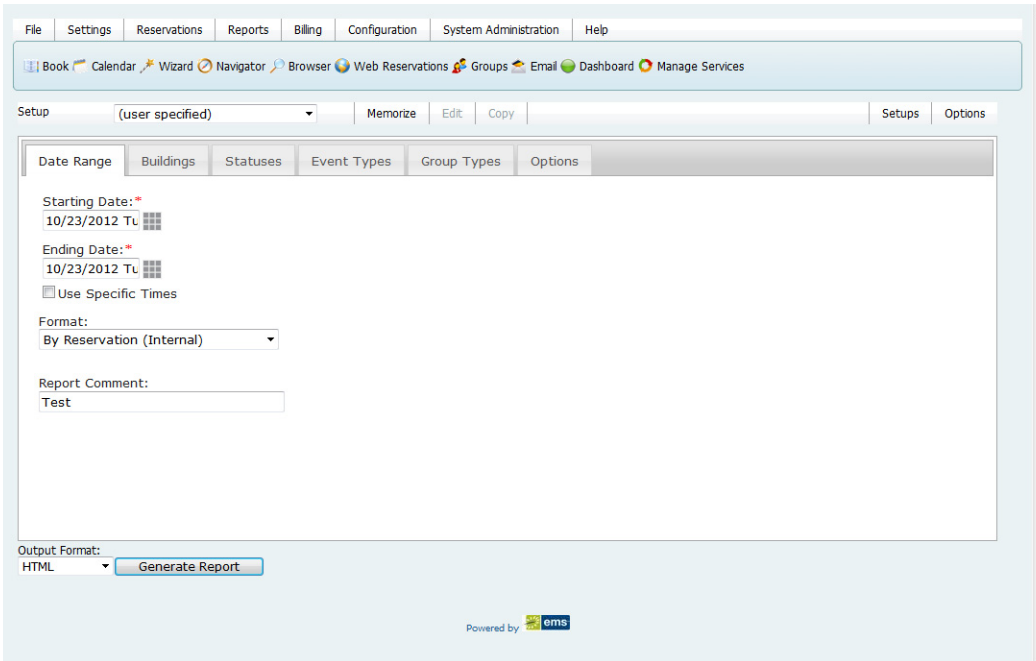
7. Click OK.

   The Memorize Report Setup dialog box closes. You return to the <Report> dialog box. The memorized report is now an option on the Setup dropdown list.

To create a memorized report by copying

1. On the EMS main menu, click Reports to open the Reports menu, and then click the option for the report that you are memorizing. For example, to memorize the Event Schedule report, click Reports > Daily > Event Schedule to open the Event Schedule dialog box.

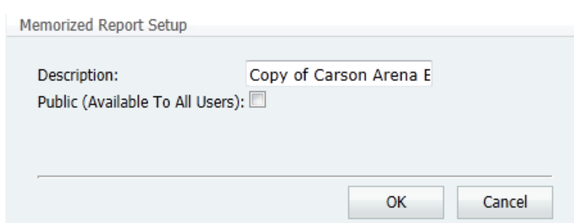
Figure 8-3: Event Schedule report dialog box



2. On the Setup dropdown list, select the memorized report from which you are copying the filter settings, and then click Copy.

   The Memorize Report Setup dialog box opens. By default, the Description field indicates that you are naming a copy of a memorized report.

Figure 8-4: Memorize Report Setup dialog box



3. In the Description field, enter a name or description for the new memorized report.

The description can be a maximum of 50 characters, including spaces.

4. If you are an administrative user, and the report is to be available to all users, then select Public (Available to All Users); otherwise, if the report is to be available only to you (the owner), then leave this option blank.

If you are not an administrative user, then only your EMS administrator can make your memorized reports available to all users. Contact your EMS administrator for assistance.

5. Click OK.

   The Memorize Report Setup dialog box closes. You return to the <Report> dialog box. The filter settings are populated with the settings for the memorized report.

6. Click Edit, and then edit the filter settings for the report as needed.

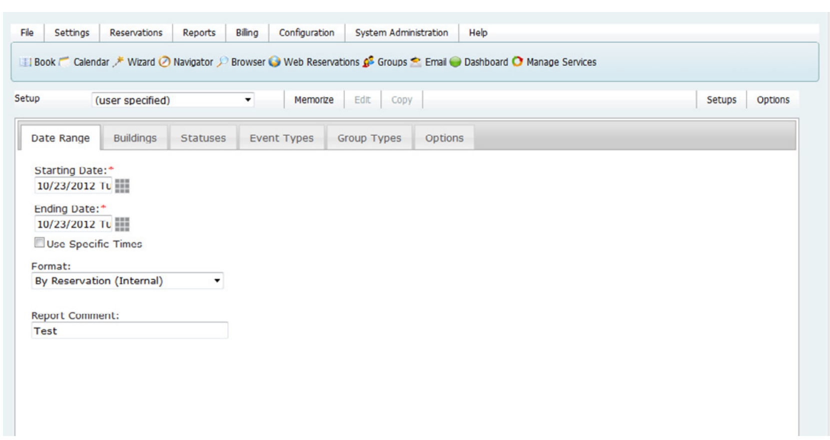
7. Click Memorize.

   The memorized report is now an option on the Setup dropdown list.

To edit or delete a memorized report

1. On the EMS main menu, click Reports to open the Reports menu, and then click the option for the memorized report that you are editing. For example, to edit a memorized Event Schedule report, click Reports > Daily > Event Schedule to open the Event Schedule dialog box.

Figure 8-5: Event Schedule report dialog box

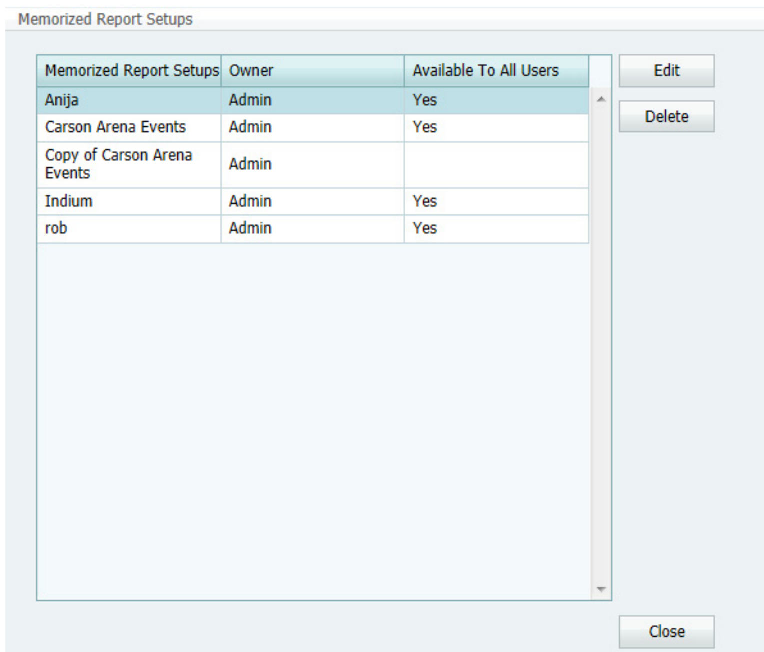


2. On the <Report> Setup dialog box, click Setups.

   The Memorized Report Setups dialog box opens. This dialog box lists all the memorized report setups for which you are the owner, and therefore, can edit the name and/or delete the report.

Administrative users can edit and delete all memorized reports in the system. See Managing Memorized Reports in the EMS Setup Guide.

Figure 8-6: Memorized Report Setups dialog box



3. Select a memorized report setup, and then do one of the following:

   - To edit the name of the report, click Edit to open the Memorize Report Name dialog box, and edit the name of the report in the Description field.

The description can be a maximum of 50 characters, including spaces.

   - To delete the report, click Delete, and then click Yes in the message that asks you if you are sure that you want to delete the selected report.

Report Descriptions and Options

This section provides a description of every EMS report in the categories listed below and it also defines the options that are available for each report.

See:

- "Daily reports" on page 299.
- "Sales reports" on page 304.
- "Statistics reports" on page 307.
- "Other reports" on page 310.
- "Exceptions reports" on page 312.
- "Hoteling reports (EMS Workplace only)" on page 315.

Daily reports

Report	Description	Options
Event Schedule	A summary of the events that are scheduled at your facility, sorted by date and event start time. The report shows event start and end time, group name, event name, and location. You typically print and post the Event Schedule in a lobby or entry way to help visitors find their events.	• Use Page Breaks - If the report is run across multiple days, then each day starts on a new page. • Show Bookings on Start Date Only—If a booking is scheduled overnight, then only the start date of the booking is displayed in the report. For example, a booking exists for 3P Thursday through 10A Friday. If this option is selected, then the booking is displayed only for Thursday in the report. • Show Holidays—Displays any holidays that are configured in the EMS database on the report. • Show Building Hours—Displays building hours on the report. • VIP Events Only—Only the events that are marked as a “VIP” are displayed in the report. • Use Calendar Styles: Events are displayed in the font/color of the Calendar Style that is associated with each event.
Event Calendar	A chronological list of scheduled events in a wall calendar format.	• Use Calendar Styles—Events are displayed in the font/color of the Calendar Style that is associated with each event. • Weekly Calendar—One week per page is displayed in the report. • Show Adjacent Calendar Days—Works in conjunction with the Weekly Calendar option to display events that occur on Saturday and Sunday in the report. • Grey Out Adjacent Calendar Days—Works in conjunction with The “Show Adjacent Calendar Days” option to display events that occur on adjacent days in gray instead of in black. • Hide Holidays—By default, holidays are displayed on the Daily Calendar Report. Select this option to hide holidays in the report. • By Room—Displays events one room at a time in a calendar view.

Report	Description	Options
Room Cards	A list of events that is designed to be posted outside a room or event space. The report notes the date, event time, and location for events, as well as the group sponsoring each event. The report can be a single list of all events that are scheduled for the room on a particular date, or it can be a single page per event.	• Show Bookings on Start Date Only—If a booking is scheduled overnight, then only the start date of the booking is displayed in the report. For example, a booking exists for 3P Thursday through 10A Friday. If this option is selected, then the booking is displayed only for Thursday in the report. • Print Blank Room Cards—Prints a room card for a space that does not have any events scheduled. • Print Logo—Prints the facility logo on each room card. You can specify the logo location on the right or left side of the room card. • Sort Room Cards By Book Sequence—If Book Sequencing is being used on Room Configuration, then a facility can print room cards in the Book Sequence order. • Print Combo Room Components—Prints an individual room card for each component of a combo room. • Suppress End Time—Do not show the end times for bookings in the report.
Activity Schedule	A list of bookings in all rooms in a building, or just in a specific room in the building. The report, which shows event start and end times, event name, group name and room, can be generated for a range of dates. The report can generated in one of two formats—by Date or by Building.	• Use Page Breaks—A new page is generated for each date or for each building. • Show Bookings on Start Date Only—If a booking is scheduled overnight, then only the start date of the booking is displayed in the report. For example, a booking exists for 3P Thursday through 10A Friday. If this option is selected, then the booking is displayed only for Thursday in the report.

Report	Description	Options
Setup Worksheet	An internal report that setup crews, custodial, or operations personnel use to ensure that each room is arranged properly for each event. The report displays detailed information about each booking, including setup type, setup notes, required resources, user defined fields, special instructions and resource item notes.	• Use Page Breaks—If this report is run across multiple days, then each day starts on a new page. • Highlight Changes Made Within:(days)—Changes that have been made within the specified number of days are highlighted in the report. • Limit Bookings To Those With Details In Selected Categories—Only bookings with a booking detail from the specified categories are displayed in the report. • Show Bookings on Start Date Only—If a booking is scheduled overnight, then only the start date of the booking is displayed in the report. For example, a booking exists for 3P Thursday through 10A Friday. If this option is selected, then the booking is displayed only for Thursday in the report. • Keep Detail Together—If an event has booking details, the details are kept together on one page instead of being split across two pages. • Show Holidays—Holidays are displayed in the report. • Show Building Hours—Building hours that are associated with each building are displayed in the report. • Show Item Notes—Any notes that have been entered for a booking detail item are displayed in the report. • Show Item Special Instructions—Any special instructions that have been entered in VEMS for a booking detail item are displayed in the report. • Show User Defined Fields—Any user defined fields and their answers for a reservation are displayed in the report. • Show Booking Changes Only—Bookings that have been edited within the specified number of days are displayed in the report.

Report	Description	Options
Service Order Schedule	Lists the service orders that are scheduled for a date or date range. Produced by category.	• Use Page Breaks—If this report is run across multiple days, then each day starts on a new page. • Show Details—Booking item details that associated with each event are displayed in the report. • Highlight Changes Made Within:(days)—Changes that have been made within the specified number of days are highlighted in the report • Show Pricing—Any pricing that is associated with an item is displayed in the report. • Show Item Notes—Any notes that have been entered for a booking detail item are displayed in the report. • Show Item Special Instructions—Any special instructions that have been entered in VEMS for a booking detail item are displayed in the report.
Service Orders	Separate pages for each service order in a date range. The report provides information on the event and the items or services needed. Produced by category.	• Highlight Changes Made Within:(days)—Changes that have been made within the specified number of days are highlighted in the report. • Footer Message—Used to specify the Footer message that is displayed on each page of the report. • Show Item Notes—Any notes that have been entered for a booking detail item are displayed in the report. • Show Item Special Instructions—Any special instructions that have been entered in VEMS for a booking detail item are displayed in the report.

Report	Description	Options
Banquet Event Order	Separate pages for each booking that occurs on a date or within a date range that has the "Primary Category" specified. Service orders, resource information, notes, and information for resource with order type categories are included in the report.	• Highlight Changes Made Within:(days)—Changes that have been made within the specified number of days are highlighted in the report. • Show Pricing—Any pricing that is associated with an item is displayed in the report. • Limit Bookings To Those With Details In Selected Categories—Only bookings with a booking detail from the specified categories are displayed in the report. • Show Item Notes—Any notes that have been entered for a booking detail item are displayed in the report. • Show Item Special Instructions—Any special instructions that have been entered in VEMS for a booking detail item are displayed in the report. • Show Item Selection Notes—Any notes that have been entered for a booking detail item selection are displayed in the report. • Show Service User Defined Fields—Any user defined questions and their answers for any listed category are displayed in the report. • Set Page Numbers By Booking—Resets page number for every unique booking. • Use Page Breaks—If this report is run across multiple days, then each day starts on a new page.
Resource Schedule	Lists by category and date, how many of each resource item is needed, as well as the event time, event name, location, and group.	• Use Page Breaks—If this report is run across multiple days, then each day starts on a new page. • Highlight Changes Made Within:(days)—Changes that have been made within the specified number of days are highlighted in the report. • Show Overbooked Resources Only—Only those bookings where the selected resource exceeds the number available in inventory at that time are displayed in the report.

Report	Description	Options
Service Order Change Report	List the service orders to which a change has been made by Booking/Service Order ID. Includes the service order category, a description of the change, the old value for the service order, the new value for the service order, the date of the change, and the ID for the user who made the change.	N/A
Attendee Visitor Report	Lists the attendees for an event by date or date range, and indicates whether they are visitors and shows their group name, phone number, event name, the room they will be in, and the start and end times for their event.	• Use Page Breaks—If this report is run across multiple days, then each day starts on a new page.
Production Report	Lists production items and their quantities grouped by production area.	• Show Item Notes—Any notes that have been entered for a booking detail item are displayed in the report. • Show Item Special Instructions—Any special instructions that have been entered in VEMS for a booking detail item are displayed in the report. • Show Item Selections—Any selections that have been entered for a booking detail item are displayed in the report.

Sales reports

Report	Description	Options
Sales by Group Type	Lists the sales for each group type for a date or date range.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.

Report	Description	Options
Sales by Group	Lists the sales for each group, divided by group type, for a date or date range.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.
Sales by Category	Lists the revenue generated by each resource category for a date or date range.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.
Sales by Resources	Lists the sales for each resource item for a date or date range.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.
Sales by Reservation	Lists the reservations that have bookings for a specified date or date range and shows the charges, by category, for the reservation. Also gives a grand total for all reservations. If a reservation also has bookings that fall outside the specified date or date range, these figures are not included in the report.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.
Sales by Billing Reference	Lists the total sales for a date or date range, based on the billing reference number on the reservations that have bookings in the specified range. Sales that are associated with reservations that have no billing reference number are not included in the report.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.

Report	Description	Options
Sales by Booking	Lists the sales for a particular date or for each date in a date range, broken down by booking. This report displays the following information—Start/End Times, Group, Event Name, Location, Billing Reference#, PO Number, Payment Type, Status, Reservation ID, Booking ID, and Sales amount.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.
Status Changes by Reservation	Lists the sales that are associated with a reservation where the reservation or booking status was changed.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.
Status Changes by Booking	Lists the sales that are associated with bookings where the bookings status was changed.	• Display Amount—Select from Net Sales, Gross Sales, or Discounts. • Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Amounts—Group Types with zero sales/discounts are displayed in the report.

Statistics reports

All Statistics reports, except Hourly Room Utilization and Hourly Resource Inventory Utilization, provide an “Analyze” feature to view data. Click Analyze to open a Browser page that displays the queried data. You can group the information by column, you can export the raw data to an Excel file, and you can click Details to provide more detailed information about the queried data.

The Room Utilization report, the Hourly Room Utilization report, and the Hourly Room Utilization report are available only in EMS Enterprise. They are not available in EMS Professional.

Report	Description	Options
Room Statistics	Lists all rooms by building and for each room, indicates the following information—the number of bookings for the date range selected, the reserved hours, the event hours, the estimated attendance (i.e., setup count), and the actual attendance.	• Include Report Criteria—The filter settings for the report are displayed in the report.
Room Utilization	Lists the number of bookings, hours used, hours available, percent utilization, and hours vacant for rooms, by building, for the date range specified.	• Day Selection—Specify which day(s) of the week to include in the report. • Group By Utilization Category—Groups rooms by utilization (low, high, unused). • Include Cost—The cost for vacancies is displayed in the report. • Include Unused—Include rooms that contain no bookings in the report. • Cap Utilization at 100%?—Percent utilization cannot exceed 100%. • Low Utilization—Specify what percentage equals “Low” utilization. • High Utilization—Specify what percentage equals “High” utilization. • Availability Based On—Select to base availability on one of the following - Building Hours, Hours per Day, or Specific Hours. • Include Report Criteria—The filter settings for the report are displayed in the report.

Report	Description	Options
Hourly Room Utilization	Displays room utilization broken down by hours in the day, by percentage utilized.	• Day Selection—Specify which day(s) of the week to include in the report. • Display Chart—Includes a chart on the final page of the report that summarizes the reported data.
Hourly Resource Inventory Utilization	Displays resources, and the number of items used on an hourly basis for a specified date range.	• Day Selection—Specify which day(s) of the week to include in the report. • Display Chart—Includes a chart on the final page of the report that summarizes the reported data.
Group Statistics	Displays Number of Bookings, Reserved Hours, Event Hours, Estimated Attendance, and Actual Attendance by Group Type for a given date or date range. The format can be set to “Detail” to provide statistics for each specific group.	• Include Report Criteria—The filter settings for the report are displayed in the report.
Event Type Analysis	Provides information by event type on the following—the number of reservations, the number of bookings, the percentage of total reserved hours, the percentage of total event hours, the percentage of total estimated attendance, the percentage of total attendance, the actual attendance, and the percentage of total.	• Include Report Criteria—The filter settings for the report are displayed in the report. • Display Chart—Includes a chart on the final page of the report that summarizes the reported data.
Reservation Source Analysis	Displays the number of reservations, the number of bookings with percentage, reserved hours with percentage, event hours with percentage, estimated attendance with percentage, and actual attendance with percentage by reservation source.	• Include Report Criteria—The filter settings for the report are displayed in the report. • Display Chart—Includes a chart on the final page of the report that summarizes the reported data.
Resource Statistics	Lists the quantity and the hours used by category and by resource item.	• Include Report Criteria—The filter settings for the report are displayed in the report. • Show Zero Quantities—Includes all resources even if the resource is not used during the date range specified. • Show Inactive Resources—Includes all inactive resources used during the date range specified.

Report	Description	Options
Room Availability	Provides a count of room availability by room type for a given date range.	N/A
Setup Count Analysis	Lists the total number of bookings by setup count.	N/A
Seat Occupancy	Displays the capacity for each room, the number of bookings for the date range, the seats available for the bookings, the total estimated attendance based on setup count on each booking, the average estimated attendance, and the estimated percentage of seats filled for the specified date range.Figures are also provided for total actual attendance, average actual attendance, and actual percentage of seats filled.	• Include Report Criteria—The filter settings for the report are displayed in the report.
Benchmark Metrics Report	Compiles metrics for a number of different areas within EMS, for example, Rooms By Number of Bookings, Reservations By Source, and so on.	• Days Open Per Week—Indicates the number of days per week your facility is open per week. The default value is 7. • Hours Open Per Day—Indicates the number of hours per day that your facility is open. The default value is 10.

Other reports

Report	Description	Options
Cancellation Report	Lists the bookings that have a status that was changed to “Cancelled” on the date or dates specified, or lists the bookings on the date or dates specified that have a status type of “Cancelled.” The report also lists the date that the booking status was changed, the date the bookings were to have taken place, and the location of the event, the name of the person who canceled the booking, the reason for the cancellation, and the booking ID. You can run the report in one of two formats—by Booking Date (the date that the bookings were to occur) or by Cancel Date (the date that the bookings were canceled).	N/A
Cancellation Summary	Summarizes, by reservation, all charges for bookings on a date or in a date range. The report shows the first and last bookings canceled within the reservation, the Group, the reservation number, the group contact, the event name, the event type, the total charges, and the reason for cancellation of the most recently canceled booking. Reservations that do not have charges associated with the bookings are not displayed on this report. You can select Use Specific times and then enter a range of times to limit the report to bookings that occurred within this specified time range.	N/A

Report	Description	Options
Reservation Summary	A summary of reservations that occurred within a specific date range. The report also lists complete reservation information (reservation number, event name, group, contact person, and so on) and booking dates. User defined fields can also be printed in this report. You can select Use Specific times and then enter a range of times to limit the report to reservations that occurred within this specified time range.	N/A

Exceptions reports

Report	Description	Options
Undefined Setups	Lists the bookings on the selected date or date range for which no setup count has been entered. The report lists the following information for the bookings—the event name, time and location, contact name and phone number, booking status, and ID number. You can select Use Specific times and then enter a range of times to limit the report to bookings that occurred within this specified time range. You can enter information about the report, or a name or description for the report in the Report Comment field.	• Show Bookings on Start Date Only—If a booking is scheduled overnight, then only the start date of the booking is displayed in the report. For example, a booking exists for 3P Thursday through 10A Friday. If this option is selected, then the booking is displayed only for Thursday in the report.
Status Reminder Report	Lists the bookings that have a status with a reconfirm date that falls within the selected date range. You typically use the information in this report to review tentative bookings. The report can be run in one of two formats—by Status Date (the date that the event was put in a “Tentative” status) or by Booking Date (the actual date of the event). You can select Use Specific times and then enter a range of times to limit the report to bookings that occurred within this specified time range. You can enter a report name or description or any pertinent information about the report in the Comment field.	N/A

Report	Description	Options
Wait List Report	Lists all the bookings with a Wait status for the time period that you have requested. Detects situations where a booking has been canceled and there are one or more bookings with a Wait status that can now be changed to Confirmed, and indicates if the room is available. You can select Use Specific times and then enter a range of times to limit the report to bookings that occurred within this specified time range.	N/A
Booking Conflict Analysis	Reviews information on all bookings for a date or date range and lists any conflicts **Note:** EMS does not allow double-bookings, but they might exist because conversion of data from systems that do allow them, or the result of users failing to restart EMS after encountering error messages.	N/A
Building Hours Exceptions	Lists events for a date or date range that fall outside of the configured building hours. Either event time or reserved time is checked based on the “Validate Building Hours on Event Time” parameter. The report also shows the start and end times, group, event name, location, reservation number, and booking number. You can select Use Specific times and then enter a range of times to limit the report to bookings that occurred within this specified time range. You can enter information about the report, or a name or description for the report in the Report Comment field.	N/A

Report	Description	Options
Inactive Room With Bookings	Lists the bookings for a specified date or date range that are scheduled in inactive rooms. You can select Use Specific times and then enter a range of times to limit the report to bookings that occurred within this specified time range. You can enter information about the report, or a name or description for the report in the Report Comment field. You can click View to open the booking for viewing and editing, changing the status of the booking and/or emailing the group.	N/A
Inactive Groups With Reservations	Lists the reservations for a specified date or date range that are scheduled for inactive groups. You can click View to go to the reservation for viewing and editing, including changing the status of the reservation and/or its bookings.	N/A
Invalid Service Orders	Lists the service orders that have a start time and/or end time that fall outside the reserved time for the room. Lists the category, date, reserved and event start and end times, location, group, reservation number, booking number, service order number and a description of the invalid order. You can select Use Specific times and then enter a range of times to limit the report to bookings that occurred within this specified time range. You can enter information about the report, or a name or description for the report in the Report Comment field. **Note:** Service orders that fall outside the reserved time are considered invalid even if the Validate Service Order Times Against Booking parameter is set to “No.”)	N/A

Report	Description	Options
Invalid Billing References	Lists the bookings for a particular date or date range that are in reservations that have invalid billing reference numbers. You can select Use Specific times and then enter a range of times to limit the report to bookings that occurred within this specified time range. You can enter information about the report, or a name or description for the report in the Report Comment field. **Note:** A billing reference number is considered invalid if it has not been defined in the Billing Reference Configuration area but the Validate Billing Reference parameter is set to “Valid Only.”	N/A
Inactive Web Process Templates	Displays the inactive web process templates that are attached to reservations.	N/A

Hoteling reports (EMS Workplace only)

Report	Description	Options
Room Occupancy Summary	Displays, by building and room type, the number and percentage of rooms occupied.	N/A
No Show	Lists the bookings for which the reservation holder did not check in. **Note:** A customer can be checked in via the EMS Kiosk, the EMS desktop client, or VEMS.	N/A

Report	Description	Options
Early Checkout	Lists the bookings for which the reservation holder checked out before the end of the reserved time. **Note:** A customer can be checked out via the EMS Kiosk, the EMS desktop client, or VEMS.	N/A
Visitor	Lists events for groups that have cities on their group record, other than what is specified in the Exclude Locations field. If multiple locations are to be listed, they should be entered with a comma between them (for example, Denver, Houston, Tampa, and so on).	N/A
Booking Notice Statistics	Lists the total bookings for a date or date range, divided into three “Amount of Notice” categories, where the Amount of Notice is the time between when the booking was scheduled and the date/ time for which it was scheduled. The report can be generated in one of two formats— “standard” or by room type.	N/A
Transition	Tracks the occupants of hoteling spaces during a specified date range. Lists by floor and room where the occupant was last, what room the occupant is moving to, and who was in the space the previous day. Typically this report is run for a two day range and the days of the week must be checked. This report can be used by personnel who are responsible for preparing hoteling spaces for each occupant.	• Show Details—Prints the categories that are associated with the bookings. • Highlight Changes Made Within:(days)—Changes that have been made within the specified number of days are highlighted in the report.
Arrivals and Departures	Lists the departures and arrivals for a particular room by building and floor. The report shows the time of the departure if the customer is a departure and the time of the arrival if the customer is an arrival. Typically, this report is run for a two day timespan listing the departure date first and the arrival date second.	N/A

Report	Description	Options
Groups With Multiple Bookings	Lists groups that have multiple bookings for the date or date range specified. The information is organized by date, and lists the start and end times, the room, the room type, and the booking status for each booking.	N/A
Check In Statistics	Lists the percentage of customers who have checked in by building, building-room type, or room type. **Note:** A customer can be checked in via the EMS Kiosk, the EMS desktop client, or VEMS.	N/A

Billing

Accurate and timely billing is critical to ensuring a successful experience for organizations that schedule events at your facilities. EMS provides a variety of functions for working with invoices and transactions for reservations and bookings as well as for reporting on this information.

This chapter covers the following topics:

Overview of Billing in EMS

In EMS, at a high-level, billing is a two-step process:

- The first step is to generate invoices. (See “Working with Invoices” on page 322.) You can generate invoices based on reservation number, date range, or both. For example, you could generate invoices for all bookings in Reservation 1829 that occurred last month. After you have generated the invoices, EMS tracks the amount due and the age of the invoices.

As part of this process, you can generate the Billing Worksheet report. (See “Generating an EMS Billing Report” on page 350.) You use this report to review the dollar amounts for the bookings for which you intend to create invoices. You can correct any discrepancies that you note in the report by editing the bookings or booking items in question.

- The second step to is process received payments using the Payment Entry function. (See “Searching for Transactions” on page 335.) You can also use this function to enter deposits made against a reservation before invoicing or booking and to enter adjustments.

Financial transactions in EMS are batched by department. For example, if a user who is a member of the Scheduling department applies a deposit to a reservation, then the deposit is shown on a confirmation only if the user who applied the deposit or other users in the Scheduling department print the confirmation. If a user in another department, for example, the Catering department, prints the confirmation, then the deposit is not shown on the confirmation. Similarly, invoices that are generated by a department are printed on the Ageing report only if the report is generated for the same department. If you invoice a reservation or one of its bookings, any deposit that was previously made on the reservation is then applied and is no longer shown on the confirmation. If you invoice an event, the event is locked and cannot be edited. You can edit the event only after you void the invoice. You cannot void an invoice if payments have been made against it. You must first void the payments. You can use an adjustment with a negative dollar amount to clean up your financial records. For example, you generate an invoice for $102 for a group and the group returns a check for $100. If you do not want to ask the group for a $2.00 check, an adjustment of “$2.00-” balances your books.

Working with Invoices

You can generate an invoice in EMS based on a specific booking date or date range, a reservation number, or both. For example, you can generate invoices for all bookings from May 1 through May 14, for all bookings in reservation number 22, or for all bookings in reservation number 22 that occurred between May 1 and May 14. You can generate multiple invoices for the same booking, with each invoice showing the charges for a different category (such as room charges on one invoice, catering charges on another invoice, and so on). This might be necessary in situations in which you must produce multiple invoices for the same booking if the departments within your organization bill separately for the services they provide. You can also reprint an invoice and void an invoice.

You can work with invoices for a single reservation, or you can batch process multiple invoices. If you want to work with invoices for a single reservation, you do so through the Transactions tab in the Navigator. If you want to work with a batch of invoices, you do so through the EMS Billing menu: Billing > Invoices > Invoicing.

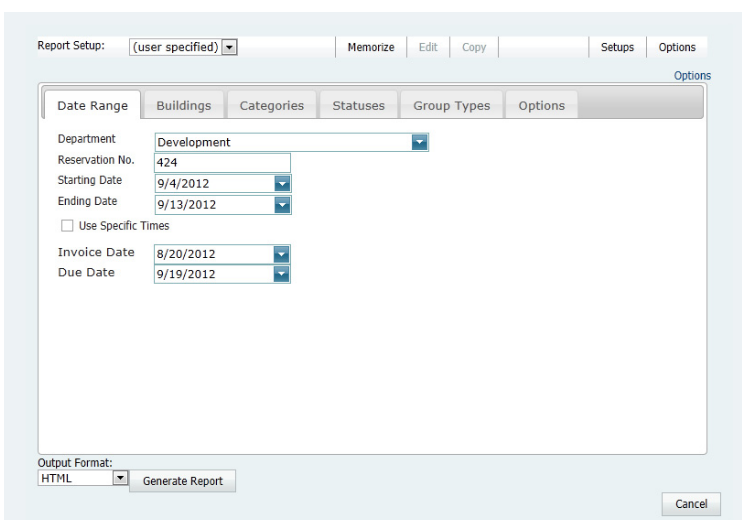
To generate an invoice

Before you generate an invoice, you should generate the Billing Worksheet report. See "Generating an EMS Billing Report" on page 350.

1. Do one of the following:
   - Open the reservation in the Navigator (see "Opening a reservation in the Navigator" on page 67), and on the Transactions tab, click New > Invoice.
   - On the EMS main menu, click Billing > Invoices > Invoicing.

   The Invoicing page opens.

Figure 9-1: Invoicing page



2. Do one of the following:
   - Review the selections on this page, and optionally, make any needed modifications.

Field	Description
Date Range tab	
Department	Select the department that is creating the invoices. The department name and address is printed at the top of the invoice. **Note:** This field is automatically populated if you have a default department assigned to your user account but you can select a different value if needed.
Reservation Number	Automatically populated if you are generating an invoice from the Transaction tab; otherwise, enter a reservation number.
Starting Date Ending Date	Automatically populated with the first (starting) booking date and the last (ending) booking date for the selected reservation when you are generating an invoice from the Transaction tab; otherwise, enter the date range of the bookings for which you are generating the invoice.
Use Specific Times	If only a specific time for the bookings is to be invoiced (for example, the bookings are from 8 am to 5 pm and you want to invoice the booking from only 8 am to noon), then click Use Specific Times, and then enter a specific time period.
Invoice Date	The default value is the current day's date. You can leave this value as is, or enter a different date.
Due Date	The system default value is 30 days from the current day's date. (Your EMS administrator might have configured a different default value for this field.) You can leave in the field as is, or you can enter a different date.
Buildings tab/Categories tab/Statuses tab/Group Types tab	
Open the appropriate tab on the page and select the buildings, resource categories, booking statuses, and group types that are to be invoiced. This information is displayed on the invoice. **Note:** A Show Inactive option is available for both categories and statuses. Select this option to show inactive categories and statuses. You can select these inactive items as part of your filtering criteria. **Note:** To select a building, category, and so on, select the item in the Available list (CTRL-click to select multiple items), and then click the Move button (>) to move the items to the Selected list.	
Options tab—Format settings for a printed confirmation	
Header Message Footer Message	Select the header message and footer message that is to be printed on the invoice. By default, the header and footer messages are printed on every page of the invoice. To print the header only on the first page of the invoice, clear the Print Header on Each Page option.
Currency	Select the currency that indicates how a room or resources in a category should be charged.
Print Comments	Include the comments for the reservation in the printed invoice.
Print Reminders	Include the reminders for the reservation in the printed invoice.
Print User Defined Fields	Include user-defined fields and their values in the printed invoice.

Field	Description
Suppress Reserved Time	Do not show the reserved time on the printed invoice. (Instead, only the event time is included on the printed invoice.)
Print Item Notes	Include the notes for any booking items in the printed invoice.
Print Zero Priced Items	Include resources for which there was no charge in the printed invoice.
Print Item Selections	Include any resource item selections in the printed invoice.
Print Header On Each Page	Include the selected Header message on each page of the printed invoice.
Suppress Logo	Do not show your department's/organization's logo on the printed invoice.
Print Billing Reference Allocation	Include the billing reference numbers for the event as well as the percentage of charges that is allocated to each number in the printed invoice.
Print Category Subtotals	Include the subtotal charges by category in the printed invoice.
Display Messages as HTML	If you have defined any HTML messages, then select this option to display the HTML version of these messages in the printed invoice; otherwise, the message is displayed in plain text.

If needed, you can always save, or memorize, these settings. *See "Working with Memorized Reports" on page 293.*

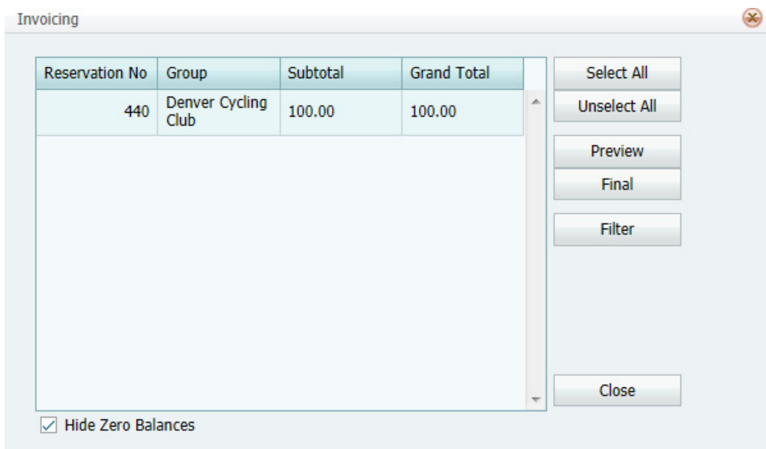
- On the Setup dropdown list, select a saved, or memorized, invoice.

If you select a memorized confirmation, then the only changes that you can make are to the dates and/or times on the Date Range tab.

3. Select the output format for the invoice, and then click Generate Report.

   The generated invoices are displayed in the Invoicing dialog box. By default, invoices with a zero balance are not shown. See Figure 9-2 on page 325.

Figure 9-2: Invoicing dialog box with generated invoices



4. Optionally, you can do one or more of the following to work with the invoices that are displayed; otherwise, if you are satisfied with the invoices, you can go to Step 5 to post the invoice.

   - To show zero balance invoices in the window, clear the Hide Zero Balances option.
   - To preview an invoice, select the invoice, or CTRL-click to select multiple invoices, and then click Preview.

   If you selected the default format of HTML on the Invoicing dialog box, then the invoice is displayed onscreen in its own page. The preview is titled “Invoice Preview” to distinguish the invoices from invoices that have been posted. You can use your browser options to view the invoice prior to printing, set your printing options, print the invoice, and so on. For all other invoice formats, you must indicate whether to open the invoice, or to save the invoice. To open an invoice in any format other than HTML, you must have the correct application installed on your client:

Output Format	Required Application
PDF	Adobe Reader or Adobe Acrobat
RTF	Microsoft Word
XLS	Microsoft Excel
HTML	Web Browser
TEXT	Notepad or Textpad
TIFF	Any graphics application including Microsoft Paint and Microsoft Office Picture Manager.

- To change the criteria for the invoices, click Filter to return to the Invoicing window After changing the criteria, you can generate the invoices again.

5. To post an invoice, select the invoice, or CTRL-click to select multiple invoices, and then click Final.

   A message opens warning you that you are about to post and print (#) invoices, and asking you if want to continue.

6. Click Yes.

   The message closes and an onscreen preview of the *final* invoices opens. The preview is titled “Invoices” and each invoice has been issued an invoice number. The preview page contains options for printing a hard copy of the invoices, and so on. Select the option or options that best fit your working needs.

After you generate and post an invoice, the message “Items have been invoiced” is displayed in red text on the Reservation Summary tab, the Booking Summary tab, and the <Booking Detail> Summary tab in the Navigator. The booking detail folder in which the invoiced items reside now has a green background in the Booking Details pane and the icon for each invoiced item also has a green background in the Items pane. Also, the invoice is permanently saved, and you cannot edit it. You can make changes to the balance due for a reservation only by creating an adjustment or by voiding the invoice and regenerating it after you edit the booking information. (Because invoiced bookings are locked and cannot be edited, you must void the invoice before you can edit the bookings.)

To reprint an invoice

You can reprint both non-voided and voided invoices. You can reprint invoices *for only one department at a time* from the Billing area of EMS. Reprinting an invoice does not recalculate the invoice. The invoice is simply printed as it appeared when it was first generated. You can specify the invoices that you are reprinting, or you can search for invoices that meet specific criteria, and then select specific invoices to reprint from the list of search results.

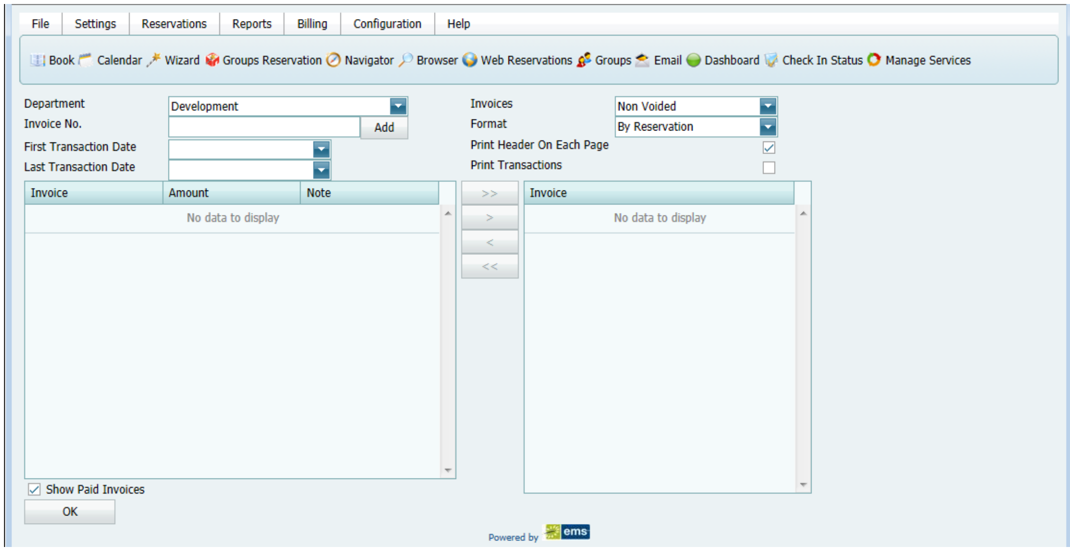
To reprint invoices for one or more departments, you must select the reservation in the Navigator, open the Transactions tab and CTRL-click to select the multiple invoices that you are reprinting, and then use the Reprint option on the Transactions tab.

To specify invoices for reprinting

1. On the EMS main menu, click Billing > Other > Reprint Invoices.

   The Reprint Invoices page opens. See Figure 9-3 on page 327.

Figure 9-3: Reprint Invoices page



2. In the Department field, select the department that generated the invoices.

This field is automatically populated if you have a default department assigned to your user account but you can select a different value if needed.

3. In the Invoice No. field, enter the number of the invoice that you are reprinting, and then click Add.

   The invoice is displayed (by number) in the lower right Invoice pane.

4. Repeat Step 3 until you have added all the invoices that you are reprinting.
5. Leave the reprinting criteria set to their default values, or optionally, edit them as needed.

Option	Description
Invoices	The invoice type that you are reprinting—Non Voided (the default value) or Voided.
Format	Select the sort order for the reprinted invoices. The default value is By Reservation.
First Transaction Date Last Transaction Date	Leave these values blank to reprint the invoice for all bookings; otherwise, enter the date range of the bookings for which you are reprinting the invoice.
Print Header on Each Page	Leave this option selected to print the invoice header on every page of the invoice.
Print Transactions	Select this option to include any associated transactions (deposits, payments, and so on) in the reprinted invoice.

6. Click OK.

   A message opens, asking if you want to open or save the Invoice.pdf.

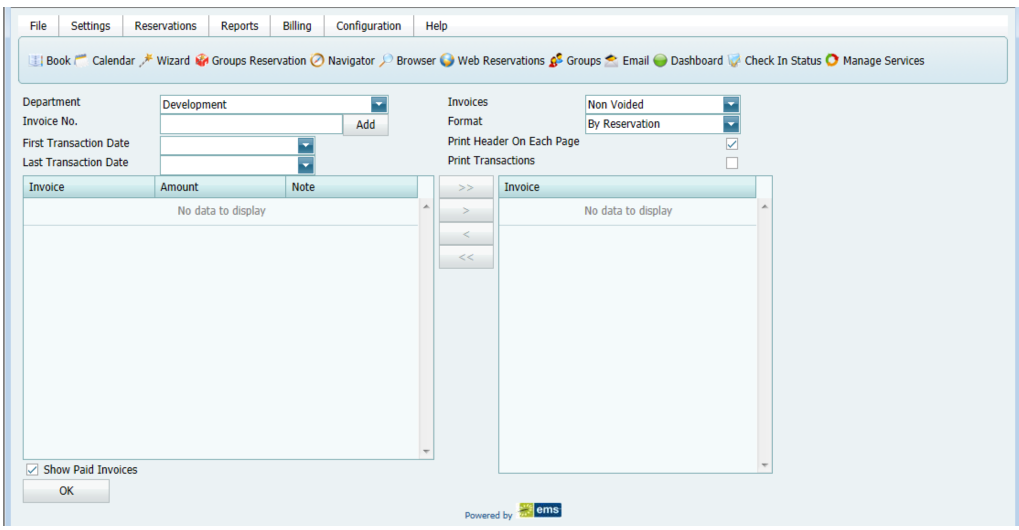
7. Select the option that best fit your working needs.
   - If you click Open, the Invoice opens onscreen. You can always indicate a file name and save the file after you view it.
   - If you click Save, you must select the directory in which to save the file.

To search for invoices to reprint

1. On the EMS main menu, click Billing > Other > Reprint Invoices.

   The Reprint Invoices page opens.

Figure 9-4: Reprint Invoices page



2. Enter the criteria to search for the invoices that you are reprinting.

   As you enter the search criteria, the lower left Invoice pane is dynamically updated with the invoices that meet the criteria. The Note column in this pane indicates if payments have been made against the invoice.

Field	Description
Department	The department that generated the invoice. You can search for invoices for reprinting as long as the invoices were generated by the same department. **Note:** This field is automatically populated if you have a default department assigned to your user account but you can select a different value if needed.
Invoices	Select the type of invoice for which to search—Non Voided or Voided.
First Transaction Date Last Transaction Date	You must enter at least a First Transaction date. By default, the Last Transaction date is set to the same date. You can change the Last Transaction date if needed.
Show Paid Invoices	Leave this option selected to include paid invoices in the search.

3. Leave the reprinting criteria set to their default values, or optionally, edit them as needed.

Option	Description
Format	Select the sort order for the reprinted invoices. The default value is By Reservation.
Print Header on Each Page	Select this option to print the invoice header on every page of the reprinted invoice.
Print Transactions	Select this option to include any associated transactions (deposits, payments, and so on) in the reprinted invoice.

4. In the lower left Invoice pane, select the invoice, or CTRL-click to select the multiple invoices that you are reprinting, and then click the Move button (>) to move the selected invoices to the lower right Invoice pane.
5. Click OK.

   A message opens, asking if you want to open or save the Invoice.pdf.
6. Select the option that best fit your working needs.
   - If you click Open, the Invoice opens onscreen. You can always indicate a file name and save the file after you view it.
   - If you click Save, you must select the directory in which to save the file.

To void an invoice

You can void an invoice only if the invoice has *not* been paid. If payments have been made against an invoice, you must first void the payments.You can void invoices *for only one department at a time*. When you void an invoice, the invoice is removed from the Ageing report and its associated bookings are unlocked. You can specify the invoices that you are voiding, or you can search for invoices that meet specific criteria, and then select specific invoices to void from the list of search results.

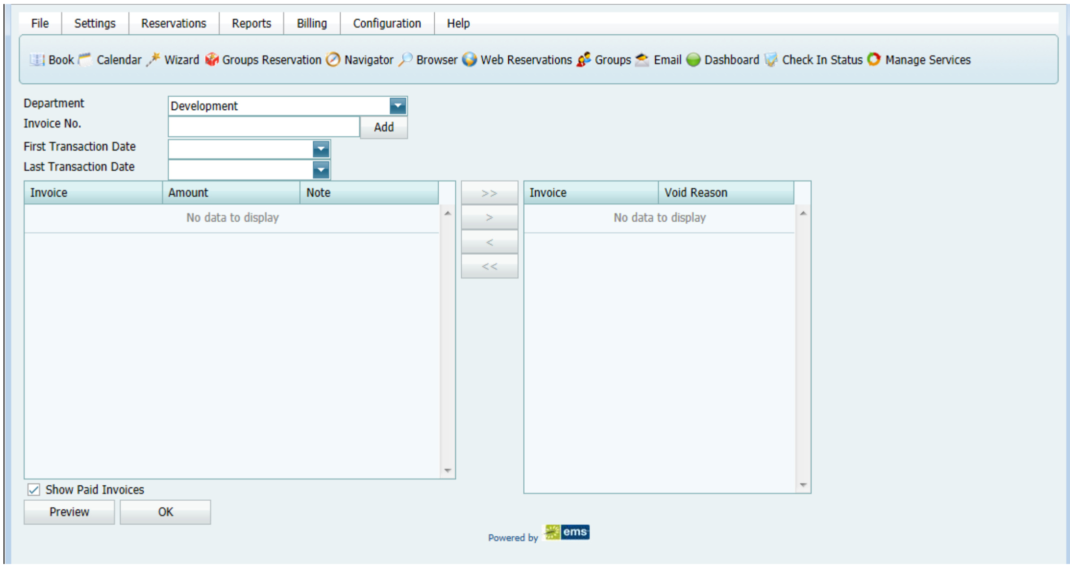
You can also void an invoice from the Transactions tab when a reservation is selected in the Navigator.

To specify invoices to void

1. On the EMS main menu, click Billing > Other > Void Invoices.

   The Void Invoices page opens. See Figure 9-5 on page 330.

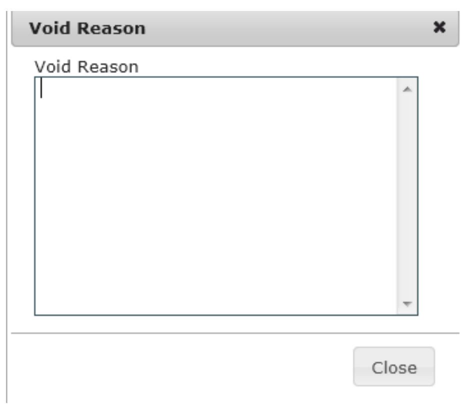
Figure 9-5: Void Invoices page



2. In the Department field, select the department that generated the invoices.
3. In the Invoice No. field, enter the number of the invoice that you are voiding, and then click Add.

   A Void Reason dialog box opens.

Figure 9-6: Void Reason



4. Enter a reason for voiding the invoice, and then click Close.

   Two results are possible:

   - If payments have *not* been applied to the invoice, then Void Reason dialog box closes and the invoice is displayed (by number) in the lower right Invoice pane. Repeat Step 3 through Step 4 until you have selected all the invoices from the *same* department that you are voiding, and then continue to Step 5.

   - If payments have been applied to the invoice, then an error message opens indicating that payments have been applied to the invoice and it cannot be voided. You must void the payments first before you can continue with voiding the invoice. See "To void a transaction" on page 347.

5. Do one of the following:

   - To review an invoice before you void it, go Step 6.

   - To void an invoice without reviewing it, go to Step 8.

6. Optionally, before you void a selected invoice, you can review it to ensure that it is indeed an invoice that you want to void. In the lower right Invoice pane, select the invoice, or CTRL-click to select multiple invoices, and then click Preview.

   A message opens, asking if you want to open or save the Invoice.pdf.

7. Select the option that best fit your working needs.

   - If you click Open, the Invoice opens onscreen. You can always indicate a file name and save the file after you view it.

   - If you click Save, you must select the directory in which to save the file.

8. In the lower right Invoice pane, select the invoice, or CTRL-click to select the multiple invoices that you are voiding, and then click OK.

   A message opens asking you if you are sure that you want to void the selected invoices.

9. Click Yes.

   A message opens indicating that the invoices have been voided.

10. Click OK

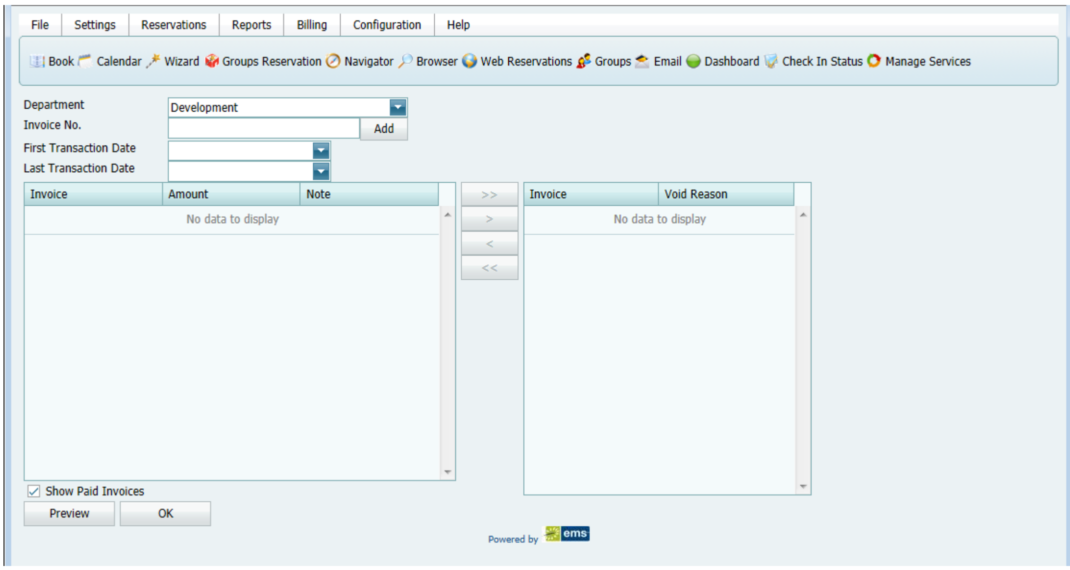
    The message and the Void Invoices dialog box close. The Void column is set to Yes on the Transactions tab for each of the voided invoices in the Navigator.

To search for invoices to void

1. On the EMS main menu, click Billing > Other > Void Invoices.

   The Void Invoices page opens.

Figure 9-7: Void Invoices page



2. Enter the criteria to search for the invoices that you are voiding.

   As you enter the search criteria, the lower left Invoice pane is dynamically updated with the invoices that meet the criteria. The Note column in the pane indicates if payments have been made against the invoice.

Field	Description
Department	The department that generated the invoice. You can search for invoices for voiding as long as the invoices were generated for the same department. You cannot void invoices from different departments.
First Transaction Date Last Transaction Date	You must enter at least a First transaction date. The Last transaction date is optional.
Show Paid Invoices	Leave this option selected to include paid invoices in the search. If you want to void an invoice against which payments have been made, then this reminder serves to prompt to you to first void the payments before you void the invoice. See "To void a transaction" on page 347.

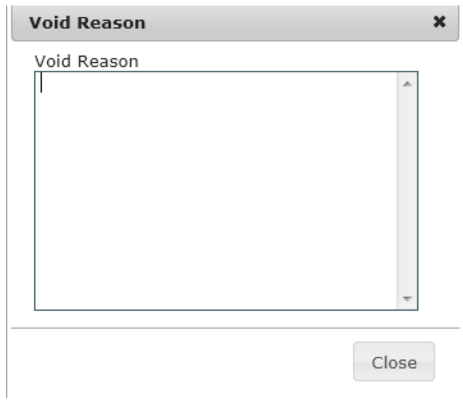
As you enter the search criteria, the lower left Invoice pane is dynamically updated with the invoices that meet the criteria. The Note column in this pane indicates if payments have been made against the invoice.

3. Select the invoice, or CTRL-click to select the multiple invoices that you are voiding, and then click the Move button (>).

Remember, you can select an invoice for voiding only if payments have not been applied to the invoice.

A Void Reason dialog box opens.

Figure 9-8: Void Reason



4. Enter a reason for voiding the invoice, and then click Close.

   The Void Reason dialog box closes. The invoices are displayed (by number) in the lower right Invoice pane.

5. Do one of the following:

   - To review an invoice before you void it, go Step 6.
   - To void an invoice without reviewing it, go to Step 8.

6. Optionally, before you void a selected invoice, you can review it to ensure that it is indeed an invoice that you want to void. In the lower right Invoice pane, select the invoice, or CTRL-click to select multiple invoices, and then click Preview.

   A message opens, asking if you want to open or save the Invoice.pdf.

7. Select the option that best fit your working needs.

   - If you click Open, the Invoice opens onscreen. You can always indicate a file name and save the file after you view it.
   - If you click Save, you must select the directory in which to save the file.

8. In the lower right Invoice pane, select the invoice, or CTRL-click to select the multiple invoices that you are voiding, and then click OK.

   A message opens asking you if you are sure that you want to void the selected invoices.

9. Click Yes.

   A message opens indicating that the invoices have been voided.

10. Click OK

    The message and the Void Invoices dialog box close. The Void column is set to Yes on the Transactions tab for each of the voided invoices in the Navigator.

Searching for Transactions

A *transaction* in EMS can be one of four types—a deposit (deposit and damage deposit), a payment, an adjustment, or a refund.

Transaction Type	Description
Deposit	A *deposit* is the dollar amount paid in advance of a meeting or event before invoicing occurs. • A *deposit* is added to a reservation. After you invoice the reservation, all outstanding deposits are applied to the invoice to reduce the balance due. • A *damage deposit* is used to a collect a deposit that is not applied to an invoice and therefore, does not reduce the balance due. Instead, if the customer does not damage the room, any reserved equipment, and so on, then you must return the damage deposit to the customer by voiding the damage deposit transaction.
Payment	A *payment* is the dollar amount that is applied to an invoice to reduce the balance due. A *pre-payment* is similar to a deposit and is applied to a reservation.
Adjustment	An *adjustment* is a modification that is made to the amount due on an existing invoice. For example, if you send out an invoice to a group for $202.00 and the group sends you a check for $200.00, you can make an adjustment of “$2.00-” to close out the invoice.
Refund	A *refund* is the return of funds that have been applied to an invoiced reservation.

You can use the Browse Transaction function to search for any of these transaction types. The results are displayed in a list view. When you carry out a search in the for a transaction, you can carry out a basic search or an advanced search. A basic search is based on the basic information that you specify for a transaction when you first create it, such as the group to which the transaction applies, the department that generated the transaction, and so on. An advanced search is a field level search that is carried out the reservation level, the transaction level, or a combination of these. For example, in an advanced search, you can specify criteria as granular as the Bill To Contact at the reservation level.

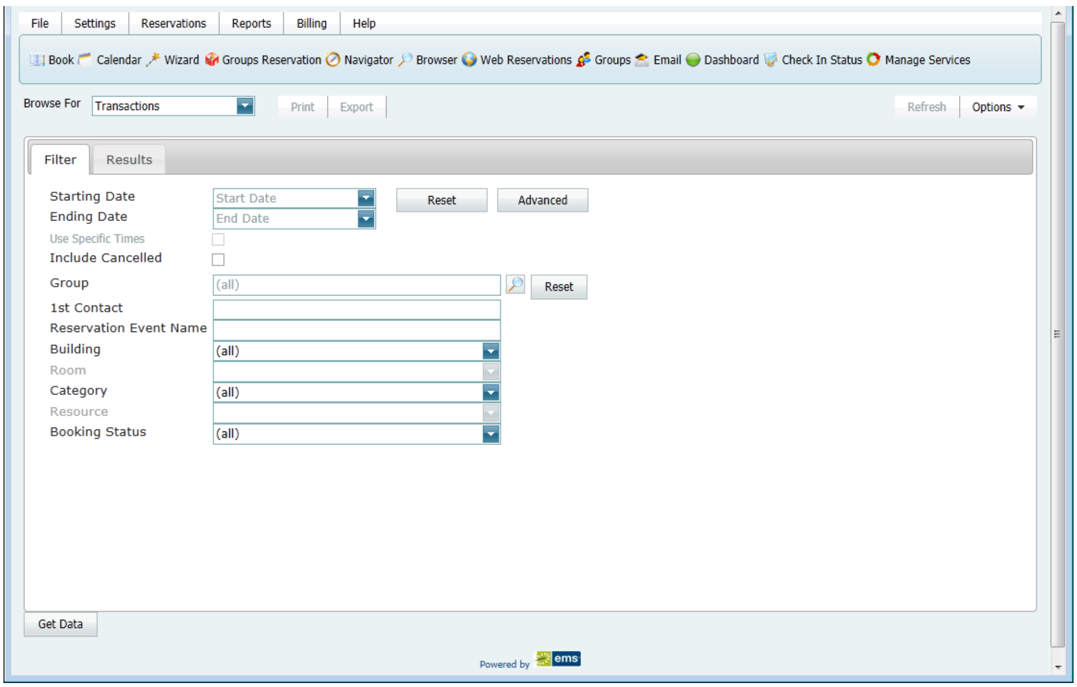
You can find all transactions for a reservation on the Transactions tab in the Navigator. See *“Reservation folder” in ,“The Navigator,” on page 65.*

To search for a transaction

1. On the EMS main menu, click Billing > Other > Browse Transactions.

   The Browse Transactions page opens. The *first* time that the Browse Transaction page opens, the Filter tab is set by default to a basic search; otherwise, the Filter tab is set to the search type (Basic or Advanced) that you last carried out.

Figure 9-9: Browse Transactions page, Basic search options



2. Click the Basic/Advanced toggle to select the type of search that is to be carried out, and then continue to one of the following:

   - “To carry out a basic transaction search.”
   - “To carry out an advanced transaction search” on page 338.

To carry out a basic transaction search

1. Enter the search criteria.

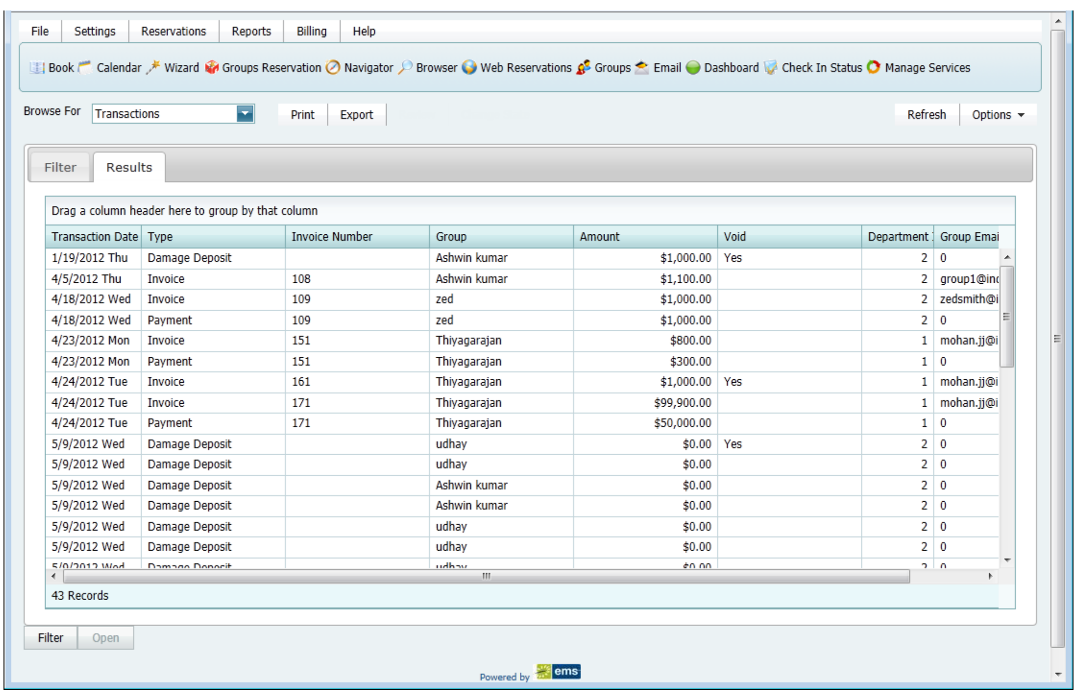
Field	Description
• Starting Time • Ending Time	The date range during which the transactions were carried out. Both are optional.
Group	Click the Search icon to open the Groups page and search for a for the group for which the transactions apply. See “To search for a group and/or contact” on page 231.

Field	Description
Department	Leave the default value set to (all) or select a specific department that generated/issued the transaction.
Transaction Type	Leave the default value set to (all), or select a specific transaction type for which to search.
Invoice Number	If you are searching for a specific invoice or invoices, enter a search string. **Note:** The search is not case-sensitive, but your search is limited to the exact order of characters in the string and it must begin with the information for which you are searching. For example, a search string of **10** returns **10**00, **10**17, but not 910.
Reservation ID	Leave the default value set to 0 to search for a transaction regardless of reservation ID; otherwise, enter the exact value of the reservation ID.
Amount	Leave the default value set to 0.00 to search for transactions regardless of the transaction amount; otherwise, enter the exact amount of the transaction.

2. Optionally, click Options and edit the default value the Number of Records to Return search option.
3. Click Get Data or Refresh.

   The search results are displayed on the Results tab.

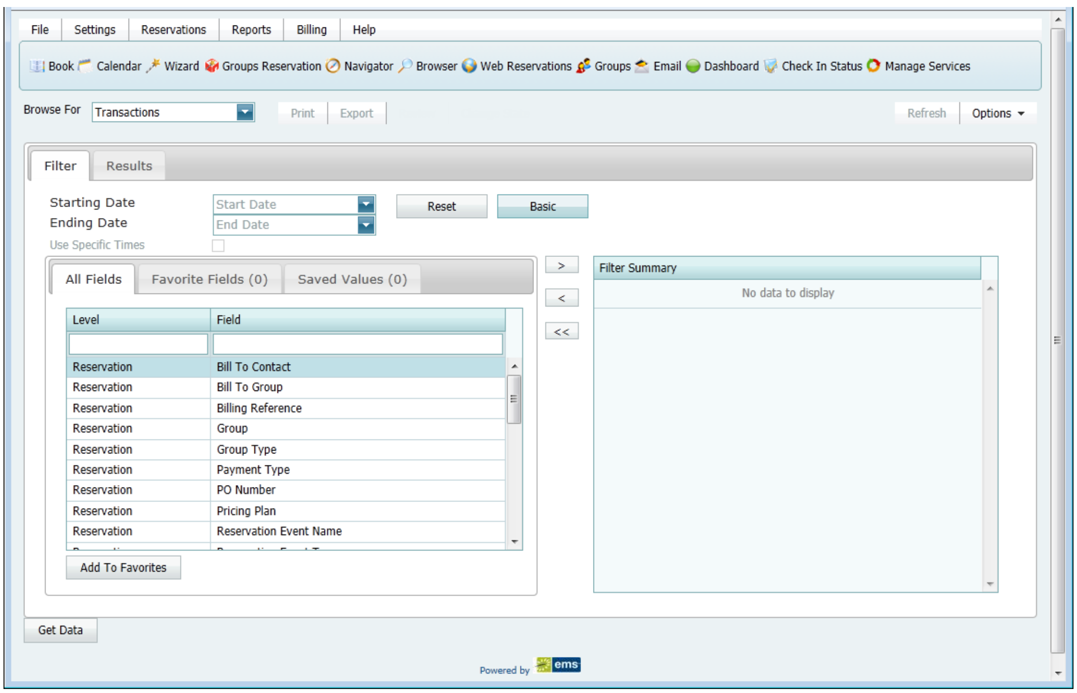
Figure 9-10: Browse Transactions page, Results tab



4. Optionally, do one or more of the following:
   - The lower pane on the Results tab is an EMS Browser window. See "An EMS Browser Page" on page 25 for all the features that are available for this pane.
   - Click Print to print the search results.
   - Click Export to export the search results to a Microsoft Excel spreadsheet.
   - Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
   - Click Refresh to requery the database based on the current search criteria.
5. Click Close.

To carry out an advanced transaction search

Figure 9-11: Browse Transaction page, Advanced search options



1. Optionally, enter a Starting Date, an Ending Date, or both.
2. Optionally, if the Starting Date and the Ending Date are the same, select Use Specific Times and enter specific time periods to search.

Use Specific Times is available only if the Starting Date is the same as the Ending Date.

3. For each field level option by which to carry out the search:
   - Select the field level option, and then click the Move button (>).

To filter the list of available fields, in the Level Search field and/or the Field Search field, enter a search string. Your search is limited to the exact order of the characters in the string, but the search string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of ***type*** *returns* ***Type****, Payment* ***Type****, and so on.*

   - When prompted, enter a value or define the limits for the option, and then click OK.

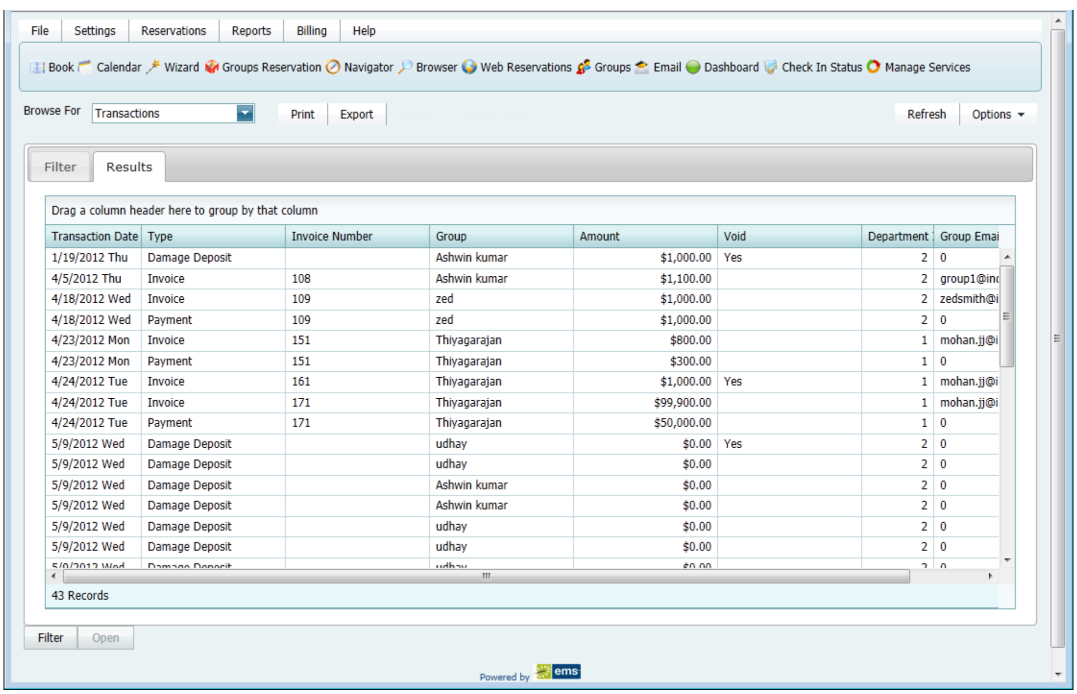
   The option is moved to the Filter Summary list.

If you have specific fields and/or values by which you always want to carry out a search, then you can set up these fields to be your Favorite fields. See *“To set up favorite fields for a Transaction search” on page 340.*

4. Optionally, click Options and edit the default values for one or more additional search options—Date/Time Filter, Number of Records to Return, and Specific Room Filters.
5. Optionally, click Options and edit the default value the Number of Records to Return search option.
6. Click Get Data or Refresh.

   The search results are displayed on the Results tab.

Figure 9-12: Browse Transactions page, Results tab



7. Optionally, do one or more of the following:
   - The lower pane on the Results tab is an EMS Browser window. See “An EMS Browser Page” on page 25 for all the features that are available for this pane.
   - Click Print to print the search results.
   - Click Export to export the search results to a Microsoft Excel spreadsheet.
   - Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
   - Click Refresh to requery the database based on the current search criteria.
8. Click Close.

To set up favorite fields for a Transaction search

If you have specific fields and/or values by which you always want to carry out a Transaction search, you do not have to filter the list of fields on the All Fields tab for every search. Instead, you can set up each of these fields to be a favorite field with a specific value or limit if needed.

1. Open the Browse Transactions page, and make sure that the Advanced search features are displayed.
2. For each field that you are setting up as favorite field, select the field on the All Fields tab, and then click Add to Favorites.

   The field is added to the Favorite Fields tab.
3. Optionally, after you define a value or define the limits for a field, click Save Value on the Filter dialog box.

   The next time that you carry out a search, you can simply open the Favorite Fields tab or the Saved Values tab to carry out a search based on your customized list of search fields.

Working with Transactions

Working with transactions in EMS consists of entering the transaction correctly, and if needed voiding a transaction. You can:

- Enter a deposit and void a deposit.
- Enter a payment and void a payment.
- Enter an adjustment and void an adjustment.
- Enter a refund and void a refund.

The steps for entering the different types of transactions are specific to the transaction. The steps for voiding a transaction are identical, regardless of the transaction type.

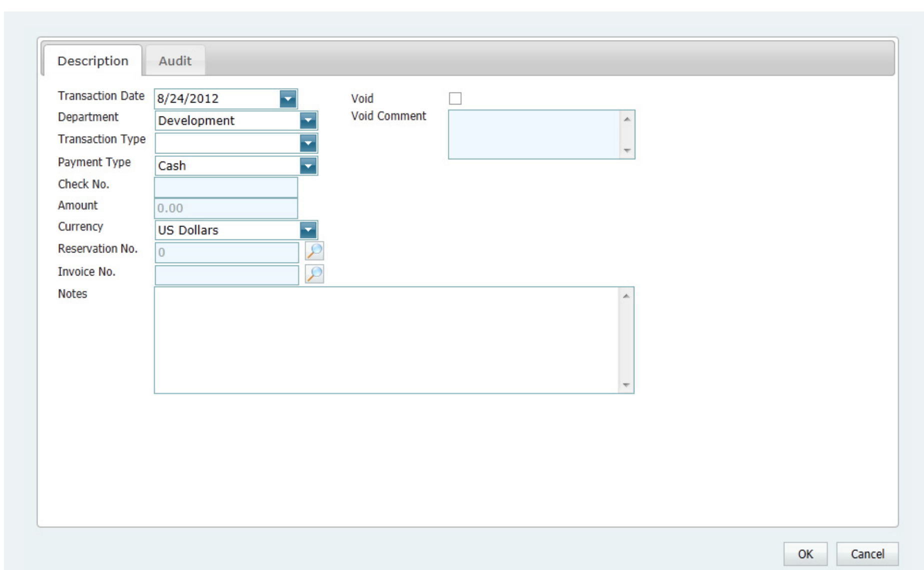
If needed, you can first search for a transaction to ensure that it has not already entered or voided. See “To search for a transaction” on page 336.

To enter a deposit or damage deposit for a reservation

1. Do one of the following:
   - Open the reservation in the Navigator (see “Opening a reservation in the Navigator” on page 67), and on the Transactions tab, click New > Payment.
   - On the EMS main menu, click Billing > Payments > Payment Entry, and then on the Payment Entries page, click New.

   The Payment Entry dialog box opens.

Figure 9-13: Payment Entry dialog box



2. Enter the deposit information.

Field	Description
Transaction Date	The default value is the current day's date. You can edit this value if needed.
Department	Select the department.
Transaction Type	Select the transaction type—Damage Deposit, Deposit (Reservation), or Deposit (Bookings). • A Deposit (Reservation) is best suited for reservations with one or more bookings that are to be invoiced in their entirety upon completion of the event. • A Deposit (Bookings) is best suited for reservations with multiple bookings, for example, an event with multiple occurrences spanning several months, that is to be billed monthly. A Deposit (Bookings) allows you to spread the deposit across multiple months so that only a portion of the deposit is consumed and applied to the invoice that is generated monthly. In this scenario, a large deposit that is entered as Deposit (Reservation) would be consumed in its entirety by the first invoice that is generated.
Payment Type	Select the payment type.
Check No.	Enter a check number if you selected "Check" as the payment Type.
Amount	Enter the amount of the deposit.
Currency	Select the currency for the deposit.
Reservation No.	Automatically populated if you opened the Payment Entry dialog box from the Transaction tab in the Navigator; otherwise, enter a reservation number or click the Search icon  to open the Reservations page and search for a reservation.
Invoice No.	N/A as deposits are applied before an invoice is generated. The invoicing process totals the charges for the specified date range, consumes any applied *reservation* deposits, and results in a net balance due for the invoice. The invoicing process does not consume any Damage deposits.
Notes	Optional. Enter any other comments or statements that explain or clarify the deposit.

3. Click OK.

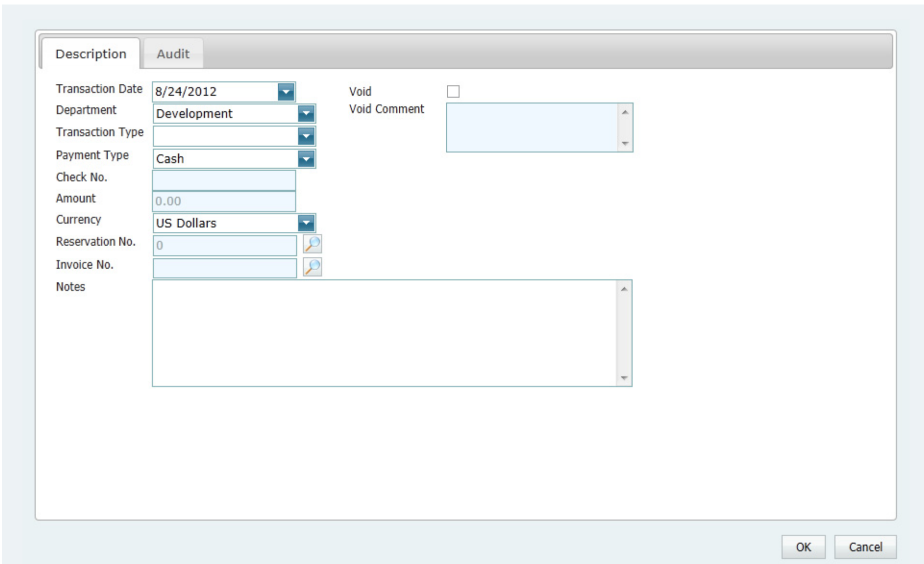
   The Payment Entry dialog box closes. The transaction information is displayed on the Transactions tab for the reservation.

To enter a payment or pre-payment

1. Do one of the following:
   - Open the reservation in the Navigator (see "Opening a reservation in the Navigator" on page 67), and on the Transactions tab, click New > Payment.
   - On the EMS main menu, click Billing > Payments > Payment Entry, and then on the Payment Entries page, click New.

   The Payment Entry dialog box opens.

Figure 9-14: Payment Entry dialog box



2. Enter the payment information.

Field	Description
Transaction Date	The default value is the current day's date. You can edit this value if needed.
Department	Select the department.
Transaction Type	Select the transaction type—Payment or Pre-payment. **Note:** Remember that pre-payments act just like deposits in that they are applied to a reservation and are applied to an invoice reducing the balance due. Payments are applied to an invoice.
Payment Type	Select the payment type.
Check No.	Enter a check number if you selected "Check" as the payment Type.
Amount	Enter the amount of the payment.
Currency	Select the currency for the payment.

Field	Description
Reservation No.	• If you selected Payment as the Transaction Type, then this field is not available as payments are applied against invoices, not reservations. • If you selected Pre-payment as the transaction type, then the field is automatically populated if you opened the Payment Entry dialog box from the Transaction tab in the Navigator; otherwise, you must enter a reservation number or click the Search icon to open the Reservations page and search for a reservation.
Invoice No.	• If you selected Pre-payment as the Transaction Type, then this field is not available as pre-payments are applied before an invoice is generated. • If you selected Payment as the Transaction Type, then you must enter an invoice number in this field, or click the Search icon to open the Invoices page and search for an invoice.
Notes	Optional. Enter any other comments or statements that explain or clarify the payment.

3. Click OK.

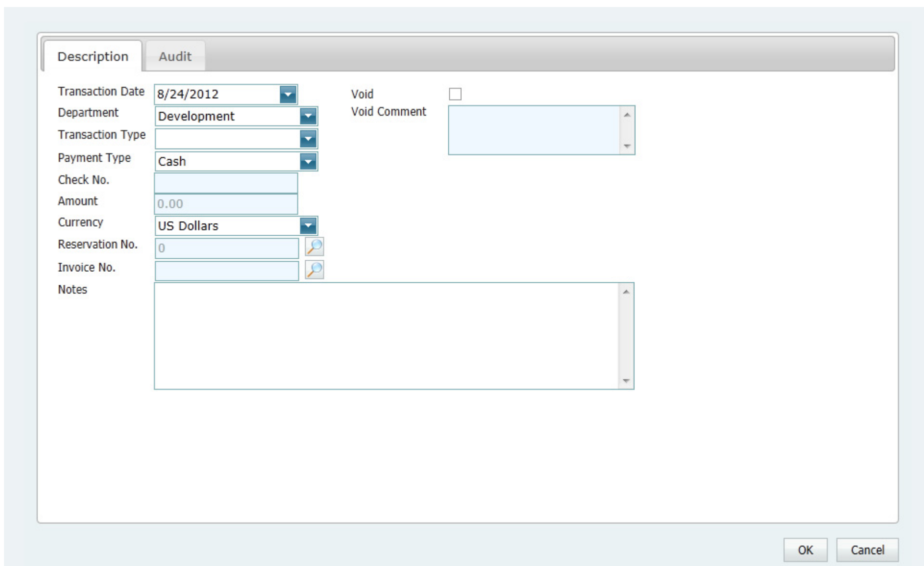
   The Payment Entry dialog box closes. The transaction information is displayed on the Transactions tab for the reservation.

To enter an adjustment for an invoice

1. Do one of the following:
   - Open the reservation in the Navigator (see “Opening a reservation in the Navigator” on page 67), and on the Transactions tab, click New > Payment.
   - On the EMS main menu, click Billing > Payments > Payment Entry, and then on the Payment Entries page, click New.

   The Payment Entry dialog box opens.

Figure 9-15: Payment Entry dialog box



2. Enter the adjustment information.

Field	Description
Transaction Date	The default value is the current day’s date. You can edit this value if needed.
Department	Select the department.
Transaction Type	Select the transaction type—Adjustment.
Payment Type	Select the payment type.
Check No.	Enter a check number if you selected “Check” for the payment type.
Amount	Enter the amount of the adjustment. To decrease the invoice by the indicated amount, enter a minus sign (-) before or after the amount.
Currency	Select the currency for the adjustment.
Reservation No.	N/A as adjustments are applied to invoices.
Invoice No.	You must enter an invoice number or click the Search icon to open the Invoices page and search for an invoice

Field	Description
Notes	Optional. Enter any other comments or statements that explain or clarify the adjustment.

3. Click OK.

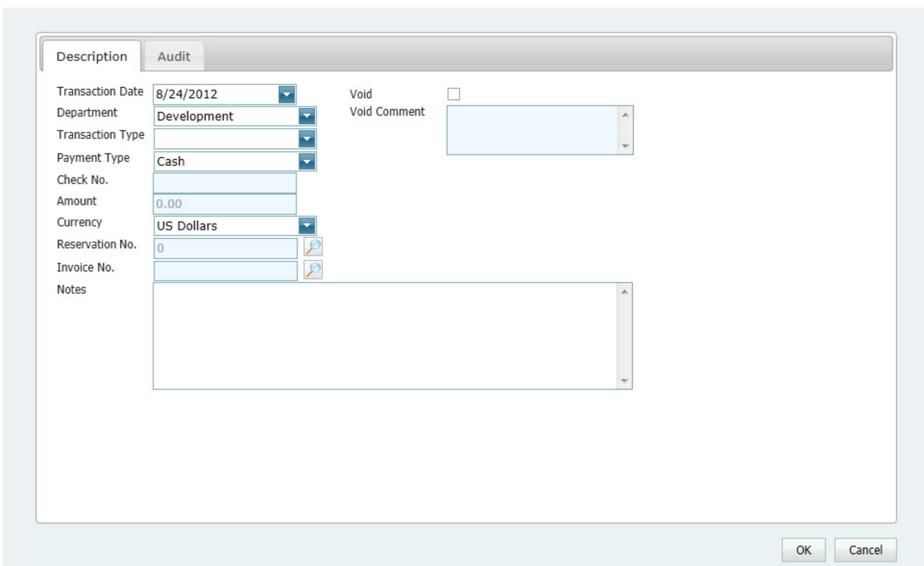
   The Payment Entry dialog box closes. The transaction information is displayed on the Transactions tab for the reservation.

To enter a refund

1. Do one of the following:
   - Open the reservation in the Navigator (see “Opening a reservation in the Navigator” on page 67), and on the Transactions tab, click New > Payment.
   - On the EMS main menu, click Billing > Payments > Payment Entry, and then on the Payment Entries page, click New.

   The Payment Entry dialog box opens.

Figure 9-16: Payment Entry dialog box



2. Enter the refund information.

Field	Description
Transaction Date	The default value is the current day's date. You can edit this value if needed.
Department	Select the department.
Transaction Type	Select the transaction type—Refund.
Payment Type	Select the payment type.
Check No.	Enter a check number if you selected "Check" as the payment type.
Amount	Enter the amount of the refund.
Currency	Select the currency for the refund.
Reservation No.	N/A as refunds are applied to invoices.
Invoice No.	You must enter an invoice number or click the Search icon to open the Invoices page and search for an invoice
Notes	Optional. Enter any other comments or statements that explain or clarify the refund.

3. Click OK.

   The Payment Entry dialog box closes. The transaction information is displayed on the Transactions tab for the reservation.

To void a transaction

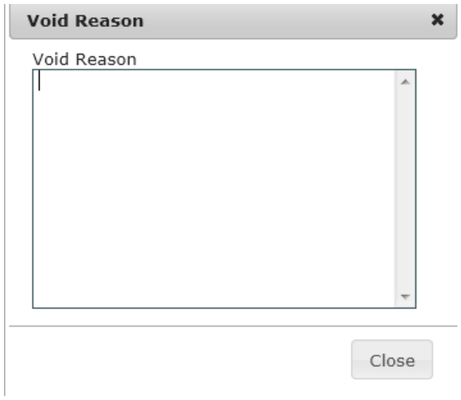
You can void a transaction for a reservation from the Transactions tab, or you can void a transaction from the Payment Entries page.

To void a transaction from the Transactions tab

1. Open the reservation in the Navigator. (See "Opening a reservation in the Navigator" on page 67.)
2. Open the Transactions tab, and on the Transactions tab, select the transaction, or CTRL-click to select the multiple transactions that you are voiding, and then click Void.

   A Void Reason dialog box opens. See Figure 9-17 on page 348.

Figure 9-17: Void Reason dialog box



3. Enter the reason for voiding the transactions, and then click Close.

   The Void Reason dialog box closes and a message opens indicating that the transaction has been voided.

4. Click OK.

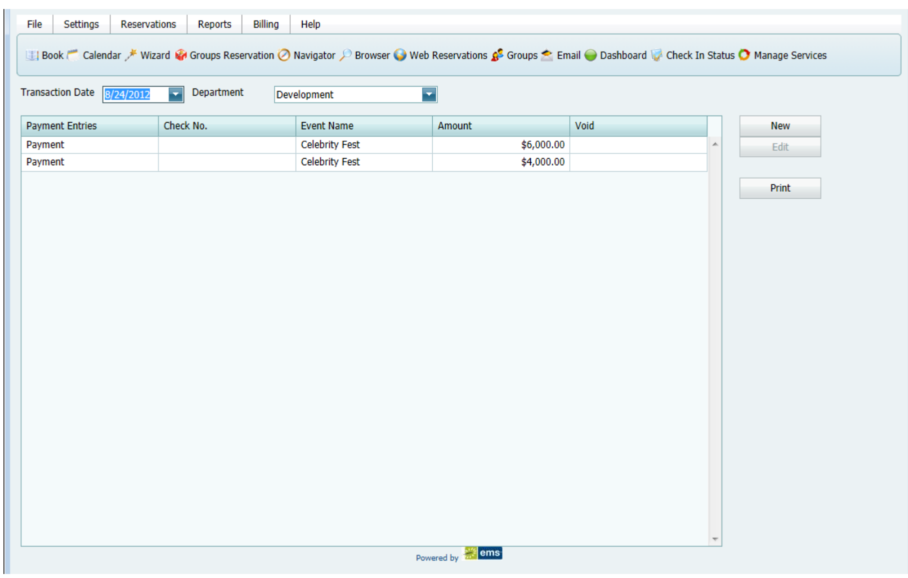
   The Void Transaction message closes. The Void column is set to Yes for each of the voided transactions in the Navigator.

To void a transaction from the Payment Entries page

1. On the EMS main menu, click Billing > Payments > Payment Entry.

   The Payment Entries page opens. This page lists all transactions (voided and non-voided) that were ever made in your EMS system for a selected department on a selected date.

Figure 9-18: Payment Entries page



2. Select the date (the default value is the current day's date) and the department for which you are voiding the transaction.

   The Payment Entries page is updated with the list of payments that meet the date and department criteria.

3. Select the transaction that is to be voided, and then click Edit.

   The Payment Entry dialog box opens. This page details specific information for the selected transaction. (See Figure 9-13 on page 341.)

4. Click Void, and then in the Void Comment field, enter a reason for voiding the transaction.

5. Click OK.

   The Payment Entry dialog box closes. You return to the Payment Entries page. The Void column is set to Yes for the voided transaction.

Generating an EMS Billing Report

All EMS Billing reports are available under the Billing option on the main menu. For any EMS report, you can specify the parameters, options, and format for the report, or you can generate the report according to *memorized* settings. (For detailed information about a memorized report, see “Working with Memorized Reports” on page 293.) Not all reports require the same parameters, nor do they all have the same options available. In addition, you can generate different reports in different formats.

The parameters and options that are available for each report are discussed in “Report Descriptions and Options” on page 352. Contact your EMS administrator if you need assistance in generating any of these report.

To generate a report

1. On the EMS main menu, click Billing to open the Billing menu, and then do one of the following:
   - To generate the Billing Worksheet report, click Billing > Invoices > Billing Worksheet.
   - To generate any other Billing report, click Billing > Reports, and then click the option for the report that you are generating. For example, to generate the Ageing report, click Billing > Reports > Ageing.

All Billing reports other than the Billing Worksheet report are also available from Reports > Billing.

2. On the Setup dropdown list, do one of the following:
   - To generate the report according to the filter settings that you want (parameters, options, and so on), leave user-specified selected, then go to Step 3.
   - To run the report with filter settings that have been saved, or memorized, select the memorized report, and then go to Step 4.

For detailed information about memorized reports, see “Working with Memorized Reports” on page 293.

3. Specify the report parameters, options, and format. See:
   - “Invoice reports” on page 353.
   - “Reports” on page 353.

4. Click Generate Report.

   If you selected the default format of HTML, then the report is displayed onscreen in its own page. You can use your browser options to view the report prior to printing, set your printing options, print the report, and so on. For all other report formats, you must indicate whether to open the report, or to save the report. To open a report in any format other than HTML, you must have the correct application installed on your client:

Output Format	Required Application
PDF	Adobe Reader or Adobe Acrobat
RTF	Microsoft Word
XLS	Microsoft Excel
HTML	Web Browser
TEXT	Notepad or Textpad
TIFF	Any graphics application including Microsoft Paint and Microsoft Office Picture Manager.

   Unless you change the setup, all subsequent reports will be generated and printed according to the parameters and options that you have specified and in the format that you specified. If you want to save certain settings so that you do not have to adjust the filter settings every time you run the report, you can memorize the report. See “Working with Memorized Reports” on page 293.

Report Descriptions and Options

This section provides a description of every EMS report in the categories listed below and it also defines the options that are available for each report.

See:

- "Invoice reports" on page 353.
- "Reports" on page 353.

Invoice reports

Report	Description	Options
Billing Worksheet	Provides information on how bookings are to be invoiced. The report can include bookings within a date range, bookings within a reservation, or bookings within a date range inside a reservation. The report breaks down the charges in the same way as an invoice. The report also provides options for printing heading/footer messages and the detail for zero-dollar items.	See “Options tab—Format settings for a printed confirmation” in “To generate an invoice” on page 322.

Reports

Report	Description	Options
Ageing Report	A list of outstanding invoices. Current invoices are listed first, followed by past due invoices organized by age. Ageing Reports are based on department.	• Currency—Select the currency for the invoices. • Show Unapplied Deposits—Deposits that are applied to reservations that have not been invoiced are displayed on the report.

Report	Description	Options
Statements	A list of outstanding invoices for a selected group. Current invoices are listed first, followed by past due invoices organized by age.	• Currency—Select the currency for the invoices. • Report Title—Can create a title that is displayed at the top of the statement. • Header Message—Select a message from the pre-configured messages that is displayed at the top of every page of the statement. • Include Transactions On Zero Balance Invoices Within [ ]days—Statements that have a zero balance within the specified number of days are displayed. • Show Billing Reference Number—The billing reference number is displayed under the invoice information. • Show Purchase Order Number—The purchase order number is displayed under the invoice information. • Show Transaction Notes—Any notes entered for the transaction are displayed under the invoice information. • Use Current group Address - The *current* address of the group is displayed on the statement. (This address might or might not be the address for the group when the reservation was made.)

Report	Description	Options
Transaction Report	Shows all the billing transactions during a specified period if you generate the report in the By Transaction Type by Date format. Simply enter the date or date range and click Print. The report lists the group, event name, reservation ID, transaction date, transaction type, invoice number, check number, and amount. **Note:** If the report is generated in Standard format, deposits are not shown as transactions if they have been absorbed by the generation of an invoice. **Note:** You can also generate the Transaction Report from within a reservation to see only transactions for the selected event and you can generate the Transaction Report from the Print option on the Payment Entries page. Click Billing > Payments > Payment Entry, and then on the Payment Entries page, click Print.	Currency—Select the currency for the billing transactions.
Voided Transaction Report	Lists the payments, deposits, or adjustments that were voided on a specific date or within a date range. Lists the group, event name, reservation ID, transaction date and type, invoice number (if applicable), check number, and amount.	Currency—Select the currency for the voided transactions.
Invoice Detail Report	Provides detail for all invoices that were generated within a given date range. **Note:** See "To reprint an invoice" on page 326 for detailed instructions about the options that are available for the Print Invoice Detail dialog box.	N/A

Report	Description	Options
General Ledger Distribution	Shows the totals for invoices that were generated within a given date range. Entries are broken down by account, invoice, rate plan, or invoice. You can also generate this report in a Summary format.	• Currency—Select the currency for the invoices. • Invoices With Payments Only—Only invoices where payment has been received are posted on the report. • Show Applied Deposits/Prepayments—Applied deposits and prepayments are posted on the report. (An applied deposit is a deposit on a reservation that has been invoiced.)

User Settings

As an EMS user, you can manage many aspects of your account to better suit your working needs.

This chapter covers the following topics:

- "Setting User Preferences and Default Values" on page 359.
- "Changing your Password" on page 362.

Setting User Preferences and Default Values

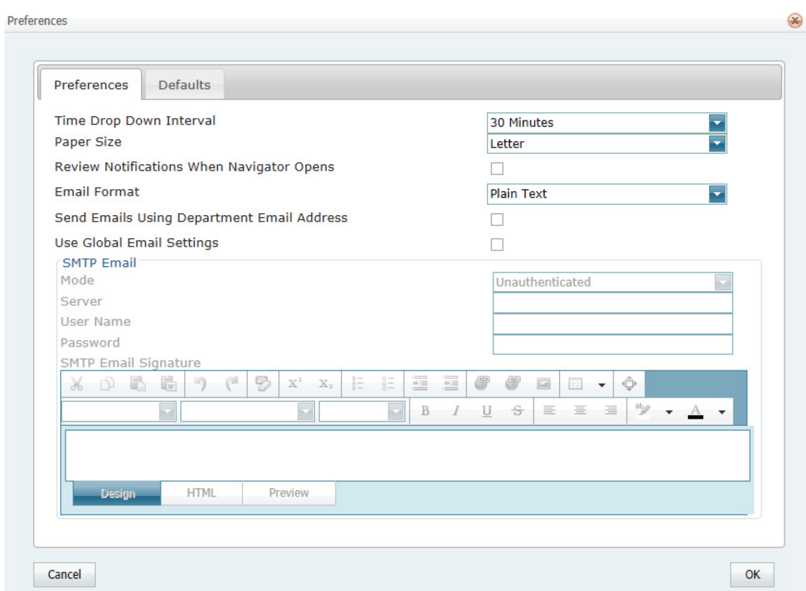
Preferences, like system parameters, are settings that affect the basic functioning of your EMS system. The difference is that system parameters are global settings that affect all users on the system, whereas preferences are applicable only to your user account. You can set the values for many preferences for your EMS instance to better suit your working needs. These preferences include the time interval for Time dropdown fields, the size of the paper on which reports, confirmations, and invoices are to be printed, the format in which to send emails from your computer, and the default values for specific fields in the Reservation Wizard and other EMS client windows.

To set user preferences and default values

1. On the EMS main menu, click Settings > Preferences.

   The Preferences dialog box opens. The Preferences tab is the active tab.

Figure 10-1: Preferences dialog box, Preferences tab



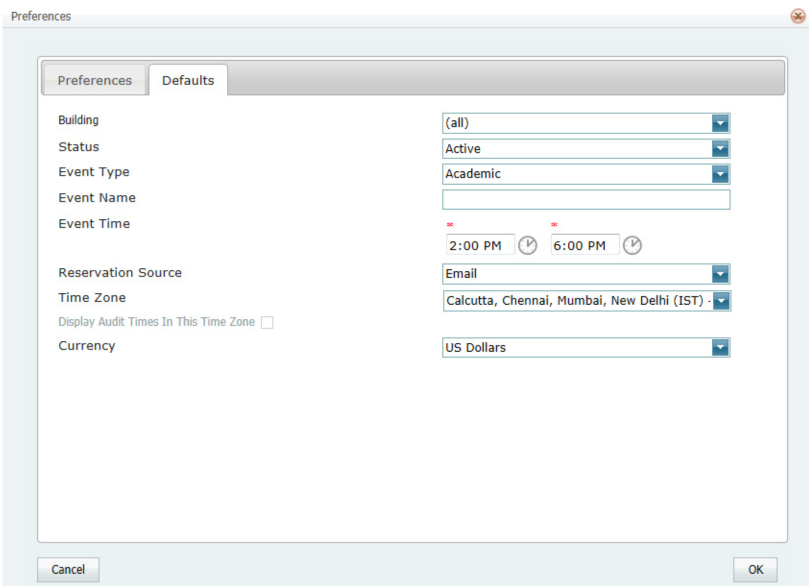
2. Edit your user preferences as needed.

Field	Description
Time Drop Down Interval	The time interval displayed on a Time dropdown list—i.e., if you select 30 minutes, then options on the dropdown list are displayed as 1:00 1:30, 2:00 and so on. All Time dropdown lists are 24 hour lists.
Paper Size	The size of the paper on which reports, confirmations, and invoices are printed. Values are Letter, Legal, and A4.

Field	Description
Review Notifications When Navigator Opens	If this option is selected, then a notification in the Dashboard is automatically marked as “Reviewed” if you select the notification, and then click Go To. If this option is not selected, then you must select a notification, and then click Reviewed to manually mark the notification as “Reviewed.”
Email Format	The format in which your emails are sent—HTML or Plain Text.
Send Emails Using Department Email Address	Select this option if you want the From email address for all the emails that you send from EMS to be the email address of the department that is associated with your user account.
Use Global Email Settings	If you want to use the global email settings that your EMS administrator has defined, then select this option.
SMTP Email	Contact your EMS administrator with assistance in specifying these values. **Note:** If you are using SMTP Email settings that are specific to your account, then you also have the option of creating a signature that is to be included in all the emails that you send from EMS. You can design the signature in plain text on the Design tab or in HTML format on the HTML tab. You can always preview the signature on the Preview tab.

3. Open the Defaults tab, and set the default values for the indicated items.

Figure 10-2: Preferences dialog box, Defaults tab



Field	Description
Building	You can select all buildings, a specific building, or a specific view or area. The value that you select here automatically populates the Building dropdown list in the Reservation Wizard and other EMS client pages, for example, the Visitors page.

Field	Description
Status Event Type Event Name Event Time Reservation Source Time Zone/ Display Audit Times in This Time Zone Currency	The values that you select here automatically populate the appropriate fields in the Reservation Wizard, and other EMS client pages. **Note:** The event name can be a maximum of 30 characters, including spaces.

4. Click OK to close the Preferences dialog box and apply your edited preferences and default values.

Changing your Password

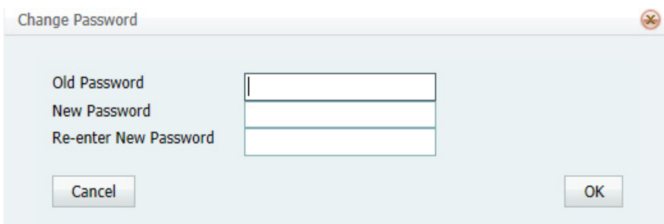
When your EMS administrator first sets up your user account, your password is predefined for you. You can change this password if you want.

To change your password

1. On the EMS main menu, click Settings > Change Password.

   The Change Password dialog box opens.

Figure 10-3: Change Password dialog box



2. Do the following:
   - In the Old Password field, enter your current EMS password.
   - In the New Password field, enter the new password.
   - In the Re-enter New Password field, enter your new password again, exactly as you entered it in the New Password field.
3. Click OK to close the Change Password dialog box.

   The next time that you log in to EMS, you must use your new password.

Other Reservation Functions

EMS contains several miscellaneous standalone functions to assist you in managing and maintaining reservations and bookings in your system as well as managing your general work requirements.

This chapter covers the following topics:

- "Recording Actual Attendance Numbers for Bookings" on page 365.
- "Sending Email from EMS" on page 367.
- "Viewing a History of Sent Emails" on page 373.
- "Generating Multiple Confirmations" on page 375.
- "Managing Attendees and Visitors" on page 379.

Recording Actual Attendance Numbers for Bookings

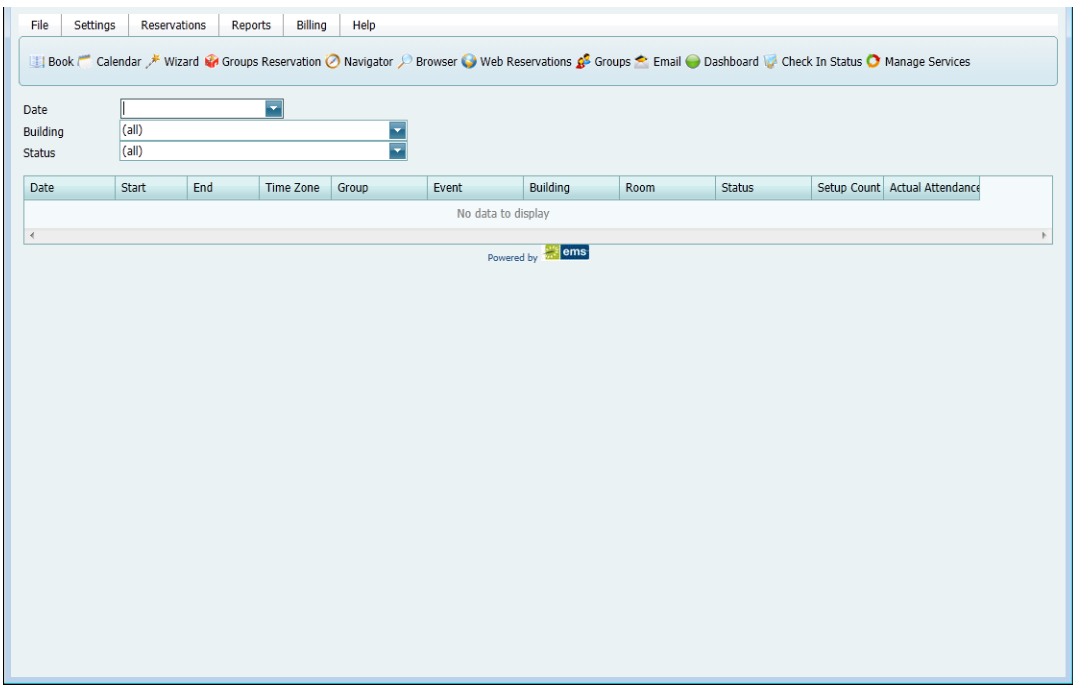
You use the Attendance Entry tool to view and record the actual attendance for *bookings*. (The tool does not address reservation-level attendance.) The actual attendance numbers that you enter do not replace the setup count (i.e., the estimated attendance) that you entered prior to an event. Reports that provide attendance information typically provide both the estimated attendance and the actual attendance.

To record actual attendance numbers for bookings

1. On the EMS main menu, click Reservations > Other > Attendance Entry.

   The Attendance Entry page opens.

Figure 11-1: Attendance Entry page



2. In the Date field, select a date for which you are recording the booking attendance.

The date must occur on or before the current day's date.

3. Optionally, specify a building and/or a booking status to filter the list of booking results.

4. For each booking as needed, scroll to the Actual Attendance column, double-click in the column to select the currently displayed value, and then enter the actual attendance number in the column.
5. Click Update.

Sending Email from EMS

You use SMTP email to send the following emails from the EMS Web Client:

- Individual emails to EMS groups/contact or users. See "To send an email to an EMS group/contact or user" below.
- Confirmations to EMS groups/contact or users. See "To send a confirmation" on page 369.

EMS also provides an SMTP emailing function that you can use to send *generic* emails (emails that are not "tied" to a confirmation, reminder, and so on) to any recipient of your choice. You can also use this function to send invoices to any recipient of your choice.

To send any email, your user account must be configured with an email address. To send generic emails, your user email preferences must also be configured. Contact your EMS administrator if you need assistance with this. See your EMS administrator or internal IT staff for information on how to enable SMTP email.

To send an email to an EMS group/contact or user

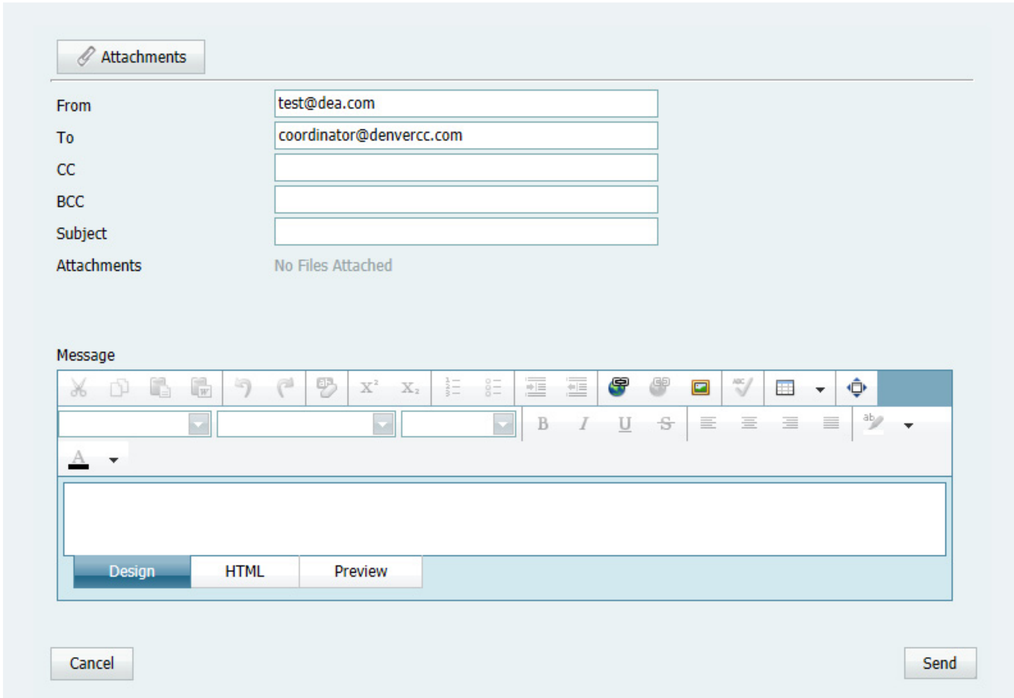
1. Search for the group that you are emailing. See "To search for a group and/or contact" on page 231.
2. Do one of the following:
   - On the Groups page, select the group and then click Email.

     A pre-addressed SMTP email form opens. The From field is populated with the email address for your user account, but you can edit this value. The To field is populated with the email address that is defined for the group, but you can edit this value. Go to Step 4.
   - On the Groups page, select the group, and then click Open.

     The group-specific page opens. Go to Step 3.
3. On the group-specific page, make sure that the group is selected in the left pane, and then click Email.

   A pre-addressed SMTP email form opens. The From field is populated with the email address for your user account, but you can edit this value. The To field is populated with the email address that is defined for the group, but you can edit this value.

Figure 11-2: SMTP Email form for a group



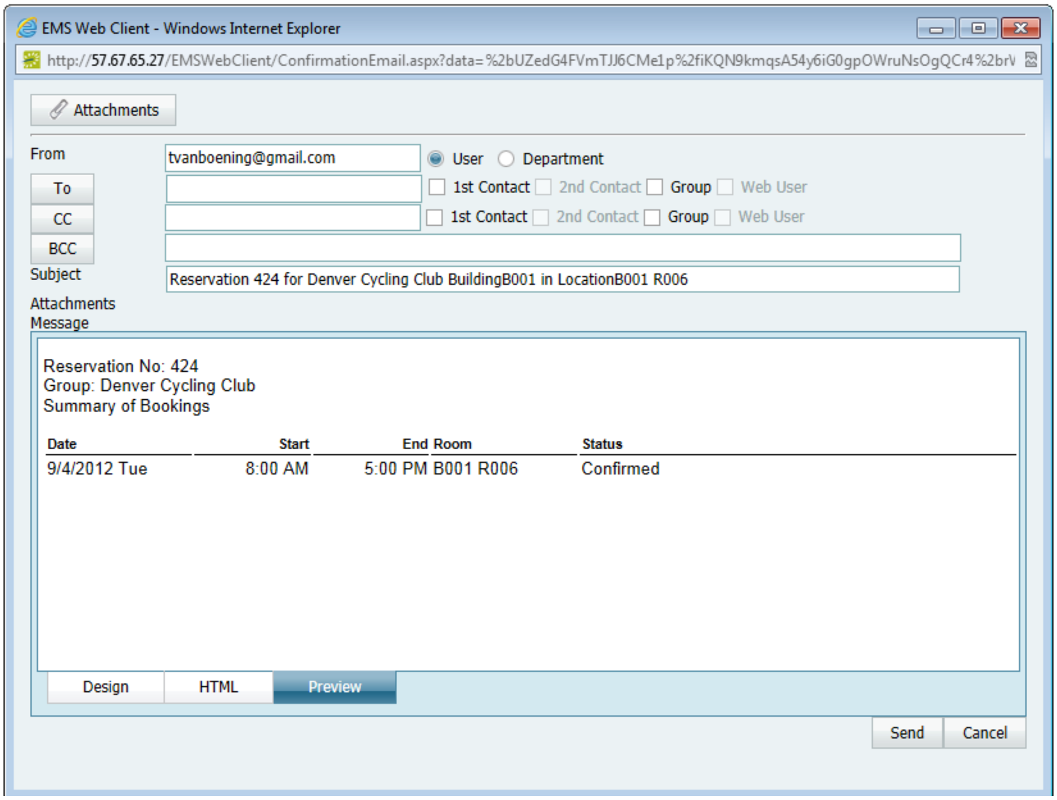
4. Enter the necessary information in the Subject and Message fields.
5. Optionally, do one or both of the following:
   - To attach a file, click Attachments at the top of the window.
   - To format the body of the email message, use one of the following options:
     - Design is selected by default. Use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the headers and footers.
     - Select HTML and enter the necessary HTML code to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the headers and footers. You can click Preview to view how your HTML-formatted message will look before you send the email.

To send a confirmation

1. On the Confirmation dialog box, click Email.

   An Email page that displays the confirmation in the body opens in Preview mode.

Figure 11-3: SMTP email page for a confirmation



2. Indicate the email address *from* which the confirmation is to be sent.

You can select User, which is the email address that is associated with your User account, or you can select Department, which is the email address of the department that is associated with your user account. See *"Setting User Preferences and Default Values" on page 359.*

3. Select the recipients for the email.

4. Optionally, do one or both of the following:
   - To add attachments to the file, click Attachments.

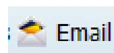
If the emailed confirmation includes one or more attachments, then the Confirmation Title is also used for the name for all attachments other than an .ics file. If the confirmation includes an .ics file, then the .ics file is always named Confirmation.ics. To include the entire confirmation as an attachment, or an .ics file in a confirmation, see "Specifying your Confirmation Settings" on page 281.

   - To change the formatting of the message, do one of the following:
     - Open the Design tab and use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the headers and footers. You can click Preview to view how your plain text-formatted message will look before you send the email.
     - Open the HTML tab and enter the necessary HTML code to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the headers and footers. You can click Preview to view how your HTML-formatted message will look before you send the email.
5. Click Send.

To send a generic email

A *generic* is an email that is not “tied” to a confirmation, reminder, and so on. You can send a generic email to any recipient of your choice. If your organization does not use an email client such as Microsoft Outlook, you can also use this function to send invoices to any recipient of your choice.

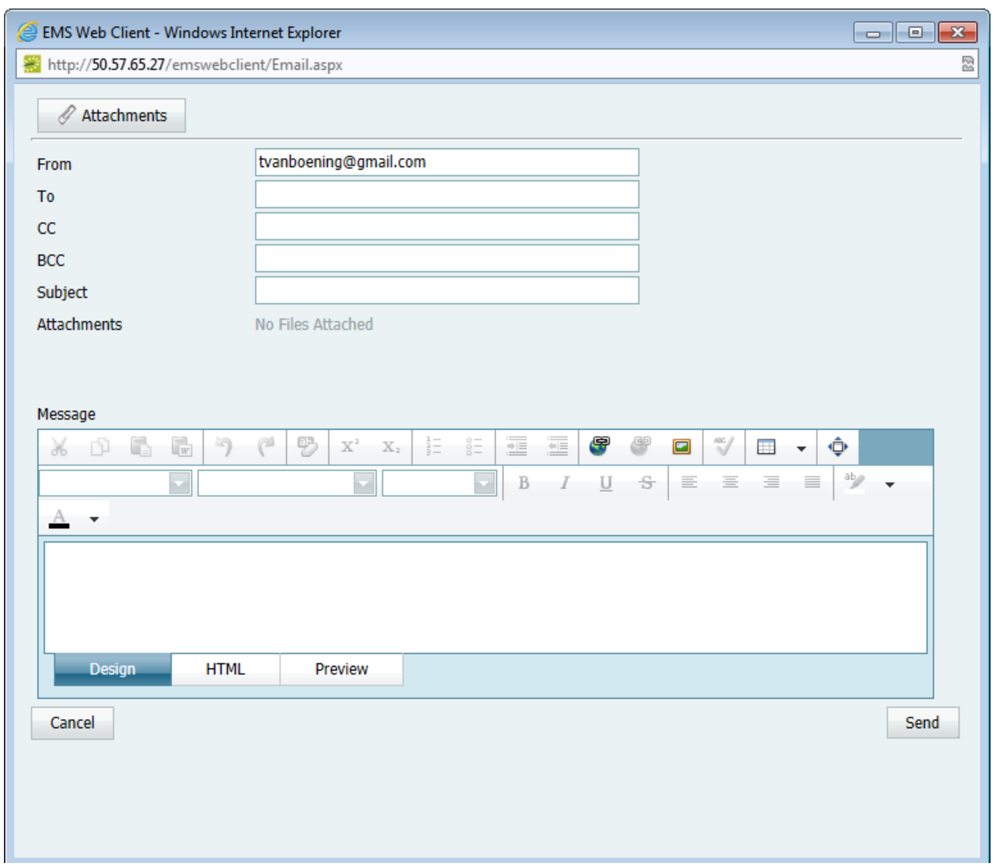
To send an invoice, you must have previously generated and saved the invoice or you must reprint the invoice so that you can send it as an attachment in the email. See “Working with Invoices” on page 322.

1. On the EMS toolbar, click the Email icon 

.

   A generic email form opens. Depending on your preferences, the From field is automatically populated either with the email address that is specified for your user account, or the email address of the department that is associated with your user account, but you can change this value. (See “Setting User Preferences and Default Values” on page 359.)

Figure 11-4: Generic email form



2. Enter the necessary information in the Subject and Message fields.
3. Optionally, do one or both of the following:
   - To attach a file, click Attachments at the top of the window.

To send an invoice, you must have previously generated and saved the invoice or you must reprint the invoice so that you can send it as an attachment in the email. *See "Working with Invoices" on page 322.*

   - To format the body of the email message, use one of the following options:
     - Design is selected by default. Use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the headers and footers.
     - Select HTML and enter the necessary HTML code to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the headers and footers. You can click Preview to view how your HTML-formatted message will look before you send the email.
4. Click Send.

Viewing a History of Sent Emails

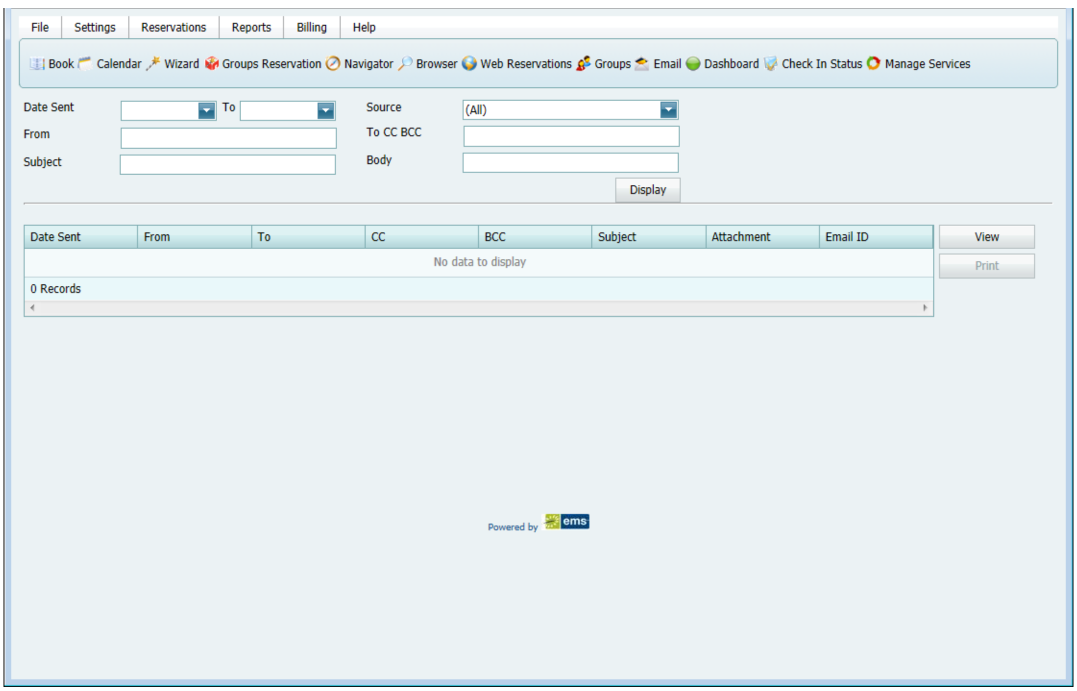
You can use the Email History function to review a list of all emails that have been sent from within your organization's EMS system via SMTP (not via Microsoft Outlook), including confirmation emails, report emails (which includes invoices, reminders, queries, web requests, and group and contact information), and generic emails. You can also view the contents of sent emails and print sent emails

To view a history of sent emails

1. On the EMS main menu, click Reservations > Other > Email History.

   The Emails page opens.

Figure 11-5: Emails page



2. Enter the search criteria for the emails, and then click Display.

Under Source, the Report option collectively refers to confirmations, invoices, reminders, queries, web requests, and group and contact information.

All of the emails that meet the search criteria are displayed in the bottom pane of the Emails page.

3. Optionally, do one or more of the following:
   - To view an email, select the mail in the search results list, and then click View.
   - To print the complete email results list, click View > Print List.

     A message opens, asking you if you want to open or save the Email History.pdf file.
     - If you click Open, the file opens onscreen. You can always indicate a file name and save the file after you view it.
     - If you click Save, you must select the directory in which to save the file.
   - To print the contents of one or more emails in the results list, select the mail, or CTRL-click to select multiple emails, and then click View > Print Emails.

     An onscreen preview of the selected emails opens. Options are available at the top of the preview for searching the onscreen preview, printing the onscreen preview, and exporting and saving the onscreen preview to a file format of your choice (.pdf, .xls, .xlsx, HTML, text, .csv, and as an image.)

Generating Multiple Confirmations

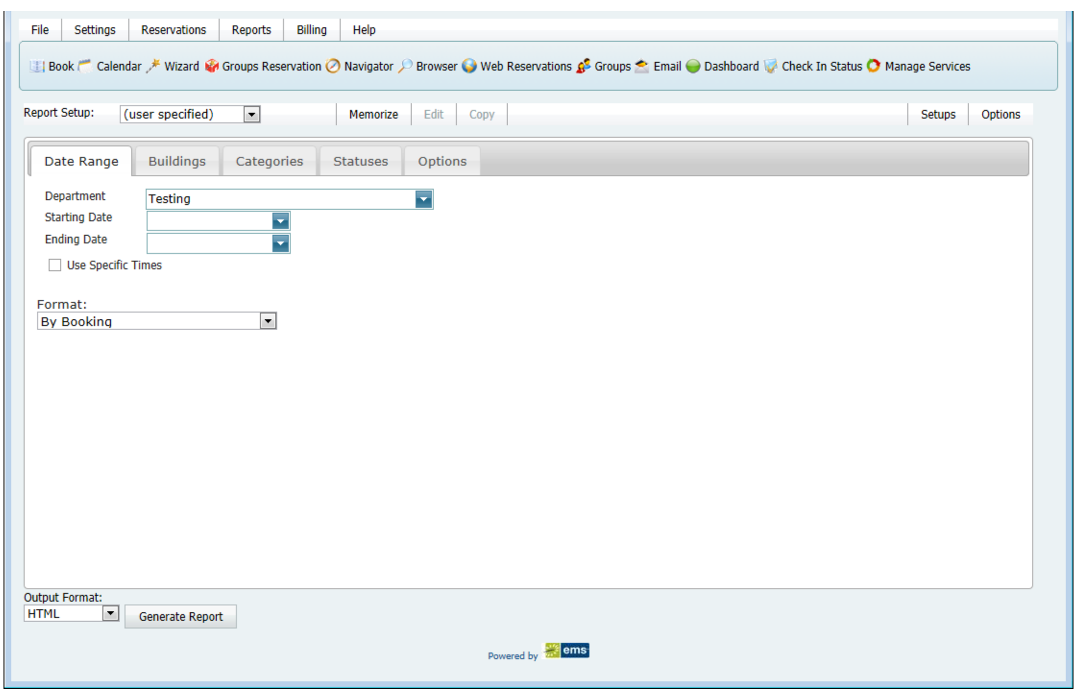
A *confirmation* is a document that details the critical information for a reservation—the date, the time, the location, the scheduled resources, and so on. Through the Navigator, you have the option of generating a single confirmation, either manually or automatically. (See “Confirmations,” on page 279.) A miscellaneous reservation function is also available for manually generating multiple confirmations at the same time. When you generate multiple confirmations, all the confirmations are contained in a single file, but each confirmation begins at the top of a new page. All the confirmations are “sent” by the same office, all the confirmations use the same format (By Booking Date, By Date Added, or By Date Changed) and all the confirmations use the same print options (Confirmation Title, Header Message, and so on); however, each confirmation can contain unique information for the buildings, statuses, and/or categories that are detailed in the confirmation. Because multiple confirmations are for multiple recipients, you cannot mass email these confirmations. Instead, you can only print them, and then manually mail them. You can specify the settings for multiple confirmations “from scratch,” or you can copy an existing confirmation format, and then edit it as needed.

To generate multiple confirmations

1. On the EMS main menu, click Reservations > Other > Confirmations.

   The Confirmation page opens. The Date Range tab is the active tab.

Figure 11-6: Confirmation page, Date Range tab



2. Do one of the following:

   - Review the selections on this dialog box, and optionally, make any needed modifications.

Field	Description
Date Range tab	
Department	The department name that appears at the top the printed confirmation.
Starting Date Ending Date	The range of dates for which you are generating the confirmations.
Use Specific Times	Available only if the Starting Date is the same as the Ending Date. If this option is selected, then two fields are displayed on the Date Range tab in which you must specify the time range. After you specify the time range, click Options > Date/Time Filter, and then indicate how the confirmation is to be limited—by bookings that start within the time range, or by bookings that occur within the time range.
Format	The format/organization of the confirmation—By Booking Date, By Date Added, or By Date Changed.
Buildings tab—Select the specific buildings that are to be included in the confirmation.	
Categories tab—Select the specific booking details that are to be included in the confirmation.	
Statuses tab—Select the specific statuses that are to be included in the confirmation.	
Options tab—Format settings for a printed confirmation.	
Confirmation Title	Appears bold and centered at the top of the confirmation.
Header Message Footer Message	Pre-configured blocks of text that appear in the header and footer of the printed confirmation. **Note:** Your EMS administrator configures these values. Contact your administrator if you need assistance with adding or editing a value.
Paper Size	The size of the paper on which the confirmation is printed. Values are Letter, Legal, and A4.
Print Comments	Include the comments for the reservation in the printed confirmation.
Print Reminders	Include the reminders for the reservation in the printed confirmation.
Print Cancel Reasons	Include the reasons for cancellation in the printed confirmation.
Print User Defined Fields	Include user-defined fields and their values in the printed confirmation.
Print Room Phone	Include the phone number for the room in which the event is being held in the printed confirmation.
Print Room Notes	Include any notes for the room in which the event is being held in the printed confirmation.
Print Building Notes	Include any notes about the building in the printed confirmation.
Print Billing Reference Allocation	Include the billing reference numbers for the event as well as the percentage of charges that is allocated to each number in the printed confirmation.

Field	Description
Print PO Number Allocation	Include the PO numbers for the event as well as the percentage of charges that is allocated to each number in the printed confirmation.
Print Category Subtotals	Include the subtotal charges by category in the printed confirmation.
Print Room Type	Include the room type for the event in the printed confirmation.
Print Item Selection Notes	Include the notes for each resource selection item for the event in the printed confirmation.
Suppress Reserved Time	Do not show the reserved time for the event in the printed confirmation.
Suppress Location	Do not show the location for the reservation in the printed confirmation.
Suppress Pricing	Do not show the reservation's room charges or resource charges in the printed confirmation.
Suppress Logo	Do no show your organization's logo in the printed confirmation.
Suppress Item Notes	Do not show notes for any booking items in the printed confirmation.
Suppress Item Special Instructions	Do not show special instructions for any booking items in the printed confirmation.
Suppress Item Selections	Do not show any resource item selections in the printed confirmation.
Always Display Time Zone	Always show the time zone for the event in the printed confirmation.
Display Messages as HTML	If you have defined any HTML messages, then select this option to display the HTML version of these messages in the printed confirmation; otherwise, the message is displayed in plain text.
Limit Bookings to Those With Details in Selected Categories	Show only those bookings in the printed confirmation that contain details for the categories that are selected on the Categories tab.

If needed, you can always save, or memorize, these settings. See *"Working with Memorized Reports" on page 293.*

- On the Setup dropdown list, select a saved, or memorized, confirmation.

If you select a memorized confirmation, then the only changes that you can make are to the dates and/or times on the Date Range tab.

3. Click Generate Report.

   If you selected the default format of HTML, then the confirmation is displayed onscreen in its own page. You can use your browser options to view the confirmation prior to printing, set your printing options, print the confirmation, and so on. For all other confirmation formats, you must indicate whether to open the confirmation, or to save the confirmation. To open and print a confirmation in any format other than HTML, you must have the correct application installed on your client:

Output Format	Required Application
PDF	Adobe Reader or Adobe Acrobat
RTF	Microsoft Word
XLS	Microsoft Excel
HTML	Web Browser
TEXT	Notepad or Textpad
TIFF	Any graphics application including Microsoft Paint and Microsoft Office Picture Manager.

   Unless you change the filter settings, all subsequent confirmations are generated and printed according to the parameters and options that you have specified.

To email the confirmation report, you can attach the saved confirmation report to an email. If needed, you can use the generic email function to send the email. *See “To send a generic email” on page 371.*

Managing Attendees and Visitors

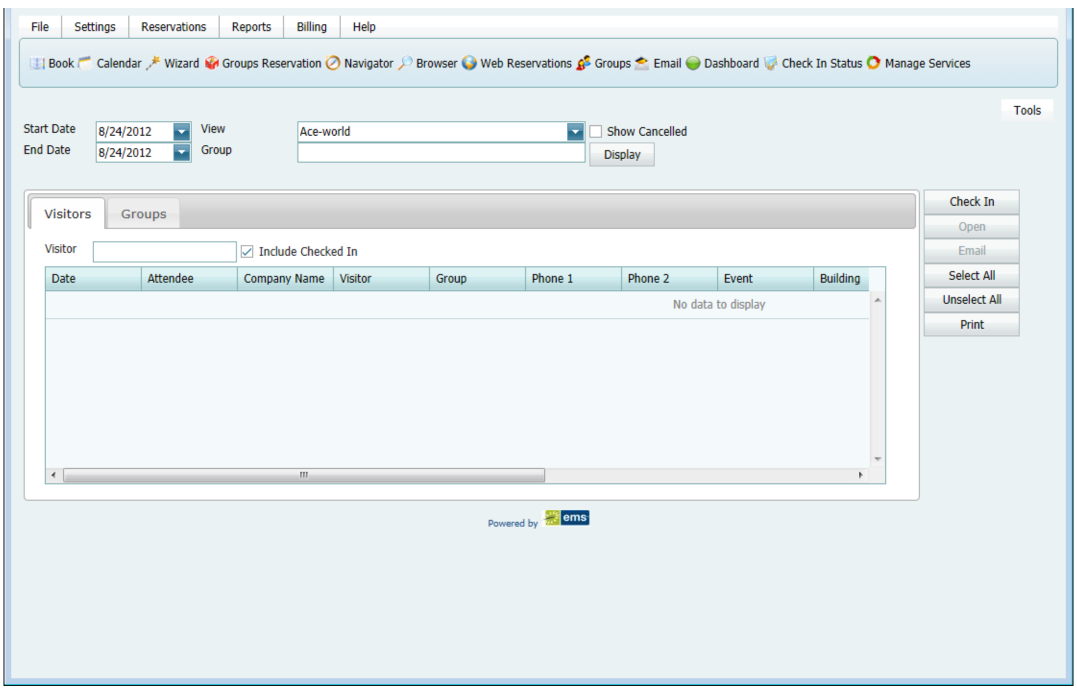
EMS provides standard functionality for managing *registered* attendees and visitors, which are attendees and visitors who have been added as an attendee type category to a booking. You can search for registered attendees and visitors, and you can check in and check out registered attendees and visitors. The *optional* Visitor Management module provides functionality for managing *unregistered* attendees and visitors. If your organization has purchased and installed this module, you can also check in unregistered visitors to an event, check out unregistered visitors from an event, and import a list of attendees using the Add Booking Details Wizard in the Navigator.

To manage registered attendees and visitors

1. On the EMS main menu, click Reservations > Other > Visitors.

   The Visitors page opens. By default, the Visitors tab is the active tab.

Figure 11-7: Visitors page, Visitors tab



2. Specify one or more of the following for your search criteria:
   - Start Date/End Date—The default value is the current day's date.
   - Building—Select (all) buildings, a specific building, an area, or a view to search.
   - Show Cancelled—Select this option to search for registered attendees or visitors for canceled events.
   - Group—To search for registered attendees or visitors regardless of group, leave this field blank; otherwise, to search based on a specific group, enter a search string in the field.
   - Visitor—To search for a specific attendee or visitor, enter a search string in the field.

For both search fields, your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of ***aca*** *returns* ***Aca****demic Affairs Office, Department of* ***Aca****demic Affairs, and so on.*

   - Include Checked In—Selected by default. Clear this option to search only for registered attendees and/or visitors who have *not* yet been checked in to their events.
3. Click Display.

   The list of registered attendees and/or visitors who meet the search criteria are displayed in the bottom pane of the Visitors page.
4. Optionally, do one or more of the following:
   - Select an attendee or visitor from the search results, and then click open to open the reservation in the Navigator that contains the booking that the attendee/visitor is attending.
   - Select an attendee or visitor from the search results, or CTRL-click to select multiple attendees/visitors, and then click Check In to "check in" the attendees/visitors to the event. A date and timestamp is added to each attendee's/visitor's record.
   - Select an attendee or visitor from the search results, or CTRL-click to select multiple attendees/visitors, and then click Check Out to "check out" the attendees/visitors from the event. A date and timestamp is added to each attendee's/visitor's record.

Check Out is available only if the selected attendees/visitors have been checked into the event.

- Select an attendee or visitor from the search results, or CTRL-click to select multiple attendees/visitors, and then on the Tools menu, click Undo Check In to reverse the Checked In status for the attendees/visitors. (The Check In date and timestamp is removed from each attendee's/visitor's record and if needed, you can check in the attendees/visitors again). Conversely, if an attendee or visitor has been checked out, click Undo Check Out to reverse the Checked Out status for the attendee/visitor.
- On the Tools menu, click Export to export the list of registered attendees/visitors and unregistered visitors to a Microsoft Excel spreadsheet.

  A message opens asking you if want to open or save the Visitors.xls file. Select the option that best fit your working needs.

  - If you click Open, the file opens onscreen. You can always indicate a file name and save the file after you view it.
  - If you click Save, you must select the directory in which to save the file.

To preview the file, Microsoft Excel must be installed on your EMS client.

- On the Tools menu, or from the Visitors page, click Print to generate a file of the list of registered attendees/visitors and unregistered visitors.

  A variety message opens, asking you if you want to open or save the Visitors.pdf file. Select the option that best fits your working needs.

  - If you click Open, the file opens onscreen. You can always indicate a file name and save the file after you view it.
  - If you click Save, you must select the directory in which to save the file.

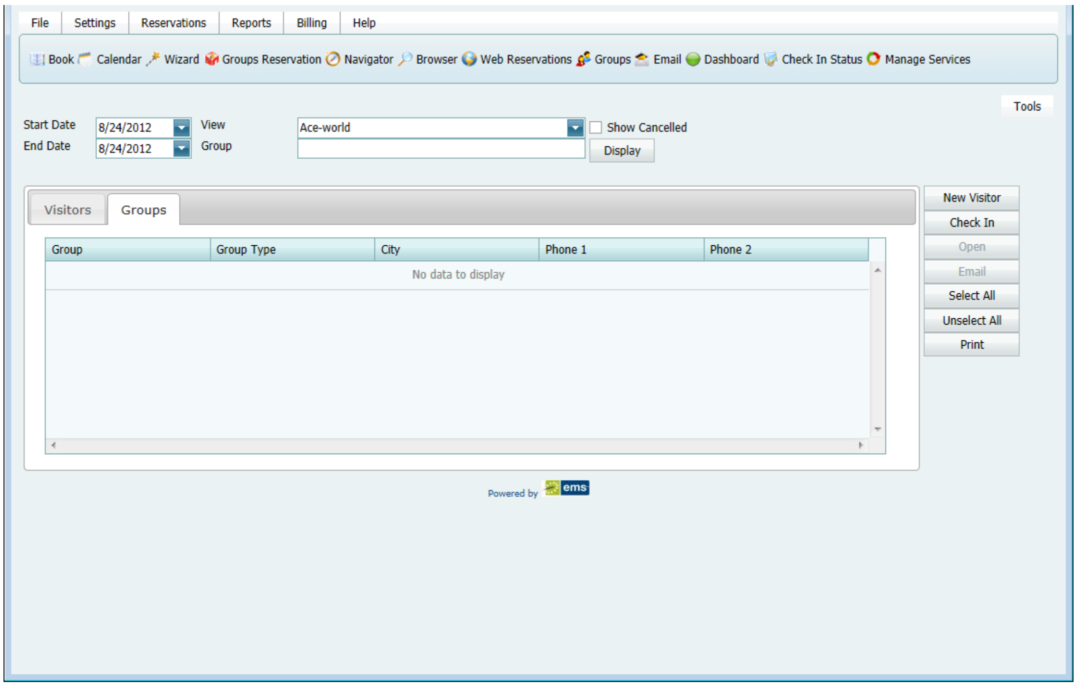
To check in/check out unregistered visitors for an event

1. On the EMS main menu, click Reservations > Other > Visitors.

   The Visitors page opens.

2. Open the Groups tab.

Figure 11-8: Visitors page, Groups tab



3. Specify one or more of the following for your search criteria:

   - Start Date/End Date—The default value is the current day’s date.
   - Building—Select (all) buildings, a specific building, an area, or a view to search.
   - Group—Enter some or all of the hosting group’s name.

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*Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **aca** returns **Aca**demic Affairs Office, Department of **Aca**demic Affairs, and so on.*

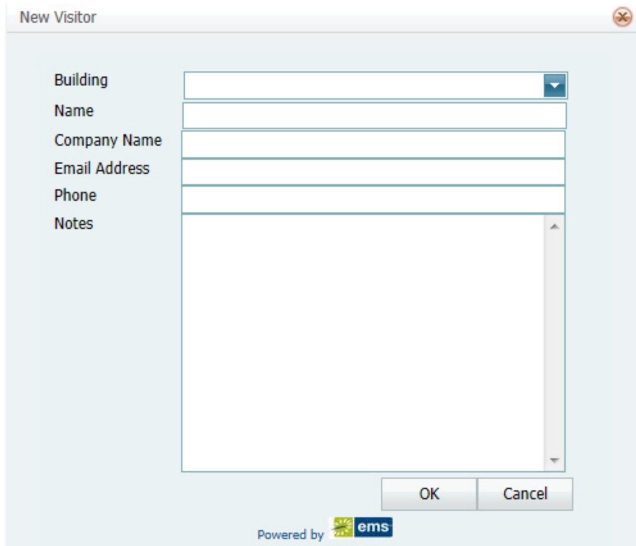
4. Click Display.

   The groups that meet your search criteria are displayed in the middle pane of the Visitors page.

5. Select the hosting group from the search results, and then click New Visitor.

   The New Visitor dialog box opens.

Figure 11-9: New Visitor dialog box



6. Enter the information for the unregistered visitor, and then click OK.

   The Visitor dialog box closes. You return to the Visitors page with the group and newly configured visitor automatically selected.

Building and Name are required fields. Depending on how your EMS administrator configured your system, Company Name, Email Address and/or Phone might be required. Notes are always optional. If you selected a specific building in Step 3, then the Building field should be automatically populated with the name of the building in which the event is scheduled and you cannot edit this value; however, if you have set your preferences for buildings such that this building is not available to you, then the Building field cannot be populated with the correct value, and you cannot add the new visitor. See “Setting User Preferences and Default Values” on page 359.

7. Repeat Step 5 and Step 6 as needed to add all the unregistered visitors to the event.

   The information that is displayed in the Event column for each unregistered visitor that is added to an event is determined by the settings that your EMS administrator specified when configuring the event building. For example, “Unregistered Visitor” might be displayed. The date and time that you add an unregistered visitor to an event is used as the Check In date and time for the visitor.

8. Optionally, before you check out or check in an unregistered visitor, do one or more of the following:

   - Select the unregistered visitor in the lower pane of the Visitors page, and then click Open to open the reservation in the Navigator that contains the booking that the unregistered visitor is attending.
   - On the Tools menu, click Export to export the list of registered attendees/visitors and unregistered visitors to a Microsoft Excel spreadsheet.

     A message opens asking you if want to open or save the Visitors.xls file. Select the option that best fit your working needs.

     - If you click Open, the file opens onscreen. You can always indicate a file name and save the file after you view it.
     - If you click Save, you must select the directory in which to save the file.

To preview the file, Microsoft Excel must be installed on your EMS client.

   - On the Tools menu, or from the Visitors page, click Print to generate a file of the list of registered attendees/visitors and unregistered visitors.

     A variety message opens, asking you if you want to open or save the Visitors.pdf file. Select the option that best fits your working needs.

     - If you click Open, the file opens onscreen. You can always indicate a file name and save the file after you view it.
     - If you click Save, you must select the directory in which to save the file.

9. To check out/check in an unregistered visitor, do one of the following:

   - Select the unregistered attendee/visitor, or CTRL-click to select multiple unregistered attendees/visitors, and then click Check Out to “check out” the attendees/visitors from the event. A date and timestamp is added to the unregistered visitors’ records.
   - Select the unregistered attendee/visitor, or CTRL-click to select multiple unregistered attendees/visitors, and then on the Tools menu, click Undo Check In to reverse the Checked In status for the unregistered attendees/visitors. (The Check In date and timestamp is removed from the unregistered visitors’ records and if needed, you can check in the unregistered visitors again). Conversely, if an unregistered visitor has been checked out, click Undo Check Out to reverse the Checked Out status for the attendee/visitor.

To import a list of attendees and visitors to an event

1. Create a tab-delimited file that contains the information (in the order listed) for the attendees/visitors that are being imported.

Field	Description	Required/Optional
Name	Text. 50 characters maximum.	Required
Company Name	Text. 50 characters maximum.	Optional
Email Address	Text. 255 characters maximum.	Optional
Phone	Text. 50 characters maximum.	Optional
Notes	Text. No maximum.	Optional
Visitor	True/False	

Each attendee/visitor must be a separate line entry. You use the Add Booking Details Wizard to import this file. You can click Print Format on the second page of the Add Booking Details Wizard to see the required format for the tab-delimited file.

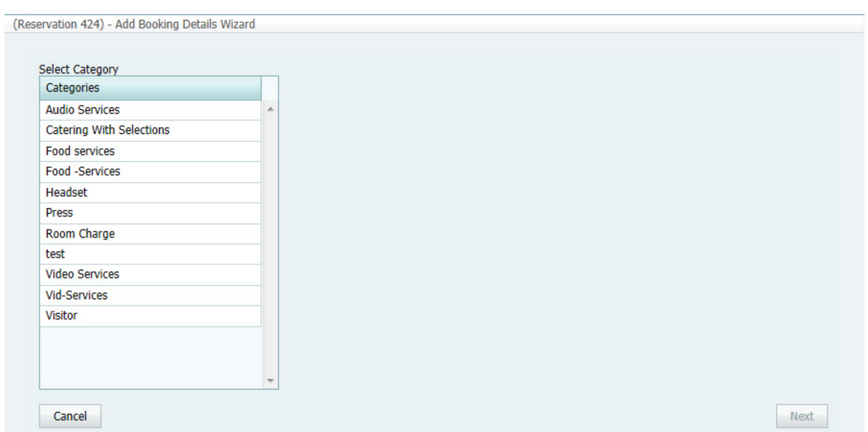
2. Open the reservation for the event in the Navigator. See:

- “Opening a reservation directly in the Navigator” on page 67.
- “Opening a reservation through the Reservation Book” on page 68.
- “Opening a reservation through a group” on page 68.
- ,“Search Tools,” on page 177.

3. In the left pane of the Navigator, select the reservation for which you are importing the list of attendees/visitors.
4. In the Bookings pane, click Tools, and then Click Add Booking Details Wizard.

   The Add Booking Details wizard opens.

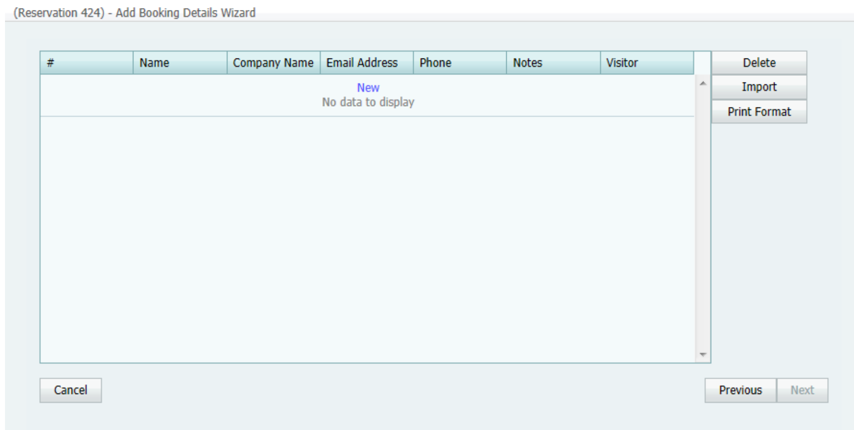
Figure 11-10: Add Booking Details wizard



5. Select Visitors or Attendees, and then click Next.

   The second page of the Add Booking Details Wizard opens with a blank row for adding an attendee/visitor to the event.

Figure 11-11: Add Booking Details Wizard, Second page



Optionally, you can click Print Format to see the required format for the tab-delimited file.

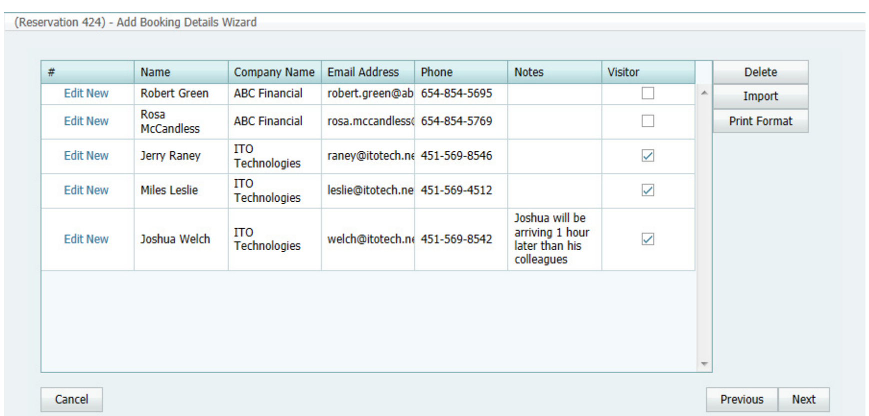
6. Click Import.

   The Import dialog box opens.

7. Click Attach Files to browse to and select the attendee/visitor import file, and then click Open to import the file.

   The Add Booking Details Wizard is updated with the imported attendee/visitor information. Each imported attendee/visitor is a separate line entry in the Wizard.

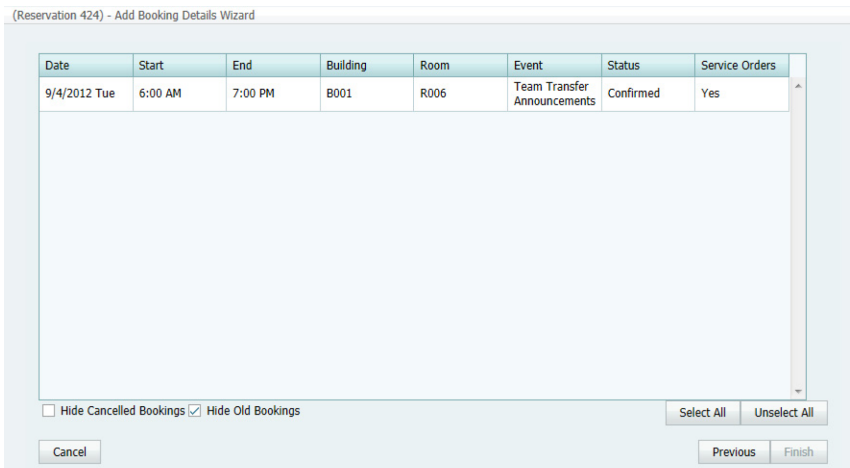
Figure 11-12: Add Booking Details Wizard, Imported Attendee/Visitor List displayed



8. Click Next.

   The Select Bookings page opens. This page displays all the bookings for the selected reservation with a date greater than or equal to the current day's date, *and* that do not already have the selected booking detail added.

Figure 11-13: Add Booking Details wizard, Select Bookings page



To show canceled bookings, clear Hide Cancelled Bookings. Conversely, to hide canceled bookings, select Hide Cancelled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

9. CTRL-click to select the bookings to which the details are being added, or click Select All to select all the displayed bookings in a single step, and then click Finish.

   A message opens asking you if you want to add more booking details.

10. Click No.

    A message opens indicating that the changes were made successfully.

11. Click OK to close the message and return to the Navigator.

    The booking detail (Attendees/Visitors) and its items (individual attendees/visitors) are displayed as folders under the appropriate booking folders in the Navigator.

EMS Workplace

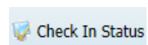
Organizations with a mobile workforce or flexible work arrangements often adopt a hoteling or hot-desking strategy—allotting workspace on an as-needed basis to accommodate more people in less space. EMS Workplace is a facility scheduling system for managing hoteling requirements, as well as the booking of meeting/event space and resources.

This chapter covers the following topics:

Managing Groups' Check In/Check Out Statuses

Employees (referred to as "groups" in this section) can check-in using a variety of active and passive EMS Workplace methods including Virtual EMS (VEMS), the EMS Kiosk, and your security badge system. You use the Group Check In Status function to view the status of all employees, with or without bookings, that have checked into your building. In addition, options are available to check in/check out an individual and to manually "no show" employees that either have not checked-in or have checked into another building.

To manage groups' check in/check out statuses

1. On the EMS toolbar, click the Check In Status icon 

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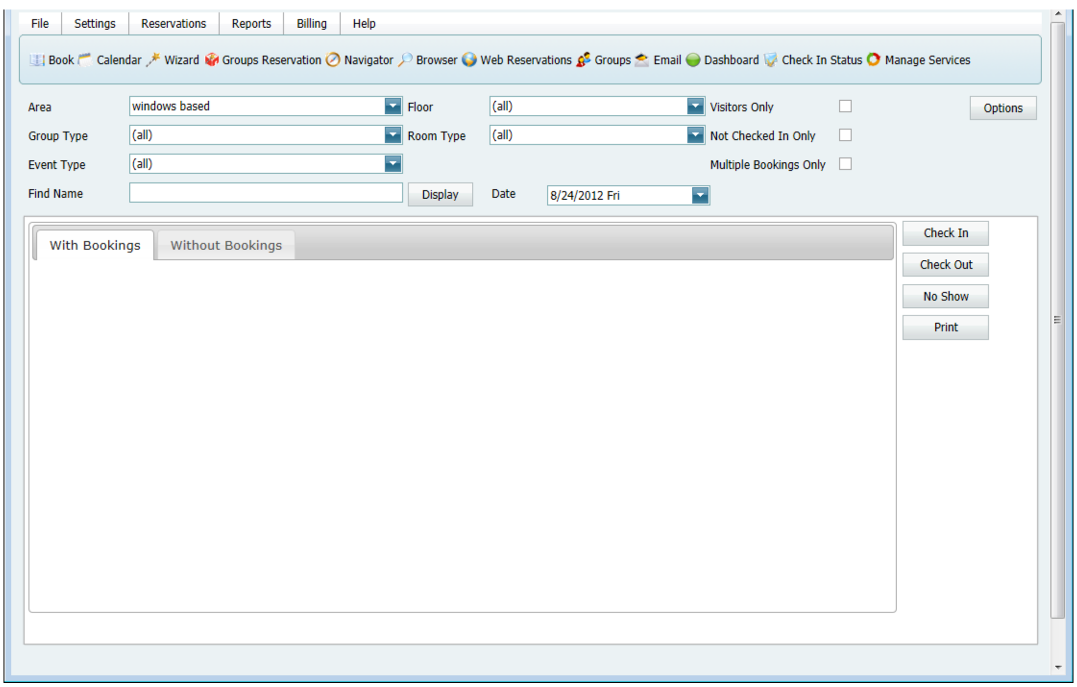
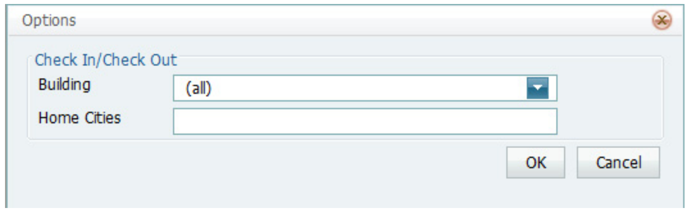
   The Group Check In Status page opens. If this is the *first* time that you have opened this page, then go to Step 2 to set the default values for your building and home city; otherwise, go to Step 3.

Figure 12-1: Group Check In Status page



2. In the upper right hand corner of the page, click Options to open the Options dialog box and select the default values for your home building and home cities.

Figure 12-2: Options dialog box



The home building is the building that selected groups are checked in to. You must separate multiple cities by commas, for example, Denver, Chicago, Atlanta. If Visitors Only is checked as one of the search options, then when you search for groups to verify their check in/check out status, the groups that have an address using any of these home cities are not returned in the search results. Only groups that do not have an address using any of these home cities and that meet all the search criteria are returned in the search results.

3. Specify the search criteria to search for the groups that are to be checked in to/checked out of a building.

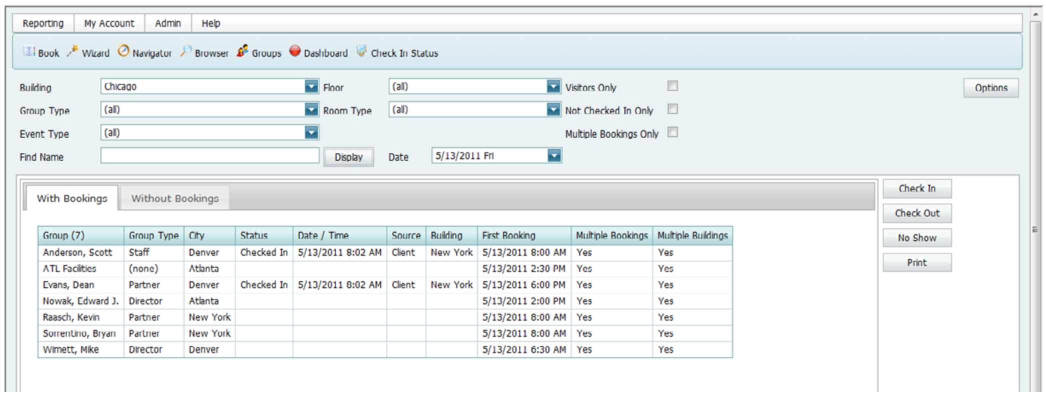
Option	Description
Building	The default value is (all), but you can select a specific building, an area, or a view.
Group Type	The default value is (all), but you can select a specific group type.
Event Type	The default value is (all), but you can select a specific event type.
Floor	The default value is (all), but you can select a specific floor.
Room Type	The default value is (all), but you can select a specific room type.
Visitors Only	Select this option only if you are searching for groups that do not have an address using any of the home cities that you have defined.
Not Checked In Only	Select this option to search only for groups that have not been checked into the building.
Multiple Bookings Only	Select this option to search only for those groups that have multiple bookings on the selected date.
Find Name	Optional field. Enter a search string by which to filter your search. The search is not case-sensitive, but it is limited to the exact order of characters in the string and the string must begin with the information for which you are searching. For example, if you enter “ed” as the search string, results can include **Ed**, **Ed**ward, **Ed**die, and so on, but not Ted or Fred.
Date	The default value is the current day’s date, but you can select a different value.

4. Click Display.

   All the groups that meet all the search criteria and that have a booking or bookings on the selected date are displayed on the With Bookings tab.

All the groups that meet all the search criteria but that do not have a booking or bookings on the selected date are displayed on the Without Bookings tab.

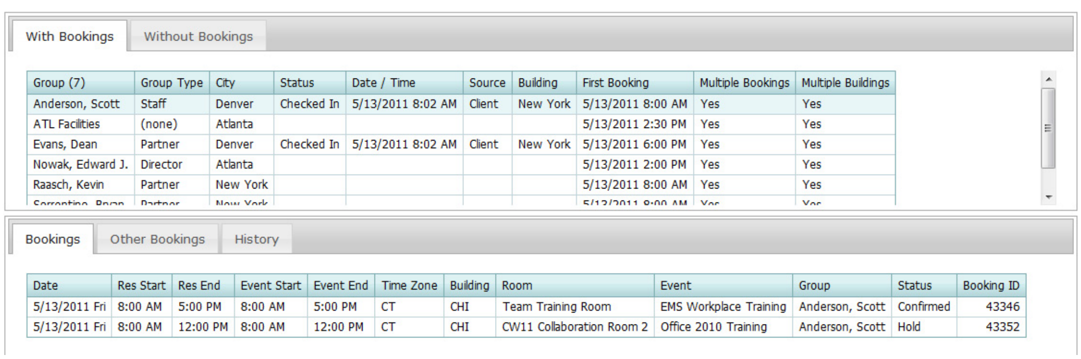
Figure 12-3: Group Check In Status page with results



5. Optionally, do one or more of the following:

   - To view all the bookings that a group has scheduled in the selected building, select the group on the With Bookings tab. The bookings are displayed on the <Building> Bookings tab.

Figure 12-4: Viewing bookings for a selected group



   - To check in a group, select the group, and then click Check In. “Checked In” is displayed in the Status column for the group on the With Bookings tab, the Date/ Time column are updated with the date and time that you clicked Check In, and “Client” is displayed in the Source column.

Remember, the group is checked in to the building that you set as your Home building, and the name of this building is displayed in the Building column.

- To check out a group, select the group, and then click Check Out. "Checked Out" is displayed in the Status column for the group on the With Bookings tab, the Date/Time column are updated with the date and time that you clicked Check Out, and "Client" is displayed in the Source column.

If your EMS client is integrated with VEMS or EMS Kiosk, then employees can also be checked in/checked out through either of these applications as well, and the Source column indicates this accordingly.

- To end a booking for a group, select the group, and then select the booking on the on the <Building> Bookings tab and click End Now. Answer "Yes" at the prompt about ending the booking immediately.
- To open an event in the Navigator, select the event entry on the <Building> Bookings tab, and then click Go To.
- To manually "no show" a group of employees, continue to "To run the No Show wizard" on page 395.

To run the No Show wizard

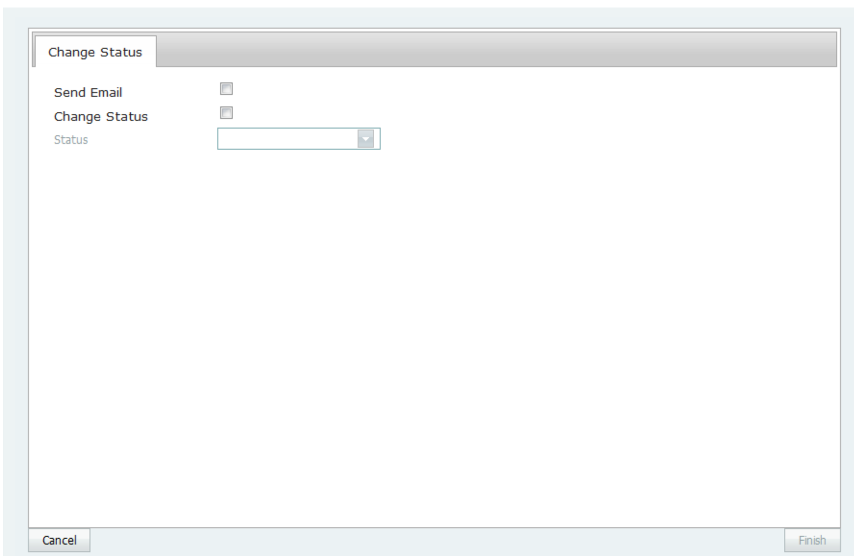
You use the No Show Wizard to email all groups that have not checked in to a specific building. It also provides options for changing the status of a group's bookings so that the group's workspace is released.

When you run the No Show wizard from the Group Check In Status page, you must manually create and send the email, and you must manually change the status. Both of these processes can be automated by creating a No Show Notification rule.Contact your EMS administrator for assistance.

1. Select the group on the With Bookings tab, and then click No Show.

   The No Show Wizard opens.

Figure 12-5: No Show Wizard



2. Do one or both of the following:

   - To send an email to the group, select Send Email to open an email form. Complete and send the email as normally would, and then click Finish.

You can include variables in the subject line as described in the Legend. For example, %2% is the code for the group name, so "Notification for %2%" would result in "Notification for Academic Affairs" being displayed in the subject line.

   - To change the status for the group's booking, select Change Status, and then on the Status dropdown list, select a new status, and then click Finish.

Mobile EMS Web Client

A Mobile EMS option is displayed on the Login page for the EMS Web Client. This option essentially provides a portal for Service Providers to access the Setup Worksheet report in a format that is optimized for a Tablet display.

This chapter covers the following topics:

- "Working with the Mobile Version of the EMS Web Client" on page 399.

Working with the Mobile Version of the EMS Web Client

A Mobile EMS option is displayed on the Login page for the EMS Web Client. This option essentially provides a portal for Service Providers to access the Setup Worksheet report in a format that is optimized for a Tablet display.

To work with the mobile version of the EMS Web Client

1. Open an Internet browser session.
2. In the browser's address field, enter the EMS Web Client URL.

Contact your EMS administrator if you need assistance.

The EMS Web Client Login dialog box opens.

Figure 13-1: EMS Web Client Login dialog box

3. In the User ID field, enter your User ID.
4. In the Password field, enter your password.

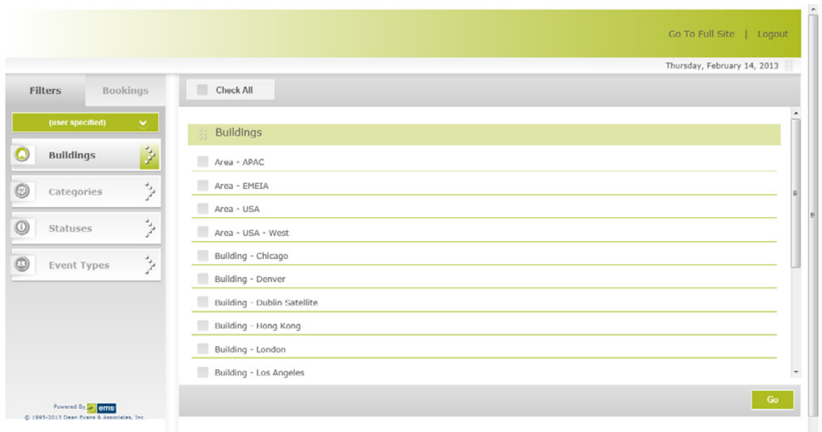
If you do not know your User ID or password, contact your EMS administrator.

5. Click Mobile EMS.

   The Setup Worksheet report opens in a format that is optimized for Tablet display.

You can click Go To Full Site at any time to open the full EMS Web Client in your default browser.

Figure 13-2: Setup Worksheet report (optimized for Tablet display)



6. Do one of the following:

   - To generate the report according to the filter settings that you specify leave (user specified) selected and then specify the necessary report parameters (Buildings, Categories, Statuses, and/or Event Types).
   - To generate the report according to predetermined filters, open the (user specified) dropdown list and select any publicly available memorized report.

   The Bookings tab is dynamically updated with the results that meet all your report criteria.

For detailed information about the Setup Worksheet report, see “Daily reports” on page 299.

7. Click Bookings to open the Bookings tab and view the report results.

EMS Desktop Client -- April 2019

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